PMS USER MANUAL

Pact Software Service Pvt Ltd

8-2-686/K/15, Road No:12, Banjara Hills, Hyderabad - 500 028

Website: [www.pactsoft.com]

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Acronyms Used

* – Mandatory Field

DD – Drop Down

DF – Date Field

NF – Numeric Field

TF – Text Field

AT- Attachment

<u>PMS (Project Management System).</u>

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.

Selection of Company

Dashboard View

Process of Project Management

1. **Creation of Project Plan**

Project Plan

Navigation: Projects >> Project Plan

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
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- **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)
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- **Completed Percent (NF):** User need to enter dates manually
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STEP: 4

- Click on Post and document will be posted.

- Click on New 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... ×   [Enterprise]

UnAssign OM Task List   **PMS Module**

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

Project Plan

WBS Detail

Phases

Task Master

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
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...
PPL-1028/1/6	Fi Social Media Gro...	Allot an EIC	Pre-Kickoff	1028.1.6
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...
PPL-1028/1/6	Fi Social Media Gro...	Allot an EIC	Pre-Kickoff	1028.1.6
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 N
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 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-...	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,MX2033	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: mx2033   Login Time: 04:31 PM

- Click on the UnAssign OM Task list and Select Doc NO
- Open Project Plan and assing 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.

STEP:1

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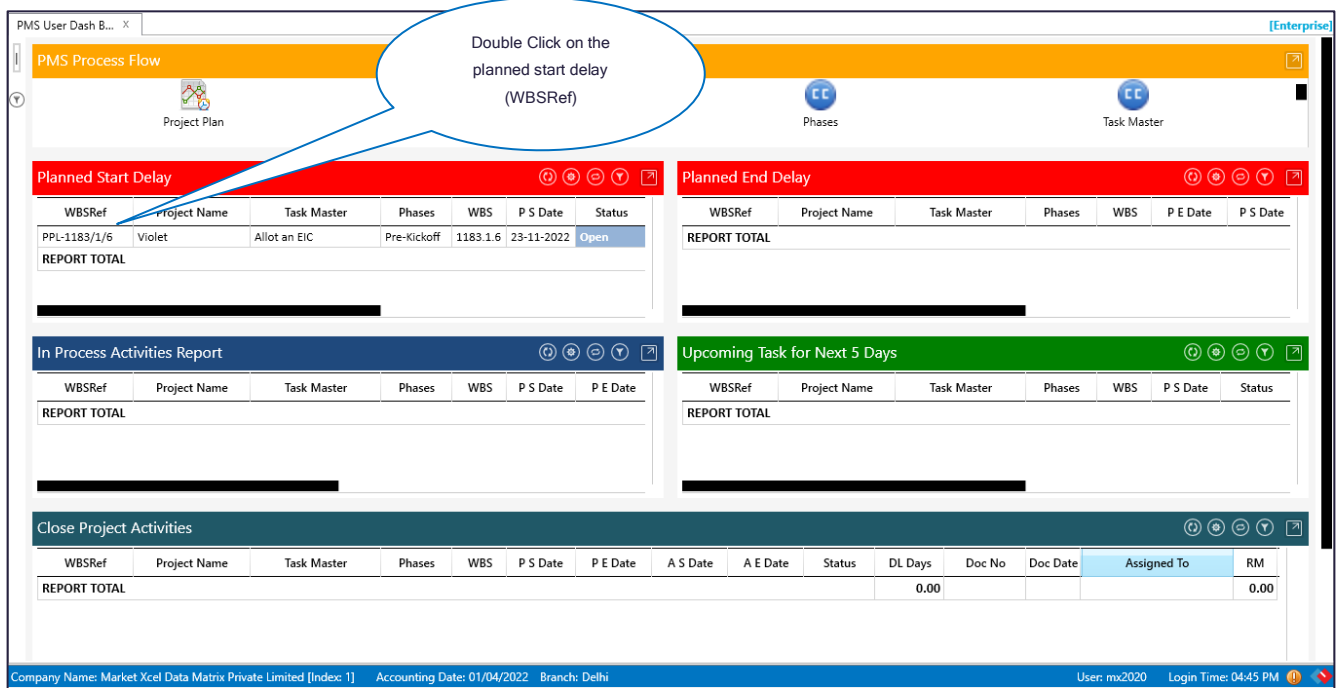- **Executive Name (DD):** Automatically selected while selecting the project
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STEP: 4

- Click on ![Post] and document will be posted.

