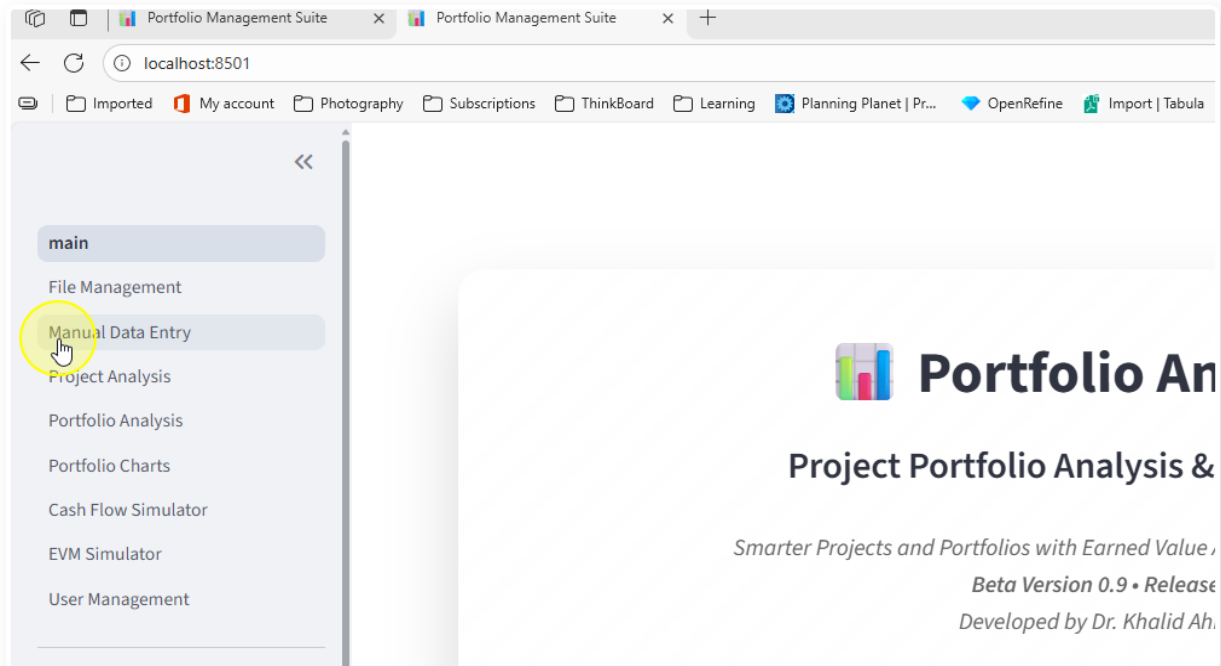


# Instructions: Portfolio Analysis Suite

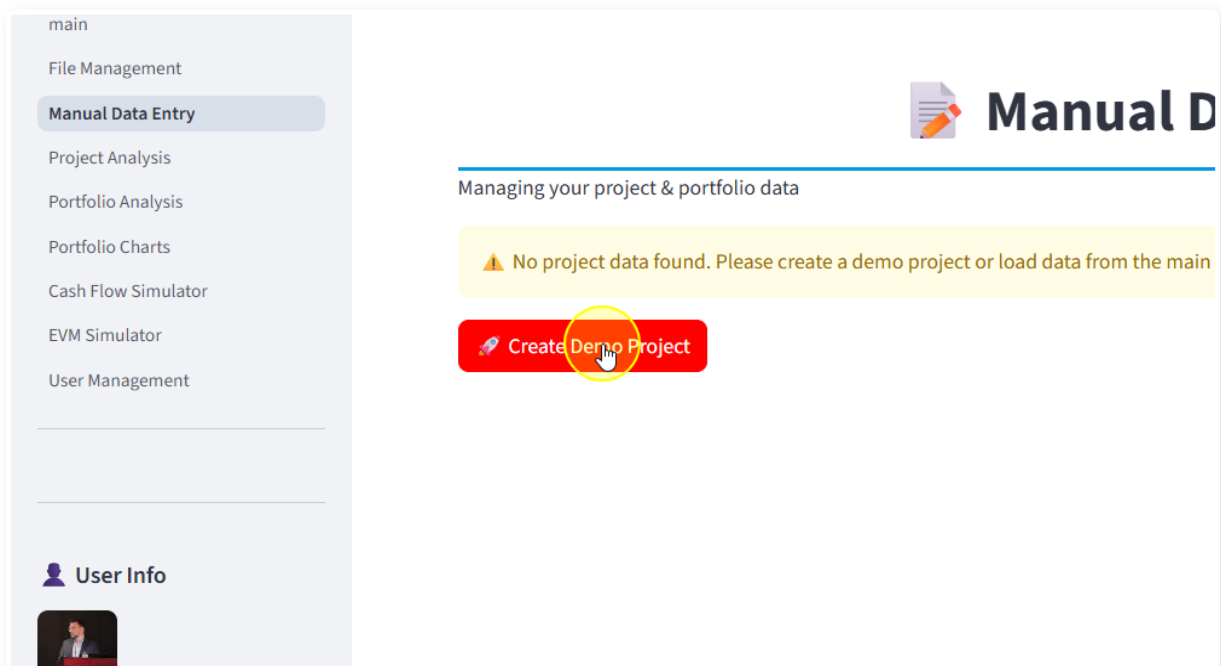
Khalid | 14 steps | 2 minutes

Monday, 20 October 2025

## 1 Click "Manual Data Entry" on Microsoft Edge



## 2 Click "Create Demo Project"



3

Click "Add New Project"

