

ESOP Tool

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Introduction

Introduction

ESOP Tool

This facilitates the process of Employee Stock Ownership Plan

Objective

Allows you to grant , allocate ,view Employee Stocks

Key Features:

- My Grants
- My Nominees
- Grants
- Allocate
- Exercise
- Reports

Supported Browser

- IE10 & above
- Google Chrome Latest Version

Training & Support

- Please contact for HR for any process related queries and training need.
- Any technical issues, contact IT-Apps via Helpdesk

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Application Link

ESOP Link

- To access within QuEST Network
<https://intranet.quest-global.com> > Top Tools > ESOP Tool (needs to be logged in)
- To access from outside the QuEST Network (over the Internet)
<https://q-secure.quest-global.com/> > Intranet > Top Tools > ESOP (needs to be logged in)

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Authentication and Authorization

Authentication and Authorization

- ESOP Tool is access controlled and is accessible only for the authorized employees who have access based on the roles & permissions.

Application Setup and Structure

Application Setup and Structure

Overview

Application setup and structure outlines the sections and components of the ESOP Tool. It defines which kinds of content go on which pages; the various page components and their purpose.

This describes the following sections:

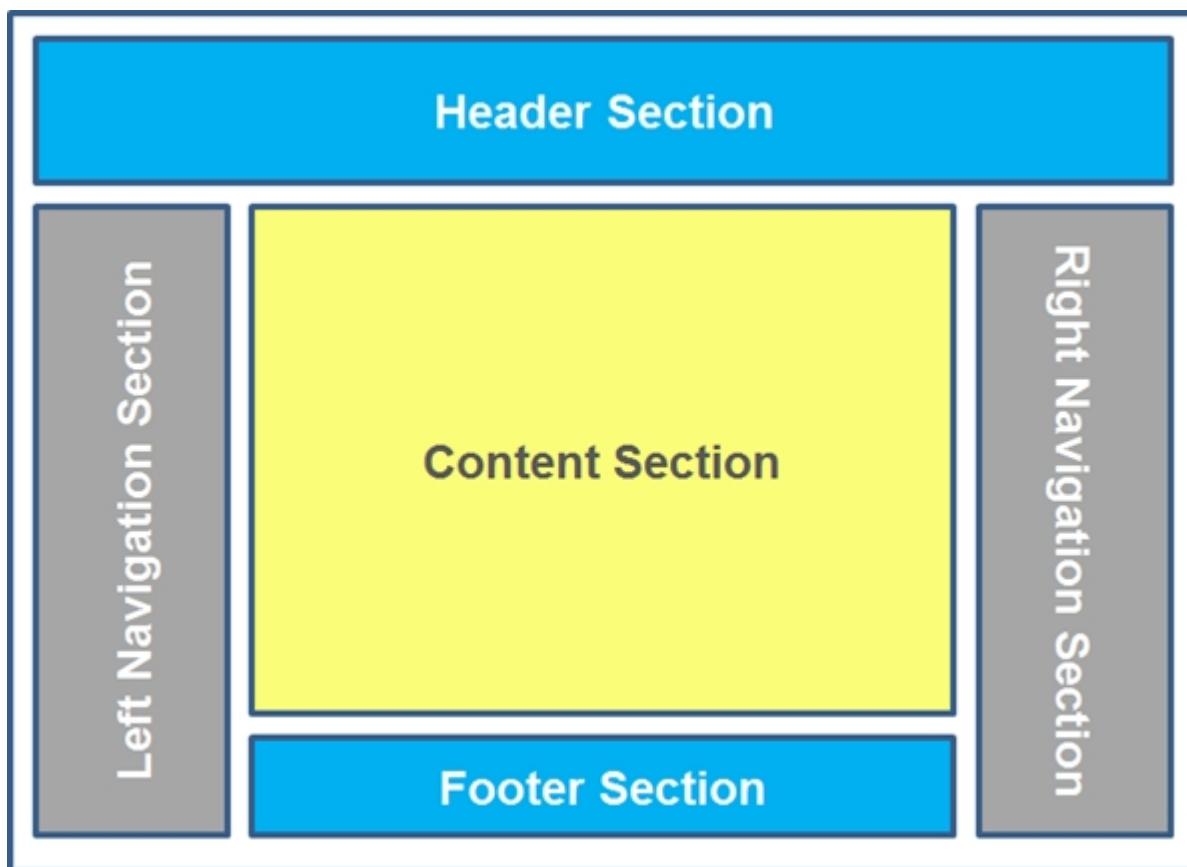
- Layout
 - To define the Application design (Layout and Look & Feel).
- Structure
 - To define the structure of the ESOP Tool i.e., how the content is organized.

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Layout

Layout

This section defines the layout of the ESOP Tool. This defines the main component available in each section and their look and feel.



