

USER MANUAL

1. Introduction

Chola PMS is a project management system built for organizations that run multiple projects across several departments — engineering, software, finance, HR, and beyond. Rather than giving everyone the same access to every project, Chola PMS structures access around four roles, so each person only sees and manages the tools relevant to their responsibilities.

1.1. Roles in Chola PMS

Super Admin

The Super Admin oversees the entire organization rather than any single project. Their responsibilities include:

- Verifying new Admin and Team Leader accounts before they can access the system
- Managing the organization's departments (adding, removing, and renaming them)
- Maintaining company branding — organization name and logo, shown throughout the system
- Reviewing and approving newly created projects
- Assigning an Admin to each approved project
- Monitoring organization-wide activity, including pending approvals and account verifications, from the dashboard

Admin

An Admin manages projects within their own assigned departments. Their responsibilities include:

- Creating new projects, scoped to the departments they belong to
- Assigning a Team Leader to an approved project
- Editing project details — timeline, budget, priority, and status
- Setting up review meetings for a project (frequency, time window, and location)
- Overseeing tasks and progress across the project as a whole
- Reviewing department-level and project-level reports

Team Leader

A Team Leader is responsible for the day-to-day running of a specific project they've been assigned to. Their responsibilities include:

- Creating and assigning tasks to team members
- Tracking task status across the project board (To Do, In Progress, On Hold, Completed)
- Uploading and managing project media (images and files) and tracking assets
- Coordinating the project's scheduled meetings
- Filling in department-wise and project-level reports
- Communicating with the project team through the project's discussion thread

Member

A Member is a team participant assigned to specific tasks within a project. Their responsibilities include:

- Viewing and completing tasks assigned to them
- Recording observations and updates on their tasks
- Uploading relevant files or images related to their work
- Participating in project communication and meetings
- Keeping their own profile and department details up to date

Vendor

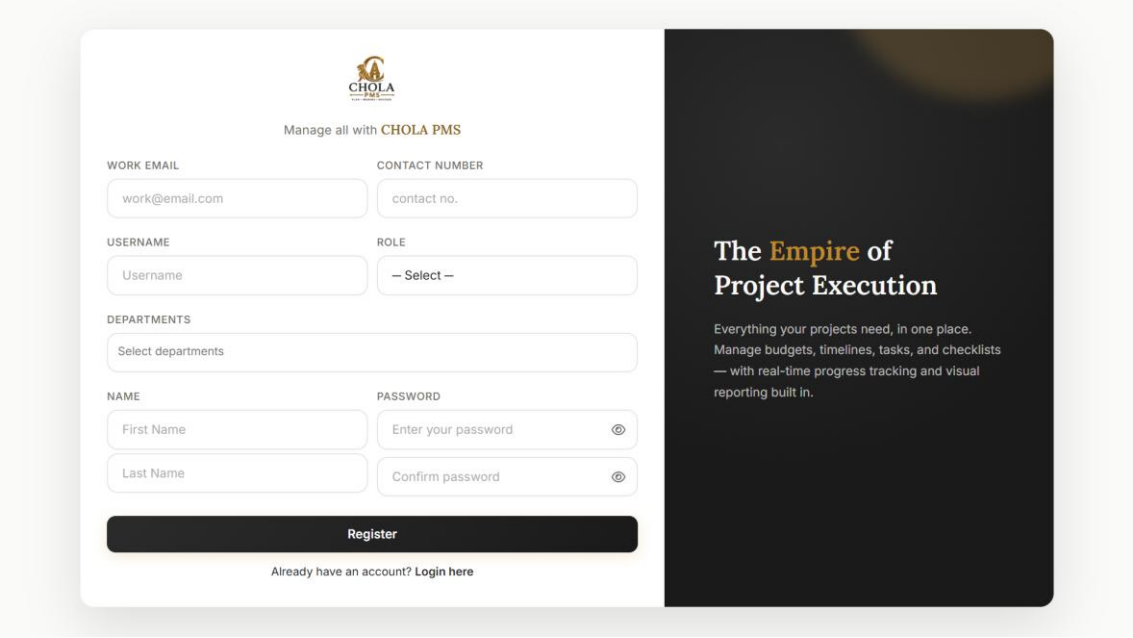
A Vendor is an external person or organization associated with a project or specific task. Vendors have **view-only access** to the projects, tasks, and subtasks they are associated with. They cannot modify project information or task-related data.

Their responsibilities and access include:

- Viewing projects, they are associated with
- Viewing tasks and subtasks associated with them
- Viewing relevant project, task, and subtask details
- Accessing associated project information for coordination and reference
- Participating in relevant project communication, if enabled
- Keeping their own vendor profile and business details up to date

Vendors cannot create, edit, delete, assign, or change the status of projects, tasks, or subtasks.

2. Registration



Before logging in for the first time, a new user must register for an account from the registration page.

