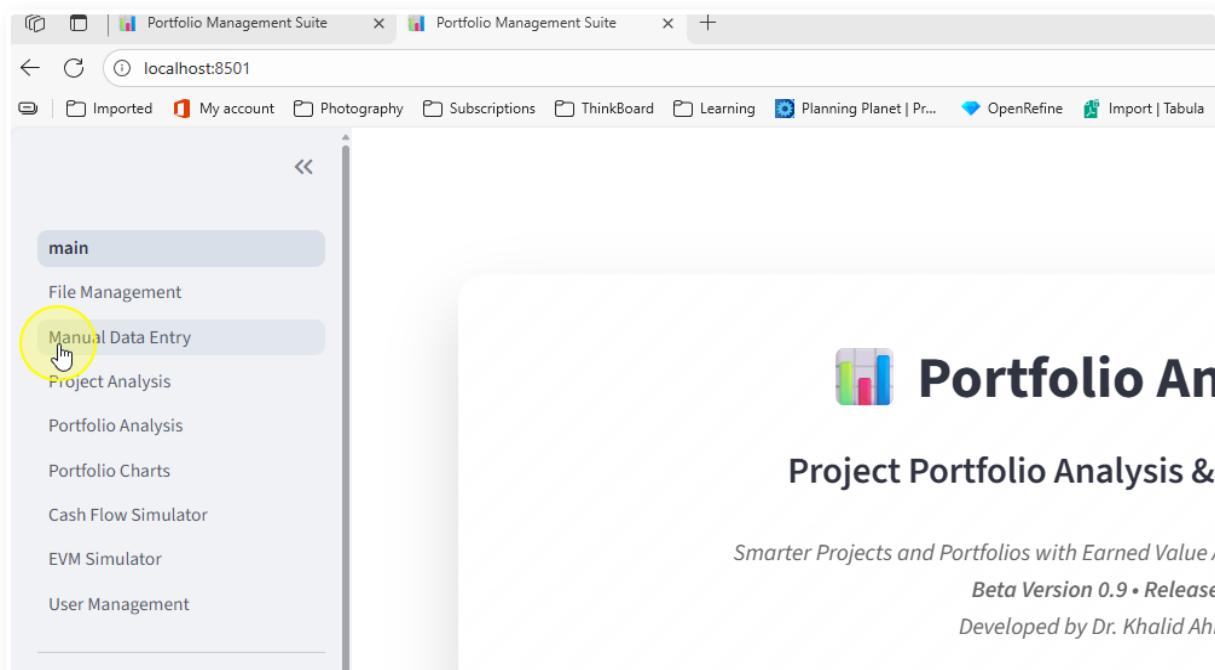


# Instructions: Portfolio Analysis Suite

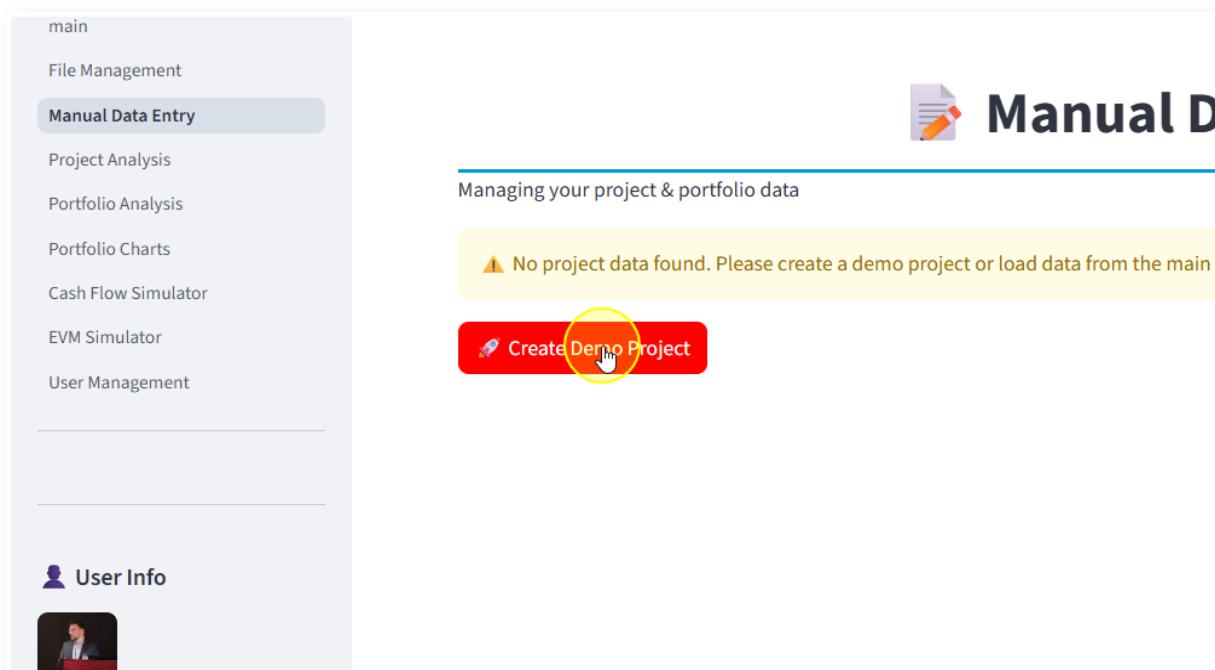
Khalid | 14 steps | 2 minutes

Monday, 20 October 2025

- 1 Click "Manual Data Entry" on Microsoft Edge



- 2 Click "Create Demo Project"



3 Click "Add New Project"

The screenshot shows the main dashboard of a project management application. On the left, there's a sidebar with navigation links like 'Project Entry', 'Analysis', 'Simulator', 'Management', 'User Info', 'Logout', and an email address '211@gmail.com'. The main content area has a title 'Managing your project & portfolio data'. It displays summary statistics: 'Total Projects' (1), 'Total BAC' (\$1,000.00), and 'Total AC' (\$500.00). Below these are three buttons: 'View & Edit Data' (grey), 'Add New Project' (red with a plus sign), and 'Bulk Operations' (grey). A yellow circle highlights the 'Add New Project' button. The section 'Project Data' follows, with a message: '⚠ No batch results found. Please run 'Batch EVM Calculation' in Portfolio Analysis to get SPI and C'. Underneath is a 'Filters' section with three dropdown menus: 'Project ID' (selected), 'Organization', and 'Plan Start Range'. The URL in the browser bar is 'http://127.0.0.1:5000'.

4 Click "Enter unique Project ID"

The screenshot shows the 'Add New Project' form. The left sidebar includes 'User Info' with a profile picture and name 'Iqbal Ahmad Khan' and email '211@gmail.com'. The main form has a title 'Add New Project'. It contains several input fields: 'Project ID \*' (highlighted with a yellow circle), 'Project Name', 'Organization', 'Project Manager', 'Financial Data' (with 'BAC (Budget) \*' set to \$1000.00 and 'AC (Actual Cost)' at \$0.00), and 'Comments'. At the bottom right is a 'Submit' button. The URL in the browser bar is 'http://127.0.0.1:5000/project/add'.

- 5 Drag from "Complete entry of required fields"

Project Name \*

Demo Project

Project Manager

Demo Manager

Actual Data

AC (Actual Cost)