- Header
- Left Navigation Section

- Right Navigation Section
- Content Section
- Footer

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Header Section

Header Section



Header section contains:

ESOP Logo:



Click on this to open the Welcome page.

GDPR Guidelines Link:

Click to open Feedback form.

Feedback Link:

Click to open Feedback form.

Help Menu:

Click to open the menu for Help manual.

User Name:

Click to open the menu for User Profile

Log out:

Click to log out from application

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Left Navigation Section

Left Navigation Section

Left navigation section contains links for My Grants, Nominees etc.



My Grants



My Nominees



Grants



Allocate



Exercise



Rescind



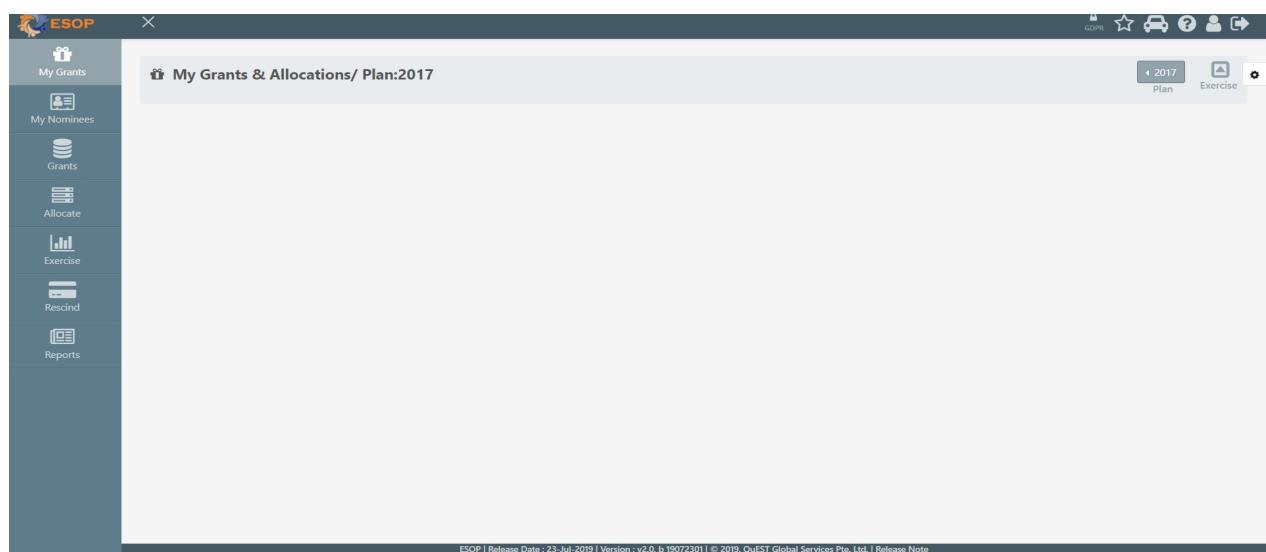
Reports

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Content Section

Content Section

Content section highlighted below is the display area for My Grants, Nominees, Reports etc.



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Footer Section

Footer Section

ESOP | Release Date : 23-Jul-2019 | Version : v2.0, b 19072301 | © 2019, QuEST Global Services Pte. Ltd. | [Release Note](#)

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Structure

Structure

ESOP tool is structured as follows:

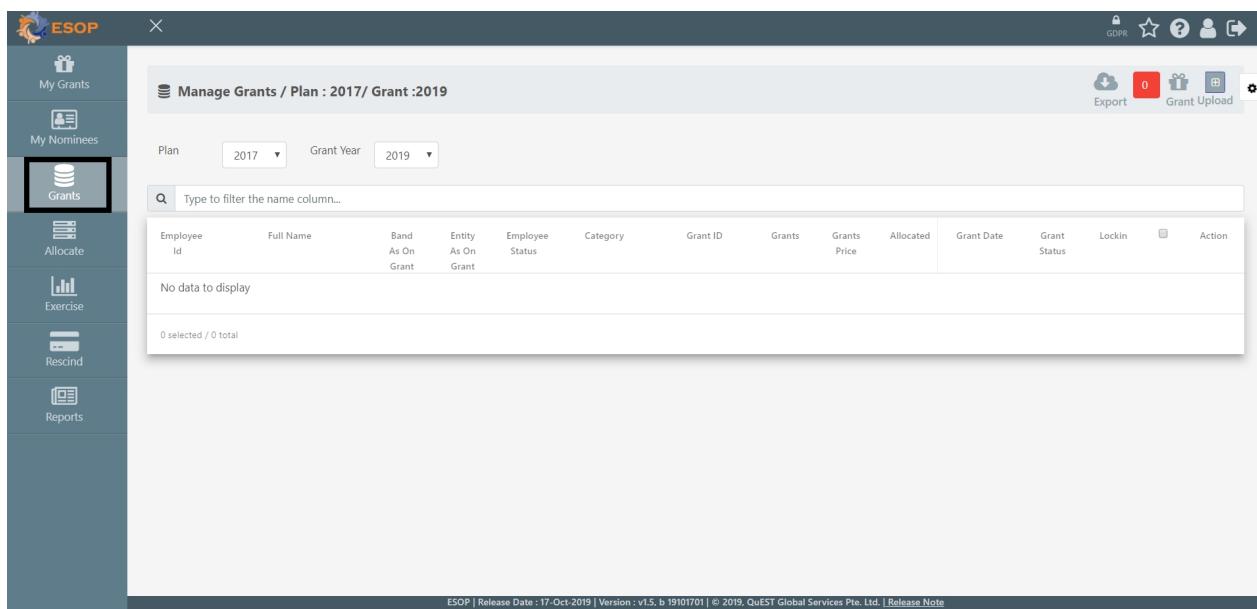
- Grants by admin
- Allocation by admin
- View My Grants
- Exercise by admin
- Rescind by admin

