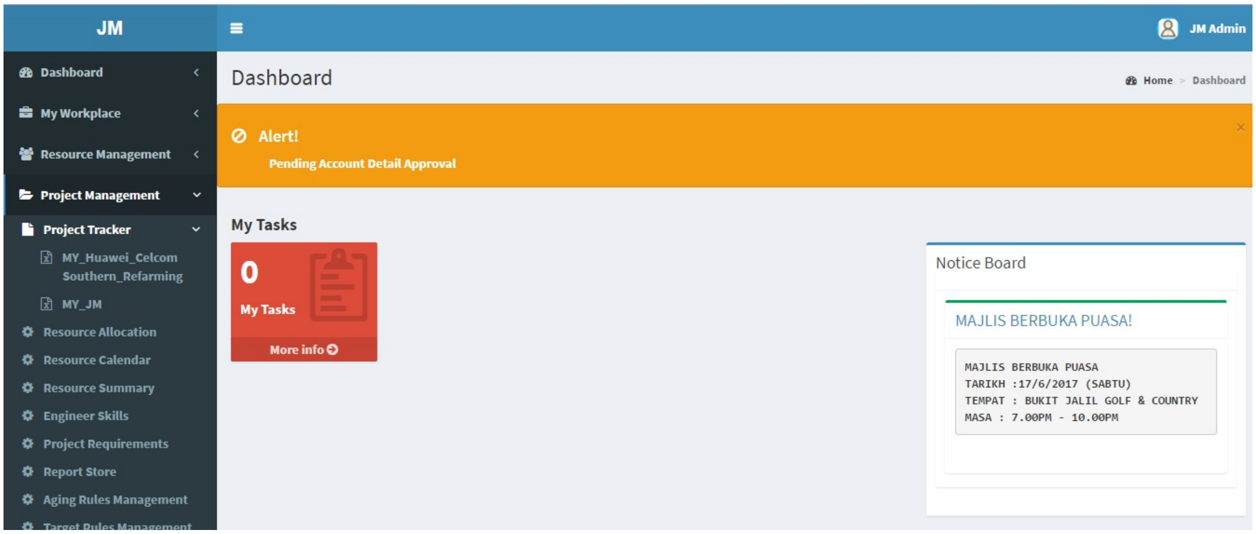
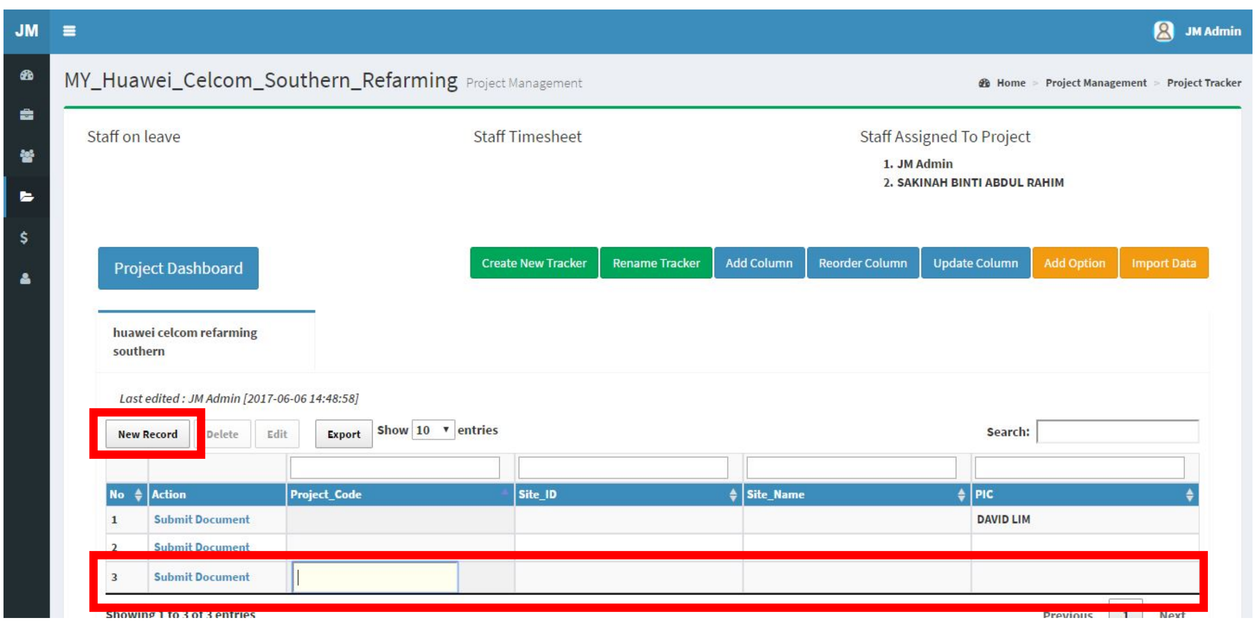
Project Management User Guide

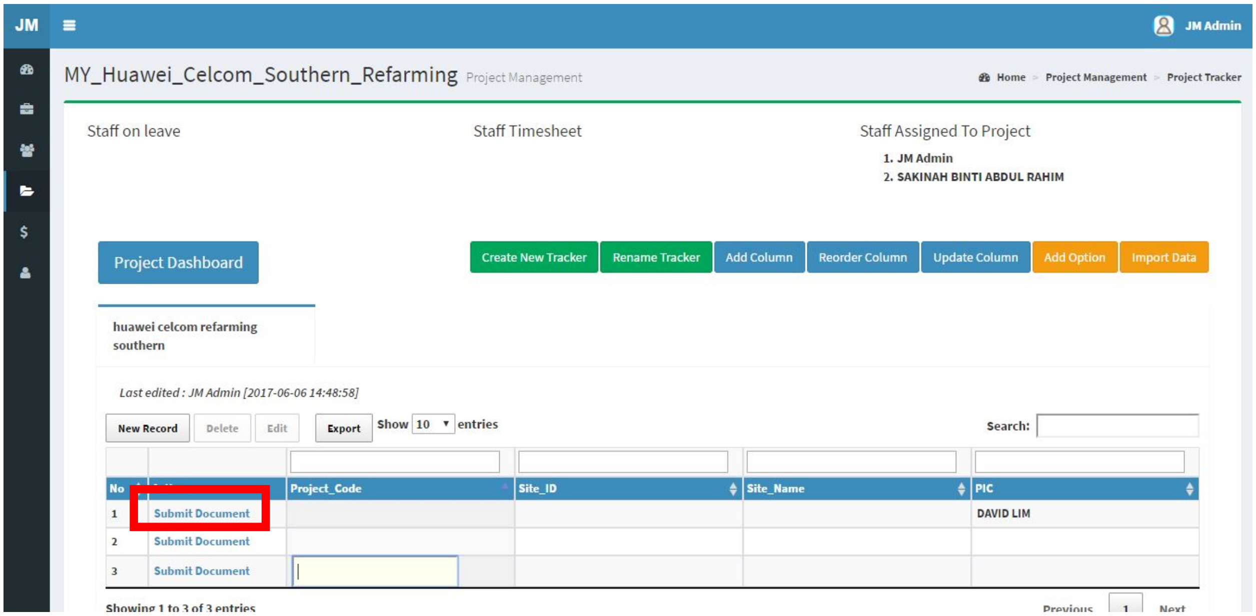
1. Click **Project Management** > **Project Tracker**
2. Below **Project Tracker** there will be list of the project
3. Click on the **Project Name** to view in detail

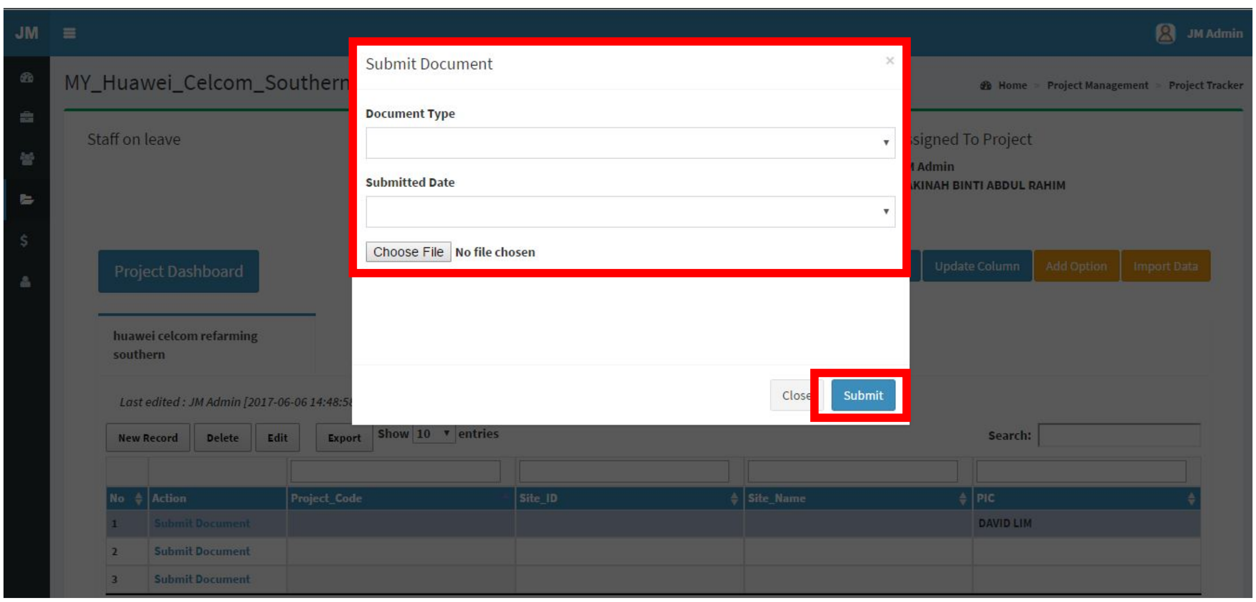


4. To insert a new record, click **New Record** and fill in those details

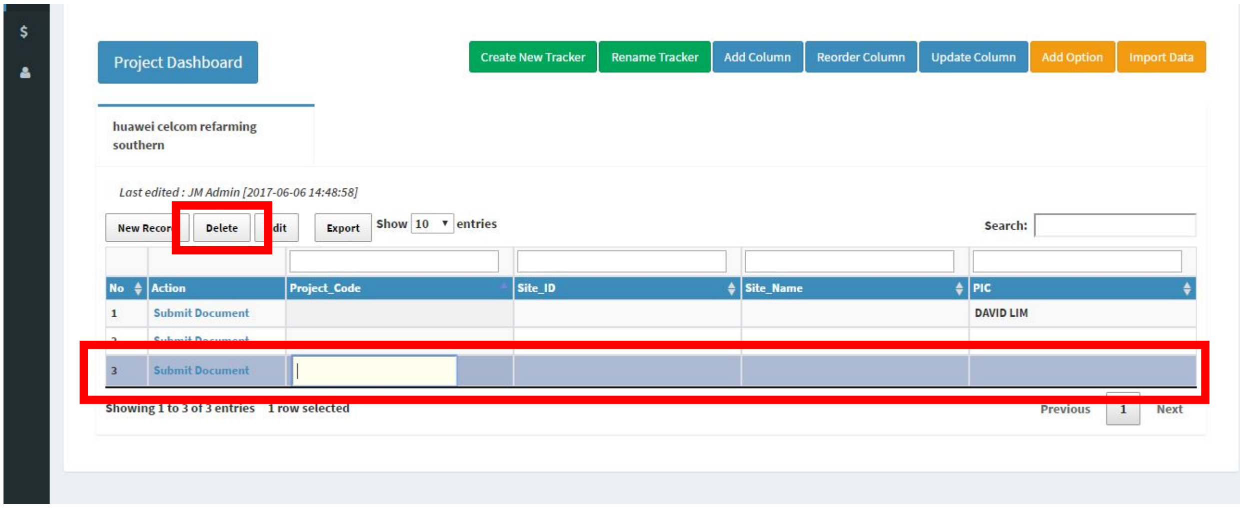


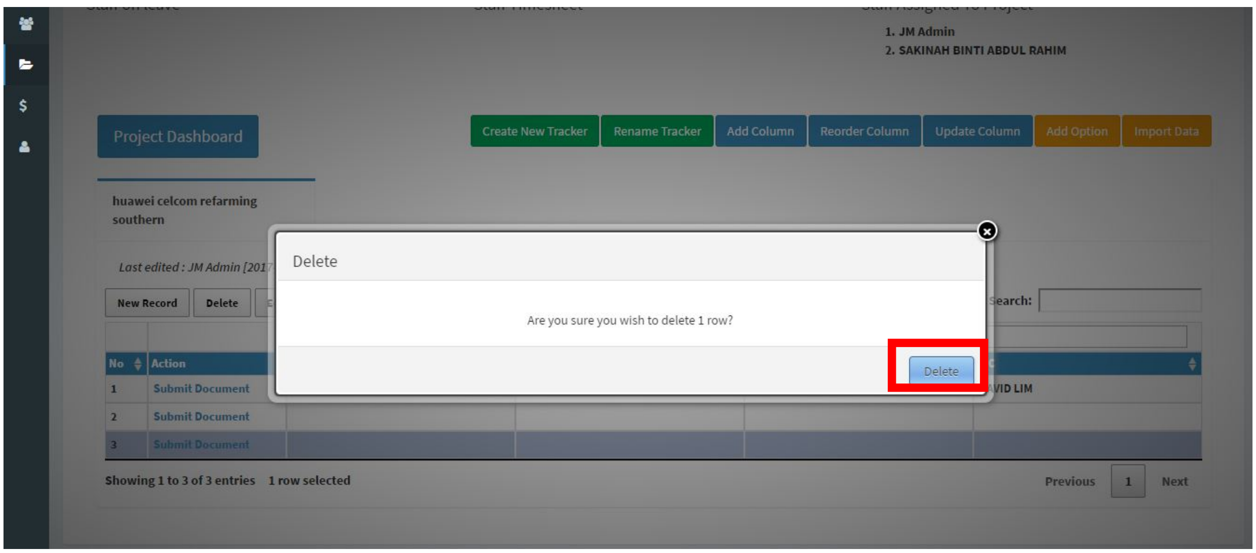
5. To submit a document in the record, click **Submit Document**
6. **Upload** the file and click **Submit**