- Click on ![New] to open a new document.

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4. EIC Update

STEP:1

1. Click on Start Button Pop up will Appear

Popup will display for Start Date

2. Enter Date

3. Click on Ok

STEP:2

STEP:3

Popup will display for Start Date

Date

Date

01/12/2022 10:48 AM

Ok   Cancel

10. Enter

11. Click on Ok

STEP:4

If you need to add any attachments

12. Click on Ok

13. Click on Add Attachment

14. Click on upload and select the file

16. Click on Save

15. Enter File Name on Description

5. Calendar

Navigation : Home >>Calendar.

1. Click on Start Button Pop up will Appear

Date

Date

01/12/2022 10:48 AM

Ok   Cancel

Popup will display for Start Date

2. Enter Date

3. Click on Ok

STEP:1
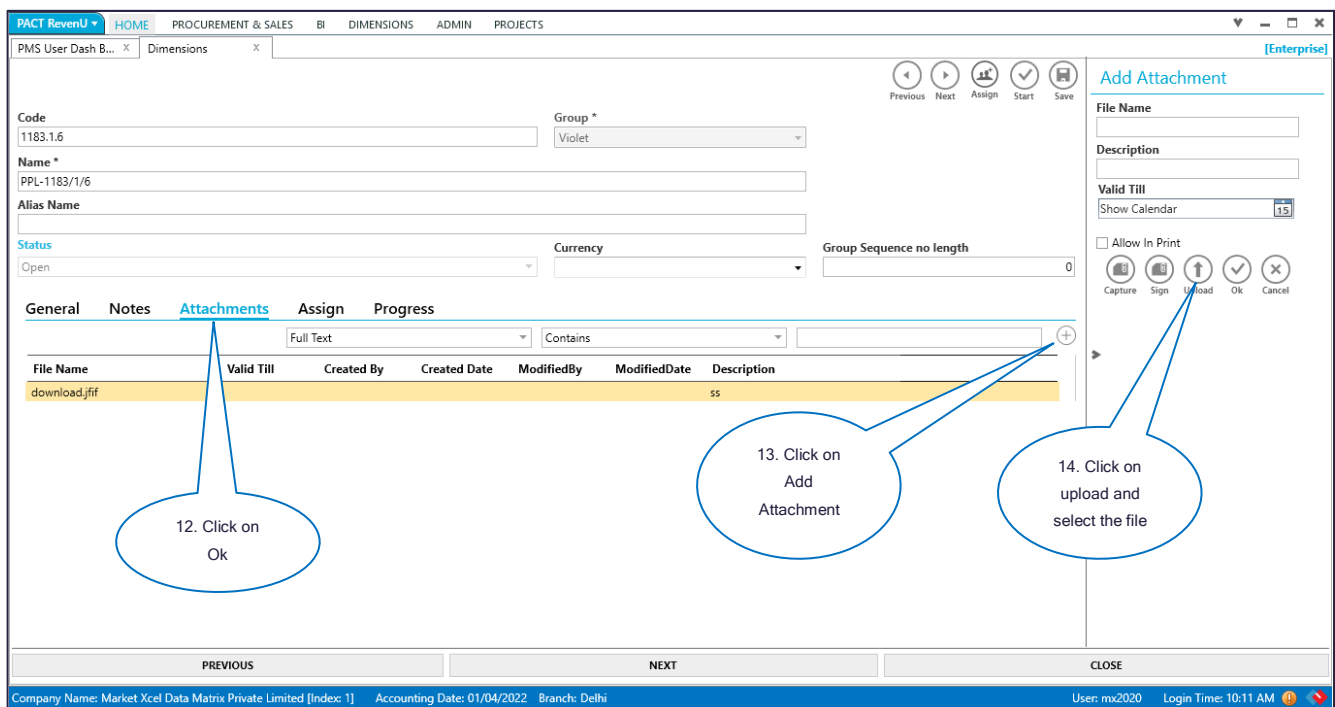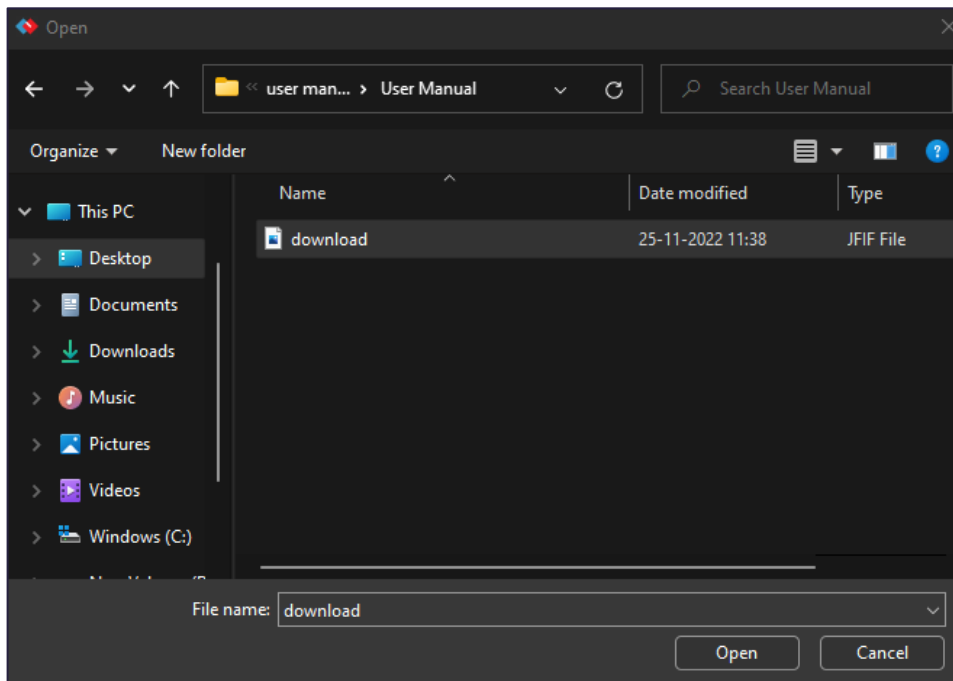
| PACT RevenU ▾ | HOME | PROCUREMENT & SALES | BI | DIMENSIONS | ADMIN | PROJECTS |

