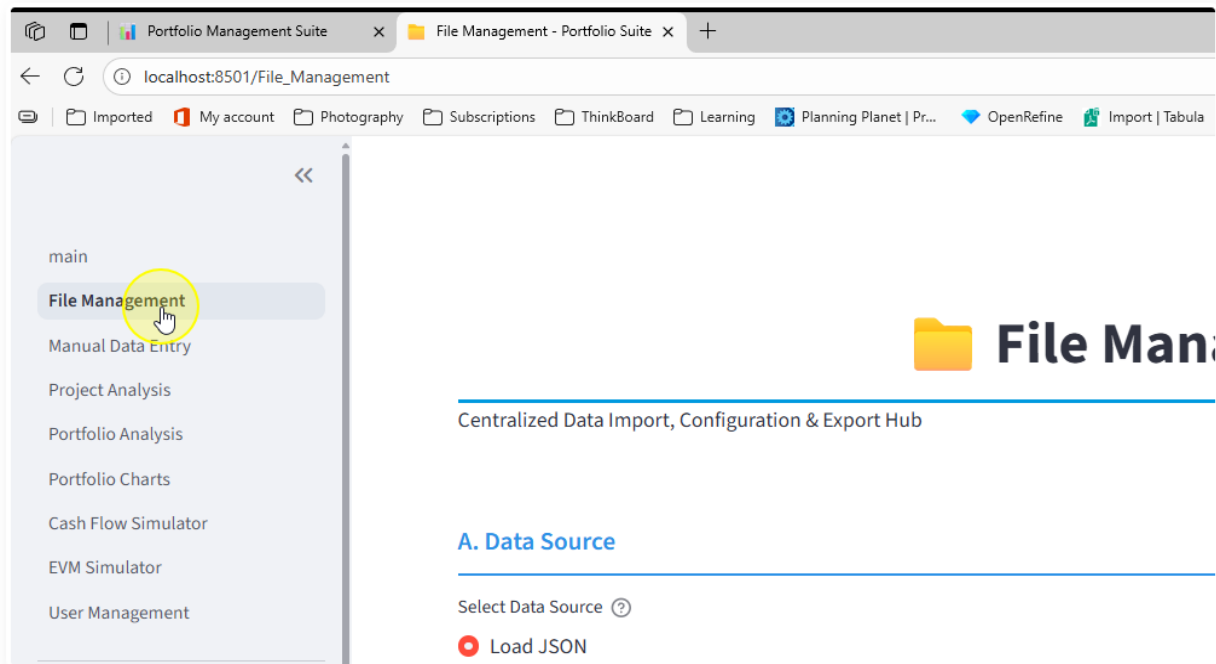# Portfolio Analysis Suite - Settings
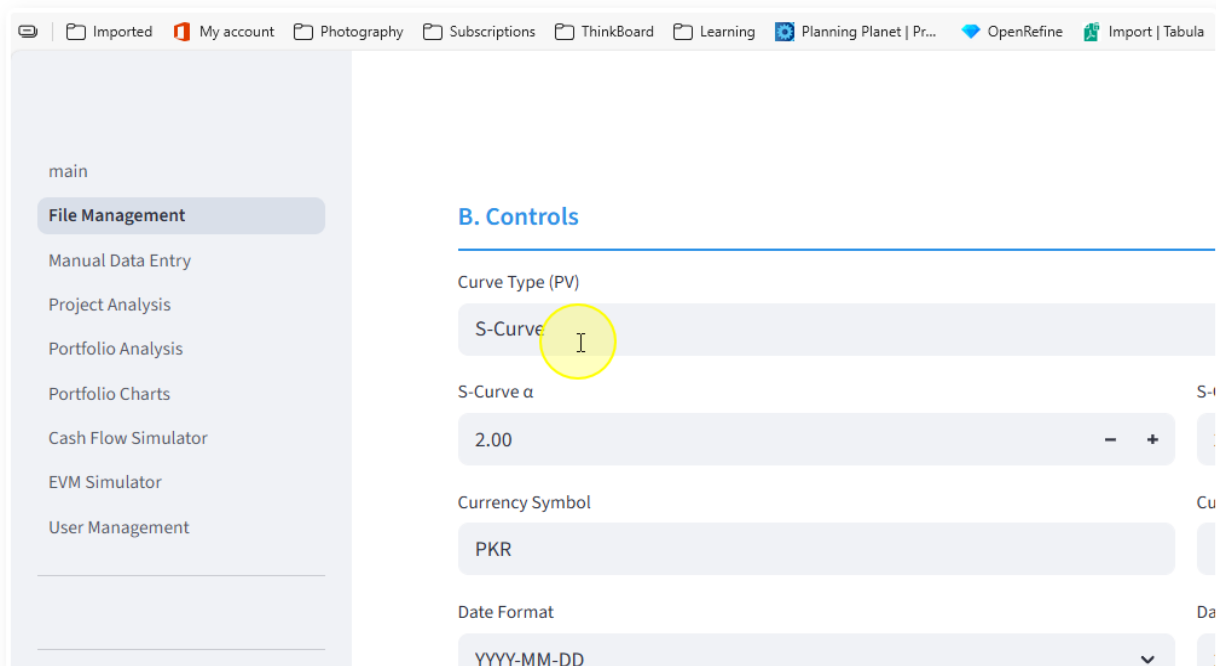
Khalid | 14 steps | 3 minutes   Monday, 20 October 2025