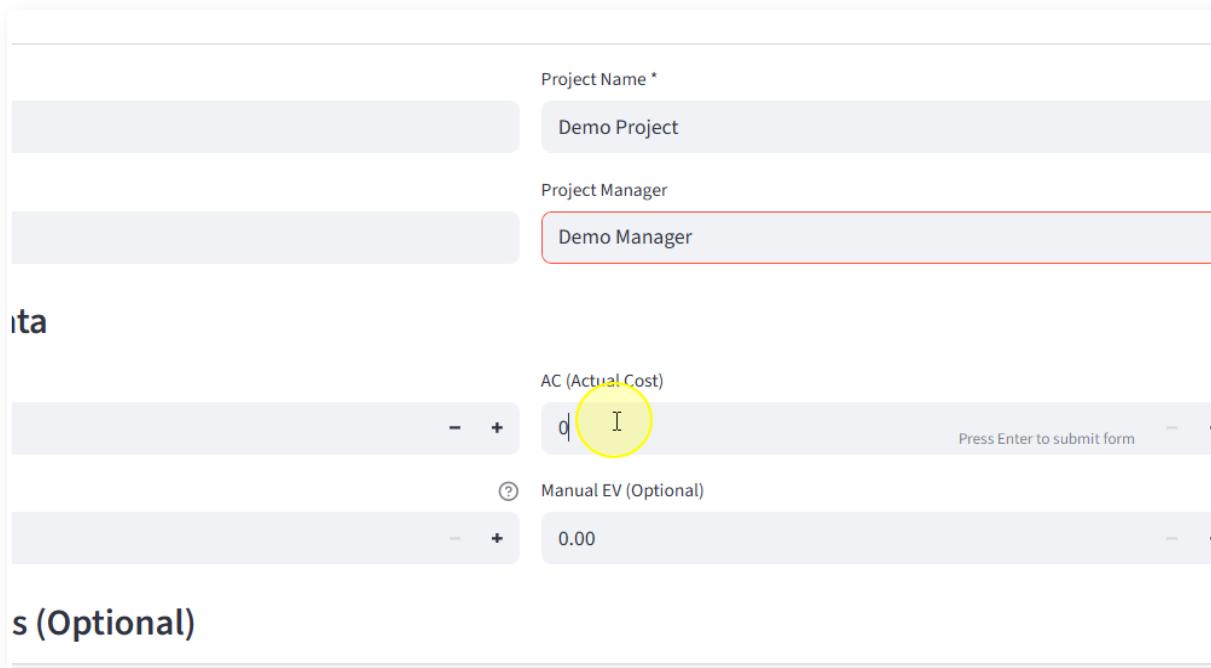
- + I

Press Enter to submit form

Manual EV (Optional)

- + 0.00

Settings (Optional)



- 6 Drop to "AC (Actual Cost)"

Project Name \*

Demo Project

Project Manager

Demo Manager

Actual Data

AC (Actual Cost)

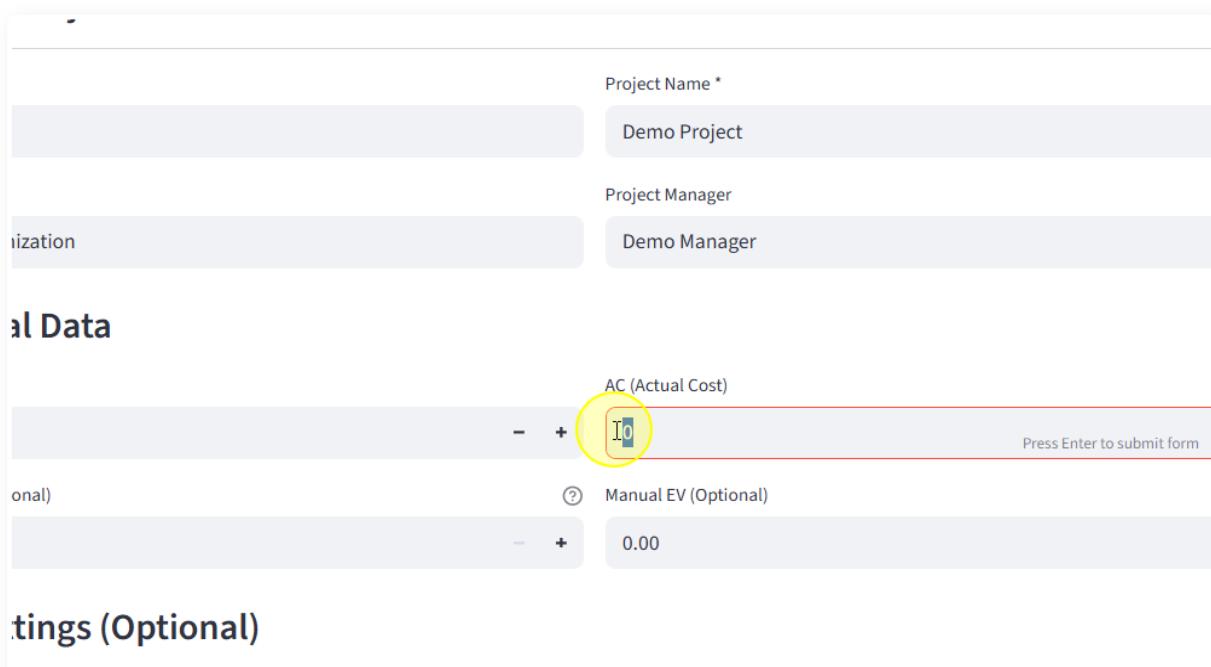
- + I0

Press Enter to submit form

Manual EV (Optional)

- + 0.00

Settings (Optional)



7

Click "Save Project"

