



PMS USER MANUAL

Pact Software Service Pvt Ltd

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Acronyms Used

* – Mandatory Field

DD – Drop Down

DF – Date Field

NF – Numeric Field

TF – Text Field

AT- Attachment

PMS (Project Management System).

Introduction

The Project Management System is a comprehensive software solution for managing projects from conception to completion. It provides project managers with the tools to create and track projects, assign tasks and resources, monitor progress, and generate reports.

1. Getting Started

Before getting started, make sure you have read the user manual and are familiar with the system. Once you have done that, you can log in to the system and start creating projects.

2. Creating a Project

Creating a project is the first step in using the Project Management System. To create a project, you need to fill out a form with the project name, description, start and end dates, and budget. Once the form is completed, you can save the project and begin adding tasks to it.

3. Adding Tasks

Tasks are the building blocks of the project plan. Each task is made up of a description, start and end dates, and priority. With the Project Management System, you can easily add tasks to a project and assign them to resources.

4. Assigning Resources

Once tasks are added to a project, they need to be assigned to the appropriate resources. Resources can be individuals, teams, or external vendors. Once resources are assigned to a task, the system will generate a notification to the resource and the project manager, so they can both stay informed of changes.

5. Delegating Responsibilities

The system provides project managers with the ability to delegate responsibilities to team members. This enables team members to view tasks assigned to them and update their progress as they work on the tasks.

6. Monitoring Progress

The system provides project managers with the ability to monitor progress on tasks and projects. This helps project managers stay on top of any changes or delays and act accordingly. The system also allows project managers to generate reports that track project progress and milestones.


7. Reporting

The system provides project managers with the ability to generate reports on project progress. Reports can include project summaries, task statuses, resource utilization, and project timelines.

8. Conclusion

The Project Management System is a comprehensive solution for managing projects from conception to completion. This user manual has provided an overview of the system and how to use its features and functions. We hope this user manual has been helpful and you are now ready to start managing projects with the system.

Login Details.





Sign In

Enter user details


Username
Enter user name

Password
Enter Password

☐ Remember Me
☐ Use Default Company

 Login  Cancel

Selection of Company





Select Company

DB Index	Company Code	Company Name
1	01	Market Xcel Data Matrix Private Limited
2	RR	RR

☐ Set As Default Company

Select on the company

Click on Submit Button

 Submit  Cancel

Dashboard View

PACT RevenU | HOME | FINANCE | PROCUREMENT & SALES | BI | **DIMENSIONS** | ADMIN | PROJECTS

Manage | Customize Division | Preferences | Manage

Division Branch Locations Department Category Area Employees Name Territory

Others1 Others2 Others3 Vat Unit Type GST PAN Type TCS

PMS Dash Board x [Enterprise]

PMS Process Flow

Project Plan WBS Detail Phases Task Master

Planned Start Delay

Project name	Task Master	WBS	Status	Assigned	P S Date	DL Days
Salon Audit 2	Briefing to field teams	835.1.4	Open			P
Salon Audit 2	Briefing to field teams	835.1.5	Open			P
Salon Audit 2	Briefing to field teams	835.1.6	Open			P
Salon Audit 2	Briefing to field teams	835.1.7	Open			P

Planned End Delay

Project name	Task Master	WBS	Status	Assigned	DL Days	P E Date
Consumer Engagemen...	Receipt of Budget Sheet	898.2	In Proc...	MX1499	75	16/09/2022
Metro	Allot an EIC	869.1.3	In Proc...	MX319	74	17/09/2022
Halo	Allot an EIC	914.1.1	In Proc...	MX1033	69	22/09/2022
Salon Audit 2	Briefing to field teams	835.1.1	In Proc...		98	24/08/2022

In Process Activities Report

Project name	Task Master	WBS	Status	Assigned	P S Date	P E Date
Consumer Engagemen...	Receipt of Budget Sheet	898.2	In Proc...	MX1499	15/09/20...	16/09/20...
Metro	Allot an EIC	869.1.3	In Proc...	MX319	16/09/20...	17/09/20...
Halo	Allot an EIC	914.1.1	In Proc...	MX1033	21/09/20...	22/09/20...
Water	Allot an EIC	1020....	In Proc...	MX015,M...	14/10/20...	15/10/20...

Upcoming Task for Next 5 Days

Project name	Doc No	Status	Assigned	WBS	P S Date	P E Date

Company Name: Market Xcel Data Matrix Private Limited [Index: 1] | Accounting Date: 01/04/2022 | User: admin | Login Time: 04:15 PM

Voucher Prefix

Project *

Branch *

Select the Projects

OK Close

Click on OK

Select the Branch

Process of Project Management

1. Creation of Project Plan

Project Plan

Navigation: Projects >> Project Plan

Project Plan [Posted]

Doc Date * 23/11/2022 **Doc No *** 1183/ 1 **Customer Name** 143 Nielsenq India Private Limited

Project Violet **Executive Name** Nahush Kumar **Department** Client Servicing **Start Date** 15/11/2022

End Date 22/11/2022 **Completion Date** Show Calendar **Completion Percent** **Status** Implementation

Contact Person Kaushal Sharma **Overall Percent** **In Process percent** **WBS Detail** Violet

JOBNo 20221175

#	WBS	Activi...	Phases	Task Master	TM	Location	Attachments	AttachFile	AS	Project Percent	Contribution Percent	Planned Start Date
1	1183.1.1	Open	Pre-Kickoff	-	A	Locations	No	...		30	30	23/11/2022 12:00 AM
2	1183.1.2	Open	Pre-Kickoff	Allot an EIC	A	Delhi	No	...		20	20	23/11/2022 12:00 AM
3	1183.1.3	Open	Pre-Kickoff	Allot an EIC	A	Jaipur	No	...		20	20	23/11/2022 12:00 AM
4	1183.1.4	Open	Pre-Kickoff	Allot an EIC	A	Bangalore	No	...		20	20	23/11/2022 12:00 AM
5	1183.1.5	Open	Pre-Kickoff	Allot an EIC	A	Chennai	No	...		20	20	23/11/2022 12:00 AM
6	1183.1.6	Open	Pre-Kickoff	Allot an EIC	A	Mumbai	No	...		20	20	23/11/2022 12:00 AM
7												
8												
9												

Company Name: Market Xcel Data Matrix Private Limited [Index: 1] Accounting Date: 01/04/2022 User: admin Login Time: 04:15 PM

STEP:1

- **Doc Date* (DF):** Enter the Document Posting Date. Current date is auto-picked.
- **Doc No.* (NF):** Enter the Document No.