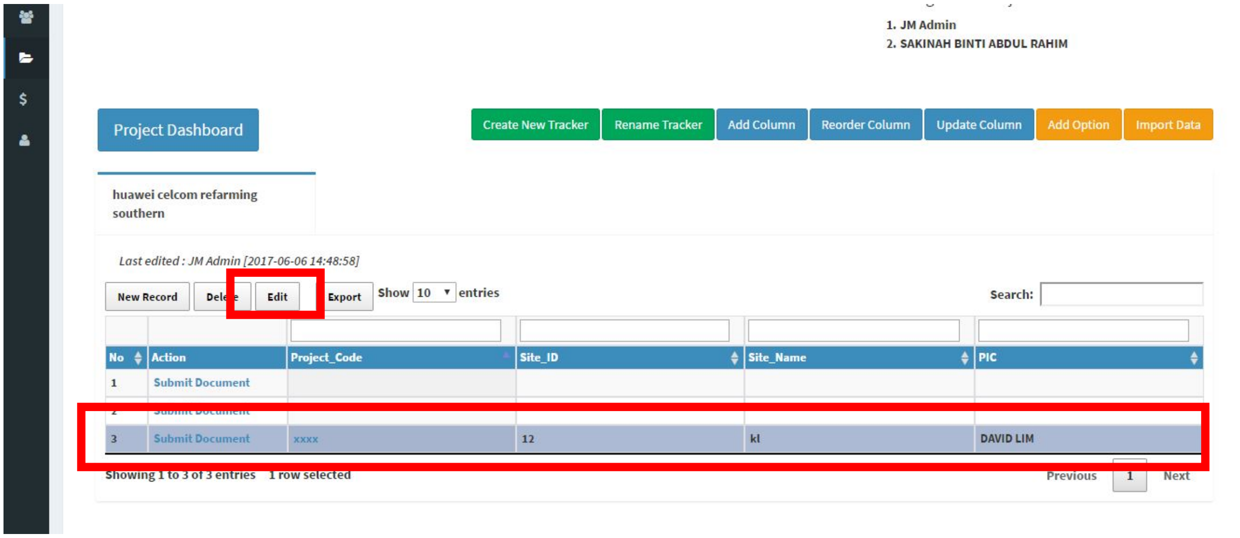


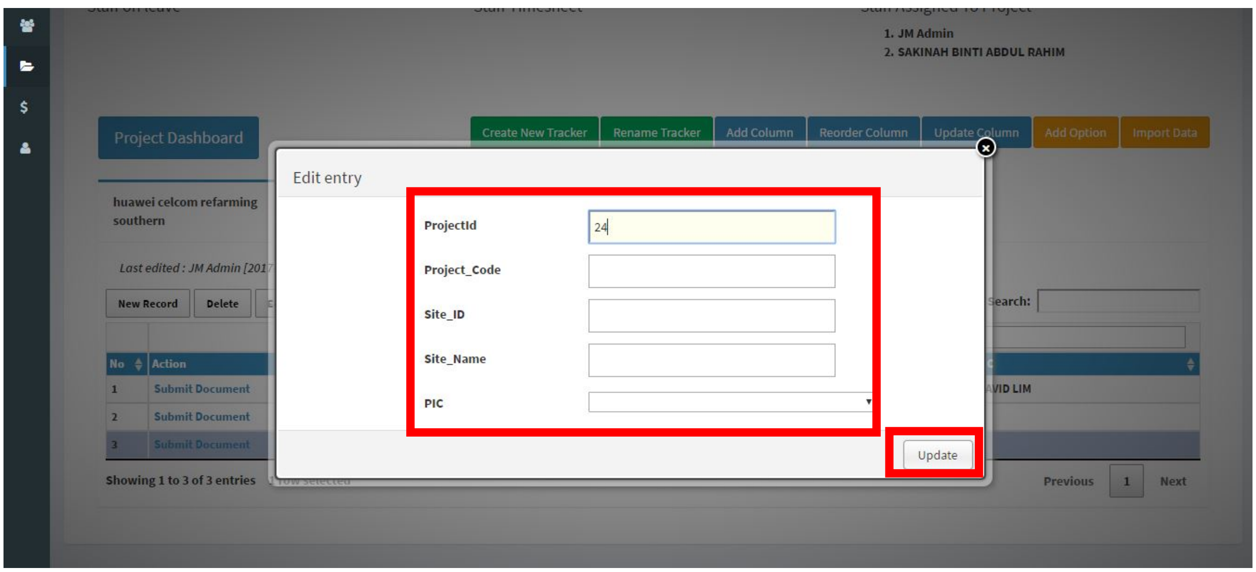
7. To delete existing record, select the row and click **Delete**