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Grants By Admin

Grants By Admin

Click on the highlighted link below as shown to open Admin Grants Dashboard.



ESOP | Release Date : 17-Oct-2019 | Version : v1.5. b 19f01701 | © 2019, QuEST Global Services Pte. Ltd. | [Release Note](#)

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Allocation By Admin

Review By PM

Click on the highlighted link below as shown to open admin Allocation Dashboard.

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My Grants

My Grants

Click on the highlighted link below as shown to open User Grants Dashboard.

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Nominees

Click on the highlighted link below as shown to open User Nominees dashboard.

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Exercise By Admin

Monetization event by admin

Exercise approve/reject by admin

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Rescind By Admin

Rescind by admin

The screenshot shows a list of employees with their grant details and status. The columns include Employee Number, Employee Name, Employee Status, Plan, Total Grants, Total Allocation, Available Options, Rescind Options, and Action. The Employee Status column is currently set to "Active". The Rescind Options column shows values ranging from 0 to 1,164.0. The Action column contains edit icons.

| Employee Number | Employee Name | Employee Status | Plan | Total Grants | Total Allocation | Available Options | Rescind Options | Action |
|-----------------|---------------|-----------------|------|--------------|------------------|-------------------|-----------------|--------|
| [REDACTED] | [REDACTED] | Active | 2017 | 1920 | 1920 | 696.0 | 100 | |
| [REDACTED] | [REDACTED] | Active | 2017 | 1500 | 1500 | 600.0 | 0 | |
| [REDACTED] | [REDACTED] | Active | 2017 | 2230 | 2230 | 944.0 | 0 | |
| [REDACTED] | [REDACTED] | Active | 2017 | 450 | 450 | 360.0 | 0 | |
| [REDACTED] | [REDACTED] | Active | 2017 | 370 | 370 | 360.0 | 0 | |
| [REDACTED] | [REDACTED] | Active | 2017 | 380 | 380 | 360.0 | 0 | |
| [REDACTED] | [REDACTED] | Active | 2017 | 650 | 650 | 940.0 | 0 | |
| [REDACTED] | [REDACTED] | Active | 2017 | 660 | 660 | 940.0 | 0 | |
| [REDACTED] | [REDACTED] | Active | 2017 | 3350 | 3350 | 1,384.0 | 0 | |
| [REDACTED] | [REDACTED] | Active | 2017 | 2910 | 2910 | 1,164.0 | 0 | |

0 selected / 161 total

The screenshot shows a list of employees with a modal dialog titled "Rescind Options of [REDACTED]". The dialog contains fields for Plan, Entity, Band, Grant Id, Grant Date, Allocation, Vested Options, Rescind, and Remarks. The "Rescind" field is set to 100, and the "Remarks" field contains "company". There are "Save" and "Close" buttons at the bottom of the dialog.

| Employee Number | R. M. | Saty... | Deva... | Bhut... | O.P... | Gunt... | Options | Rescind Options | Action |
|-----------------|-------|---------|---------|---------|--------|---------|---------|-----------------|--------|
| [REDACTED] | | | | | | | | 100 | |
| [REDACTED] | | | | | | | | 0 | |
| [REDACTED] | | | | | | | | 0 | |
| [REDACTED] | | | | | | | | 0 | |
| [REDACTED] | | | | | | | | 0 | |
| [REDACTED] | | | | | | | | 0 | |
| [REDACTED] | | | | | | | | 0 | |
| [REDACTED] | | | | | | | | 0 | |
| [REDACTED] | | | | | | | | 0 | |