STEP:2

- **Project (DD):** Automatically selected while selecting the project
- **Executive Name (DD):** Automatically selected while selecting the project
- **Department (DD) :** Automatically selected while selecting the project
- **Start Date (DF):** Automatically selected while selecting the project
- **End Date (DF):** Automatically selected while selecting the project
- **Completion Date (DF):** User has to enter the required data
- **Completion Percentage (NF):** Auto calculate the Overall % of Completion of Project
- **Status (DD) :** Combo box (Implementation)
- **Contact Person (TF):** Automatically selected while selecting the project
- **Overall Percent(NF) :**
- **In Process Percentage (NF):**
- **WBS Detail (DD):** Automatically selected while selecting the project
- **JOBNO (TF):** Automatically selected while selecting the project

STEP:3

- **WBS (TF)** : Its also a project activity
- **Activity Status (DD)**: Combo Box (Open)
- **Phases (DD)**: It's a Dimension (Have 5 Phases, 1. Pre-Kickoff, 2. Field Work, 3. Closure Activities 4. Data Processing, 5. Questionnaire Programming – Phase.
- **Task Master (DD)**: It's a Dimension
- **TM (Task Mode) (DD)** : Default Automatic (A) & Selective (S)
- **Location (DD)**: It's a Dimension (User need to select drop down of location)
- **Attachments (DD)**: Combo Box (Yes; No)
- **AttachFile (AT)**: (Physical Attachment of soft copy)
- **AS (Attachment status) (TF)**: Attached document status will be shown as (Yes or No)
- **Project Percent (NF)**: Will auto populate from contribution percent.
- **Contribution Percent *(NF)**: Enter the percentage for each phase
- **Planned Start Date *(DF)**: User need to enter dates manually (**It should be within office hours timings**)
- **Planned End Date *(DF)**: User need to enter dates manually (**It should be within office hours timings**)
- **Planned Days (NF)**: Auto Calculation days (Planned Start Date – Planned End Date)
- **HoursPerDay (NF)**: Standard of 8 Hours
- **Planned Working Hours (NF)**: Actual planned hours excluding weekends & Holidays
- **Planned Duration Days (NF)**: Actual planned days excluding weekends & Holidays
- **Dependencies (TF)**: Assigning of dependencies between two tasks.
- **Assigned TO (TF)**: Selection of User manually
- **Invoiced (DD)** : Auto Populated NO
- **Completed Percent (NF)**: User need to enter dates manually
- **Actual Start Date (DF)**: User need to enter dates manually
- **Actual End Date (DF)**: User need to enter dates manually
- **Actual Days (NF)**: Actual days excluding weekends & Holidays
- **Actual Working Hours (NF)**: Actual working Hours excluding weekends & Holidays
- **Actual Duration Days (NF)**: Actual Duration Days excluding weekends & Holidays

STEP: 4

- Click on  and document will be posted.
- Click on  to open a new document.

(The above mentioned functionalities will remain same for all documents discussed further and hence not mention in respective document section)

2. Assignment of OM to PM & OM to EIC

Click on the UnAssign OM Task list and Select Doc NO

PMS OM User Da... x [Enterprise]

UnAssign OM Task List

WBS Detail	Location	A Status	Doc No	Doc Date	WBS	Project Name	Task Master	Phases	Start Date	End Date
Gala soiled lau...	Mumbai	Open	PPL-1214/1	30-11-2022	1214.2.2	Gala soiled laundry	Product Placement	Field Work	20-11-2022	08-12-2022
Gala soiled lau...	Mumbai	Open	PPL-1214/1	30-11-2022	1214.2	Gala soiled laundry	Group Phase	Field Work	20-11-2022	08-12-2022
Gala soiled lau...	Mumbai	Open	PPL-1214/1	30-11-2022	1214.1.3	Gala soiled laundry	Briefing to field teams	Pre-Kickoff	15-11-2022	20-11-2022
Gala soiled lau...	Mumbai	Open	PPL-1214/1	30-11-2022	1214.1.1	Gala soiled laundry	ewn	Pre-Kickoff	15-11-2022	20-11-2022
Gala soiled lau...	Mumbai	Open	PPL-1214/1	30-11-2022	1214.2.1	Gala soiled laundry	Recruitments	Field Work	20-11-2022	08-12-2022
Gala soiled lau...	Mumbai	Open	PPL-1214/1	30-11-2022	1214.1.2	Gala soiled laundry	Allot an EIC	Pre-Kickoff	15-11-2022	20-11-2022
Gala soiled lau...	Mumbai	Open	PPL-1214/1	30-11-2022	1214.1	Gala soiled laundry	Group Phase	Pre-Kickoff	15-11-2022	20-11-2022

Planned Start Delay

WBSRef	Project Name	Task Master	Phases	WBS
PPL-1063/1/2	Pluto	Allot an EIC	Pre-Kickoff	1063.1.2 2
PPL-1063/1/6	Pluto	Status Update	Field Work	1063.2.2 2
PPL-1078/1/3	FI IG Misinformation	Allot an EIC	Pre-Kickoff	1078.1.1 1
PPL-1078/1/3	FI IG Misinformation	ewn	Pre-Kickoff	1078.1.3 1

Planned End Delay

WBSRef	Project Name	Task Master	Phases	WBS
PPL-1028/1/15	FI Social Media Gro...	Receipt of RQ/MQ	Pre-Kickoff	1028.1.15 2
PPL-1028/1/6	FI Social Media Gro...	Allot an EIC	Pre-Kickoff	1028.1.6 2
PPL-1208/1/2	Carmesi Sanitary P...	ewn	Pre-Kickoff	1208.1.2 2
PPL-1208/1/6	Carmesi Sanitary P...	Budget sheet	Pre-Kickoff	1208.1.6 2

In Process Activities Report

WBSRef	Project Name	Task Master	Phases	WBS
PPL-1028/1/15	FI Social Media Gro...	Receipt of RQ/MQ	Pre-Kickoff	1028.1.15 2
PPL-1028/1/6	FI Social Media Gro...	Allot an EIC	Pre-Kickoff	1028.1.6 2
PPL-1208/1/2	Carmesi Sanitary P...	ewn	Pre-Kickoff	1208.1.2 2
PPL-1208/1/6	Carmesi Sanitary P...	Budget sheet	Pre-Kickoff	1208.1.6 2

Upcoming Task for Next 5 Days

WBSRef	Project Name	Task Master	Phases	WBS	P S Date	Status	DL Days	Doc No
REPORT TOTAL								
							0.00	