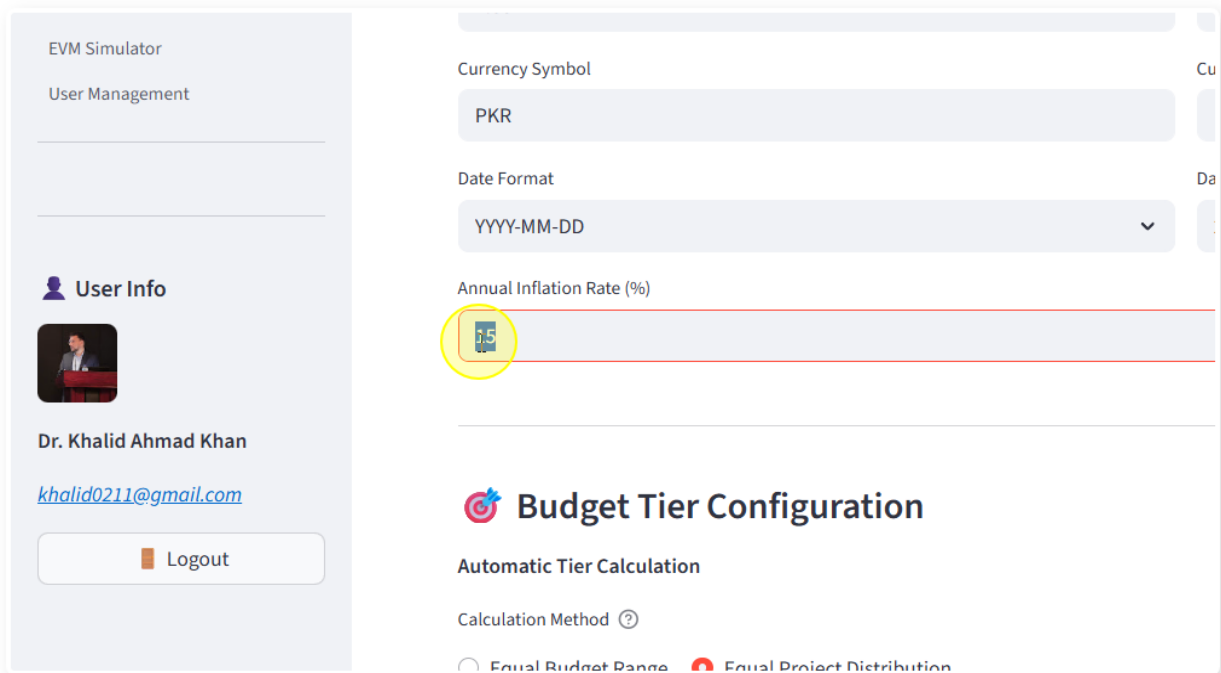**1** Click "File Management"

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

3 Drop to "Annual Inflation Rate (%)"

EVM Simulator

User Management

Currency Symbol

PKR

Date Format

YYYY-MM-DD

Annual Inflation Rate (%)