Managing your project & portfolio data

Total Projects	Total BAC	Total AC
1	1,000.00	500.00

[View & Edit Data](#) [+ Add New Project](#) [Bulk Operations](#)

### Project Data

⚠ No batch results found. Please run 'Batch EVM Calculation' in Portfolio Analysis to get SPI and C

### Filters

Project ID Organization Plan Start Range

4

Click "Enter unique Project ID"

[View & Edit Data](#) [+ Add New Project](#) [Bulk Operations](#)

### Add New Project

Project ID \*  Project Name \*

Organization  Project Manager

### Financial Data

BAC (Budget) \*  AC (Actual Cost) \*

1000.00 - + 0.00

5 Drag from "Complete entry of required fields"

Project Name \*

Demo Project

Project Manager

Demo Manager

ita

AC (Actual Cost)

- +

0

Press Enter to submit form

Manual EV (Optional)

- +

0.00

s (Optional)

6 Drop to "AC (Actual Cost)"

Project Name \*

Demo Project

Project Manager

Demo Manager

ization

al Data

AC (Actual Cost)

- +

10

Press Enter to submit form

onal)

Manual EV (Optional)

- +

0.00


tings (Optional)

## 7 Click "Save Project"

EVM Simulator

User Management

User Info



Dr. Khalid Ahmad Khan

[khalid0211@gmail.com](mailto:khalid0211@gmail.com)

Logout

Curve type

Alpha (S-curve parameter)

0.00

Schedule

Plan Start (DD/MM/YYYY) \*

01/01/2025

Save Project

## 8 Click "View & Edit Data"

File Management

Manual Data Entry

Project Analysis

Portfolio Analysis


Portfolio Charts

Cash Flow Simulator

EVM Simulator

User Management

User Info



Managing your project & portfolio data

Total Projects	Total BAC	Total
2	2,000.00	1

View & Edit Data

+ Add New Project

Bulk Operations

Add New Project

Project 'P100' added successfully!

Please switch to the 'View & Edit Data' tab to see your new project.


9

Click "Demo to edit the project"

EVM Simulator

User Management

User Info



Dr. Khalid Ahmad Khan

[khalid0211@gmail.com](mailto:khalid0211@gmail.com)

Logout

No batch results found. Please run 'Batch EVM Calculation' in Portfolio Analysis

Filters

Project ID

Search by Project ID...

Organization

All

		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


10

Click "" Edit Selected Project"

EVM Simulator

User Management

User Info



Dr. Khalid Ahmad Khan

[khalid0211@gmail.com](mailto:khalid0211@gmail.com)

Logout

No batch results found. Please run 'Batch EVM Calculation' in Portfolio Analysis

Filters

Project ID

Search by Project ID...

Organization

All

<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

Edit Selected Project

11

Click "Save Project" to save edits

The screenshot shows the 'EVM Simulator' interface. On the left is a sidebar with 'User Management' and 'User Info'. The 'User Info' section displays a profile picture, the name 'Dr. Khalid Ahmad Khan', the email 'khalid0211@gmail.com', and a 'Logout' button. The main area is titled 'Alpha (S-curve parameter)' with a value of '0.00'. Below this is a 'Schedule' section with a 'Plan Start (DD/MM/YYYY) \*' field set to '01/01/2025'. At the bottom of the main area, there are two buttons: a red 'Save Project' button with a yellow circle and a hand cursor over it, and a 'Cancel Edit' button.

12

Click "File Management"

The screenshot shows the 'Portfolio Management Suite' interface in a web browser. The browser's address bar shows 'localhost:8501/Manual\_Data\_Entry'. The sidebar on the left has a 'main' section with a list of options: 'File Management' (highlighted with a yellow circle and a hand cursor), 'Manual Data Entry', 'Project Analysis', 'Portfolio Analysis', 'Portfolio Charts', 'Cash Flow Simulator', 'EVM Simulator', and 'User Management'. The main content area has a header with 'View & Edit Data', 'Add New Project', and 'Bulk Operations'. Below this is a 'Project Data' section with a yellow warning box stating 'No batch results found. Please run 'Batch EVM Calculation' in Portfolio Analysis'. At the bottom, there is a 'Filters' section with a wrench icon.

13

Click "Run Batch EVM" to complete calculations

The screenshot shows the EVM Simulator interface. On the left sidebar, there is a 'User Info' section for Dr. Khalid Ahmad Khan with a profile picture and email [khalid0211@gmail.com](mailto:khalid0211@gmail.com), and a 'Logout' button. The main content area is titled 'C. Run Batch EVM' and indicates 'Ready to process 2 projects'. Under 'Batch Calculation Mode', there are radio buttons for 'Global Settings' (selected) and 'Project Settings'. A blue informational box states: 'All projects will be calculated using global settings from Controls section'. A red button labeled 'Run Batch EVM' with a rocket icon is highlighted with a yellow circle. Below this, there is a section titled 'D. LLM Provider (Executive Brief)'.

14

Click "Project Analysis" to view performance of individual projects

The screenshot shows a web browser window at localhost:8501/File\_Management. The left sidebar contains a menu with items: 'main', 'File Management', 'Manual Data Entry', 'Project Analysis' (highlighted with a yellow circle), 'Portfolio Analysis', 'Portfolio Charts', 'Cash Flow Simulator', 'EVM Simulator', and 'User Management'. The main content area shows 'Duration Tier 1 Name' and 'Duration Tier 2 Name' dropdowns set to 'Short' and 'Medium' respectively. Below these is a 'Duration Tier Preview' button. The bottom section of the page is identical to the previous screenshot, titled 'C. Run Batch EVM' with 'Ready to process 2 projects' and 'Global Settings' selected.