Close Activities Report

WBSRef	Project Name	Task Master	Phases	WBS	P S Date	P E Date	A S Date	A E Date	Status	DL Days	Doc No	Doc Date	Assigned To	RM
PPL-1028/1/12	FI Social Media Gro...	Briefing to TL's	Pre-Kickoff	1028.1.12	12-10-2022	12-10-2022	16-11-2022	16-11-2022	Close	0.00	PPL-1028/1	07-11-...	MXD40,MX1212,MX1592	1.00
PPL-1028/1/18	FI Social Media Gro...	Status Update	Pre-Kickoff	1028.1.18	13-10-2022	13-10-2022	16-11-2022	16-11-2022	Close	0.00	PPL-1028/1	07-11-...	MX1592,MX040	1.00
PPL-1028/1/3	FI Social Media Gro...	ewn	Pre-Kickoff	1028.1.3	10-10-2022	10-10-2022	16-11-2022	16-11-2022	Close	0.00	PPL-1028/1	07-11-...	MXD40,MX1212,MX1592...	1.00
PPL-1028/1/9	FI Social Media Gro...	Receipt of Budget She...	Pre-Kickoff	1028.1.9	11-10-2022	11-10-2022	14-11-2022	16-11-2022	Close	2.00	PPL-1028/1	07-11-...	MXD40,MX1212,MX1592	1.00
PPL-1028/1/22	FI Social Media Gro...	3rd and 4th IDIs and o...	Field Work	1028.2.2	31-10-2022	31-10-2022	16-11-2022	16-11-2022	Close	0.00	PPL-1028/1	07-11-...	MX1592,MX040	1.00
PPL-1028/1/25	FI Social Media Gro...	7th and 8th IDIs	Field Work	1028.2.5	01-11-2022	01-11-2022	16-11-2022	16-11-2022	Close	0.00	PPL-1028/1	07-11-...	MXD40,MX1212,MX1592	1.00
PPL-1132/1/6	Final CS Testing	Receipt of RQ/MQ	Field Work	1132.2.6	08-11-2022	09-11-2022	12-11-2022	12-11-2022	Close	0.00	PPL-1132/1	07-11-...	MXD40,MX1212,MX1598	1.00
PPL-1184/1/3	FI Information Liter...	Allot an EIC	Pre-Kickoff	1184.1.2	11-11-2022	21-11-2022	30-11-2022	30-11-2022	Close	0.00	PPL-1184/1	18-11-...	MX1592,MX040,MX2053	1.00
PPL-995/2/3	CS Testing	Allot an EIC	Pre-Kickoff	995.1.3	02-11-2022	03-11-2022	08-11-2022	08-11-2022	Close	0.00	PPL-995/2	02-11-...	MXD40,MX1212,MX1242	1.00
PPL-995/2/26	CS Testing	Back Check	Field Work	995.2.20	03-11-2022	04-11-2022	10-11-2022	10-11-2022	Close	0.00	PPL-995/2	02-11-...	MXD40,MX1212	1.00

Company Name: Market Xcel Data Matrix Private Limited [Index: 1] Accounting Date: 01/04/2022 Branch: Delhi User: mc2033 Login Time: 04:31 PM

- Click on the UnAssign OM Task list and Select Doc NO
- Open Project Plan and assign the task while selecting the row and right-click to access the options to assign the users.
- Select the user to whom the task should be assigned.
- Post the voucher

1. Select the row and right-click to access the options to assign the users.

2. Select the user to whom the task should be assigned.

PACT RevenU | HOME | PROCUREMENT & SALES | BI | DIMENSIONS | ADMIN | PROJECTS

PMS OM User Da... x | Project Plan x

Project Plan [Posted]

Doc Date * 30/11/2022 | Doc No * 1214/ 1 | Customer Name 13758 - Givaudan (India) Pvt Ltd

Project Gaia soiled laundry | Executive Name Dinesh Sen | Department Client Servicing | Start Date 22/11/2022

End Date 28/11/2022 | Completion Date | Completion Percent | Status Implementation

Contact Person Harshali Jain | Overall Percent | In Process percent | WBS Detail Gaia soiled laundry

JOBNO 202211102

#	WBS	Activi...	Phases	Task Master	TM	Location	Attachments	AttachFile	AS	Project Percent	Conti
1	1214.1	Open	Pre-Kickoff	Group Phase	A	Mumbai	No	...		40	
2	1214.1.1	Open	Pre-Kickoff	ewn	A	Mumbai	No	...		4	
3	1214.1.2	Open	Pre-Kickoff	Allot an EIC		mbai	No	...		4	
4	1214.1.3	Open	Pre-Kickoff	Briefing to field teams		mbai	No	...		4	
5	1214.1.4	Open	Pre-Kickoff	Receipt of Budget Sheet		mbai	No	...		4	
6	1214.2	Open	Field Work	Group Phase		mbai	No	...		40	
7	1214.2.1	Open	Field Work	Recruitments		mbai	No	...		8	
8	1214.2.2	Open	Field Work	Product Placement		mbai	No	...		8	
9											
10											

Insert Row
Copy
Copy With Reference
Paste
Delete
Map (Ctrl+F1)
Row Details (F1)
Assign
Dependencies
Generate
Edit

Assign

Selected 1214.1.1

Application Users

Search...

☐ All
☐ MX1212
☐ MX1242
☐ MX1393
☐ MX1517
☐ MX1592
☐ MX2020
☐ MX395
☐ MX907
☐ MX945

Save Cancel

Net Total
0

PREVIOUS NEXT CLOSE

Company Name: Market Xcel Data Matrix Private Limited [Index: 1] | Accounting Date: 01/04/2022 | Branch: Delhi | User: mx2033 | Login Time: 05:48 PM

STEP:1

- **Doc Date* (DF):** Enter the Document Posting Date. Current date is auto-picked.
- **Doc No.* (NF):** Enter the Document No.



STEP:2

- **Project (DD):** Automatically selected while selecting the project
- **Executive Name (DD):** Automatically selected while selecting the project
- **Department (DD) :** Automatically selected while selecting the project
- **Start Date (DF):** Automatically selected while selecting the project
- **End Date (DF):** Automatically selected while selecting the project
- **Completion Date (DF):** User has to enter the required data
- **Completion Percentage (NF):** Auto calculate the Overall % of Completion of Project
- **Status (DD) :** Combo box (Implementation)
- **Contact Person (TF):** Automatically selected while selecting the project
- **Overall Percent(NF) :**
- **In Process Percentage (NF):**
- **WBS Detail (DD):** Automatically selected while selecting the project
- **JOBNO (TF):** Automatically selected while selecting the project

