

Portfolio Analysis Suite - Settings

Khalid | 14 steps | 3 minutes

Monday, 20 October 2025

- 1 Click "File Management"

The screenshot shows a web browser window for 'Portfolio Management Suite' at 'localhost:8501/File_Management'. The left sidebar has a 'main' category with several options: File Management (highlighted with a yellow circle), Manual Data Entry, Project Analysis, Portfolio Analysis, Portfolio Charts, Cash Flow Simulator, EVM Simulator, and User Management. The right panel is titled 'File Management' with a sub-section 'Centralized Data Import, Configuration & Export Hub'. It includes a 'A. Data Source' section with a 'Select Data Source' dropdown and a 'Load JSON' button.

- 2 Click "S-Curve" and other global setting in B. Controls section

The screenshot shows the same browser window. The left sidebar still has the 'File Management' option highlighted. The right panel is titled 'B. Controls' and contains several settings: 'Curve Type (PV)' with 'S-Curve' selected (highlighted with a yellow circle), 'S-Curve α' set to '2.00' with increment/decrement buttons, 'Currency Symbol' set to 'PKR' with a dropdown arrow, and 'Date Format' set to 'YYYY-MM-DD' with a dropdown arrow.

3 Drop to "Annual Inflation Rate (%)"

The screenshot shows the EVM Simulator interface. On the left, there's a sidebar with 'User Info' showing a profile picture of Dr. Khalid Ahmad Khan and his email address. Below it is a 'Logout' button. The main area has sections for 'Currency Symbol' (PKR), 'Date Format' (YYYY-MM-DD), and 'Annual Inflation Rate (%)'. The 'Annual Inflation Rate (%)' input field contains the value '15' and is circled in yellow.

4 Click "Calculate from Data" to automatically set Tiers or specify cutoffs yourself

The screenshot shows the 'Budget Tier Configuration' page. It includes sections for 'Automatic Tier Calculation' (with 'Calculation Method' set to 'Equal Project Distribution') and 'Manual Tier Configuration'. Under 'Manual Tier Configuration', there's a 'Cutoff Points' section with three input fields: 'Cutoff 1 (PKR)' (4274.05), 'Cutoff 2 (PKR)' (5944.23), and 'Cutoff 3 (PKR)' (8510.91). There are also 'Tier Names' fields: 'Tier 1 Name' (Small), 'Tier 2 Name' (Medium), 'Tier 3 Name' (Large), and 'Tier 4 Name' (Mega). A large yellow circle highlights the 'Calculate from Data' button.

- 5 Click "Run Batch EVM" to run calculations before setting duration tier

The screenshot shows the EVM Simulator interface. On the left, there's a sidebar with 'User Info' showing a profile picture of Dr. Khalid Ahmad Khan and his email address. Below the sidebar are 'Logout' and 'D. LLM Provider (Executive Brief)' sections. The main area has a heading 'Ready to process 71 projects' and a 'Batch Calculation Mode' section with 'Select mode' and 'Global Settings' (selected) or 'Project Settings' radio buttons. A note says 'All projects will be calculated using global settings from Controls section'. A prominent red button labeled 'Run Batch EVM' is at the bottom, with a yellow circle highlighting it.

- 6 Click "Calculate from Data" or enter cutoff values yourself

The screenshot shows the 'Duration Tier Configuration' page. It has sections for 'Automatic Duration Tier Calculation' (with 'Equal Duration Range' selected) and 'Manual Duration Tier Configuration'. Under manual configuration, there's a 'Cutoff Points (months)' section with three input fields for 'Cutoff 1' (23), 'Cutoff 2' (47), and 'Cutoff 3' (60). Each field has a minus sign, plus sign, and a help icon. To the right is a 'Calculate from Data' button. Below this is a 'Duration Tier Names' section with four input fields for 'Duration Tier 1 Name' (Short), 'Duration Tier 2 Name' (Medium), 'Duration Tier 3 Name' (Long), and 'Duration Tier 4 Name' (Very Long). At the bottom is a 'Duration Tier Preview' button.

7 Click "Browse files" to set LLM Provider API key (optional)

D. LLM Provider (Executive Brief)

Choose Provider

OpenAI

Gemini

Claude

Upload API Key File

Drag and drop file here
Limit 200MB per file • TXT, KEY

Test Connection

⚠ Upload an API key first to test the connection

8 Click to select API Key - note: this will not be stored by the system

Open

Dropbox (Personal) > MySoftware > Portfolio

Name	Status	Date modified	Type	Size
geminikey.txt	✓	26/09/2025 11:46 pm	Text Document	
OpenAlkey.txt	✓	02/10/2025 3:28 pm	Text Document	

9 Click "Test API Connection" to check if API Key is valid

The screenshot shows the EVM Simulator interface. On the left, there's a sidebar with 'User Info' showing a profile picture of Dr. Khalid Ahmad Khan and his email address. Below it is a 'Logout' button. The main area has a file named 'OpenAIkey.txt' (164.0B) with a note that the API key was loaded successfully. A prominent red button labeled 'Test API Connection' is highlighted with a yellow circle and a cursor icon.

10 Click "Select Model" system will fetch list of available models from LLM site

The screenshot shows the AI Model Selection interface. At the top, a message says 'Found 67 GPT models - Model list updated!' and 'Refresh the page to see updated model list'. Below this, a dropdown menu is open, showing 'gpt-4o-mini' as the selected option, which is highlighted with a yellow circle and a cursor icon. The 'Model Parameters' section below includes sliders for 'Temperature' (set to 0.20) and 'Timeout (seconds)' (set to 60).

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Click to select model

Portfolio Charts
Cash Flow Simulator
EVM Simulator
User Management

User Info
Dr. Khalid Ahmad Khan
khalid0211@gmail.com
Logout

AI Model Selection

OpenAI Model

gpt-4o-mini

gpt-4-0613

gpt-4

gpt-3.5-turbo

gpt-5-search-api-2025-10-14

gpt-realtime-mini

gpt-realtime-mini-2025-10-06

gpt-3.5-turbo-instruct

gpt-3.5-turbo_instruct_0014

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Save data in Json format in E. Save & Download section

E. Save & Download

Download Filename

Base filename (without extension)
portfolio_package_20251020_152414

Download JSON Package Download CSV Data

Configuration Summary

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Click "Download JSON Package" after specifying name of file

The screenshot shows the EVM Simulator interface. On the left, there's a sidebar with 'EVM Simulator' and 'User Management'. Below that is a 'User Info' section with a profile picture of a man, the name 'Dr. Khalid Ahmad Khan', and the email 'khalid0211@gmail.com'. At the bottom of the sidebar is a 'Logout' button. The main area is titled 'E. Save & Download'. It has a 'Download Filename' field containing 'Portfolio_data'. Below it is a button labeled 'Download JSON Package' with a hand cursor icon, which is highlighted with a yellow circle. To the right, there's a 'Configuration Summary' section with two green boxes: one saying 'Data: 71 projects loaded' and another saying 'Controls: Configured'.

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Click "Download Complete Package" - json file will be saved in default download folder

This screenshot is similar to the previous one but shows the process of downloading a complete package. The sidebar and user info are identical. In the main area, the 'Download JSON Package' button is still present but not highlighted. Instead, the 'Download Complete Package' button, which has a folder icon, is highlighted with a yellow circle and has a hand cursor icon over it. A progress bar above it shows 'Exporting complete package with configuration'.