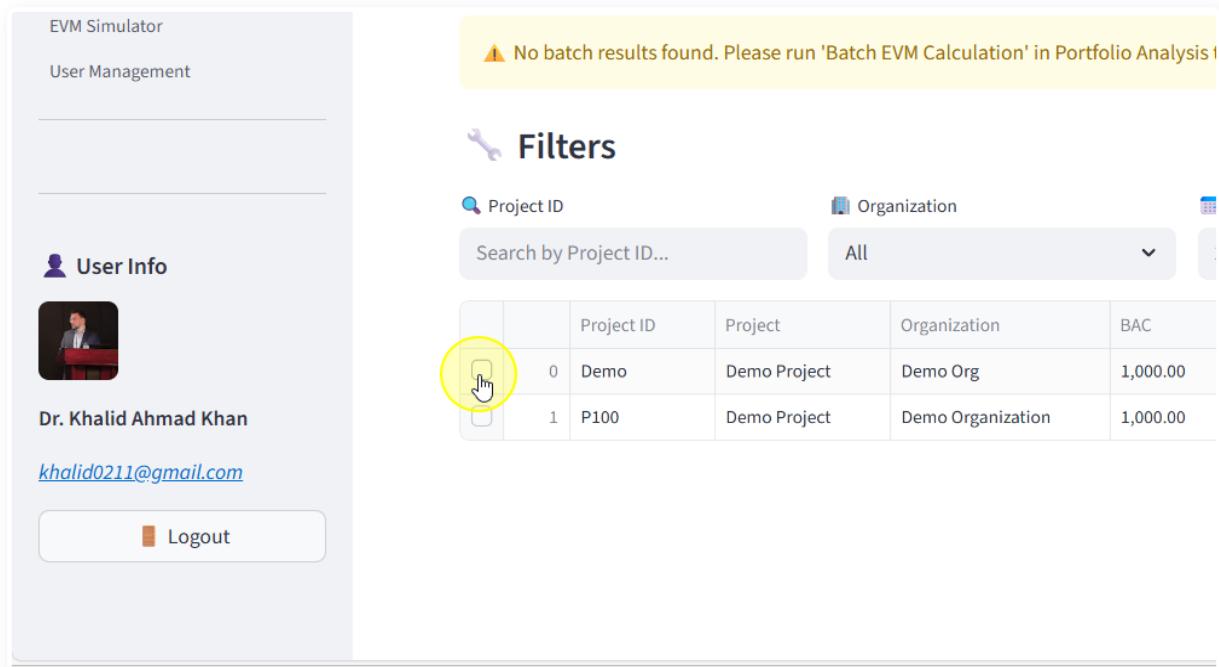
The screenshot shows the application's interface with the 'Schedule' tab selected. On the left, there is a sidebar with 'User Info' and a profile picture. The main area displays a form for setting a project's start date, which is set to '01/01/2025'. Below the date input is a red button labeled 'Save Project' with a small icon, which is also highlighted with a yellow circle.

8

Click "View & Edit Data"

The screenshot shows the application's interface with the 'View & Edit Data' tab selected. On the left, there is a sidebar with 'Manual Data Entry' selected and a profile picture. The main area displays a summary of project data: 'Total Projects: 2', 'Total BAC: 2,000.00', and 'Total Duration: 1'. At the bottom, there are three buttons: 'View & Edit Data' (highlighted with a yellow circle), 'Add New Project', and 'Bulk Operations'.