1.5

👤 **User Info**

Dr. Khalid Ahmad Khan

khalid0211@gmail.com

📙 Logout

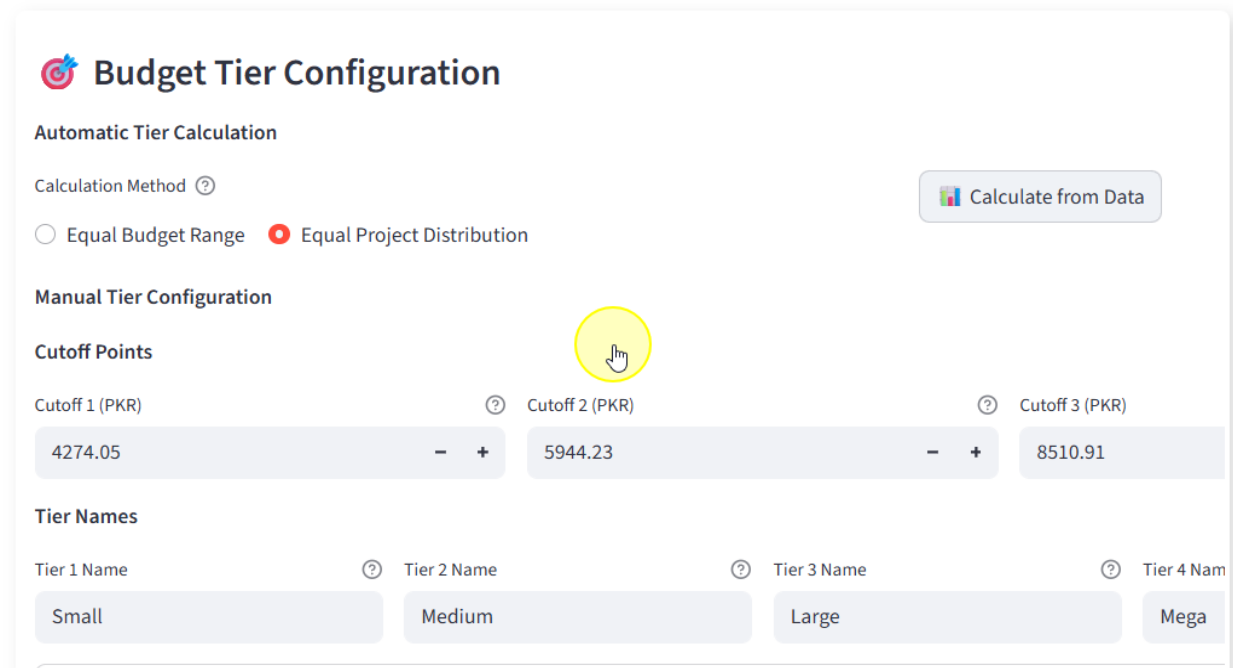🎯 **Budget Tier Configuration**

Automatic Tier Calculation

Calculation Method ⓘ

○ Equal Budget Range   ● Equal Project Distribution

---

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

🎯 **Budget Tier Configuration**

Automatic Tier Calculation

Calculation Method ⓘ   📊 Calculate from Data

○ Equal Budget Range   ● Equal Project Distribution

Manual Tier Configuration

Cutoff Points

Cutoff 1 (PKR)			Cutoff 2 (PKR)			Cutoff 3 (PKR)
4274.05	−	+	5944.23	−	+	8510.91

Tier Names

Tier 1 Name		Tier 2 Name		Tier 3 Name		Tier 4 Nam
Small		Medium		Large		Mega

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

EVM Simulator

User Management

👤 **User Info**

Dr. Khalid Ahmad Khan

khalid0211@gmail.com

📔 Logout

Ready to process 71 projects

Batch Calculation Mode:

Select mode ⍰

🔘 Global Settings ⚪ Project Settings

📊 All projects will be calculated using global settings from Controls section

🚀 Run Batch EVM

D. LLM Provider (Executive Brief)

Choose Provider

🔘 OpenAI

⚪ Gemini

---

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

🕐 **Duration Tier Configuration**

Automatic Duration Tier Calculation

Calculation Method ⍰

📊 Calculate from Data

🔘 Equal Duration Range ⚪ Equal Project Distribution

Manual Duration Tier Configuration

Cutoff Points (months)

Cutoff 1 (months)		⍰ Cutoff 2 (months)		⍰ Cutoff 3 (months)
23	− +	47	− +	60

Duration Tier Names

Duration Tier 1 Name	⍰ Duration Tier 2 Name	⍰ Duration Tier 3 Name	⍰ Duration Ti
Short	Medium	Long	Very Lor