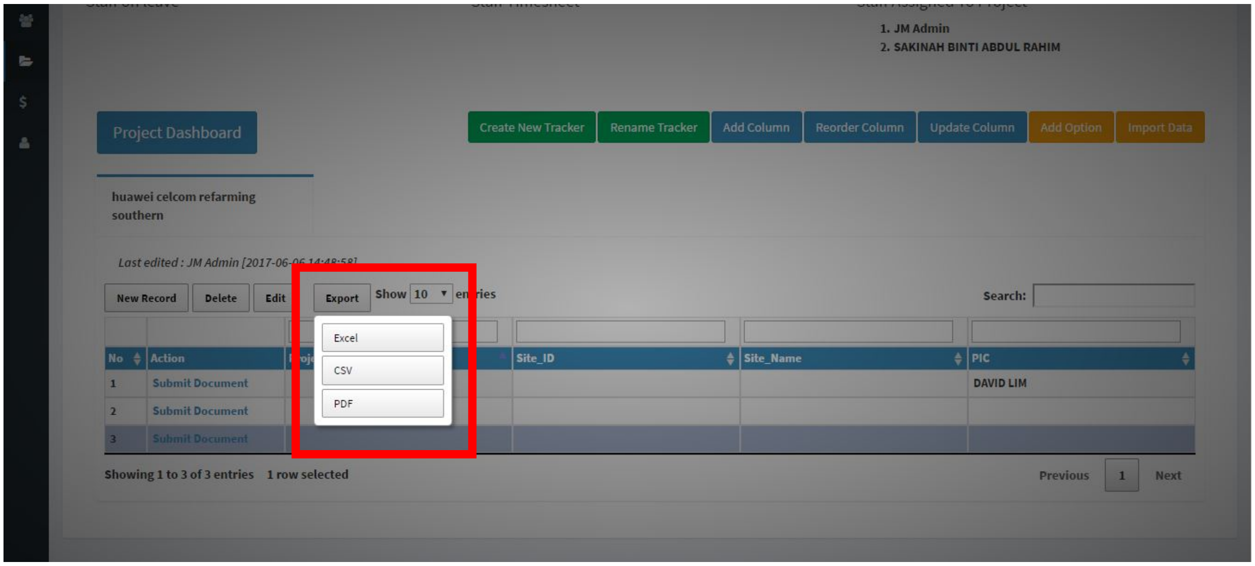


8. To edit existing record, select the row and click **Edit**

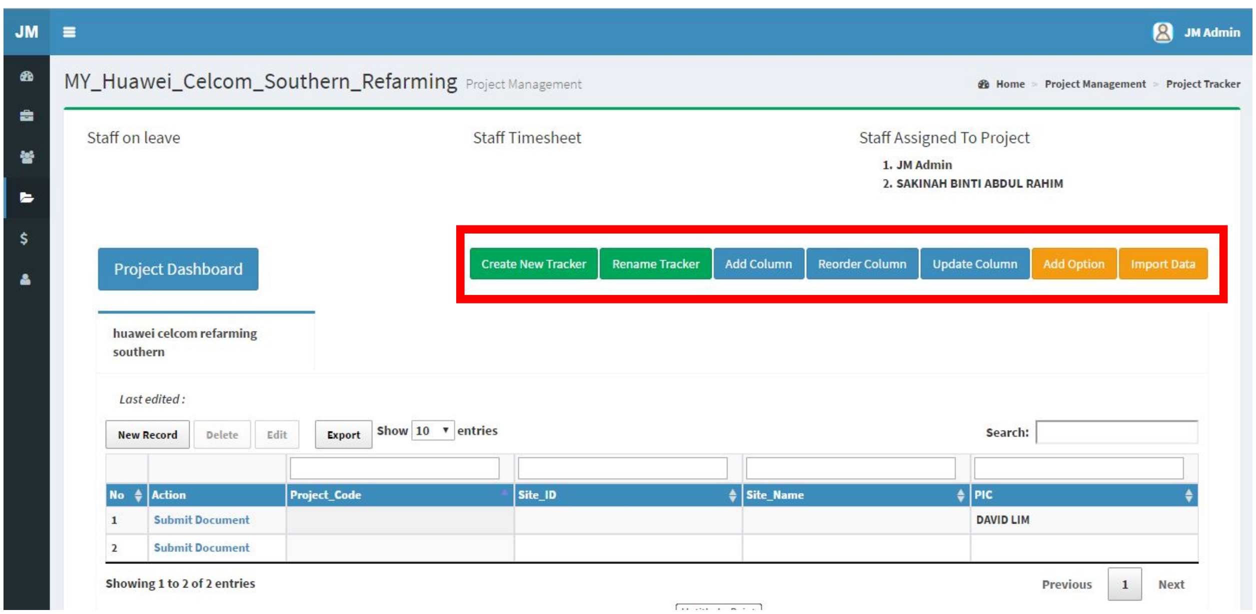




9. To export details into PDF, Excel or CSV click **Export**

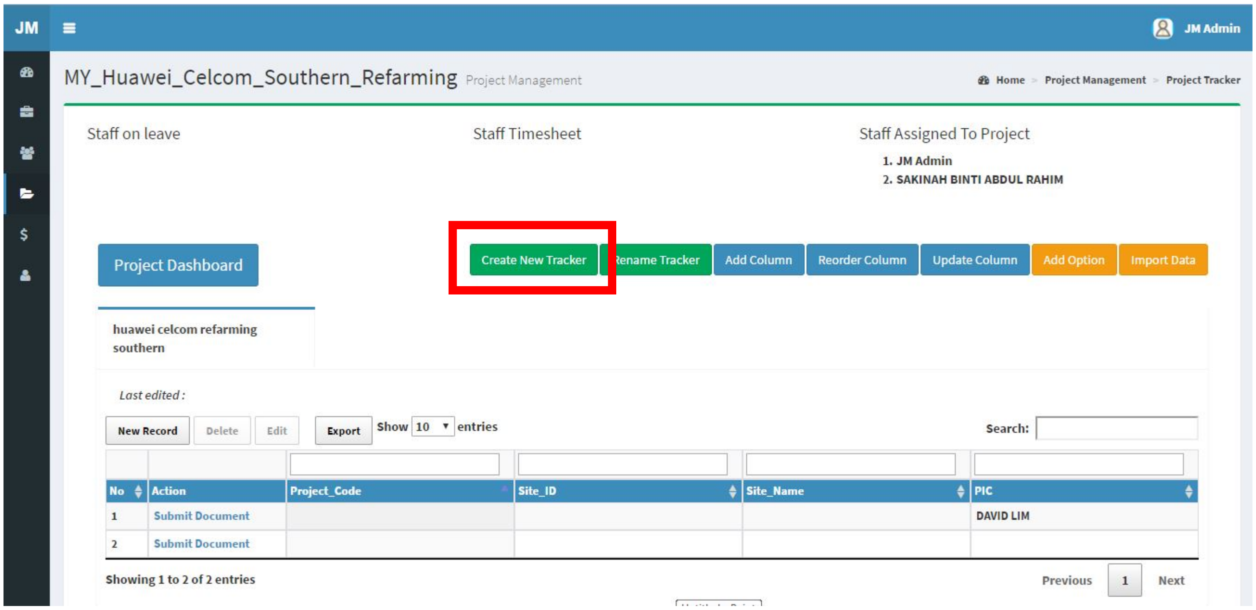


10. There are seven types of button with different function

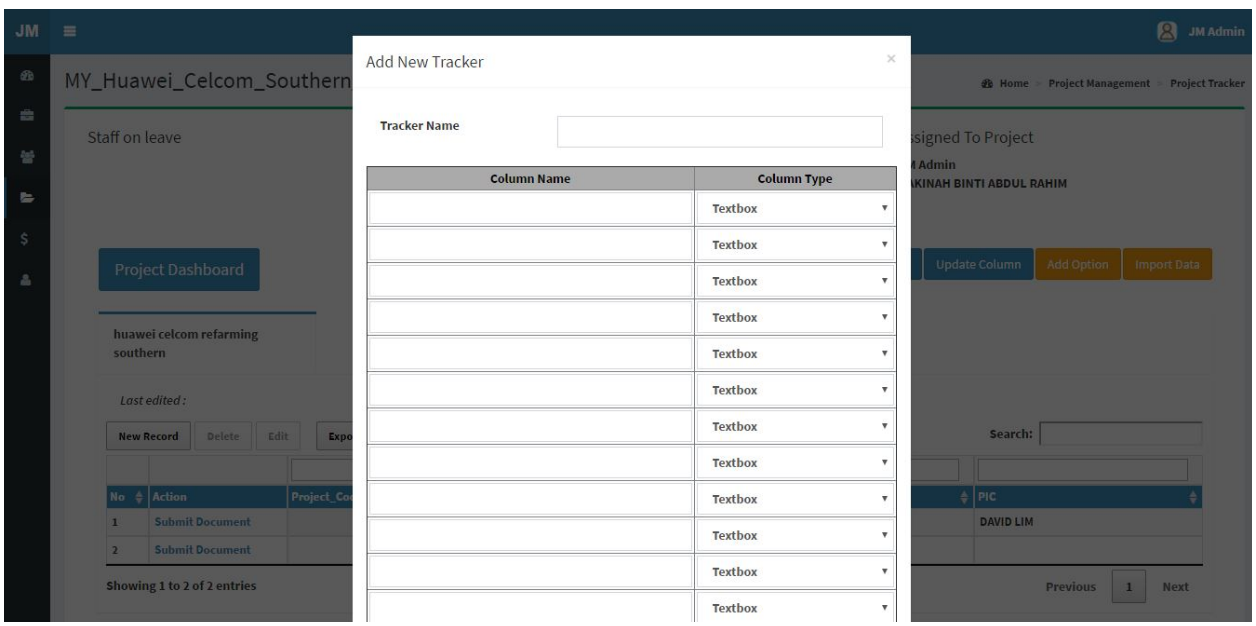


a) **Create New Tracker**

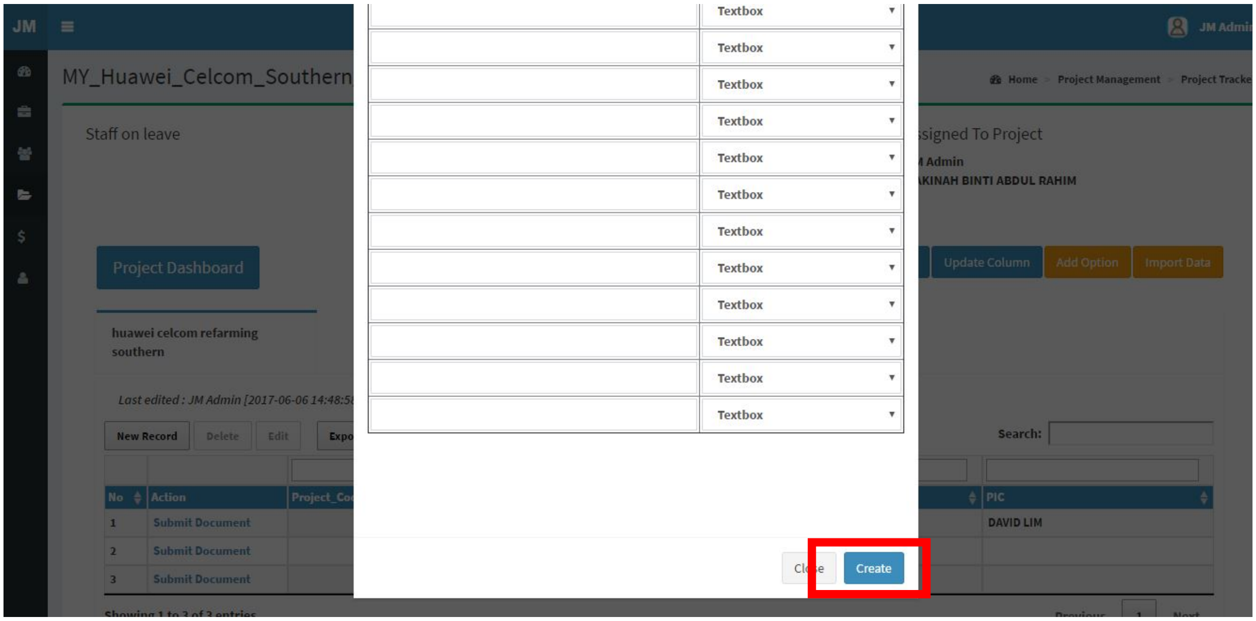
- Click **Create New Tracker** button



- Fill in all those details in pop out

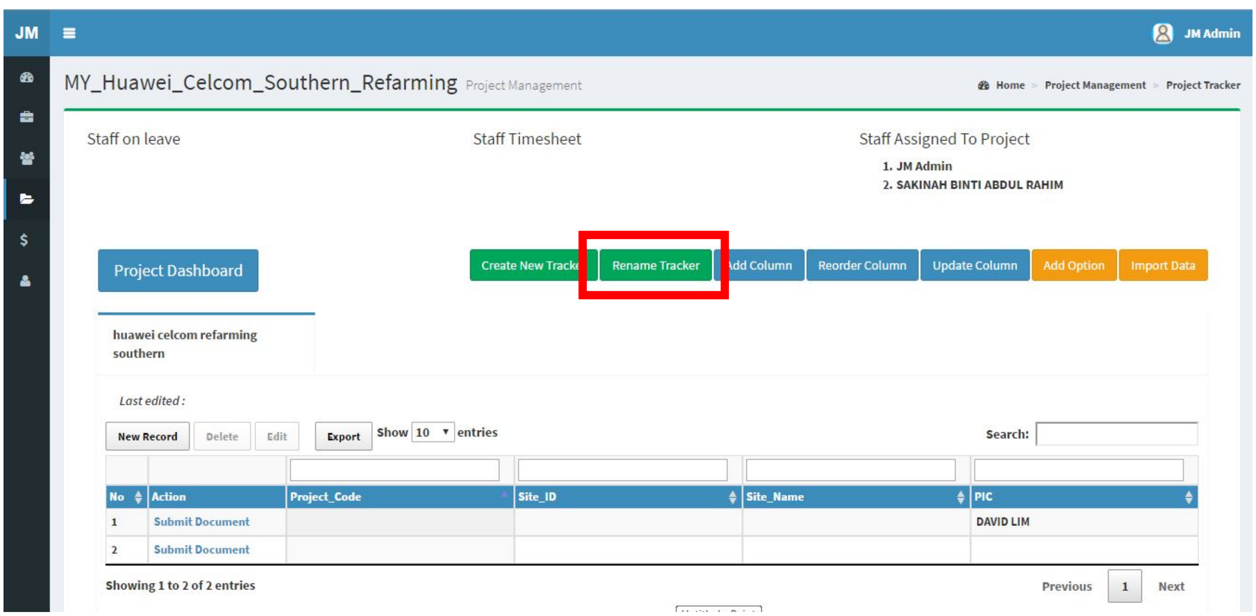


- Then click **Create**

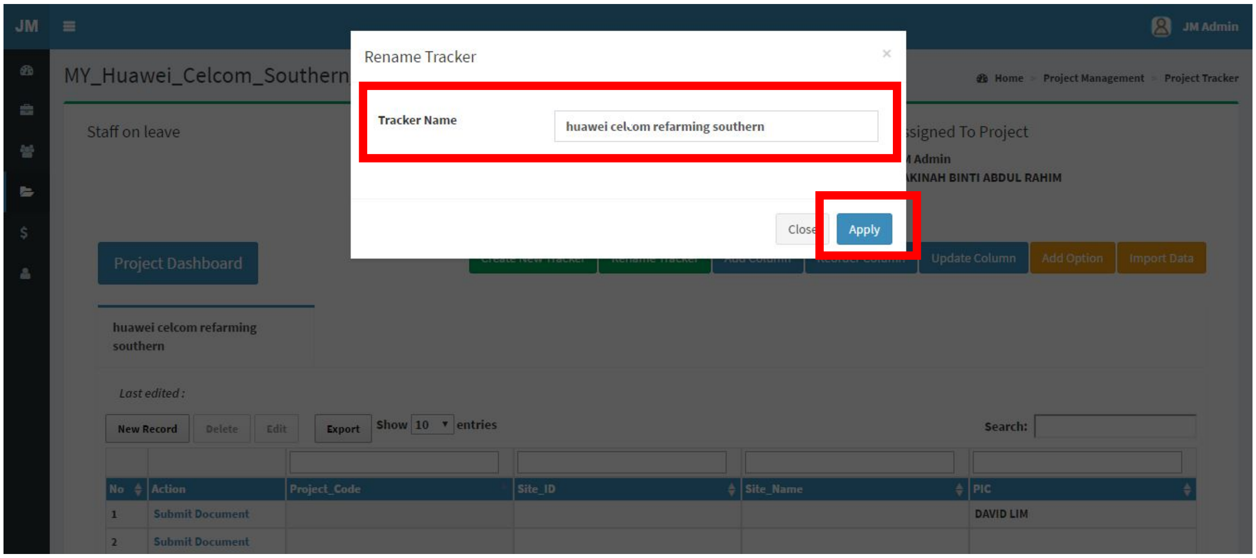


b) **Rename Tracker**

- Click **Rename Tracker** button

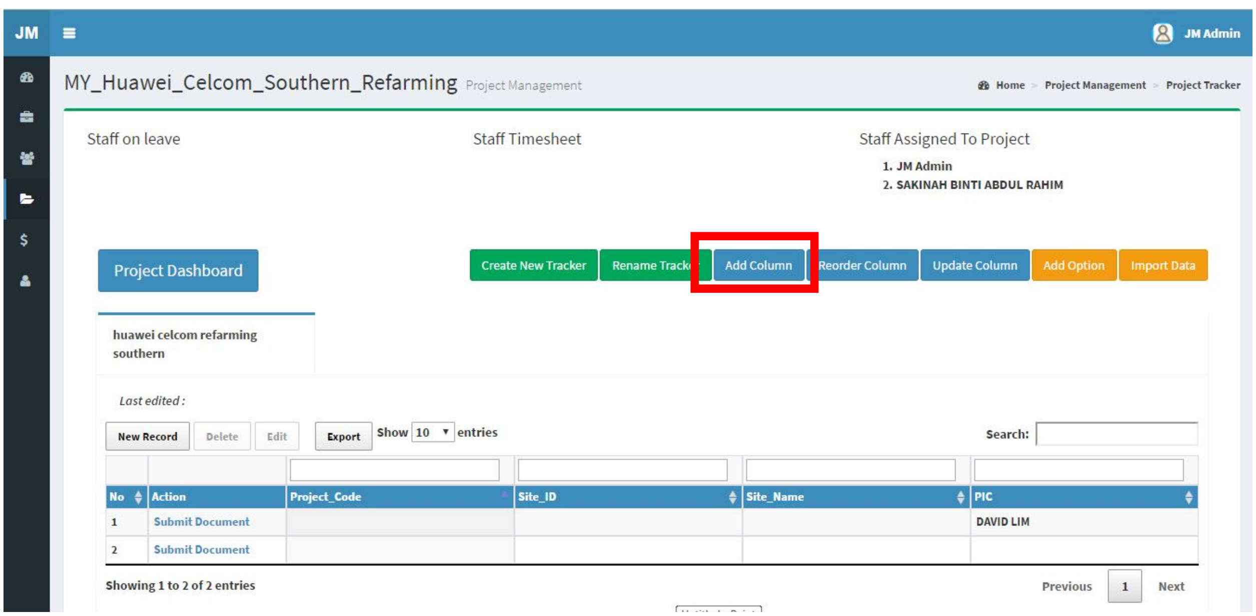


- Fill in those details
- Click **Apply**

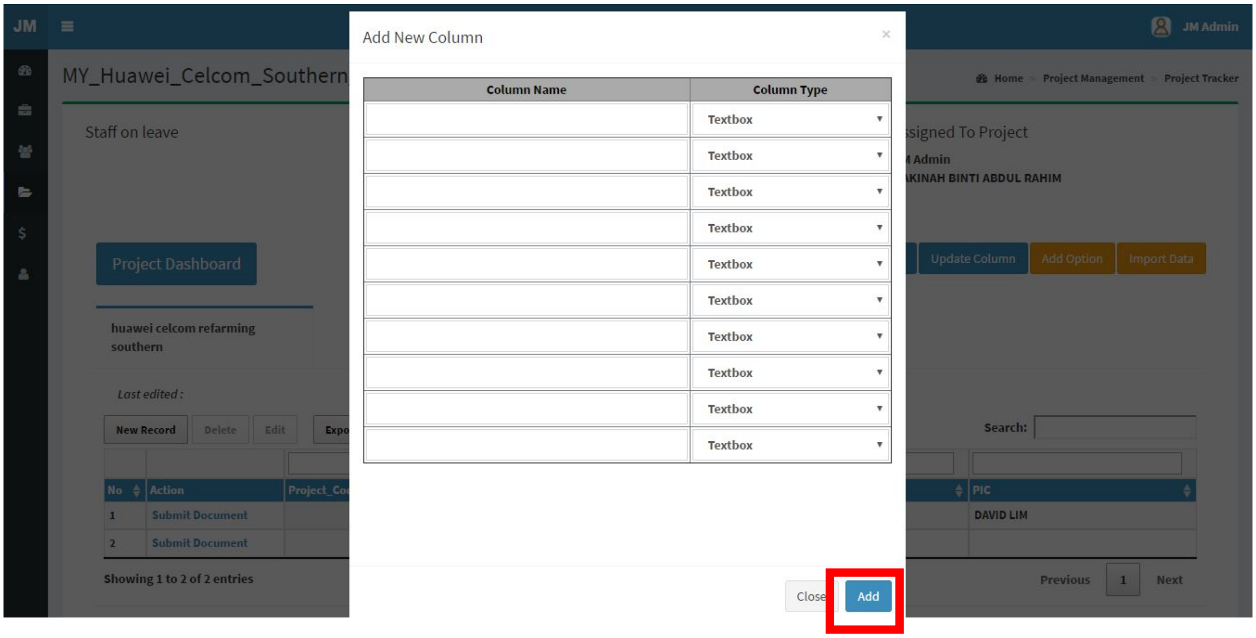