STEP:3

- **WBS (TF)** : Its also a project activity
- **Activity Status (DD)**: Combo Box (Open)
- **Phases (DD)**: It's a Dimension (Have 5 Phases, 1. Pre-Kickoff, 2. Field Work, 3. Closure Activities 4. Data Processing, 5. Questionnaire Programming – Phase.
- **Task Master (DD)**: It's a Dimension
- **TM (Task Mode) (DD)** : Default Automatic (A) & Selective (S)
- **Location (DD)**: It's a Dimension (User need to select drop down of location)
- **Attachments (DD)**: Combo Box (Yes; No)
- **AttachFile (AT)**: (Physical Attachment of soft copy)
- **AS (Attachment status) (TF)**: Attached document status will be shown as (Yes or No)
- **Project Percent (NF)**: Will auto populate from contribution percent.
- **Contribution Percent *(NF)**: Enter the percentage for each phase
- **Planned Start Date *(DF)**: User need to enter dates manually **(It should be within office hours timings)**
- **Planned End Date *(DF)**: User need to enter dates manually **(It should be within office hours timings)**
- **Planned Days (NF)**: Auto Calculation days (Planned Start Date – Planned End Date)
- **HoursPerDay (NF)**: Standard of 8 Hours
- **Planned Working Hours (NF)**: Actual planned hours excluding weekends & Holidays
- **Planned Duration Days (NF)**: Actual planned days excluding weekends & Holidays
- **Dependencies (TF)**: Assigning of dependencies between two tasks.
- **Assigned TO (TF)**: Selection of User manually
- **Invoiced (DD)** : Auto Populated NO
- **Completed Percent (NF)**: User need to enter dates manually
- **Actual Start Date (DF)**: User need to enter dates manually
- **Actual End Date (DF)**: User need to enter dates manually
- **Actual Days (NF)**: Actual days excluding weekends & Holidays
- **Actual Working Hours (NF)**: Actual working Hours excluding weekends & Holidays
- **Actual Duration Days (NF)**: Actual Duration Days excluding weekends & Holidays

STEP: 4

- Click on  and document will be posted.
- Click on  to open a new document.

(The above mentioned functionalities will remain same for all documents discussed further and hence not mention in respective document section)

3. Assignment of PM to EIC

Click on the UnAssign OM
Task list and Select Doc
NO

PMS PM User Das... x [Enterprise]

Userwise UnAssign PM Task List

Project Name	Task Master	WBSRef	Doc No	WBS	Status	Assigned	P S Date	P E Date	Len	RM
Artist	Briefing to field teams	PPL-1228/1/5	PPL-1228/1	1228...	Open	MX1592...	25-11-2022	28-11-2022	13.00	1.00
Artist	Allot an EIC	PPL-1228/1/2	PPL-1228/1	1228...	Open	MX1592...	25-11-2022	28-11-2022	13.00	1.00
CS Testing	Share venue detail	PPL-995/2/19	PPL-995/2	995.2...	Open	MX040,M...	03-11-2022	04-11-2022	12.00	1.00

Planned Start Delay

WBSRef	Project Name	Task Master	Phases	WBS
PPL-1108/1/12	IRIS 2.0	Field Work Launch	Pre-Kickoff	1108.1... 0
PPL-1132/1/38	Final CS Testing	Share revised budget...	Closure Ac...	1132.3 1
PPL-1132/1/38	Final CS Testing	Share revised budget...	Closure Ac...	1132.3 8 1
PPL-1183/1/6	Violet	Allot an EIC	Pre-Kickoff	1183.1 6 2

Planned End Delay

WBSRef	Project Name	Task Master	Phases	WBS
PPL-1028/1/15	Fi Social Media Gro...	Receipt of RQ/MQ	Pre-Kickoff	1028.1... 1
PPL-1028/1/6	Fi Social Media Gro...	Allot an EIC	Pre-Kickoff	1028.1 6 1

REPORT TOTAL

In Process Activities Report

WBSRef	Project Name	Task Master	Phases	WBS
PPL-1028/1/15	Fi Social Media Gro...	Receipt of RQ/MQ	Pre-Kickoff	1028.1... 1
PPL-1028/1/6	Fi Social Media Gro...	Allot an EIC	Pre-Kickoff	1028.1 6 1

REPORT TOTAL

Upcoming Task for Next 5 Days

WBSRef	Project Name	Task Master	Phases	WBS	P S Date	Status	DL Days	Doc No
REPORT TOTAL								
								0.00

Close Activities Report

WBSRef	Project Name	Task Master	Phases	WBS	P S Date	P E Date	A S Date	A E Date	Status	DL Days	Doc No	Doc Date	Assigned To	RM
PPL-1028/1/12	Fi Social Media Gro...	Briefing to TL's	Pre-Kickoff	1028.1...	12-10-2022	12-10-2022	16-11-2022	16-11-2022	Close	0.00	PPL-1028/1	07-11-...	MX040,MX1212,MX1592	1.00
PPL-1028/1/18	Fi Social Media Gro...	Status Update	Pre-Kickoff	1028.1...	13-10-2022	13-10-2022	16-11-2022	16-11-2022	Close	0.00	PPL-1028/1	07-11-...	MX1592,MX040	1.00
PPL-1028/1/3	Fi Social Media Gro...	ewn	Pre-Kickoff	1028.1.3	10-10-2022	10-10-2022	16-11-2022	16-11-2022	Close	0.00	PPL-1028/1	07-11-...	MX040,MX1212,MX1592...	1.00
PPL-1028/1/9	Fi Social Media Gro...	Receipt of Budget She...	Pre-Kickoff	1028.1.9	11-10-2022	11-10-2022	14-11-2022	16-11-2022	Close	2.00	PPL-1028/1	07-11-...	MX040,MX1212,MX1592	1.00
PPL-1028/1/22	Fi Social Media Gro...	3rd and 4th IDs and o...	Field Work	1028.2.2	31-10-2022	31-10-2022	16-11-2022	16-11-2022	Close	0.00	PPL-1028/1	07-11-...	MX1592,MX040	1.00
PPL-1028/1/25	Fi Social Media Gro...	7th and 8th IDs	Field Work	1028.2.5	01-11-2022	01-11-2022	16-11-2022	16-11-2022	Close	0.00	PPL-1028/1	07-11-...	MX040,MX1212,MX1592	1.00
PPL-1132/1/6	Final CS Testing	Receipt of RQ/MQ	Field Work	1132.2.6	08-11-2022	09-11-2022	12-11-2022	12-11-2022	Close	0.00	PPL-1132/1	07-11-...	MX040,MX1212,MX1598	1.00
PPL-1184/1/3	Fi Information Liter...	Allot an EIC	Pre-Kickoff	1184.1.2	11-11-2022	21-11-2022	30-11-2022	30-11-2022	Close	0.00	PPL-1184/1	18-11-...	MX1592,MX040,MX2093	1.00
PPL-995/2/3	CS Testing	Allot an EIC	Pre-Kickoff	995.1.3	02-11-2022	03-11-2022	08-11-2022	08-11-2022	Close	0.00	PPL-995/2	02-11-...	MX040,MX1212,MX1242	1.00
PPL-995/2/26	CS Testing	Back Check	Field Work	995.2.20	03-11-2022	04-11-2022	10-11-2022	10-11-2022	Close	0.00	PPL-995/2	02-11-...	MX040,MX1212	1.00