Calendar   Edit

[Enterprise]

Previous Next Assign Start Save

Update progress

Code
1079.2.1

Group *
FI Online Shopping

Name *
PPL-1079/1/16

Alias Name

Progress

Progress Date
01/Dec/2022

Note

Status
Open

Currency

Group Sequence no length
0

General   Notes   Attachments   Assign   **Progress**

| Progress | Note | Date & Time |

Ok   Cancel

4. Click on Process

5. Click on Add Note

Company Name: Market Xcel Data Matrix Private Limited [Index: 1]   Accounting Date: 01/04/2022   Branch: Delhi   User: mx2033   Login Time: 10:13 AM

PACT
BUSINESS SOLUTIONS

STEP:2

9. Click on Stop

6. Enter Process Percentage

7. Click on Add Notes

8. Click on OK

Popup will display for Start Date

10. Enter Date

11. Click on Ok
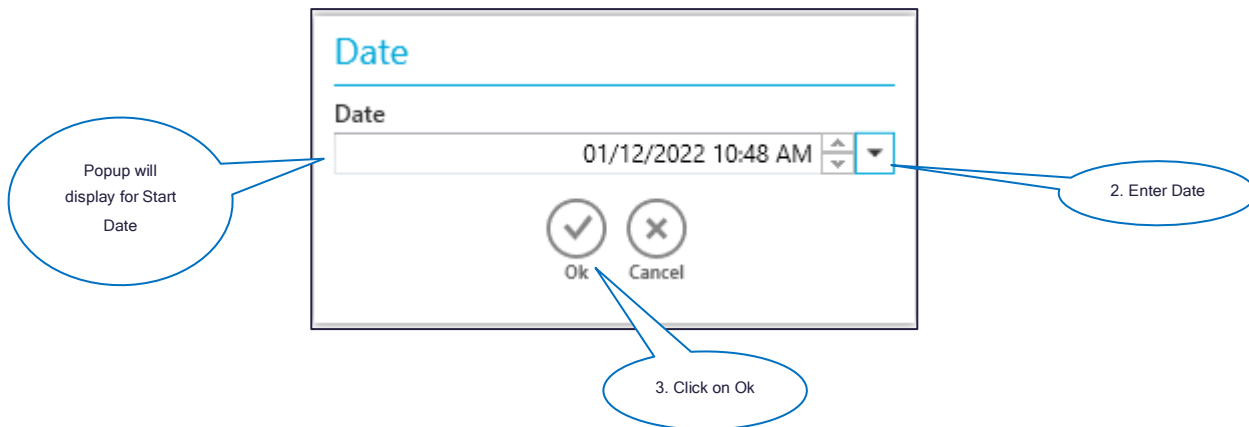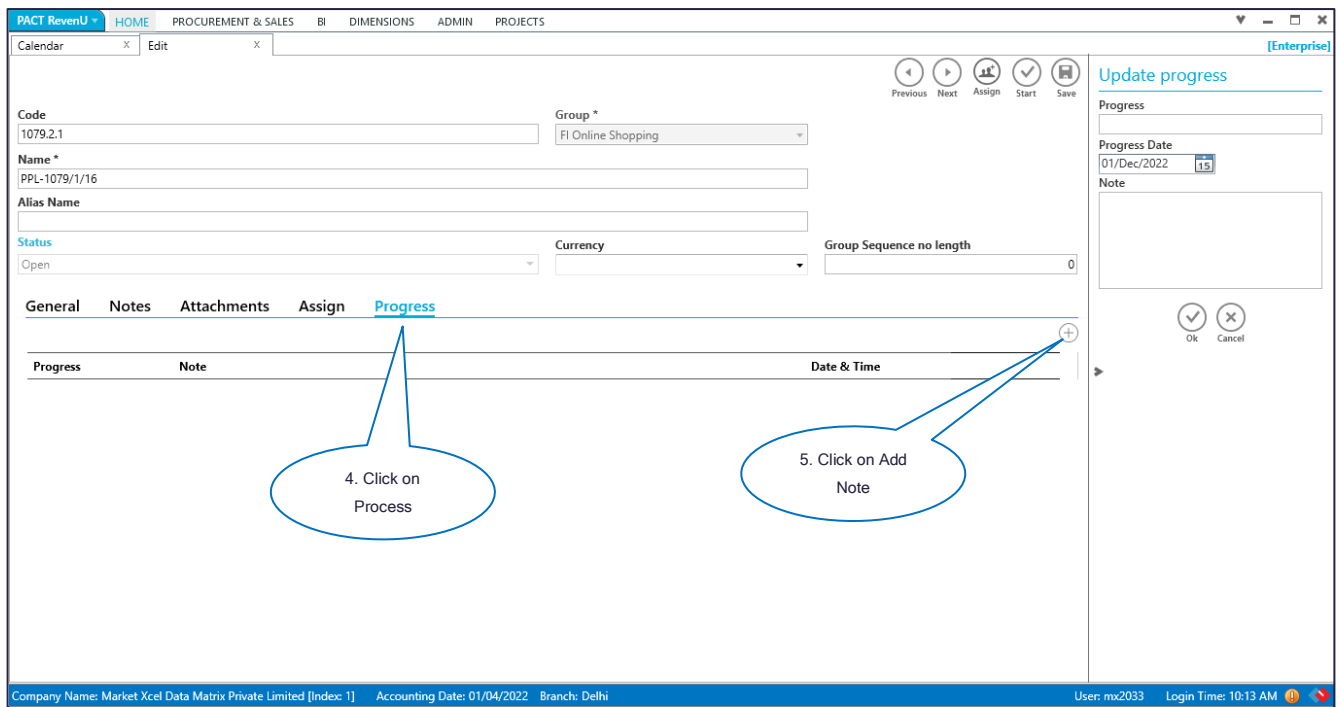
Colour Difference

- Open
- In Process
- Close