> 🔍 Duration Tier Preview

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
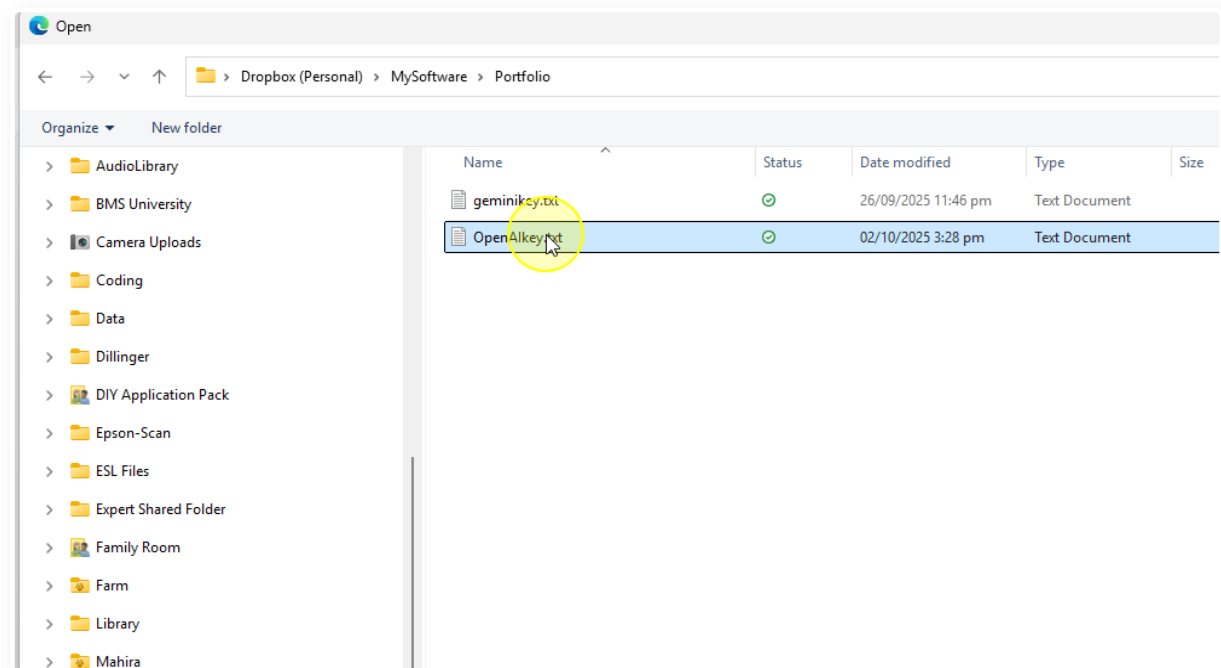Limit 200MB per file • TXT, KEY

Browse files

🔌 **Test Connection**
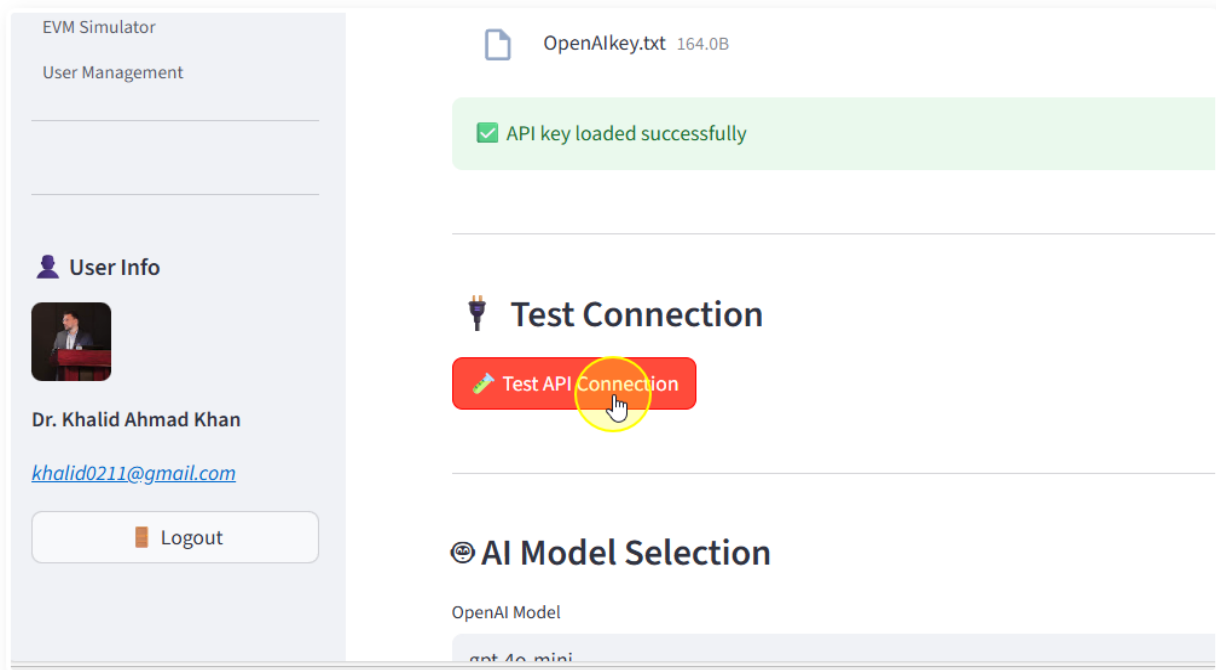
⚠️ Upload an API key first to test the connection