Company Name: Market Xcel Data Matrix Private Limited [Index: 1] Accounting Date: 01/04/2022 Branch: Delhi User: mx1212 Login Time: 04:40 PM

1. Select the row and right-click to access the options to assign the users.

PACT RevenU + HOME PROCUREMENT & SALES BI DIMENSIONS ADMIN PROJECTS

PMS OM User Da... x Project Plan x [Enterprise]

Project Plan [Posted]

Doc Date * 30/11/2022 Doc No * 1214/ 1 Customer Name 13758 Givaudan (India) Pvt Ltd

Project Gaia soiled laundry Executive Name Dinesh Sen Department Client Servicing Start Date 22/11/2022

End Date 28/11/2022 Completion Date Show Calendar Completion Percent Status Implementation

Contact Person Harshali Jain Overall Percent In Process percent WBS Detail Gaia soiled laundry

JOBNo 202211102

#	WBS	Activi...	Phases	Task Master	TM	Location	Attachements	AttachFile	AS	Project Percent	Cont
1	1214.1	Open	Pre-Kickoff	Group Phase	A	Mumbai	No	...		40	
2	1214.1.1	Open	Pre-Kickoff	ewn	A	Mumbai	No	...		4	
3	1214.1.2	Open	Pre-Kickoff	Allot an EIC		mbai	No	...		4	
4	1214.1.3	Open	Pre-Kickoff	Briefing to field teams		mbai	No	...		4	
5	1214.1.4	Open	Pre-Kickoff	Receipt of Budget Sheet		mbai	No	...		4	
6	1214.2	Open	Field Work	Group Phase		mbai	No	...		40	
7	1214.2.1	Open	Field Work	Recruitments		mbai	No	...		8	
8	1214.2.2	Open	Field Work	Product Placement		mbai	No	...		8	
9											
10											

PREVIOUS NEXT CLOSE

Company Name: Market Xcel Data Matrix Private Limited [Index: 1] Accounting Date: 01/04/2022 Branch: Delhi User: mx2033 Login Time: 05:48 PM

2. Select the user to whom the task should be assigned.

STEP:1

- **Doc Date* (DF):** Enter the Document Posting Date. Current date is auto-picked.
- **Doc No.* (NF):** Enter the Document No.



STEP:2

- **Project (DD):** Automatically selected while selecting the project
- **Executive Name (DD):** Automatically selected while selecting the project
- **Department (DD) :** Automatically selected while selecting the project
- **Start Date (DF):** Automatically selected while selecting the project
- **End Date (DF):** Automatically selected while selecting the project
- **Completion Date (DF):** User has to enter the required data
- **Completion Percentage (NF):** Auto calculate the Overall % of Completion of Project
- **Status (DD) :** Combo box (Implementation)
- **Contact Person (TF):** Automatically selected while selecting the project
- **Overall Percent(NF) :**
- **In Process Percentage (NF):**
- **WBS Detail (DD):** Automatically selected while selecting the project
- **JOBNO (TF):** Automatically selected while selecting the project