c) **Add Column**

- Click **Add Column** button

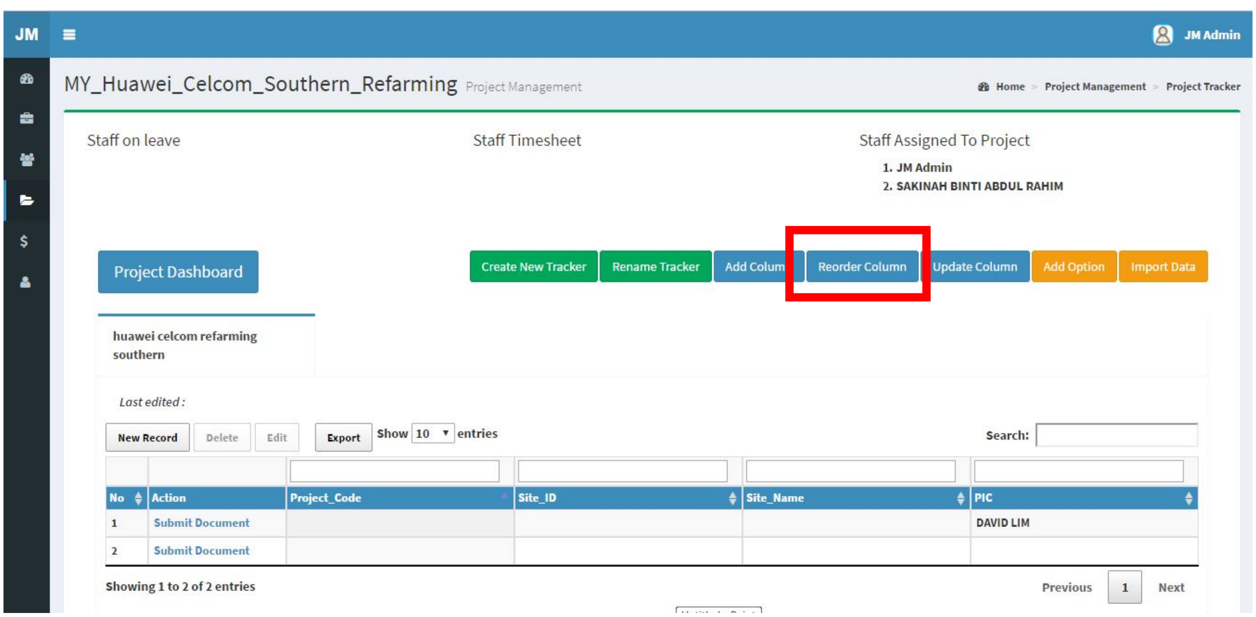


- Fill in those details
- Click **Add**

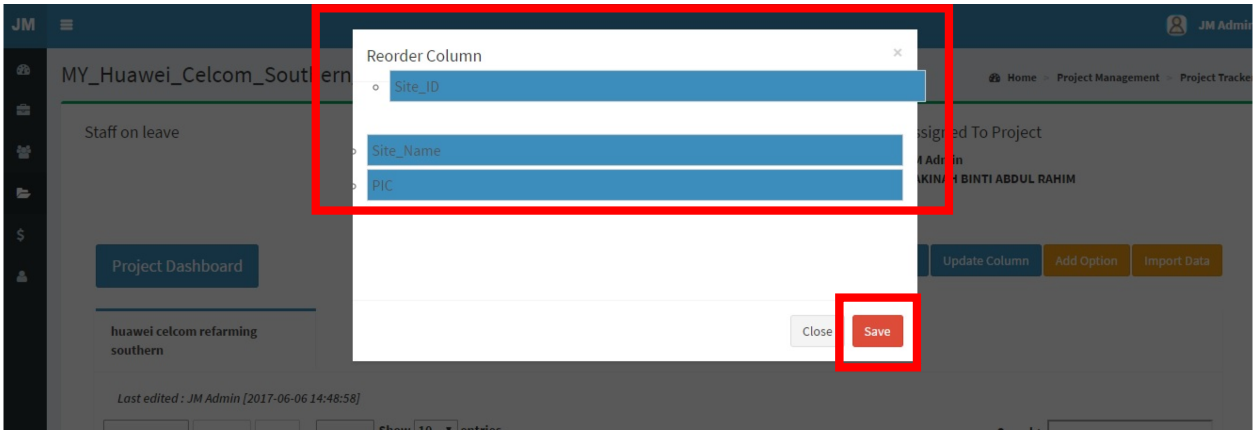


d) **Reorder Column**

- Click **Reorder Column** button

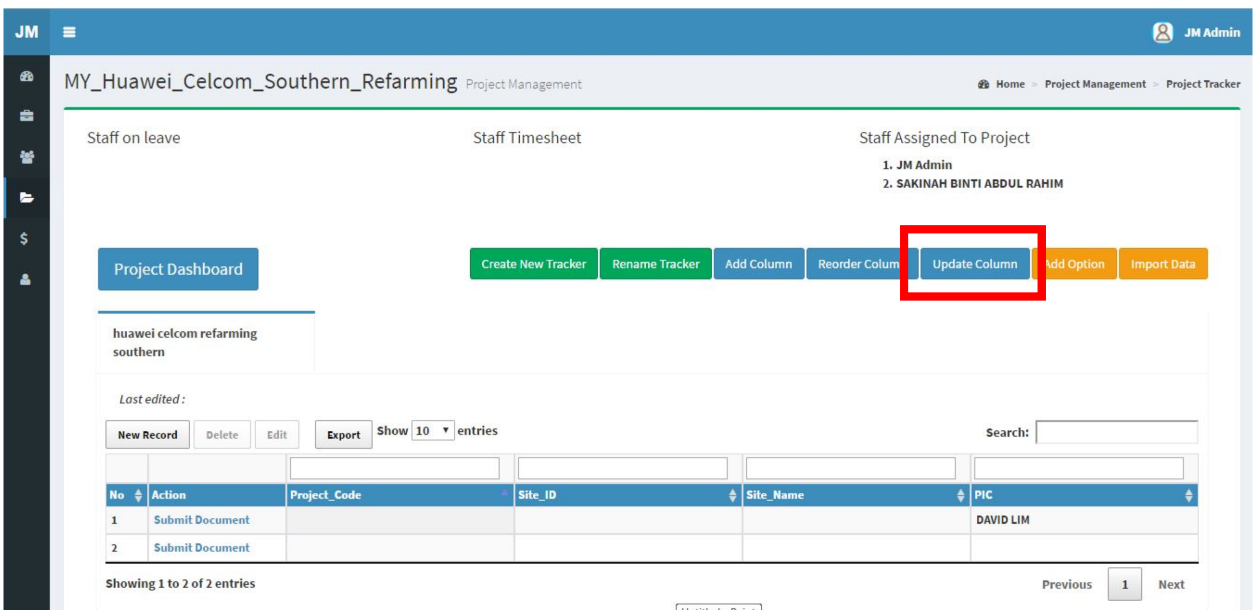


- Drag and reorder the position
- Then click **Save**

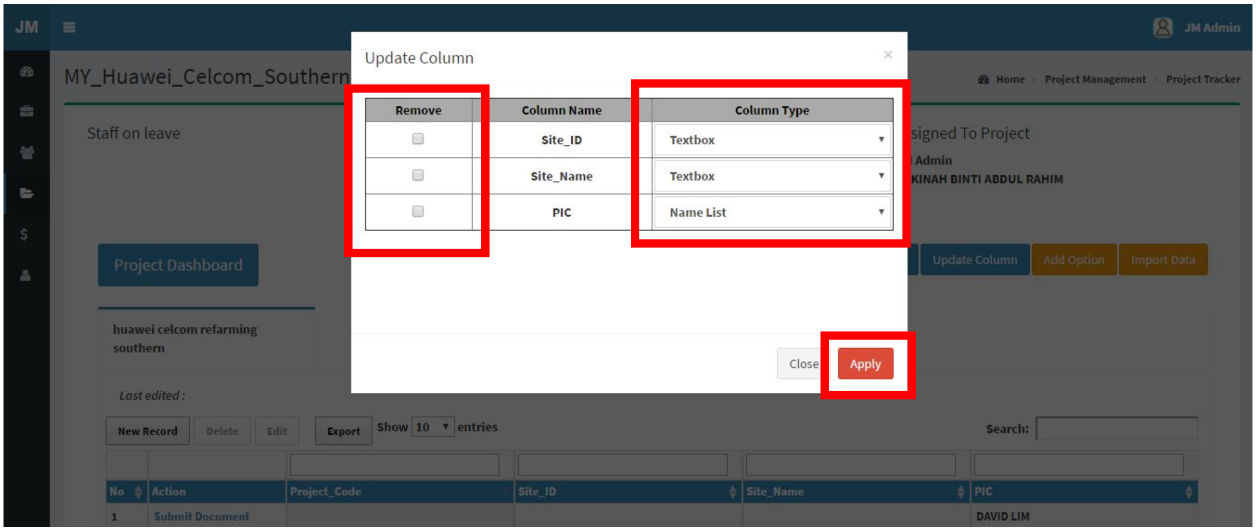


e) **Update Column**

- Click **Update Column** button

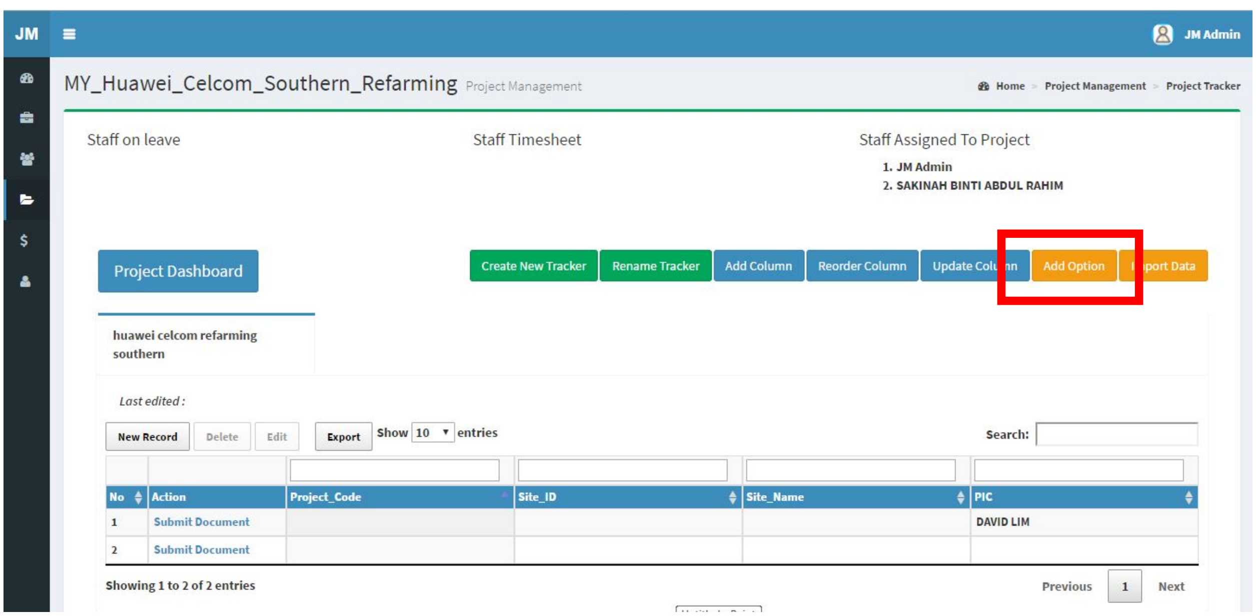


- **Tick** to remove the column
- Click on **Column Type** to change the column type
- Then click **Apply**

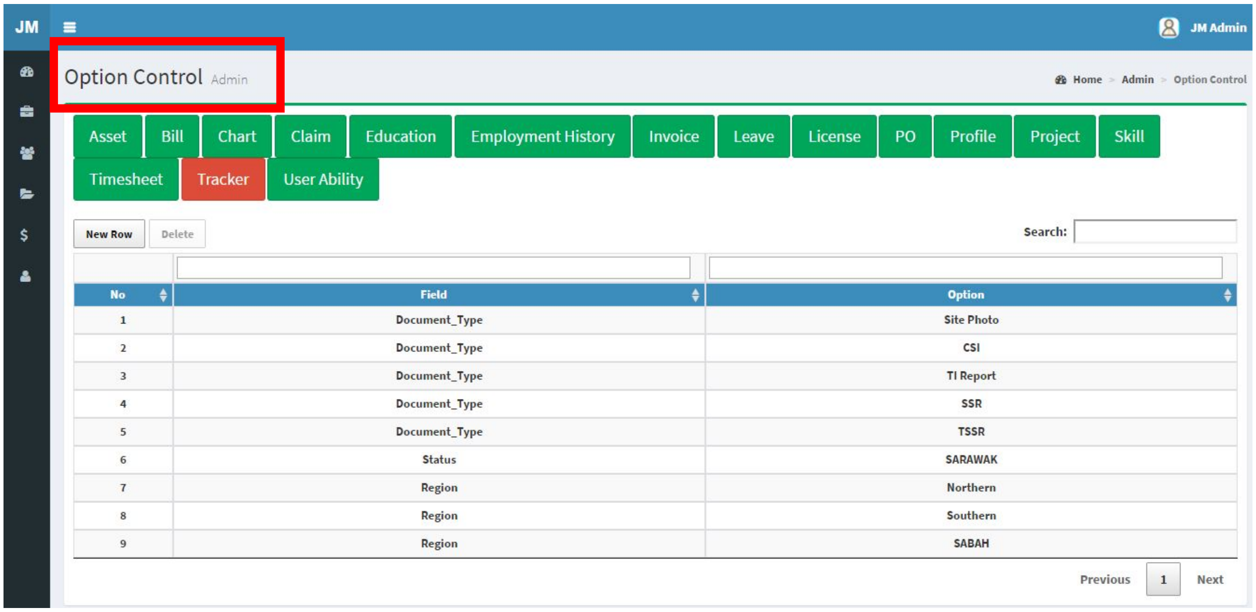


f) **Add Option**

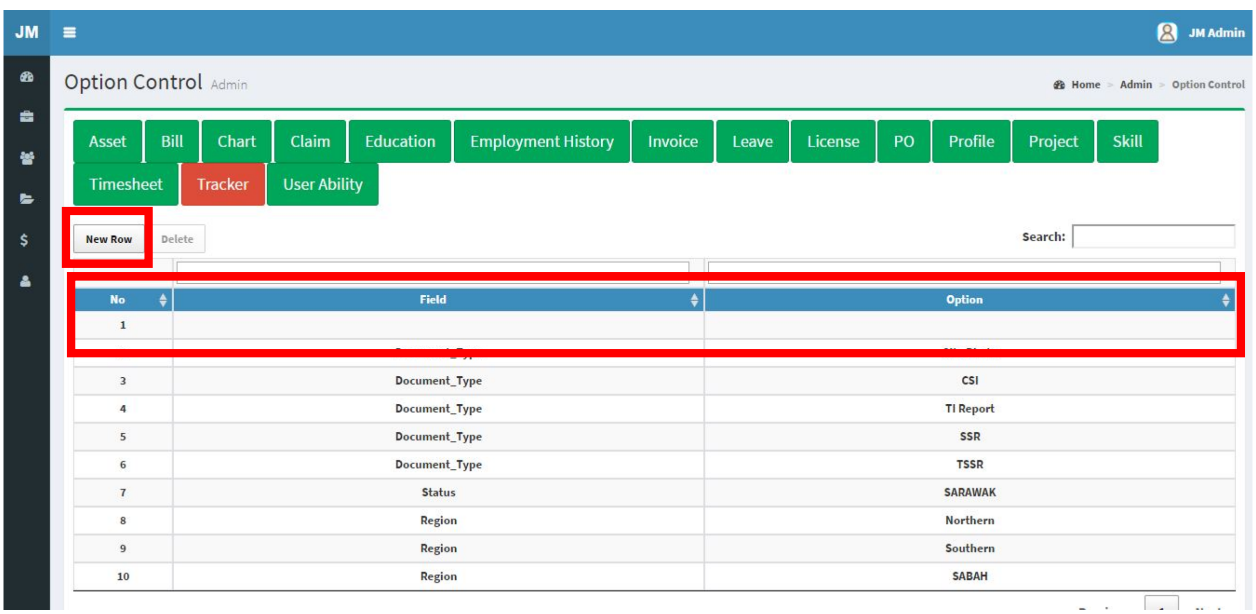
- Click **Add Option** button



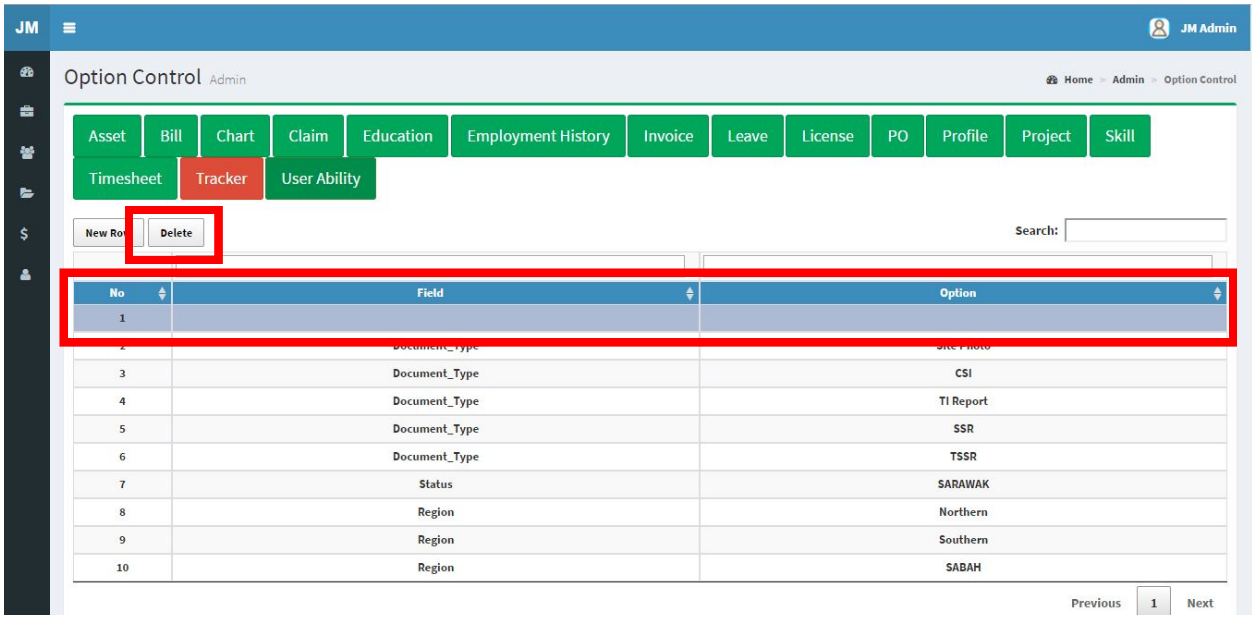
- It will redirect to **Option Control** page