0 selected / 161 total

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Tutorials

Tutorials

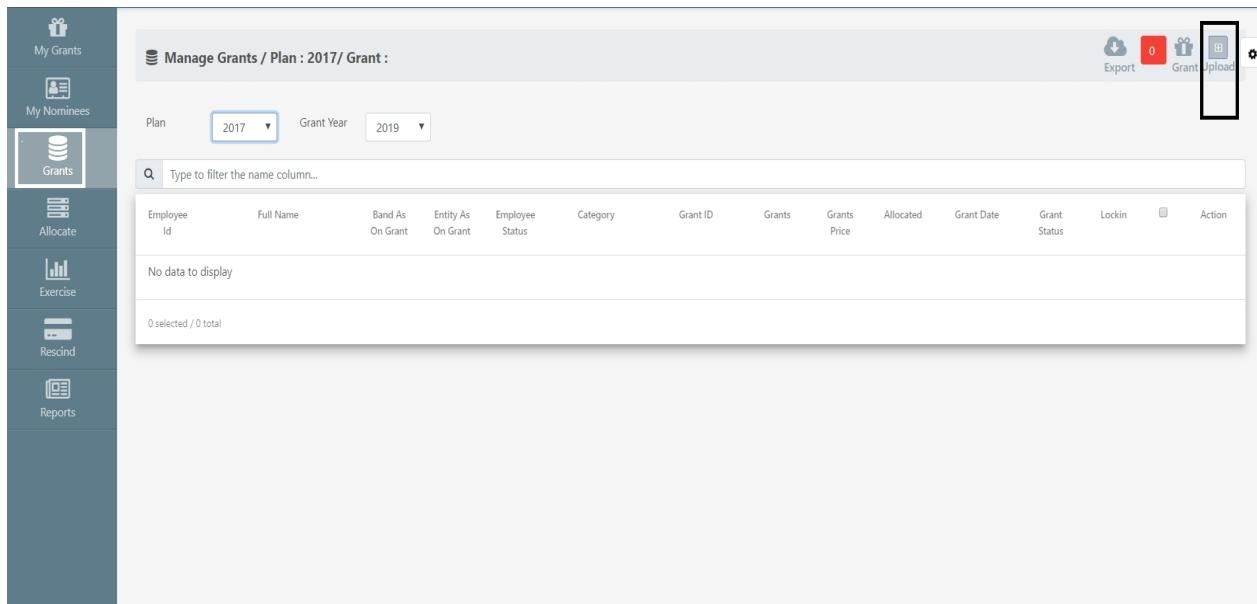
Contains help for using Promotion Nomination Tool.

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How to upload Grants?

How to Upload Grants ?

Click on Grants icon as shown below to upload employee details.



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How to grant Grants ?

How to grant Grants ?

Select Grant year, Grant date, check the check boxes to select employees and click grant button to grant Grants.

Note: Select all will select all grants of a particular date .

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How to allocate Grants?

How to allocate Allocations?

Select the allocation year to allocate Grants.

Click on action ,to edit grants allocation.

| Employee Id | Full Name | Band | Employee Status | Grant Id | Lockin | Grant | Allocation Year | Allocated | To Be Allocated | Cancelled | Vested Date | Status | Action |
|-------------|------------|------|-----------------|---------------|--------|-------------|-----------------|-----------|-----------------|-----------|-------------|-----------|--------|
| [REDACTED] | [REDACTED] | 3A | Active | G/2018/07/009 | 🔒 | 250@ 6.1\$ | 2019 | 250 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3A | Active | G/2018/07/001 | 🔒 | 1500@ 6.1\$ | 2019 | 1500 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3A | Active | G/2018/07/235 | 🔒 | 520@ 6.1\$ | 2019 | 520 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3B | Active | G/2018/07/241 | 🔒 | 180@ 6.1\$ | 2019 | 180 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3B | Active | G/2018/07/247 | 🔒 | 180@ 6.1\$ | 2019 | 180 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3B | Active | G/2018/07/019 | 🔒 | 180@ 6.1\$ | 2019 | 180 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3B | Active | G/2018/07/011 | 🔒 | 470@ 6.1\$ | 2019 | 470 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3B | Active | G/2018/07/054 | 🔒 | 470@ 6.1\$ | 2019 | 470 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3A | Active | G/2018/07/088 | 🔒 | 440@ 6.1\$ | 2019 | 440 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 2A | Active | G/2018/07/027 | 🔒 | 180@ 6.1\$ | 2019 | 180 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3A | Active | G/2018/07/046 | 🔒 | 890@ 6.1\$ | 2019 | 890 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |

Double click on quantity to edit the grants and press enter ,once allocations edit is complete click save button to save allocations.

| Edit Allocations | | | |
|--|-----------|----------|-----------|
| Plan:2017 ,Grant Date:31-Aug-17 ,Cycle 1 | | | |
| Param | Date | Quantity | Status |
| Allocation 1 | 31-Aug-18 | 334 | PENDING |
| Allocation 2 | 31-Aug-19 | 334 | ALLOCATED |
| Allocation 3 | 31-Aug-20 | 334 | PENDING |
| Allocation 4 | 31-Aug-21 | 334 | PENDING |
| Allocation 5 | 31-Aug-22 | 334 | PENDING |

0 selected / 5 total

1670 @ 6.1\$ Granted 334 Allocated 1336 To Be Allocated 0 Cancelled

Check the check boxes to select grants to allocate and click allocate button to allocate.