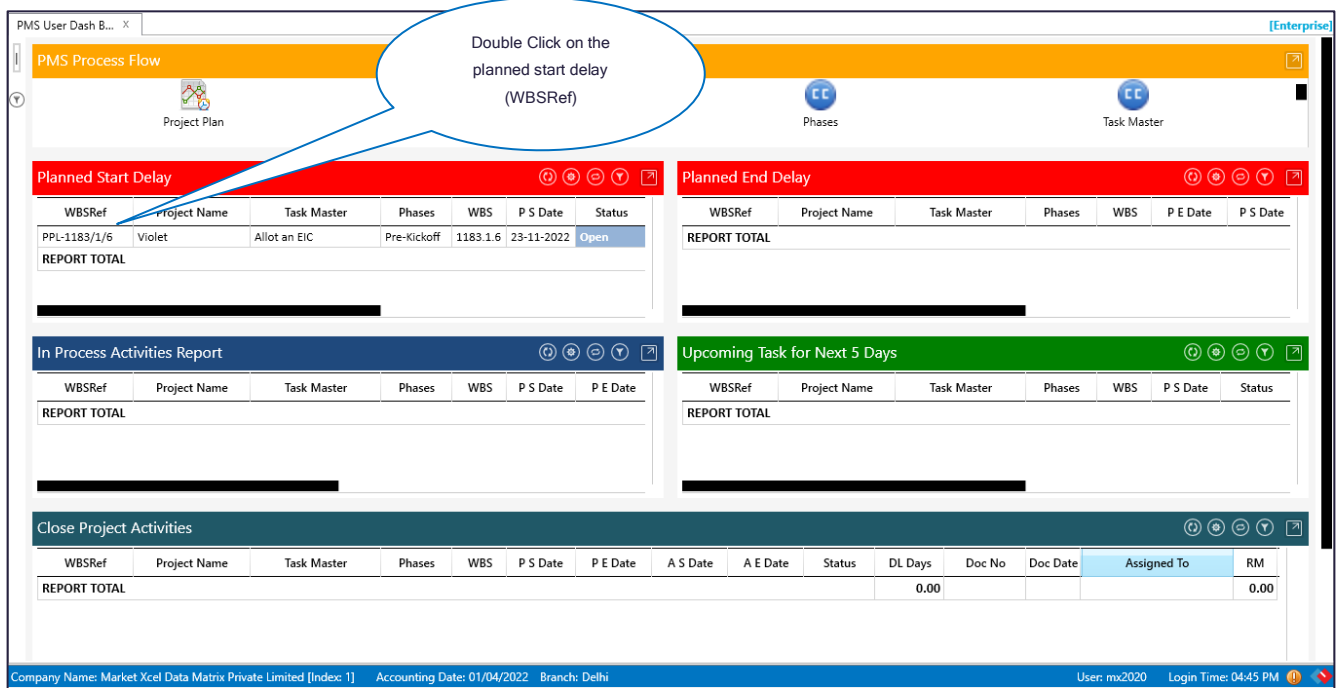
STEP:3

- **WBS (TF) :** Its also a project activity
- **Activity Status (DD):** Combo Box (Open)
- **Phases (DD):** It's a Dimension (Have 5 Phases, 1. Pre-Kickoff, 2. Field Work, 3. Closure Activities 4. Data Processing, 5. Questionnaire Programming – Phase.
- **Task Master (DD):** It's a Dimension
- **TM (Task Mode) (DD) :** Default Automatic (A) & Selective (S)
- **Location (DD):** It's a Dimension (User need to select drop down of location)
- **Attachments (DD):** Combo Box (Yes; No)
- **AttachFile (AT):** (Physical Attachment of soft copy)
- **AS (Attachment status) (TF):** Attached document status will be shown as (Yes or No)
- **Project Percent (NF):** Will auto populate from contribution percent.
- **Contribution Percent *(NF):** Enter the percentage for each phase
- **Planned Start Date *(DF):** User need to enter dates manually **(It should be within office hours timings)**
- **Planned End Date *(DF):** User need to enter dates manually **(It should be within office hours timings)**
- **Planned Days (NF):** Auto Calculation days (Planned Start Date – Planned End Date)
- **HoursPerDay (NF):** Standard of 8 Hours
- **Planned Working Hours (NF):** Actual planned hours excluding weekends & Holidays
- **Planned Duration Days (NF):** Actual planned days excluding weekends & Holidays
- **Dependencies (TF):** Assigning of dependencies between two tasks.
- **Assigned TO (TF):** Selection of User manually
- **Invoiced (DD) :** Auto Populated NO
- **Completed Percent (NF):** User need to enter dates manually
- **Actual Start Date (DF):** User need to enter dates manually
- **Actual End Date (DF):** User need to enter dates manually
- **Actual Days (NF):** Actual days excluding weekends & Holidays
- **Actual Working Hours (NF):** Actual working Hours excluding weekends & Holidays
- **Actual Duration Days (NF):** Actual Duration Days excluding weekends & Holidays

STEP: 4

- Click on  and document will be posted.
- Click on  to open a new document.

(The above mentioned functionalities will remain same for all documents discussed further and hence not mention in respective document section)

4. EIC Update


PMS User Dash B... [Enterprise]

PMS Process Flow

Project Plan Phases Task Master

Planned Start Delay

WBSRef	Project Name	Task Master	Phases	WBS	P S Date	Status
PPL-1183/1/6	Violet	Allot an EIC	Pre-Kickoff	1183.1.6	23-11-2022	Open
REPORT TOTAL						

Planned End Delay

WBSRef	Project Name	Task Master	Phases	WBS	P E Date	P S Date
REPORT TOTAL						

In Process Activities Report

WBSRef	Project Name	Task Master	Phases	WBS	P S Date	P E Date
REPORT TOTAL						

Upcoming Task for Next 5 Days

WBSRef	Project Name	Task Master	Phases	WBS	P S Date	Status
REPORT TOTAL						

Close Project Activities

WBSRef	Project Name	Task Master	Phases	WBS	P S Date	P E Date	A S Date	A E Date	Status	DL Days	Doc No	Doc Date	Assigned To	RM
REPORT TOTAL										0.00				0.00

Company Name: Market Xcel Data Matrix Private Limited [Index: 1] Accounting Date: 01/04/2022 Branch: Delhi User: mx2020 Login Time: 04:45 PM

STEP:1

1. Click on Start
Button Pop up
will Appear

The screenshot shows the 'Dimensions' form in the PACT RevenU+ application. The form includes fields for Code (1183.16), Name (PPL-1183/1/6), Alias Name, Status (Open), Currency, Group (Violet), and Group Sequence no length (0). Below these are tabs for General, Notes, Attachments, Assign, and Progress. The General tab is active, showing various project details like Dependencies, Assigned To, Project Percent, Planned Start Date, Planned End Date, Activity Status, Invoiced, Actual Start Date, Actual End Date, Actual Days, Project, Phase, and Task Activities. A callout bubble points to the 'Start' button in the top right corner of the form.

The screenshot shows a 'Date' popup dialog box. It has a title bar 'Date' and a text field containing '01/12/2022 10:48 AM'. Below the text field are two buttons: 'Ok' and 'Cancel'. A callout bubble points to the 'Date' field, another points to the 'Ok' button, and a third points to the 'Date' field again.

Popup will
display for Start
Date

2. Enter Date

3. Click on Ok

STEP:2

PACT RevenU **HOME** PROCUREMENT & SALES BI DIMENSIONS ADMIN PROJECTS

PMS User Dash B... x Dimensions x [Enterprise]

Code: 1183.1.6 Group *: Violet

Name *: PPL-1183/1/6

Alias Name:

Status: Open Currency: Group Sequence no length: 0

General Notes Attachments Assign **Progress**

Progress	Note	Date & Time
100		12/1/2022 10:44:22 AM

PREVIOUS NEXT CLOSE

Company Name: Market Xcel Data Matrix Private Limited [Index: 1] Accounting Date: 01/04/2022 Branch: Delhi User: mx2020 Login Time: 10:11 AM

4. Click on Process

5. Click on Add Notes

STEP:3

PACT RevenU **HOME** PROCUREMENT & SALES BI DIMENSIONS ADMIN PROJECTS

PMS User Dash B... x Dimensions x [Enterprise]

Code: 1183.1.6 Group *: Violet

Name *: PPL-1183/1/6

Alias Name:

Status: In Process Currency: Group Sequence no length: 0

General Notes Attachments Assign **Progress**

Progress	Note	Date & Time
100	completed	12/1/2022 10:46 AM

PREVIOUS NEXT CLOSE

Company Name: Market Xcel Data Matrix Private Limited [Index: 1] Accounting Date: 01/04/2022 Branch: Delhi User: mx2020 Login Time: 10:11 AM