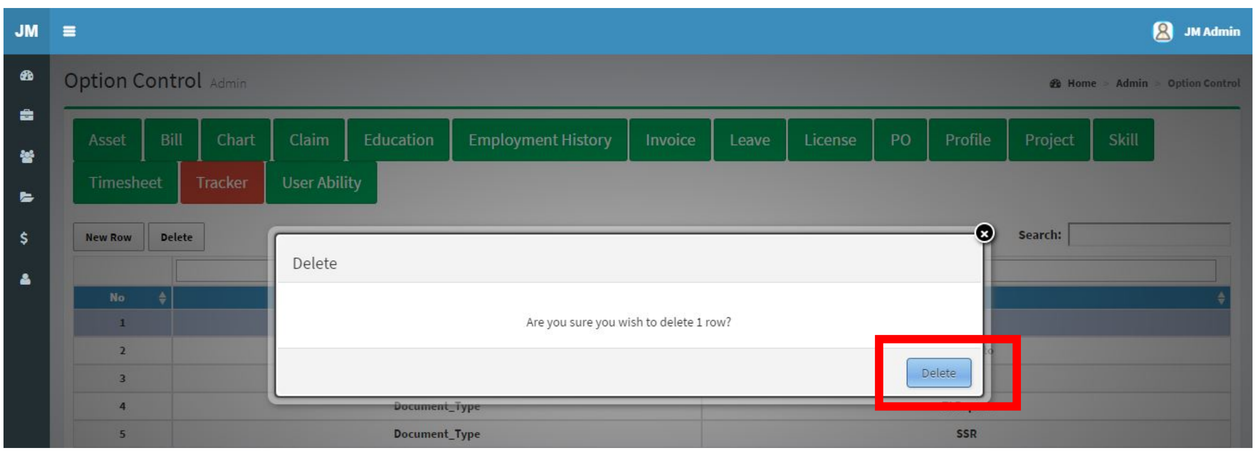


- Click **New Row** to add new option

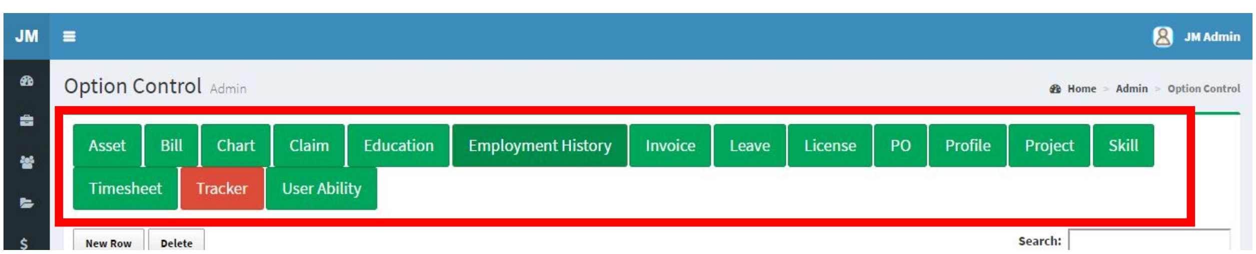


- To delete, select the row to be deleted then click **Delete**



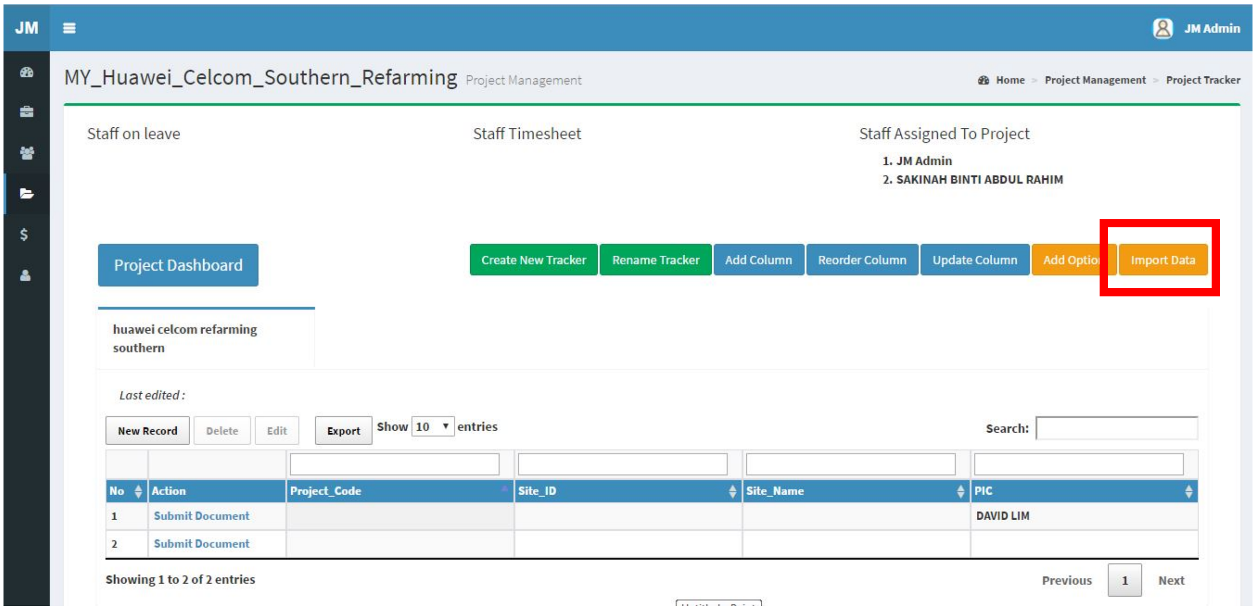


- Similar steps apply to all the button above

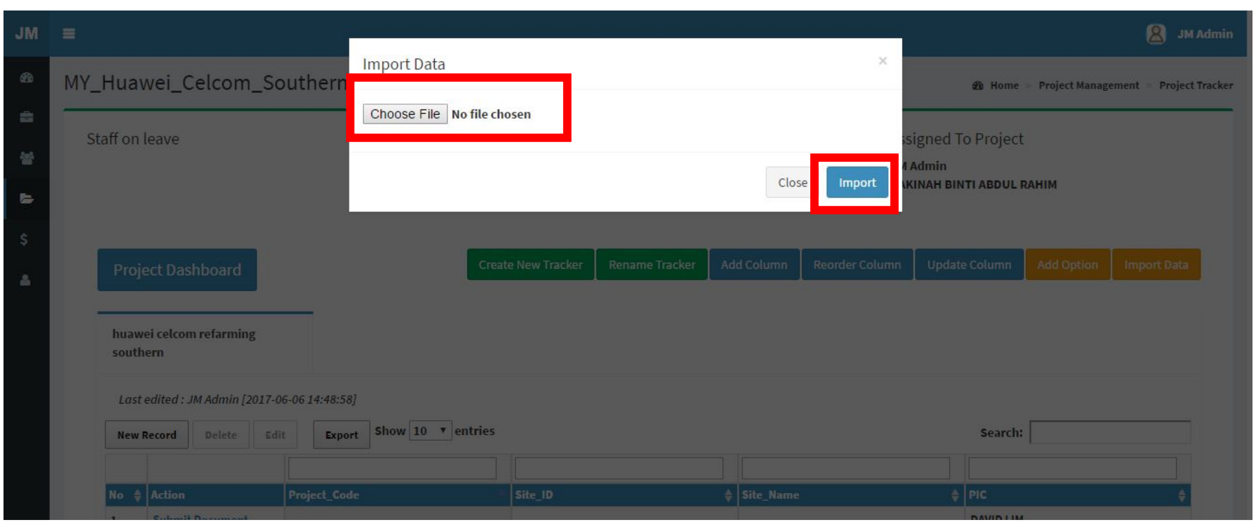


g) **Import Data**

- Click **Import Data** button

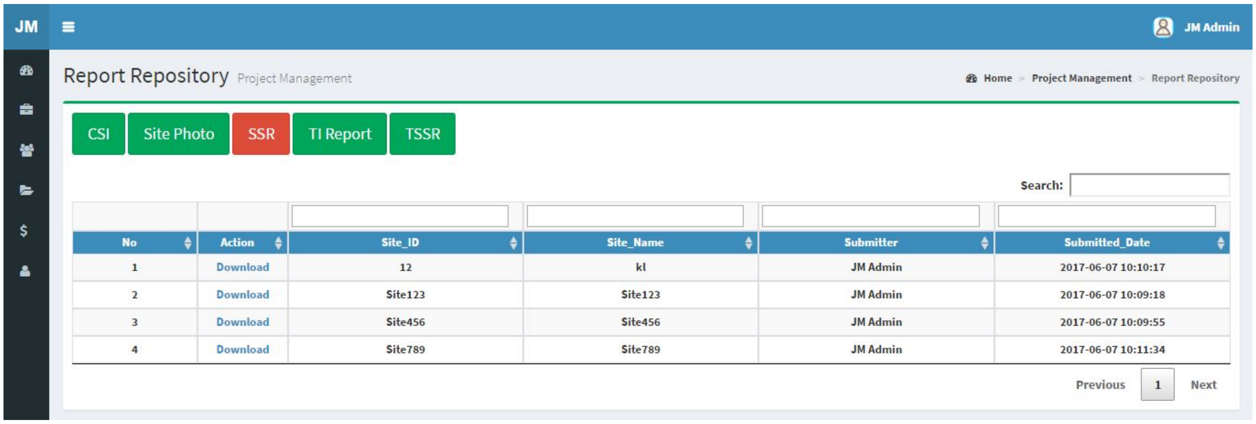


- **Upload** the file
- Then click **Import**

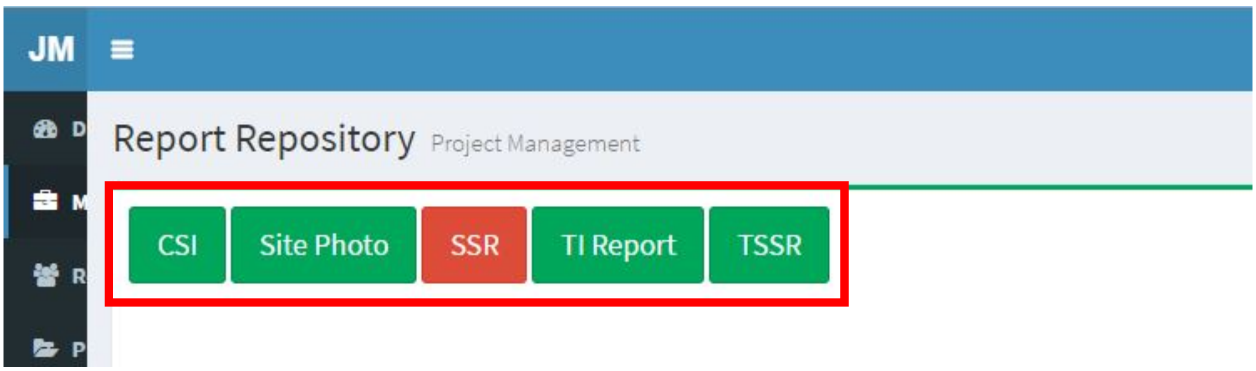


➢ REPORT STORE

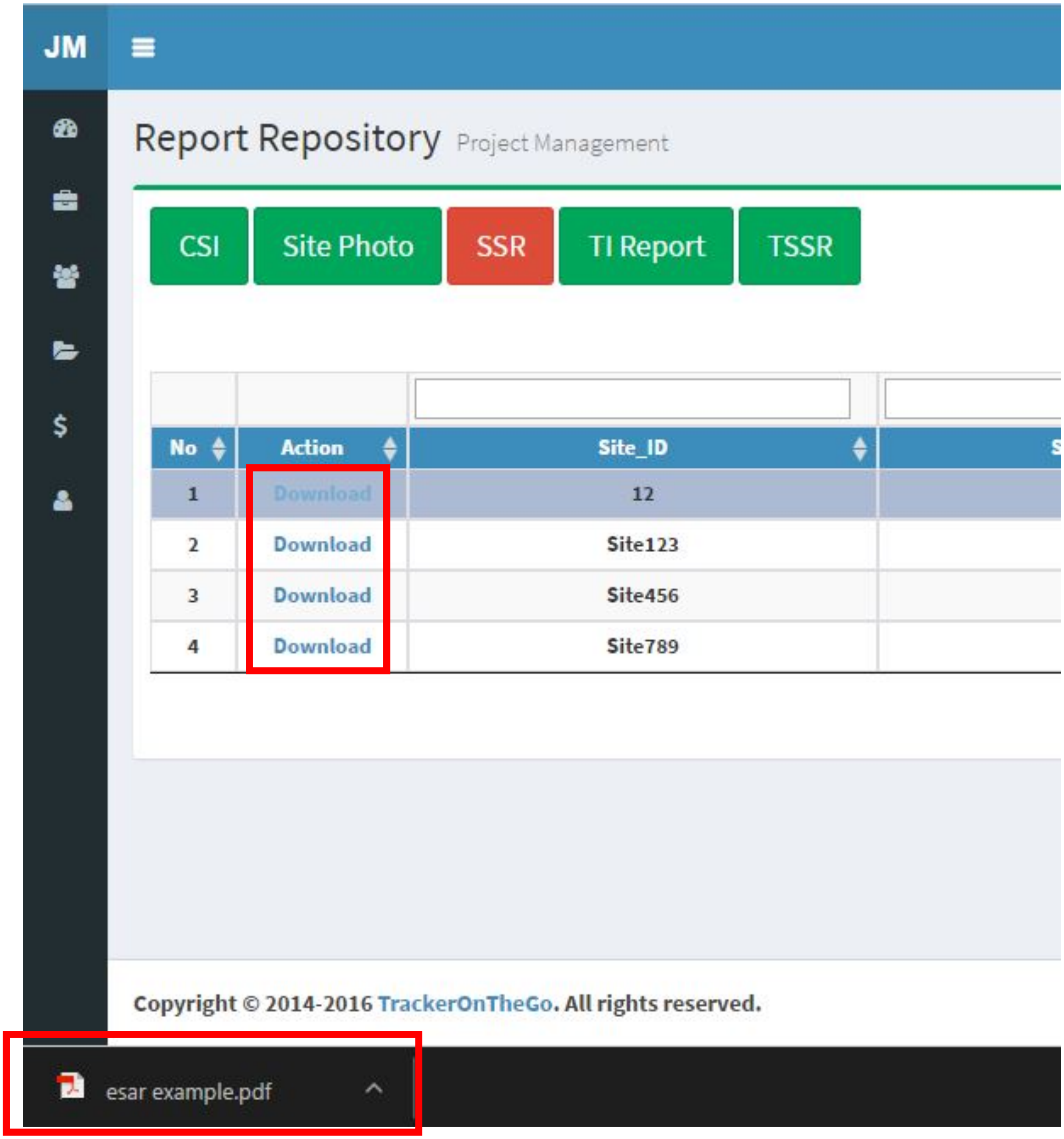
1. Click **Project Management** > **Report Store**
2. List of report can be viewed



3. Five types of report are available with green button option **CSI, Site Phot, SSR, TI Report** and **TSSR**



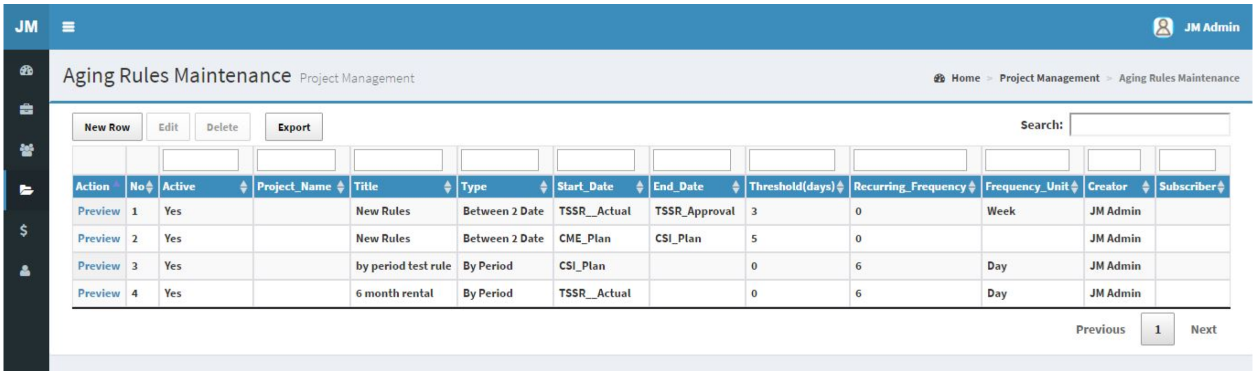
4. Click **Download** to view the report



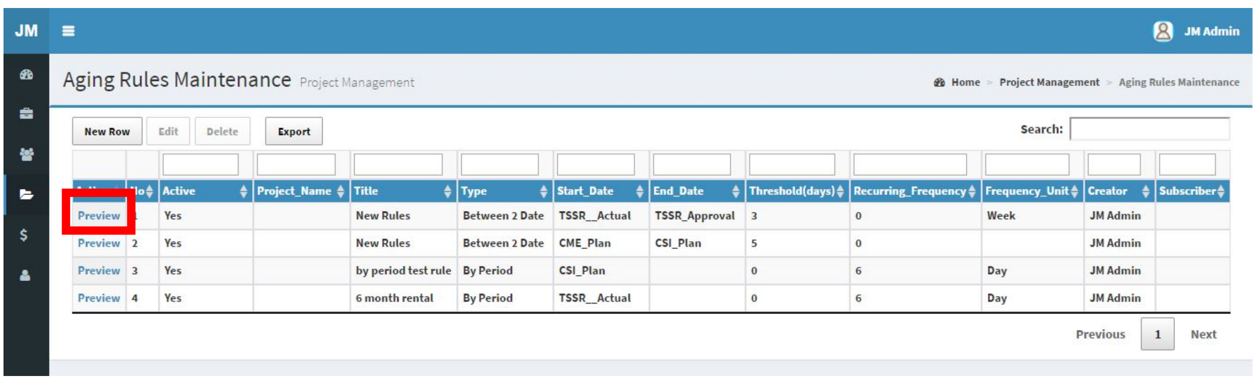
5. Similar steps apply to **CSI, Site Photo, SSR, TI Report** and **TSSR**