Note:Select all selects all grants for a particular allocation year.

| Employee Id | Full Name | Band | Employee Status | Grant Id | Lockin | Grant | Allocation Year | Allocated | To Be Allocated | Cancelled | Vested Date | Status | Action |
|-------------|------------|------|-----------------|---------------|--------|-------------|-----------------|-----------|-----------------|-----------|-------------|-----------|--------|
| [REDACTED] | [REDACTED] | 3A | Active | G/2018/07/009 | 🔒 | 250@ 6.1\$ | 2019 | 250 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3A | Active | G/2018/07/001 | 🔒 | 1500@ 6.1\$ | 2019 | 1500 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3A | Active | G/2018/07/235 | 🔒 | 520@ 6.1\$ | 2019 | 520 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3B | Active | G/2018/07/241 | 🔒 | 180@ 6.1\$ | 2019 | 180 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3B | Active | G/2018/07/247 | 🔒 | 180@ 6.1\$ | 2019 | 180 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3B | Active | G/2018/07/019 | 🔒 | 180@ 6.1\$ | 2019 | 180 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3B | Active | G/2018/07/011 | 🔒 | 470@ 6.1\$ | 2019 | 470 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3B | Active | G/2018/07/054 | 🔒 | 470@ 6.1\$ | 2019 | 470 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3A | Active | G/2018/07/088 | 🔒 | 440@ 6.1\$ | 2019 | 440 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 2A | Active | G/2018/07/027 | 🔒 | 180@ 6.1\$ | 2019 | 180 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |
| [REDACTED] | [REDACTED] | 3A | Active | G/2018/07/046 | 🔒 | 890@ 6.1\$ | 2019 | 890 | 0 | 0 | 30-Aug-19 | ALLOCATED | 🔗 |

How to view and accept Grants?

How to view and accept Grants details ?

click on view details to view grant details.

My Grants & Allocations

29-Jun-18 (Plan: 2017) Grant Id : G/2018/07/009
Options Granted: 250 @ 6.1\$ Allocated : 64
Vested : 128.0 Rescind : 100.0
Exercised : 0

31-Aug-17 (Plan: 2017) Grant Id : G/2017/08/172
Options Granted: 1670 @ 6.1\$ Allocated : 334
Vested : 668.0 Rescind : 0
Exercised : 0

View Details Grant Letter

View Details Grant Letter

Clicking on view details will show all details of a Grant

Name: [REDACTED]

Band As on Grant: 3A

Entity As on Grant: OGESPL

Grant Details

| | |
|--------|---------------|
| Id | G/2018/07/009 |
| Date | 29-Jun-18 |
| Grants | 250 |
| Price | 6.1 \$ |
| Plan | 2017 |

Allocation Schedule

| Allocation Year | Allocated Date | Allocations | Status | Vested Options | Vested Date | Expiry Date |
|-----------------|----------------|-------------|-----------|----------------|-------------|-------------|
| 2019 | 11-Jul-19 | 64 | ALLOCATED | 128 | 11-Jul-19 | 11-Jul-24 |
| 2020 | | 62 | PENDING | | | |
| 2021 | | 62 | PENDING | | | |

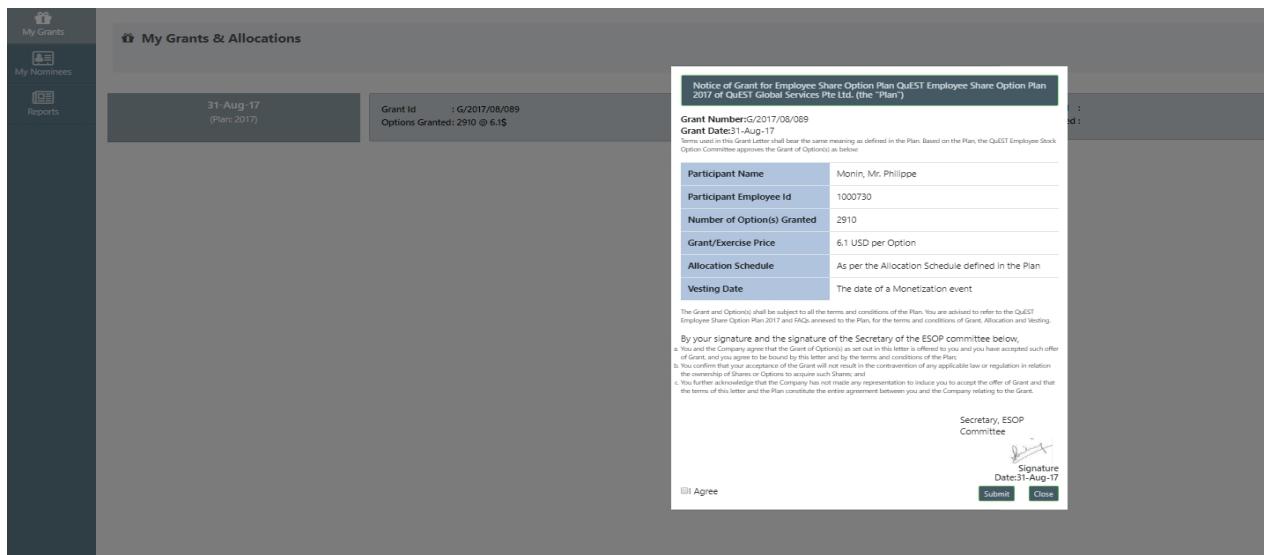
Click on sign grant to view and accept grant