9. Click on Stop & Popup will appear

6. Enter Process Percentage

7. Add Notes

8. Click on OK

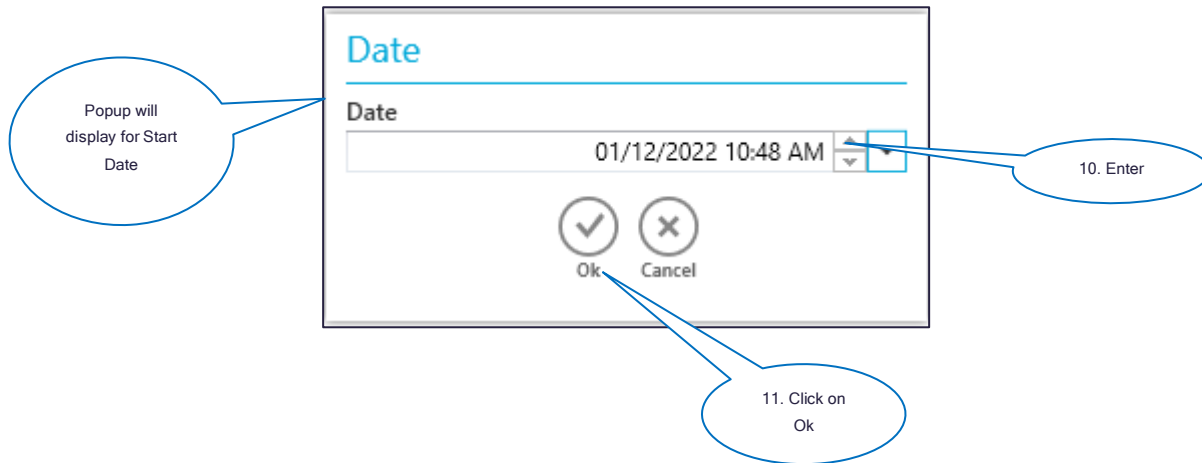
Update progress

Progress: 100

Progress Date: 01/Dec/2022 15

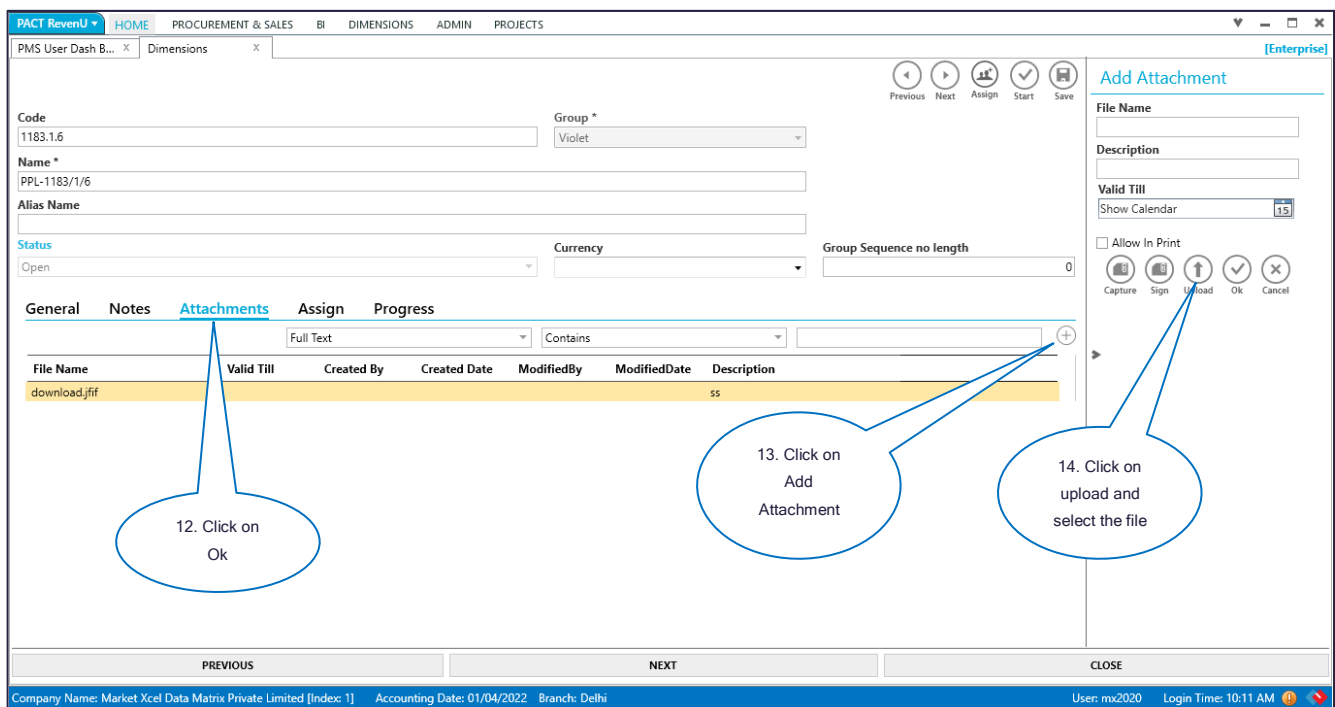
Note: completed

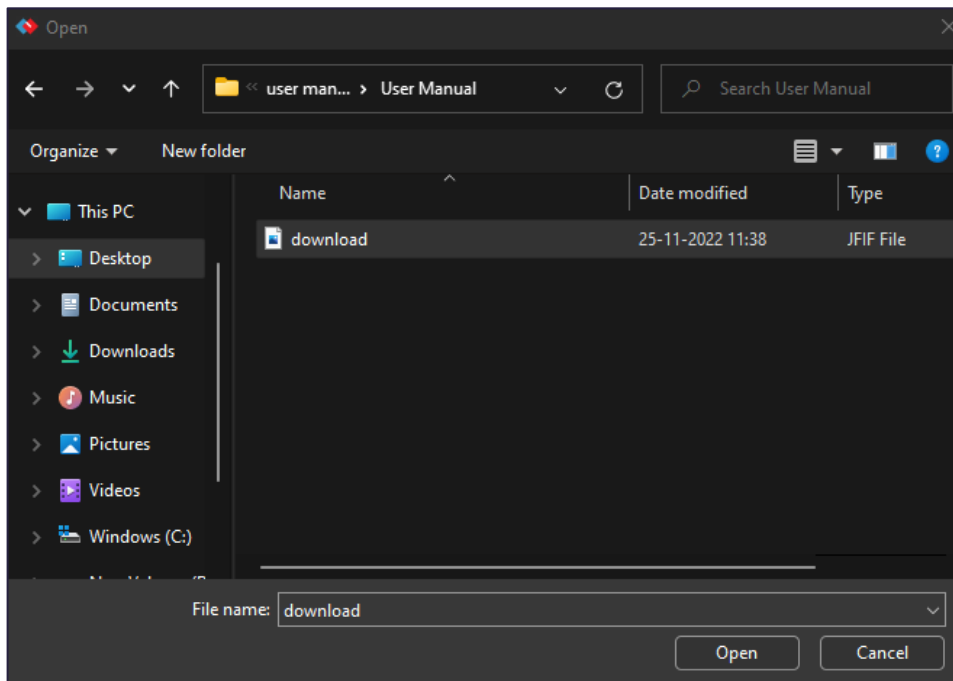
OK Cancel



STEP:4

If you need to add any attachments





PACT RevenU HOME PROCUREMENT & SALES BI DIMENSIONS ADMIN PROJECTS

PMS User Dash B... x Dimensions x

Previous Next Assign Start Save

Code: 1183.1.6 Group *: Violet

Name *: PPL-1183/1/6

Alias Name:

Status: Open Currency: Group Sequence no length:

General Notes **Attachments** Assign Progress

Full Text Contains

File Name	Valid Till	Created By	Created Date	ModifiedBy	ModifiedDate	Description
download.jfif						ss