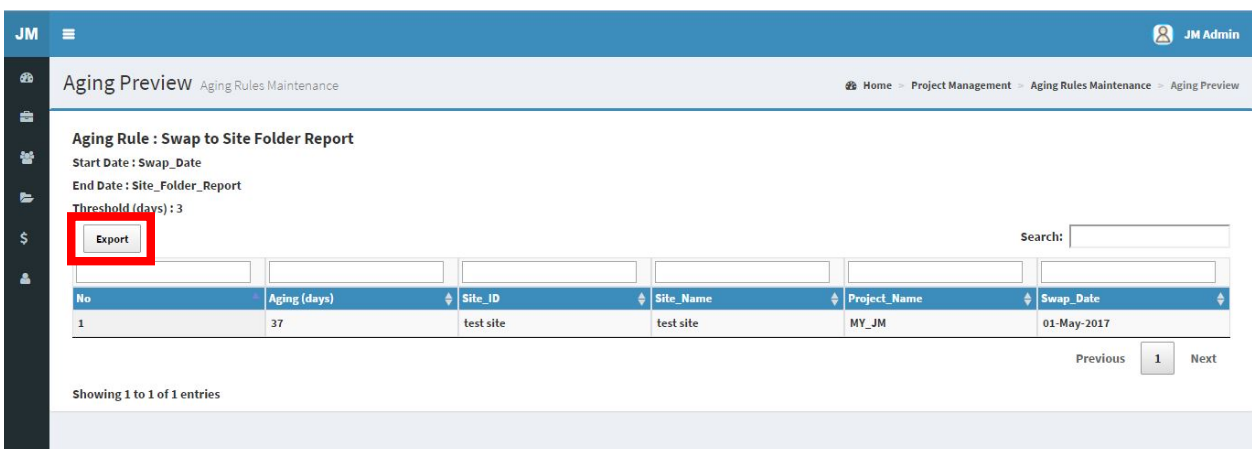
➢ AGING RULES MANAGEMENT

1. Click **Project Management** > **Aging Rules Management**

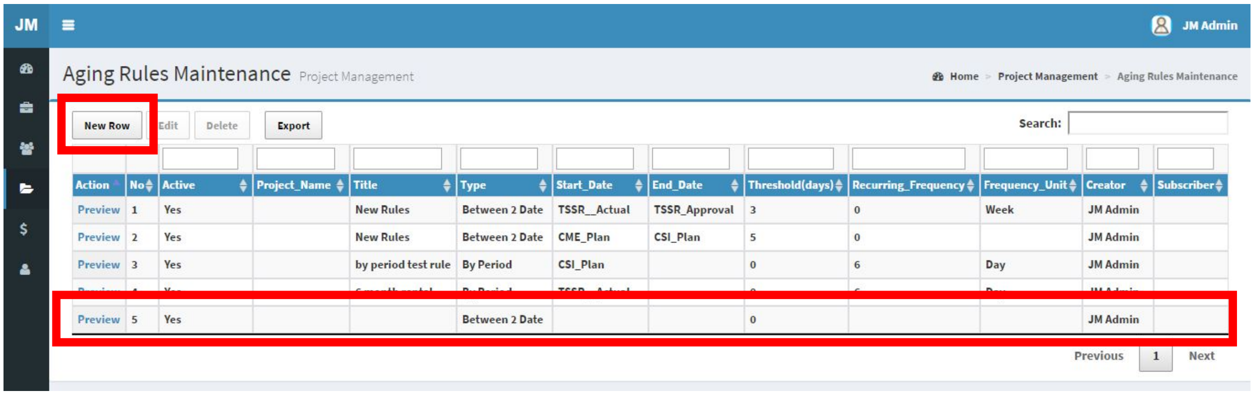


2. Click **Preview** to view in detail and it will redirect to another page
3. Click **Export** to export information into PDF, Excel or CSV

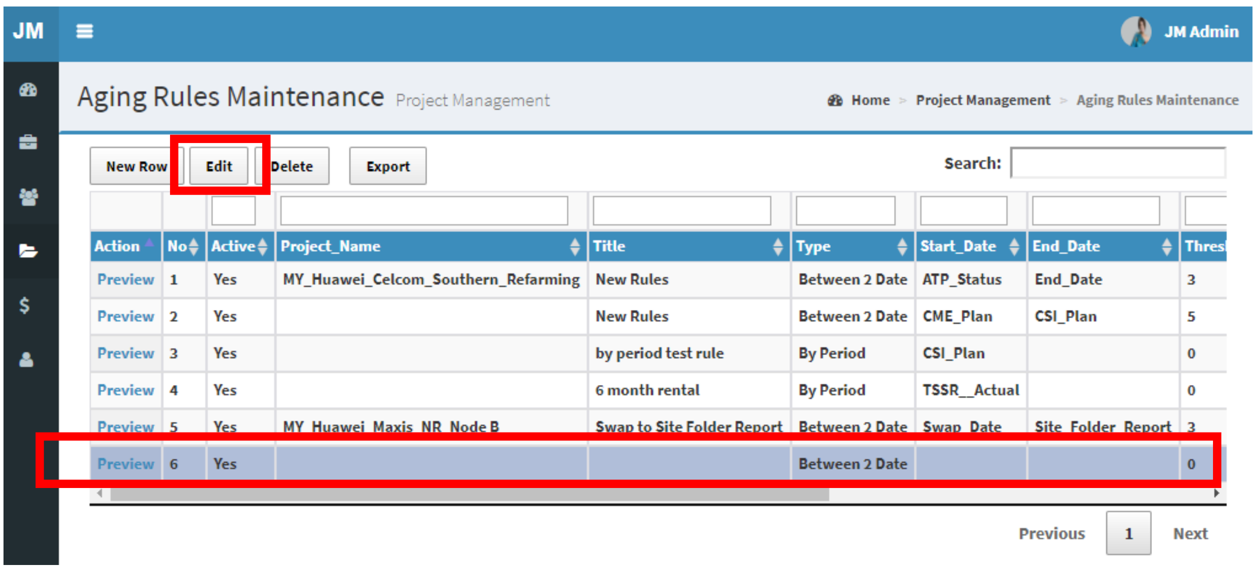




4. Click **New Row** to add new row

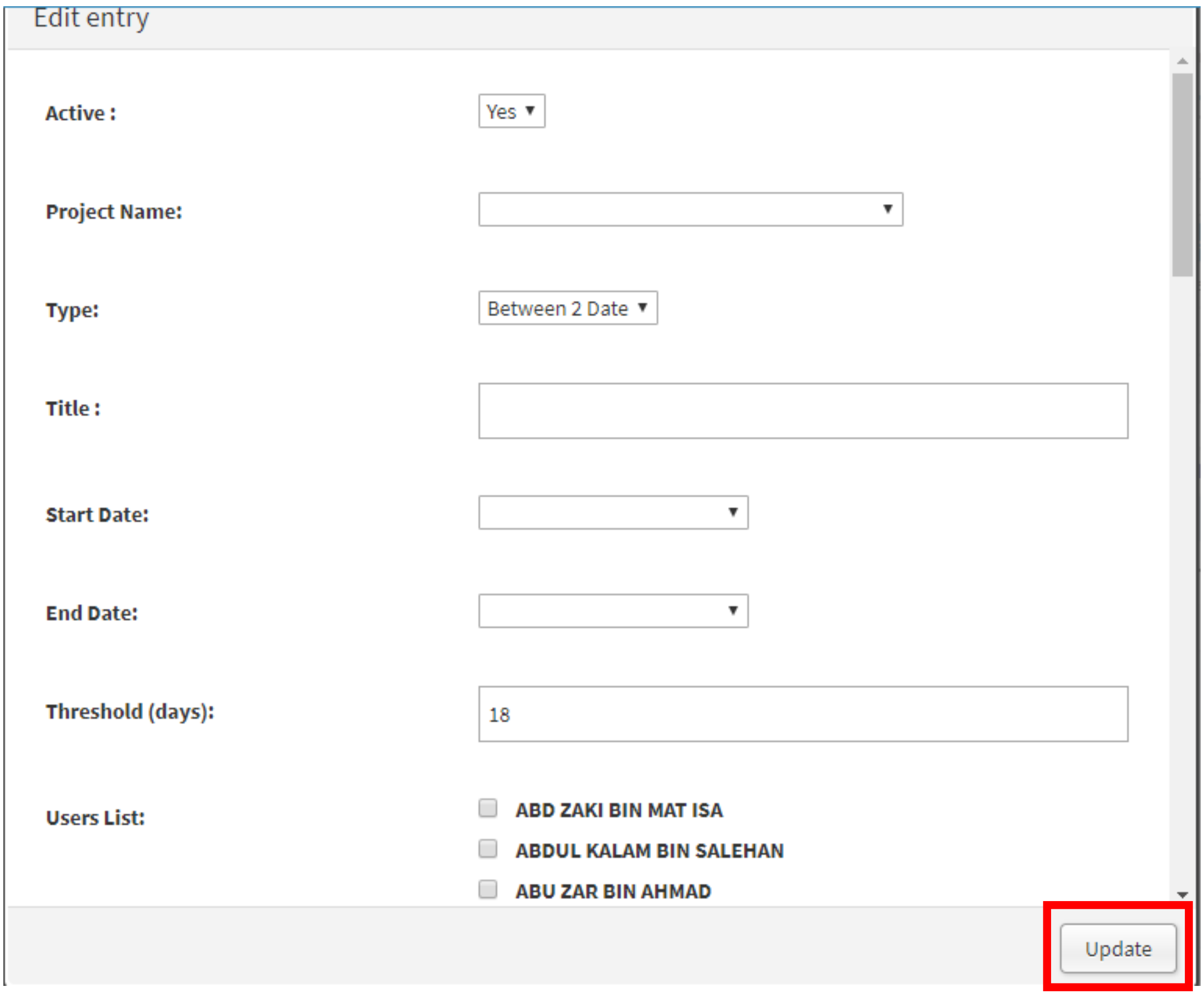


5. Select the new row and click **Edit** button

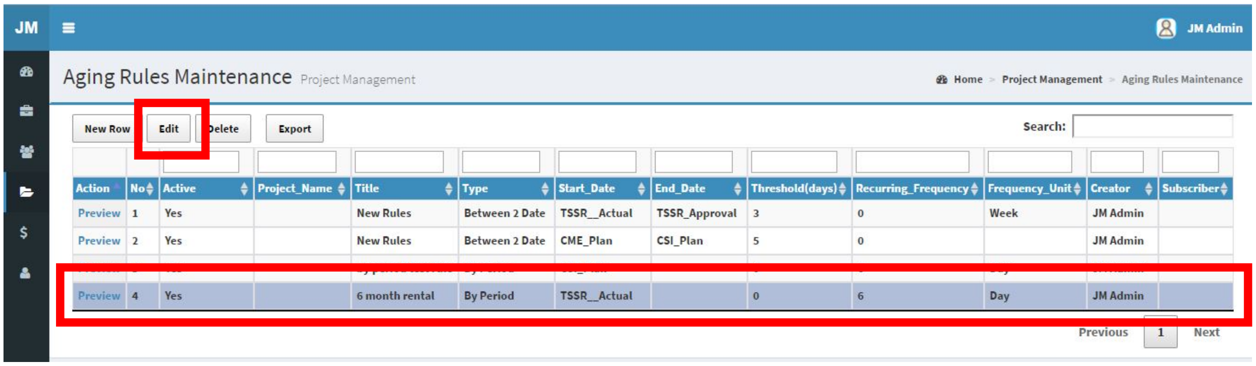


6. Fill in those details and click **Update**
   a) **Active:** Choose either Yes or No

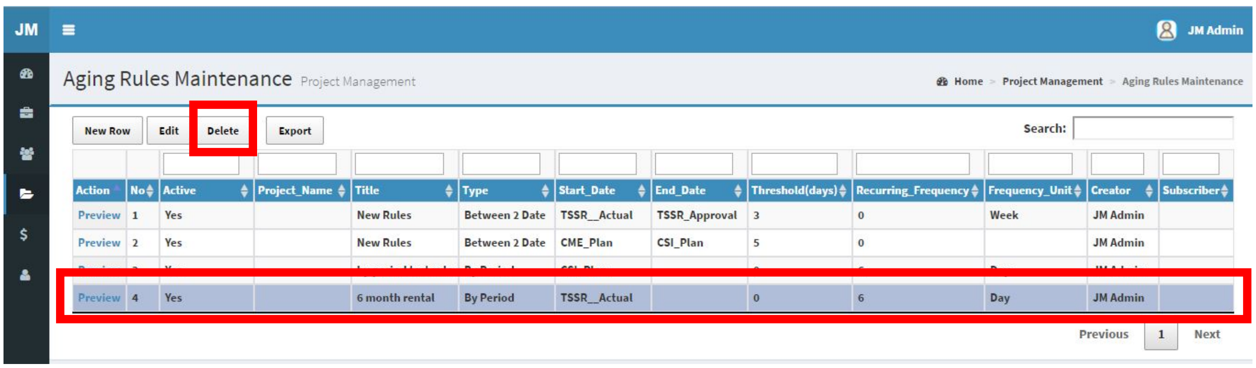
b) **Project Name:** Select the project in the given dropdown
c) **Type:** Choose whether between two dates or by period
d) **Start Date:** Choose the start date option in the given dropdown
e) **End date**: This will only appear if you choose the type as between two dates. And choose the selection according to the dropdown.
f) **Threshold (days)**: Choose your duration for threshold
g) **User List**: Tick on the names that you wished to involve in this aging.