My Grants & Allocations

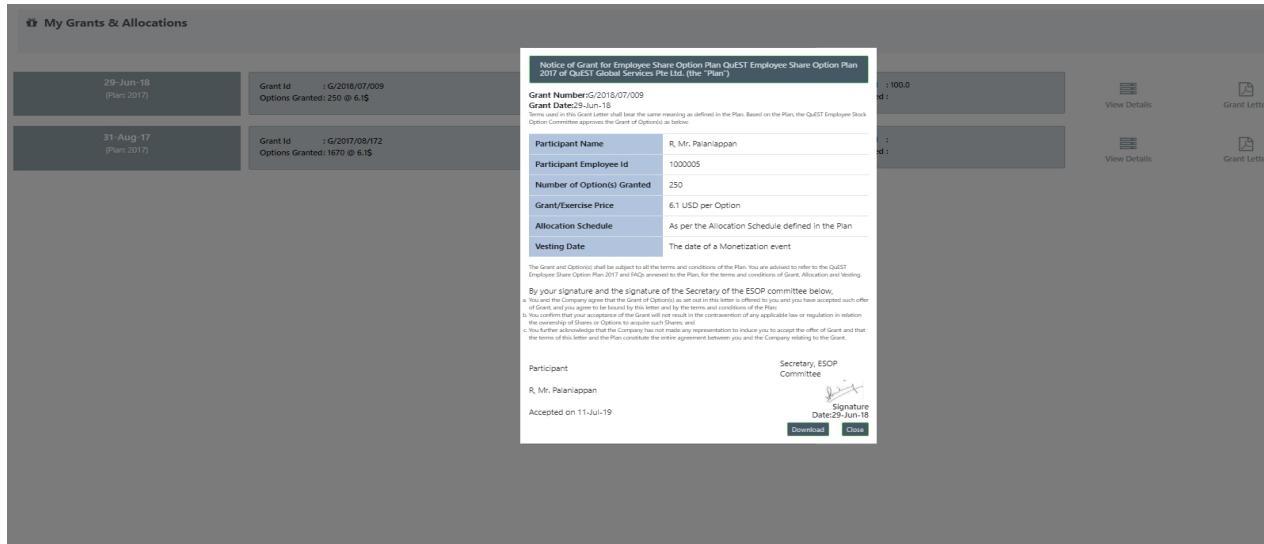
31-Aug-17 (Plan: 2017) Grant Id : G/2017/08/089
Options Granted: 2910 @ 6.1\$ Allocated : 582
Vested : 1,164.0 Rescind : 0
Exercised : 0

View Details Sign Grant

Click on sign grant pop up a grant sign letter ,check check box to accept terms & conditions, click submit button to accept grant



Click on grant letter to view signed grant and download pdf format of grant letter.



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How to add and view Nominees ?

How to add Nominees For User?