PREVIOUS NEXT CLOSE

Company Name: Market Xcel Data Matrix Private Limited [Index: 1] Accounting Date: 01/04/2022 Branch: Delhi User: mx2020 Login Time: 10:11 AM

15. Enter File Name on Description

16. Click on Save

Add Attachment

File Name: C:\Users\moiru\Desktop\user manuals

Description:

Valid Till: Show Calendar 15

Allow In Print: ☐

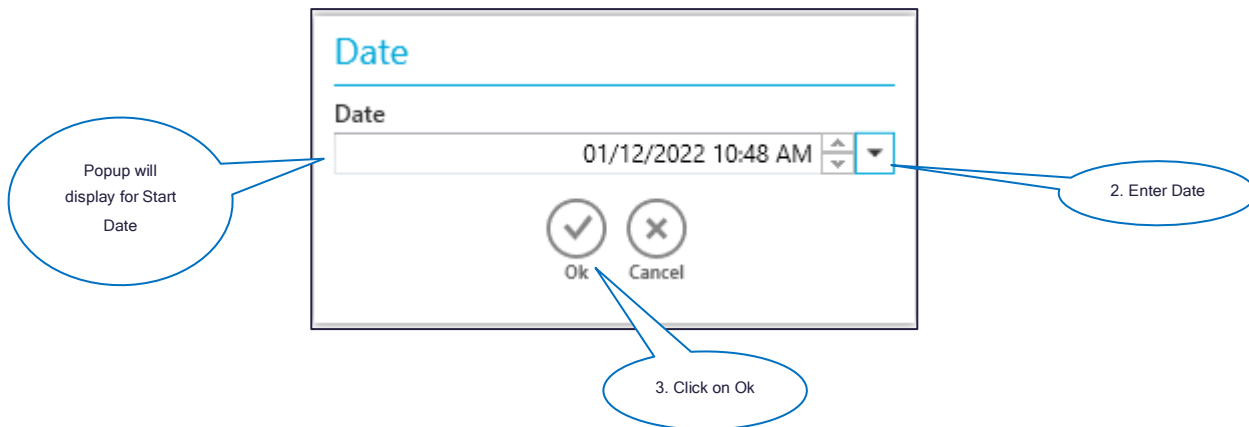
Capture Sign Upload Ok Cancel

5. Calendar

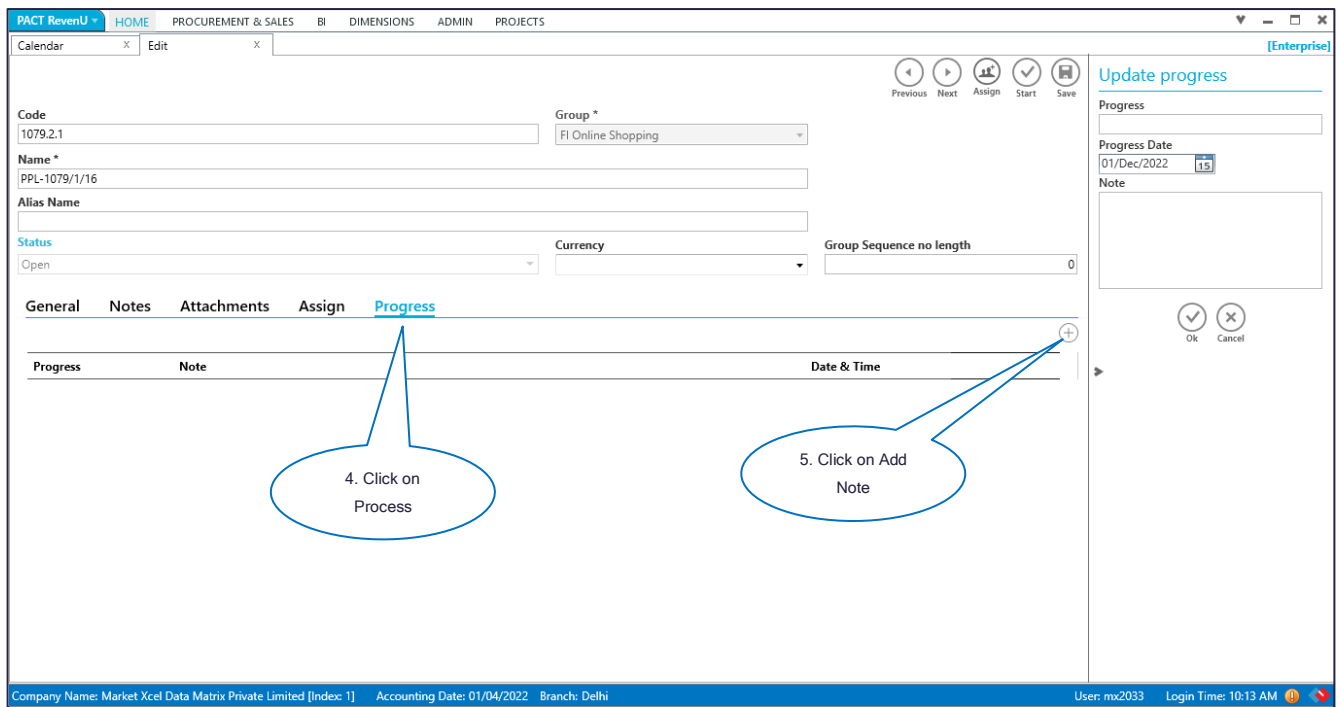
Navigation : Home >>Calendar.

The screenshot displays the PACT RevenU Calendar interface. The main area shows a monthly calendar for November 2022. A callout bubble points to a WBS element on November 22nd, labeled "Double Click on WBS Element". The right sidebar contains an "Activities" panel with fields for Type, Status, Subject, Start Date, End Date, All Day Activity, Customer Type, Customer, Contact Person, and Activities Assigned To. The bottom status bar shows "Company Name: Market Xcel Data Matrix Private Limited [Index: 1]", "Accounting Date: 01/04/2022", "Branch: Delhi", "User: mx2033", and "Login Time: 10:13 AM".



The screenshot shows the PACT RevenU "Start" button pop-up form. A callout bubble points to the "Start" button, labeled "1. Click on Start Button Pop up will Appear". The form contains fields for Code, Name, Alias Name, Status, Currency, Group Sequence no length, Group, Assigned To, Planned End Date, Activity Status, Actual Days, Project Percent, Contribution Percent, Actual Start Date, Phase, Planned Start Date, Completed Percent, Actual End Date, and Task Activities. The bottom status bar shows "Company Name: Market Xcel Data Matrix Private Limited [Index: 1]", "Accounting Date: 01/04/2022", "Branch: Delhi", "User: mx2033", and "Login Time: 12:07 PM".



STEP:1



Colour Difference

- Open 
- In Process 
- Close 