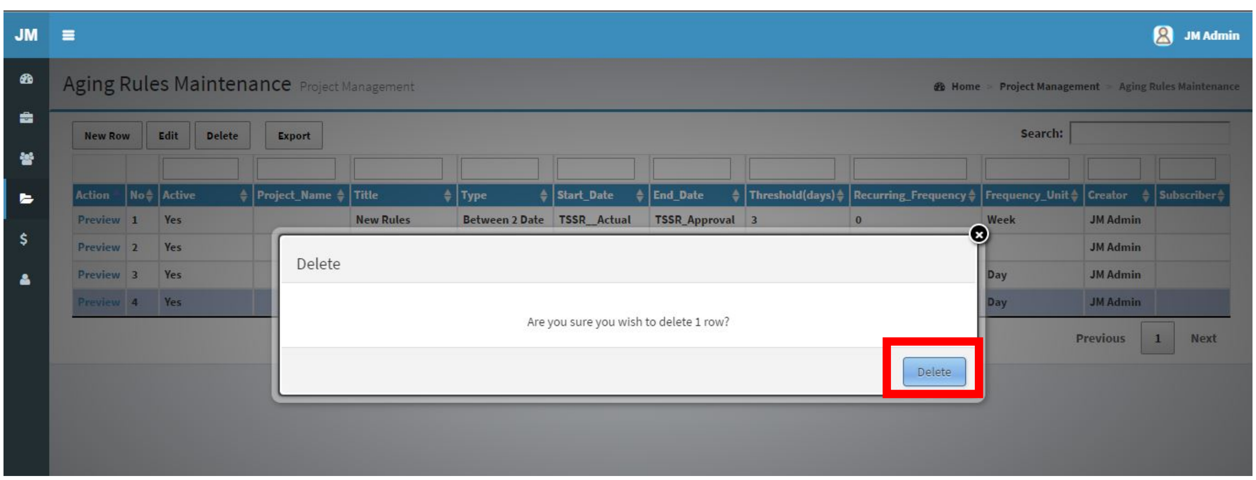
7. Select a row and click **Edit** to edit the information



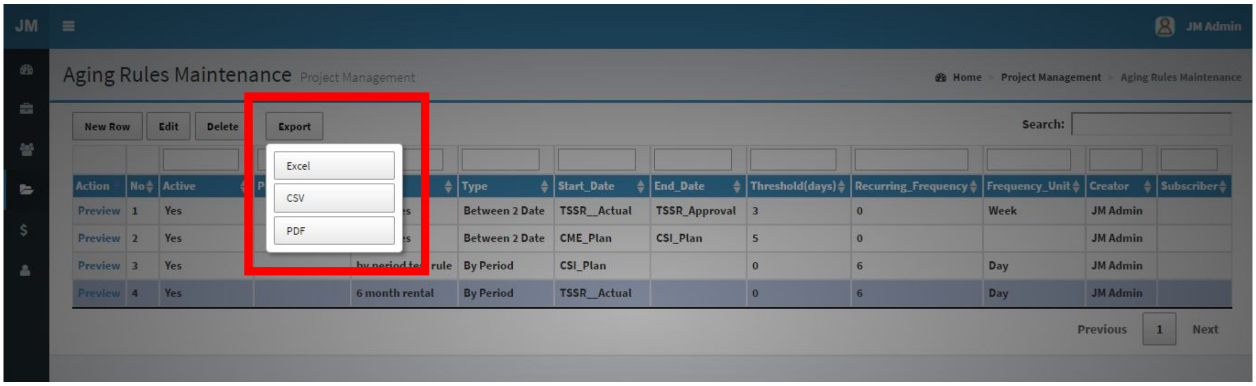
8. Select a row and click **Delete**



9. Then click **Delete**

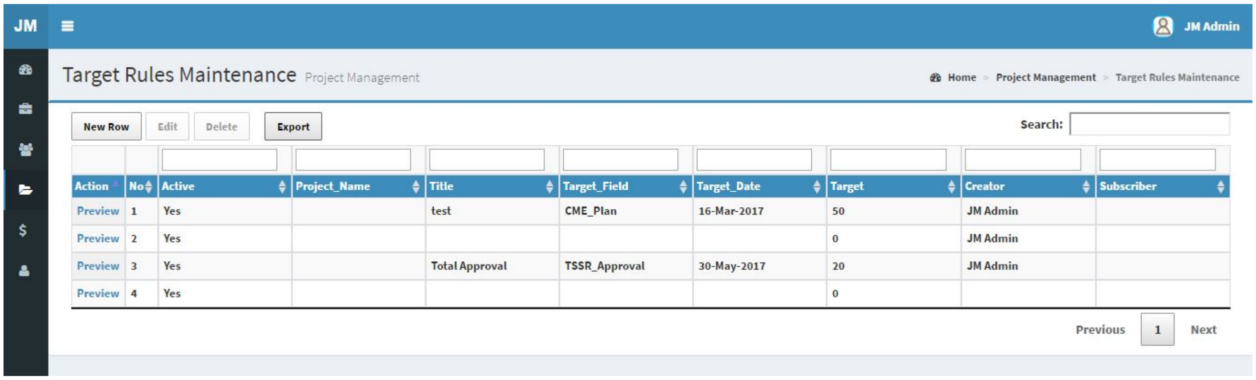


10. Click **Export** to export files into PDF, Excel or CSV

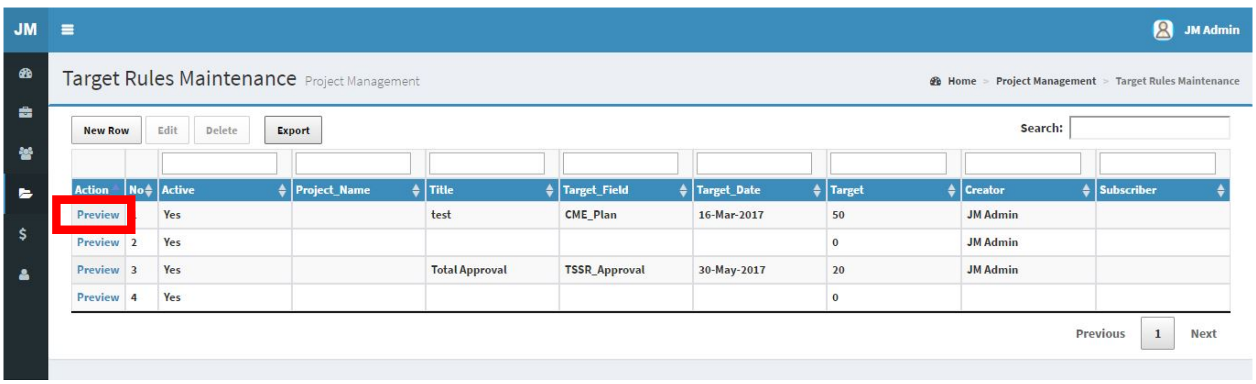


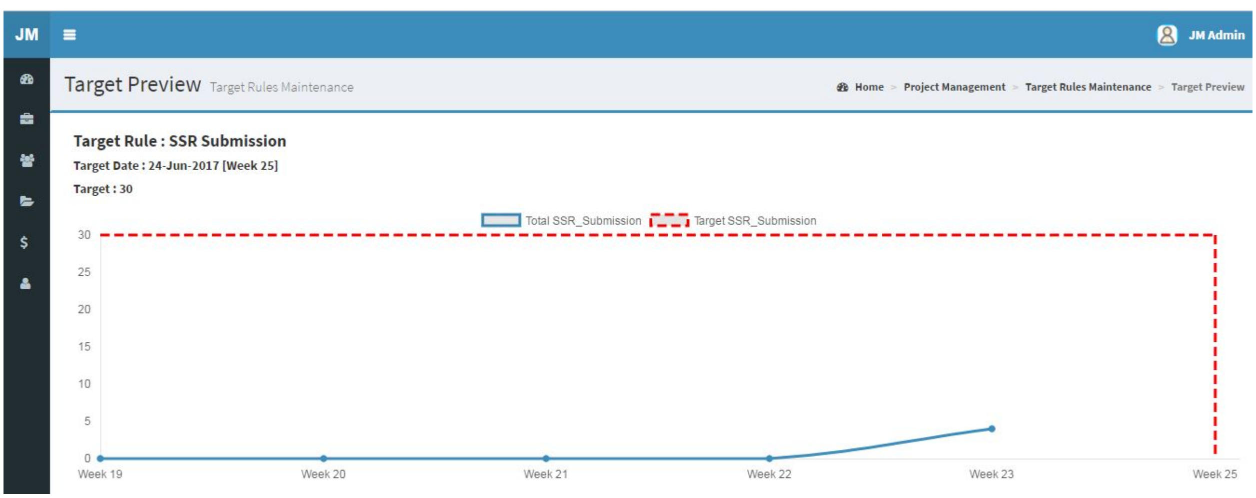
➢ TARGET RULES MANAGEMENT

1. Click **Project Management** > **Target Rules Management**

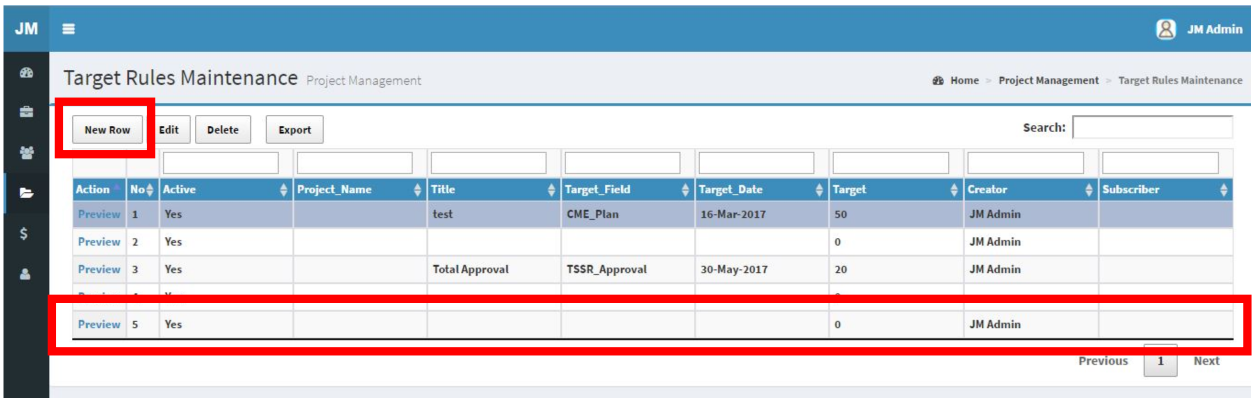


2. Click **Preview** to view in detail and it will redirect to another page
3. Click Export to export the information into PDF, Excel or CSV

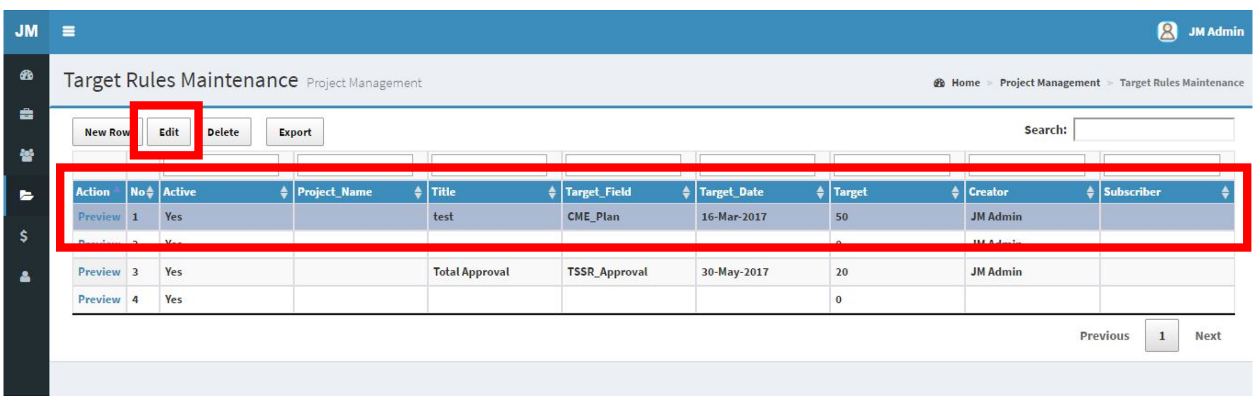




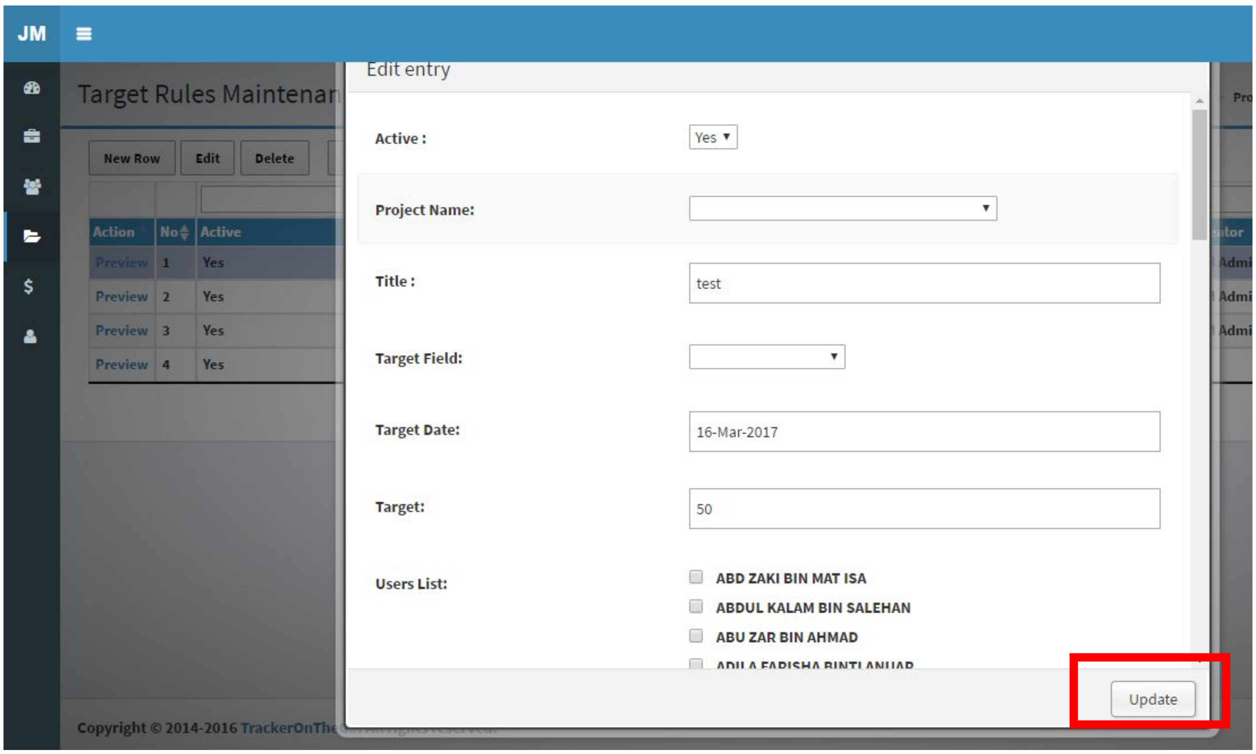
4. Click **New Row** to add new row



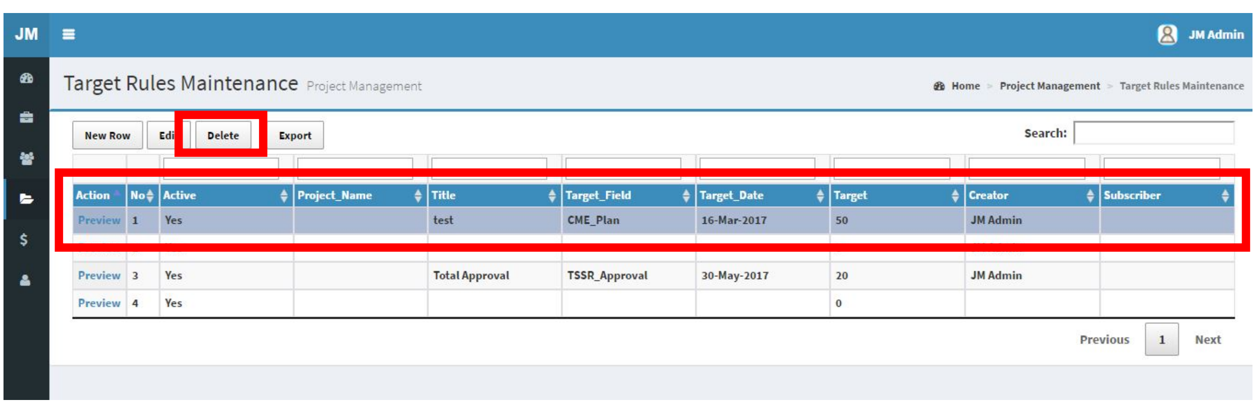
5. Select a row and click **Edit** to edit the information