Click on highlighted button to add nominee

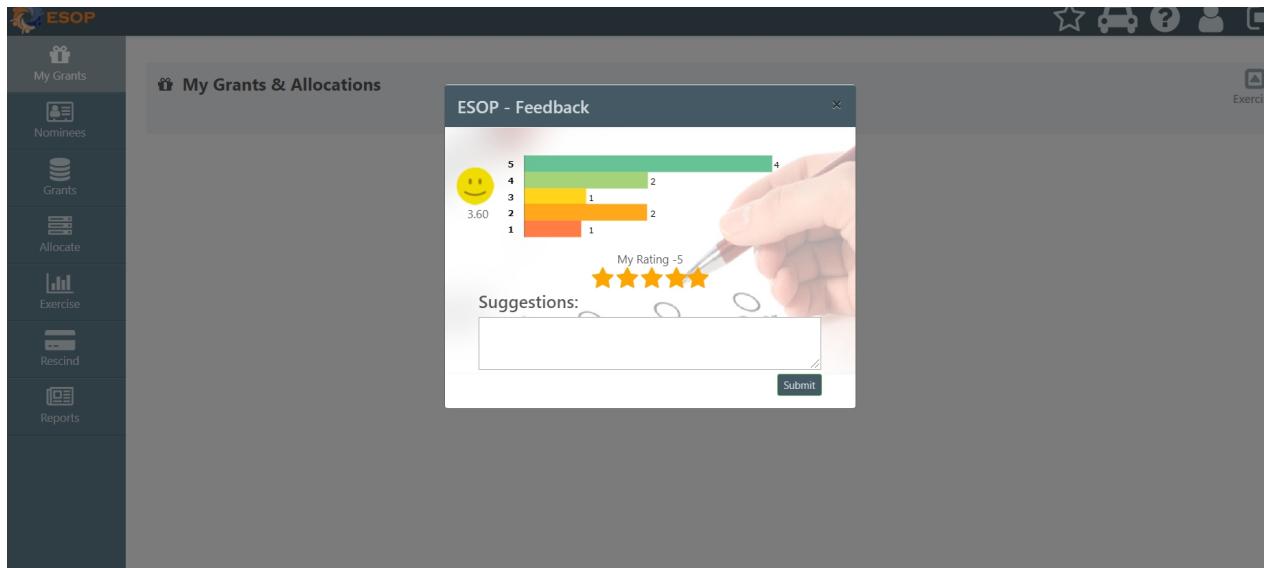
The screenshot shows a user interface for managing beneficiaries. On the left, there is a vertical sidebar with icons and labels: My Grants, My Nominees, Grants, Allocate, Exercise, Resend, and Reports. The main area is titled "Beneficiaries". A modal window is open, prompting the user to enter a nominee's details. The modal has fields for Name, Address, Relationship, and Percentage. Below the fields, a red box contains the message: "PS: Beneficiaries total percentage is less than 100%".

Click on highlighted button ,pop ups a modal to enter details of nominee.

The screenshot shows a modal window for entering nominee details. The modal has fields for Name, Address, Relationship, and Percentage. It includes a placeholder image of a person. At the bottom, there are "Submit" and "Cancel" buttons. The background shows a list of nominees with their names partially visible: "ma", "ma@bangalore", "ther", and "Sham". A red box at the bottom left of the screen contains the message: "e is less than 100%".

How to give feedback to ESOP?

Click on feedback icon on the header section of the Home page, give the ratings ,suggestions and click on submit

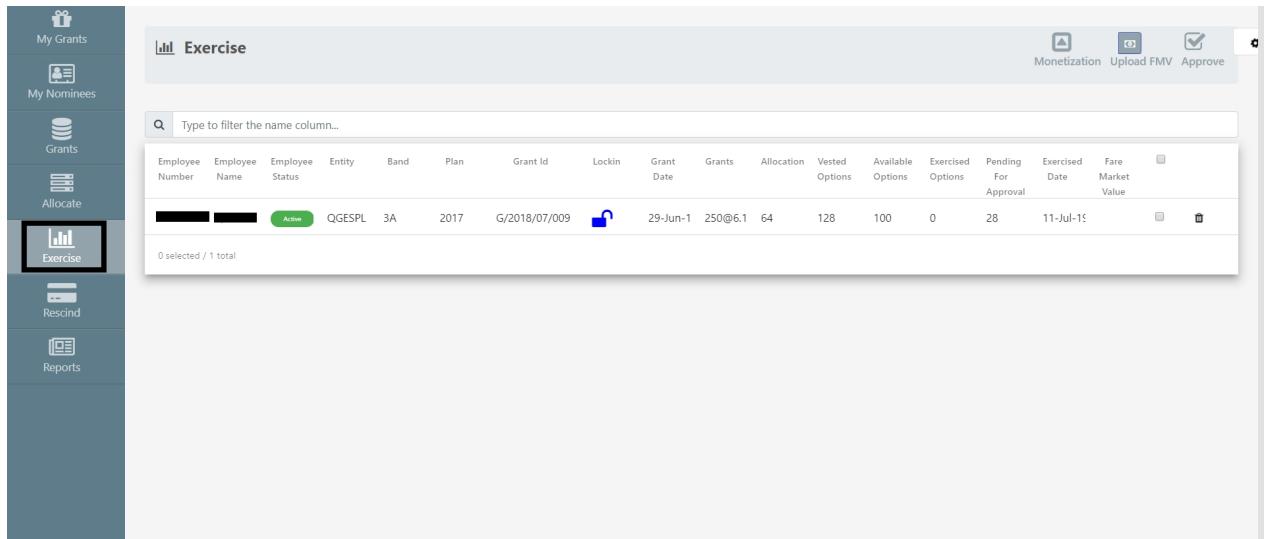


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How to start Monetization?