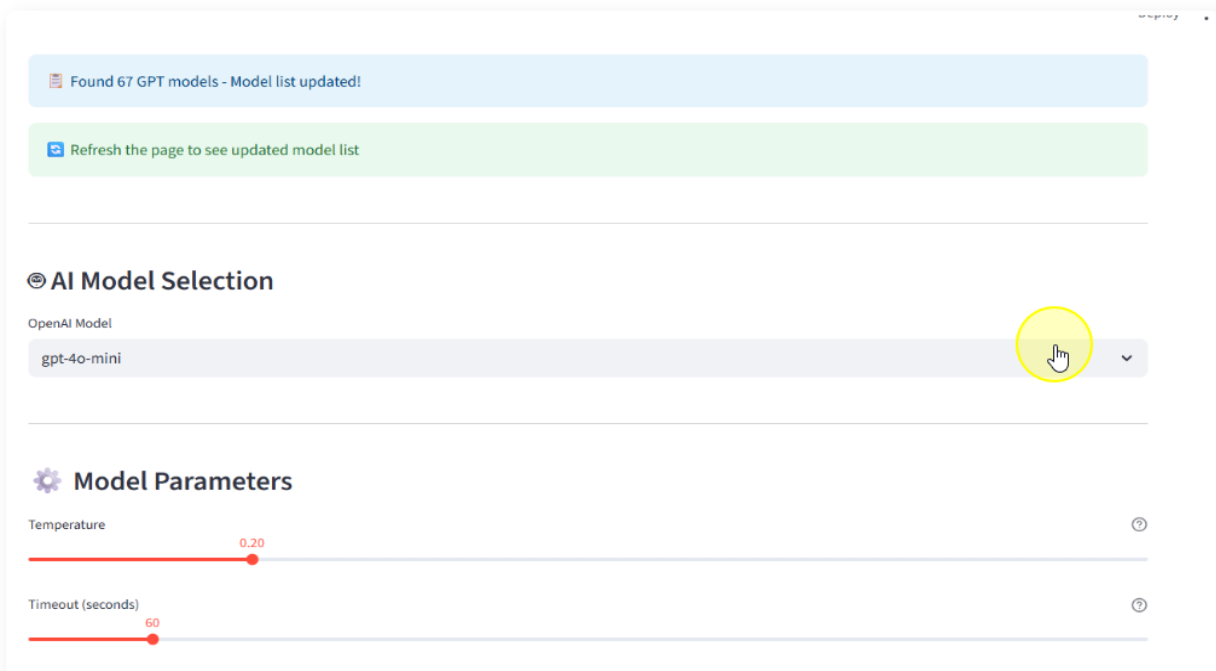**8** Click to select API Key - note: this will not be stored by the system

🔵 Open

← → ˅ ↑ ⌂ › Dropbox (Personal) › MySoftware › Portfolio

Organize ▾   New folder

Name	Status	Date modified	Type	Size
› 📁 AudioLibrary				
› 📁 BMS University				
› 📁 Camera Uploads				
› 📁 Coding	📄 geminikey.txt	⊘	26/09/2025 11:46 pm	Text Document
› 📁 Data	📄 OpenAIkey.txt	⊘	02/10/2025 3:28 pm	Text Document
› 📁 Dillinger				
› 📁 DIY Application Pack				
› 📁 Epson-Scan				
› 📁 ESL Files				
› 📁 Expert Shared Folder				
› 📁 Family Room				
› 📁 Farm				
› 📁 Library				
› 📁 Mahira				

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

EVM Simulator

User Management

OpenAIkey.txt 164.0B

✅ API key loaded successfully

👤 **User Info**

Dr. Khalid Ahmad Khan

khalid0211@gmail.com

🔲 Logout

🔌 **Test Connection**

📏 Test API Connection

😊 **AI Model Selection**

OpenAI Model

gpt-4o-mini

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

📋 Found 67 GPT models - Model list updated!

🔄 Refresh the page to see updated model list

😊 **AI Model Selection**

OpenAI Model

gpt-4o-mini   ⌄

⚙️ **Model Parameters**

Temperature   ⑦
          0.20
●━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━

Timeout (seconds)   ⑦
      60
●━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━━

11 Click to select model

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

13 Click "Download JSON Package" after specifying name of file

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