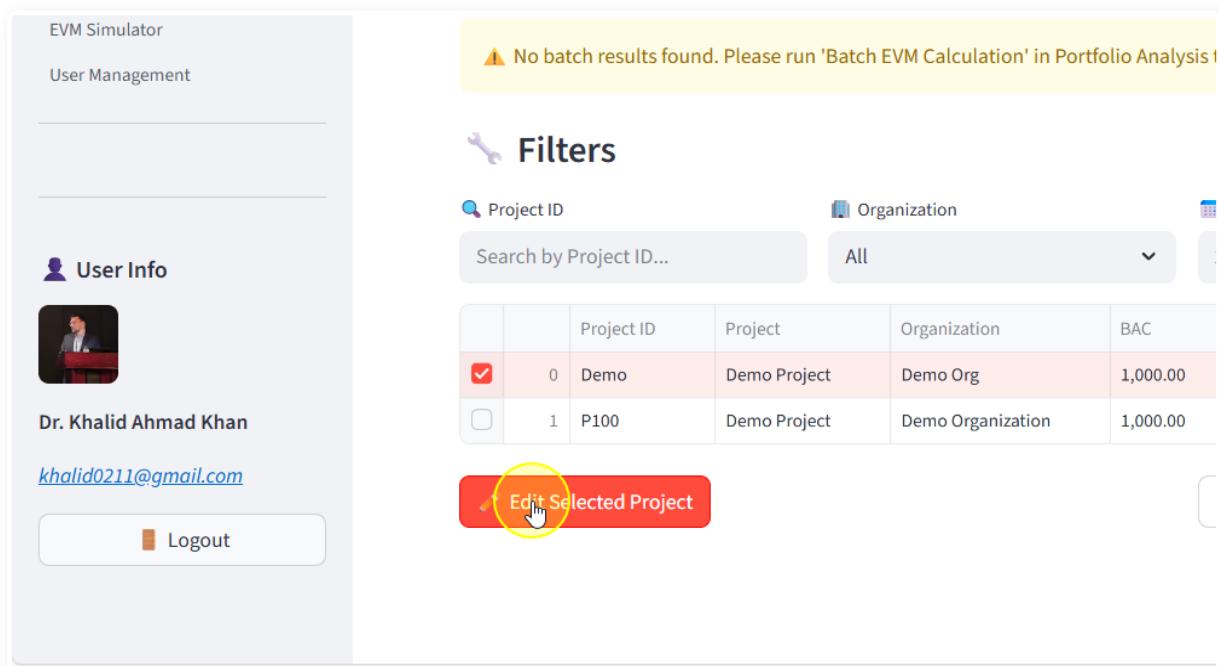
9 Click "Demo to edit the project"



The screenshot shows a user profile on the left and a 'Filters' section on the right. The filters include search fields for 'Project ID' and 'Organization', and dropdowns for 'All'. A table lists two projects: 'Demo' and 'P100'. The 'Demo' row has a yellow circle around its edit icon.

	Project ID	Project	Organization	BAC
0	Demo	Demo Project	Demo Org	1,000.00
1	P100	Demo Project	Demo Organization	1,000.00

10 Click "Edit Selected Project"



The screenshot shows the same interface as the previous one, but now the 'Demo' project is selected (indicated by a checked checkbox). The 'Edit Selected Project' button at the bottom of the table row is highlighted with a yellow circle.

	Project ID	Project	Organization	BAC	
<input checked="" type="checkbox"/>	0	Demo	Demo Project	Demo Org	1,000.00
<input type="checkbox"/>	1	P100	Demo Project	Demo Organization	1,000.00

11 Click "Save Project" to save edits

The screenshot shows a user profile on the left with a picture of Dr. Khalid Ahmad Khan and his email address. On the right, there's a parameter input for 'Alpha (S-curve parameter)' set to '0.00'. Below it is a 'Schedule' section with a 'Plan Start' date of '01/01/2025'. At the bottom of this section is a red button labeled 'Save Project' with a yellow circle and a hand cursor icon over it. To its right is a 'Cancel Edit' button.

12 Click "File Management"

The screenshot shows a browser window for 'Portfolio Management Suite' at 'localhost:8501/Manual\_Data\_Entry'. The left sidebar has a 'main' category with several options: 'File Management' (highlighted with a yellow circle and a hand cursor icon), 'Manual Data Entry' (selected and highlighted with a grey background), 'Project Analysis', 'Portfolio Analysis', 'Portfolio Charts', 'Cash Flow Simulator', 'EVM Simulator', and 'User Management'. The main content area shows a 'Project Data' section with a warning message: '⚠ No batch results found. Please run 'Batch EVM Calculation' in Portfolio Analysis!'. Below it is a 'Filters' section.

13

Click "Run Batch EVM" to complete calculations

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 are 'Logout' and other navigation links. The main area has a heading 'C. Run Batch EVM' and a message 'Ready to process 2 projects'. It includes a 'Batch Calculation Mode' section with 'Select mode' and radio buttons for 'Global Settings' (selected) and 'Project Settings'. A note says 'All projects will be calculated using global settings from Controls section'. At the bottom is a red button labeled 'Run Batch EVM' with a hand cursor icon, which is circled in yellow.

14

Click "Project Analysis" to view performance of individual projects

The screenshot shows a navigation menu on the left with various options like 'File Management', 'Project Analysis' (which is circled in yellow), 'Portfolio Analysis', etc. The main area has sections for 'Duration Tier Preview' (with 'Short' and 'Medium' tiers), 'C. Run Batch EVM', 'Ready to process 2 projects', 'Batch Calculation Mode', 'Select mode' (radio buttons for 'Global Settings' and 'Project Settings'), and a note about global settings.