How to start Monetization?

Click on Exercise icon as shown below to start monetization.



click on monetization, enter vesting factor and submit

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How to rescind by admin?

How to Rescind Grants ?

Click on Rescind icon as show below.

| Employee Number | Employee Name | Employee Status | Plan | Total Grants | Total Allocation | Available Options | Rescind Options | Action |
|-----------------|---------------|-----------------|------|--------------|------------------|-------------------|-----------------|------------|
| [REDACTED] | [REDACTED] | Active | 2017 | 1920 | 1920 | 696.0 | 100 | [REDACTED] |
| [REDACTED] | [REDACTED] | Active | 2017 | 1500 | 1500 | 600.0 | 0 | [REDACTED] |
| [REDACTED] | [REDACTED] | Active | 2017 | 2230 | 2230 | 944.0 | 0 | [REDACTED] |
| [REDACTED] | [REDACTED] | Active | 2017 | 450 | 450 | 360.0 | 0 | [REDACTED] |
| [REDACTED] | [REDACTED] | Active | 2017 | 370 | 370 | 360.0 | 0 | [REDACTED] |
| [REDACTED] | [REDACTED] | Active | 2017 | 380 | 380 | 360.0 | 0 | [REDACTED] |
| [REDACTED] | [REDACTED] | Active | 2017 | 650 | 650 | 940.0 | 0 | [REDACTED] |
| [REDACTED] | [REDACTED] | Active | 2017 | 660 | 660 | 940.0 | 0 | [REDACTED] |
| [REDACTED] | [REDACTED] | Active | 2017 | 3350 | 3350 | 1,384.0 | 0 | [REDACTED] |
| [REDACTED] | [REDACTED] | Active | 2017 | 2910 | 2910 | 1,164.0 | 0 | [REDACTED] |

click on action, enter the rescind value and remarks

The screenshot shows a software application interface for managing grants. On the left, a sidebar menu includes 'My Grants', 'My Nominees', 'Grants', 'Allocate', 'Exercise', 'Rescind' (which is highlighted), and 'Reports'. The main area is titled 'Rescind Summary' and displays a table of employee grants. A search bar at the top allows filtering by name. The table columns include Employee Number, Name, Plan, Entity, Band, Grant Id, Grant Date, Allocation, Vested Options, *Rescind, and *Remarks. A modal dialog titled 'Rescind Options of' is open over the table, showing details for a specific grant. The modal has fields for Plan (2017), Entity (QGESPL), Band (3A), Grant Id (G/2017/08/172), Grant Date (31-Aug-17), Allocation (334), Vested Options (668.0), *Rescind (0), and *Remarks (company). It also contains 'Save' and 'Close' buttons. At the bottom of the main table area, it says '0 selected / 161 total'.

| Employee Number | Name | Plan | Entity | Band | Grant Id | Grant Date | Allocation | Vested Options | *Rescind | *Remarks | Options | Rescind Options | Action |
|-----------------|------------|------|--------|------|---------------|------------|------------|----------------|----------|----------|---------|-----------------|--------|
| [REDACTED] | R. M. | 2017 | QGESPL | 3A | G/2017/08/172 | 31-Aug-17 | 334 | 668.0 | 0 | | 100 | 0 | |
| [REDACTED] | Saty. | | | | | | | | | | 0 | 0 | |
| [REDACTED] | Dev. | | | | | | | | | | 0 | 0 | |
| [REDACTED] | Bhut. | 2017 | QGESPL | 3A | G/2018/07/009 | 29-Jun-18 | 64 | 128.0 | 100 | company | 0 | 0 | |
| [REDACTED] | O.P. | | | | | | | | | | 0 | 0 | |
| [REDACTED] | Gunt. | | | | | | | | | | 0 | 0 | |
| [REDACTED] | [REDACTED] | | | | | | | | | | 0 | 0 | |
| [REDACTED] | [REDACTED] | | | | | | | | | | 0 | 0 | |
| [REDACTED] | [REDACTED] | | | | | | | | | | 0 | 0 | |
| [REDACTED] | [REDACTED] | | | | | | | | | | 0 | 0 | |
| [REDACTED] | [REDACTED] | | | | | | | | | | 0 | 0 | |

0 selected / 161 total

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Feedback and Support

Feedback

User feedback is very essential for improving the Promotion Nomination Tool. User feedback shall be collected and the feedback list should be reviewed periodically and prioritize for implementation based on the importance.

Feedback should be provided through feedback link available in ESOP tool.

Support

Technical Support:

[Intranet > Helpdesk – IT-Apps](#)

Data Queries & Support:

[Human Resources](#)

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