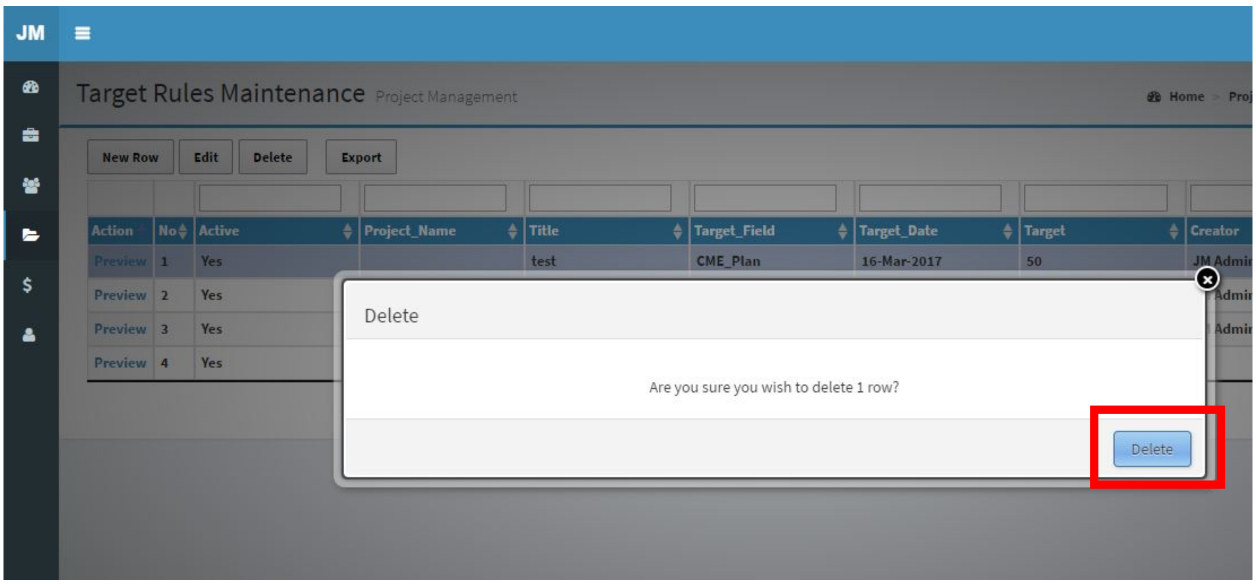
6. Fill in all those details and click **Update**
    a) **Active:** Choose either Yes or No
    b) **Project Name:** Select the Project Name in the given dropdown list
    c) **Title:** Key in the title
    d) **Target Field:** Choose the Target Field in the given dropdown list
    e) **Target Date:** Choose your target date in the given calendar dropdown
    f) **Users List**: Tick on the name wished to be in this target rules management



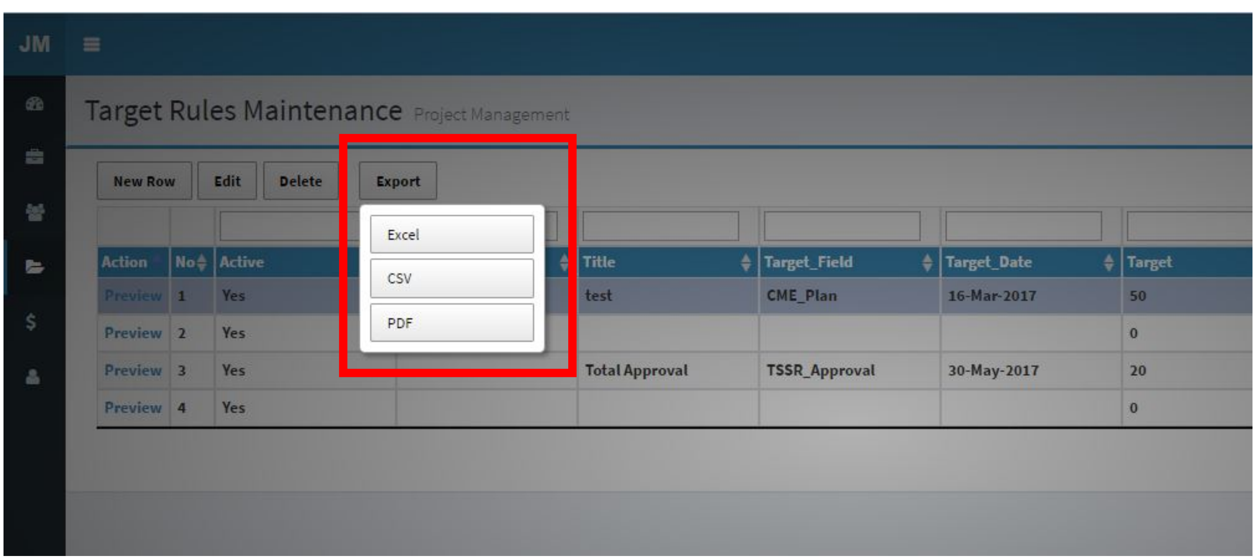
7. Select a row and click **Delete**



8. Then click **Delete**

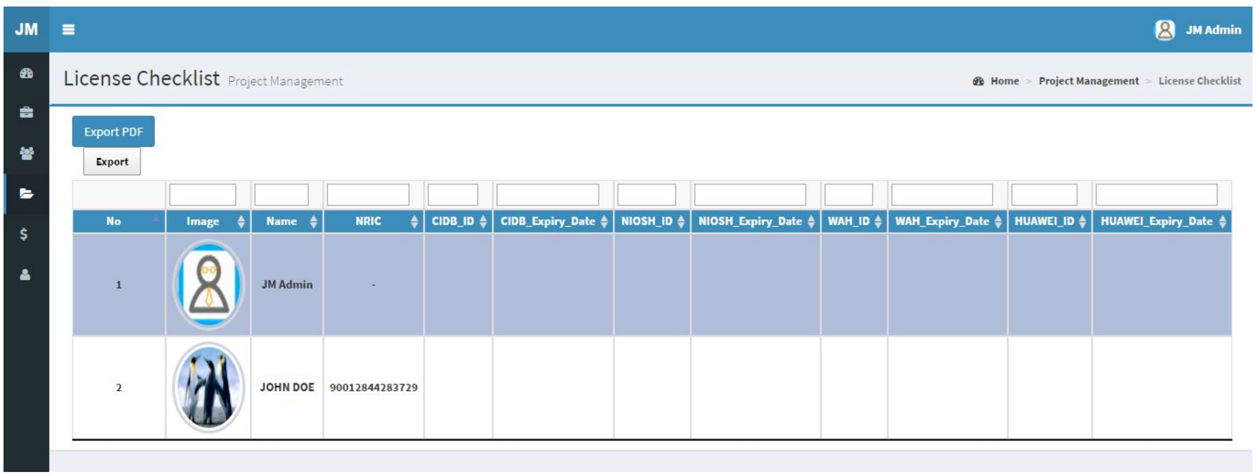


9. Click **Export** to export files into PDF, Excel or CSV

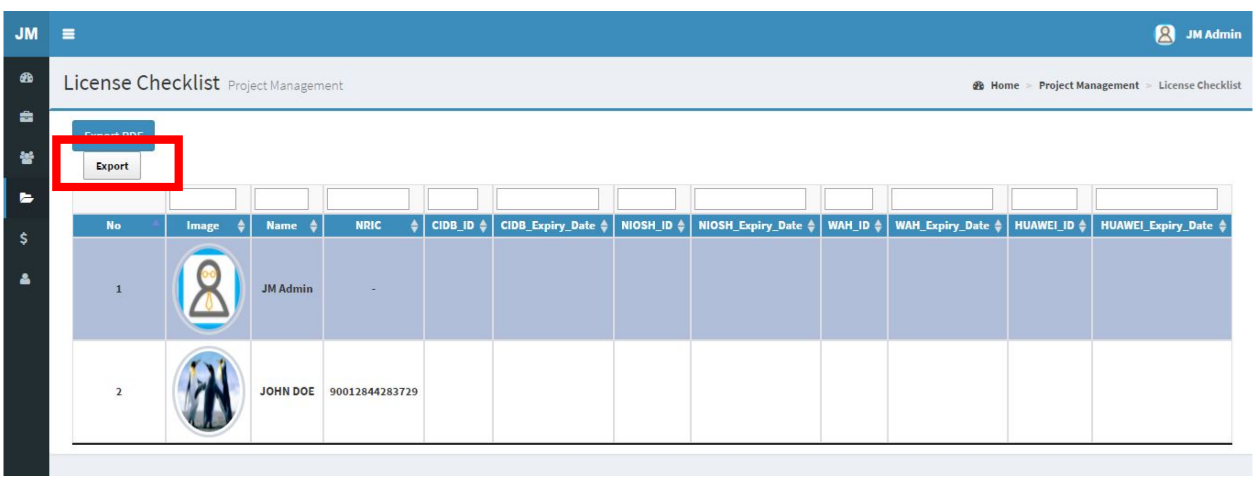


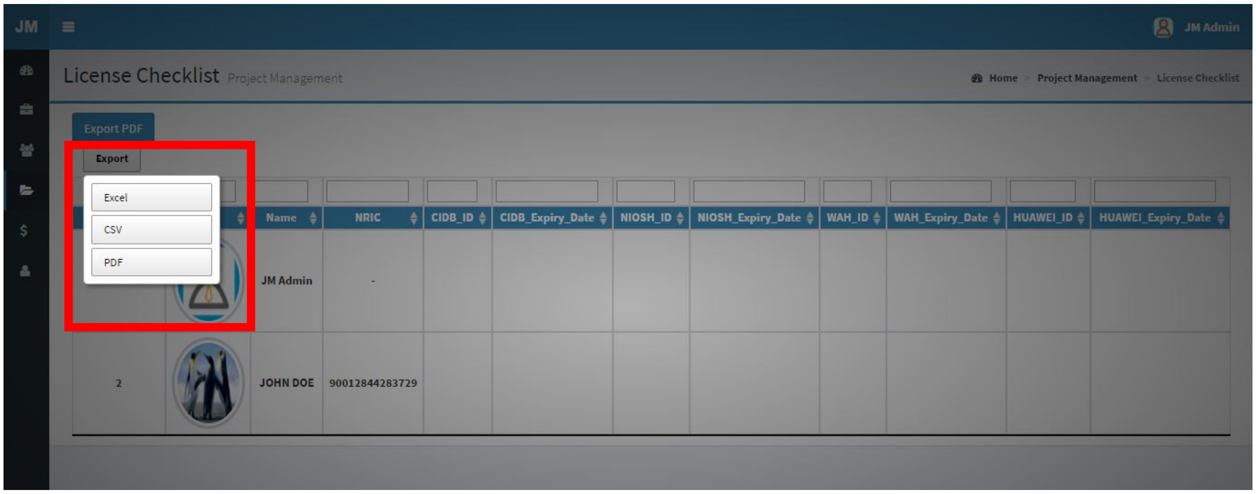
➢ LICENSE CHECKLIST

1. Click **Project Management** > **License Checklist**
2. List of checklist will appear

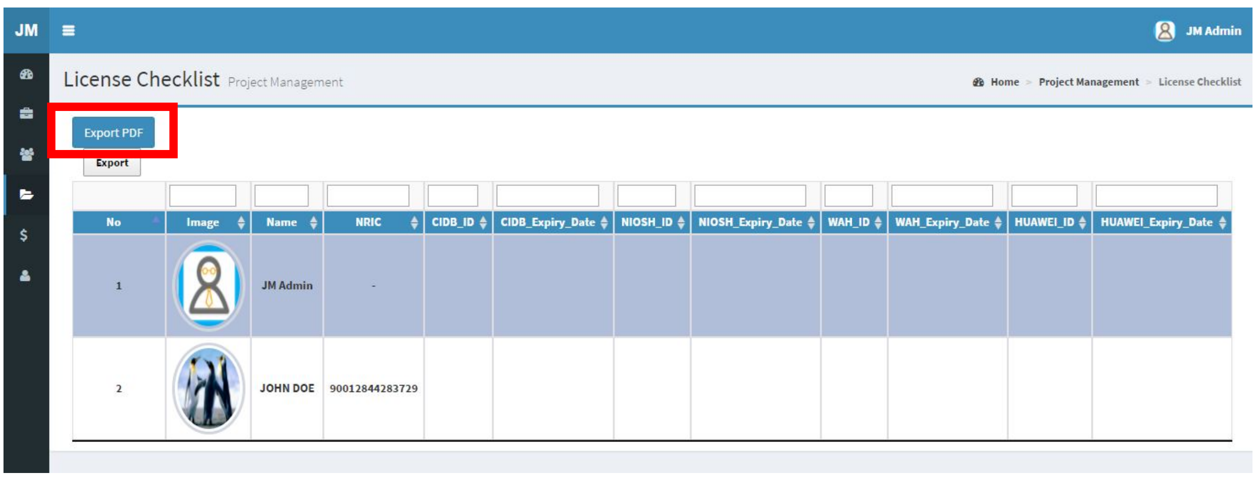


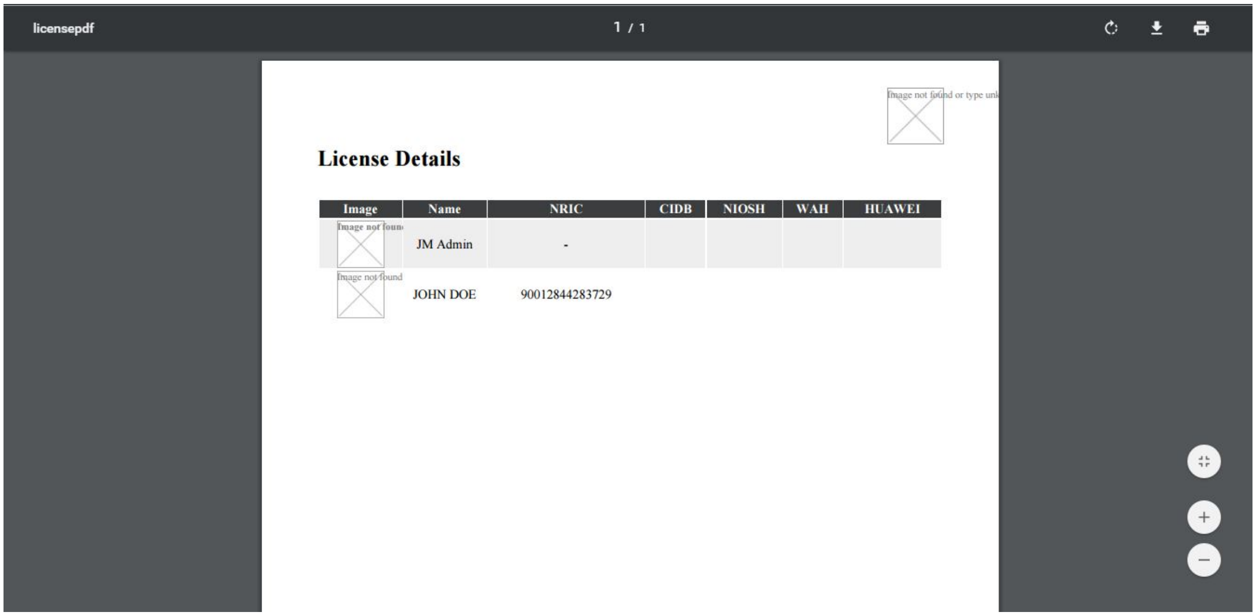
3. Click on **Export** to convert files into PDF, Excel or CSV





4. Click **Export PDF (Blue Button)** and it will redirect to another page





licensepdf

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Image not found	JM Admin	-				
Image not found	JOHN DOE	90012844283729				