To register:

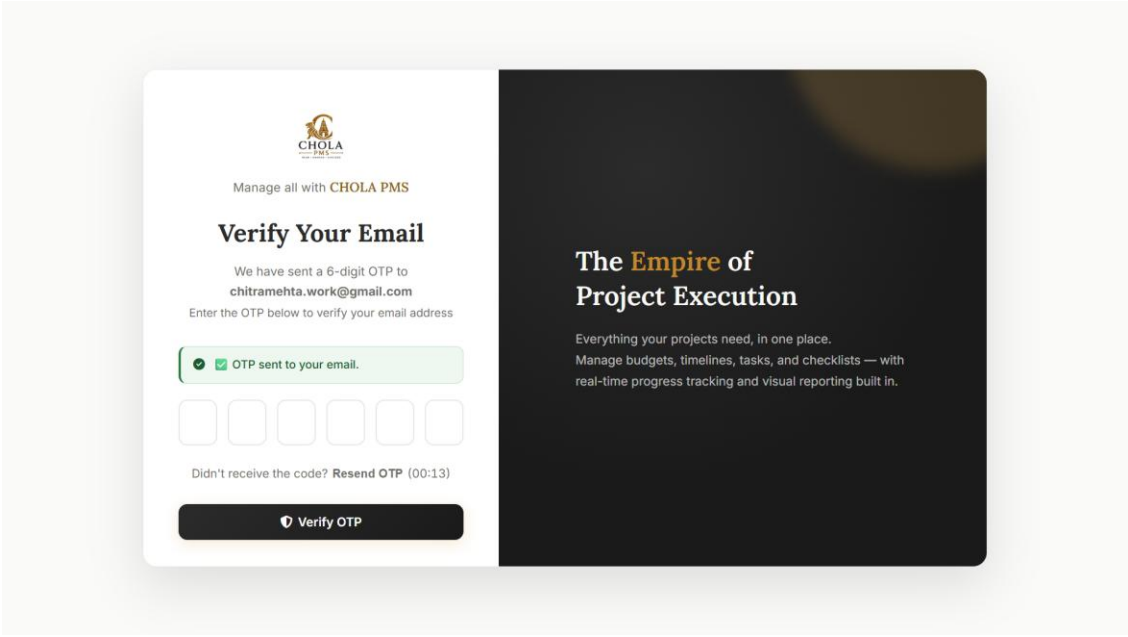
1. Enter your account details:
   - **Work Email** — your official work email address. This must be unique; you cannot register with an email already in use on another account.
   - **Contact Number** — a reachable phone number. This must also be unique per account.
   - **First Name and Last Name**
   - **Role** — Member, Team Leader, or Admin. This determines your access permissions once your account is verified — see Section 1.1 for what each role can do.
   - **Department(s)** — select one or more departments. Choose carefully: you'll be assigned to projects and tasks based on the department(s) you select here.
   - **Username** — the identifier you'll use to log in.

- **Password**

2. Make sure your password meets all requirements:
   - Minimum 8 characters
   - At least one uppercase letter
   - At least one digit
   - At least one special character
3. **Confirm Password** and make sure both fields match exactly.
4. Select **Register** to submit your account.
5. An OTP will be sent to your registered email address as part of the verification process. Complete this step to confirm your email.

> **Note:** Submitting your registration does not grant immediate access. Your account is placed under review, and a higher authority (your Admin or Super Admin) must verify it before you can log in. You'll gain access once verification is complete — see Section 3, Verification.

3. Verification



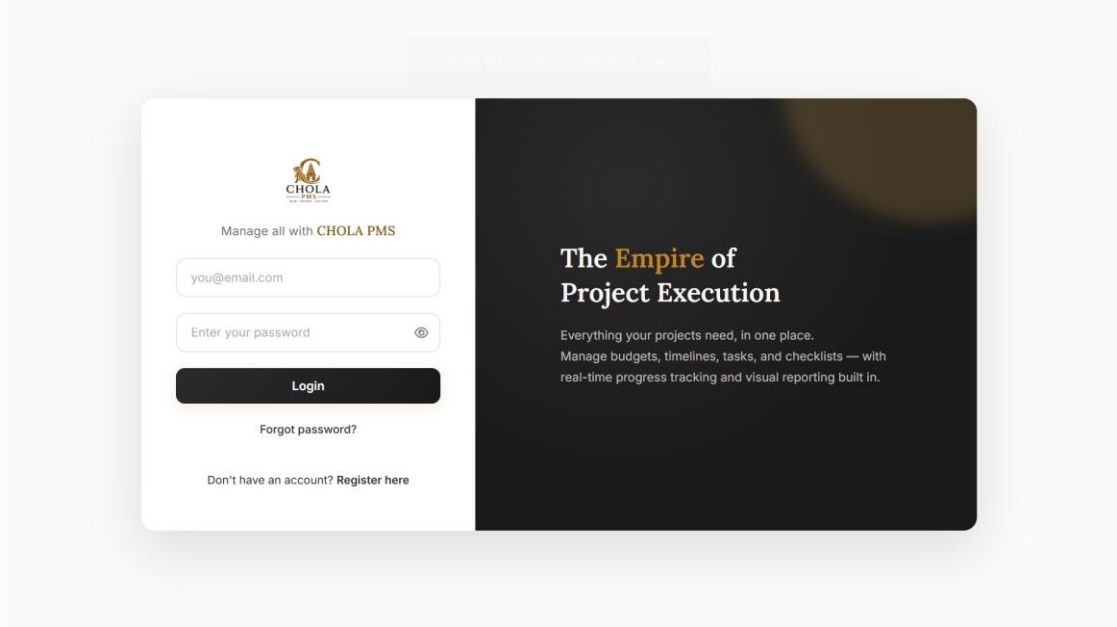
Enter the One-Time Password (OTP) sent to your registered email address, then select “Verify OTP” to proceed. If you have not received the OTP, select “Resend OTP” to request a new code.

If you attempt to log in before verification is complete, you will see an “Account Verification Pending” message.

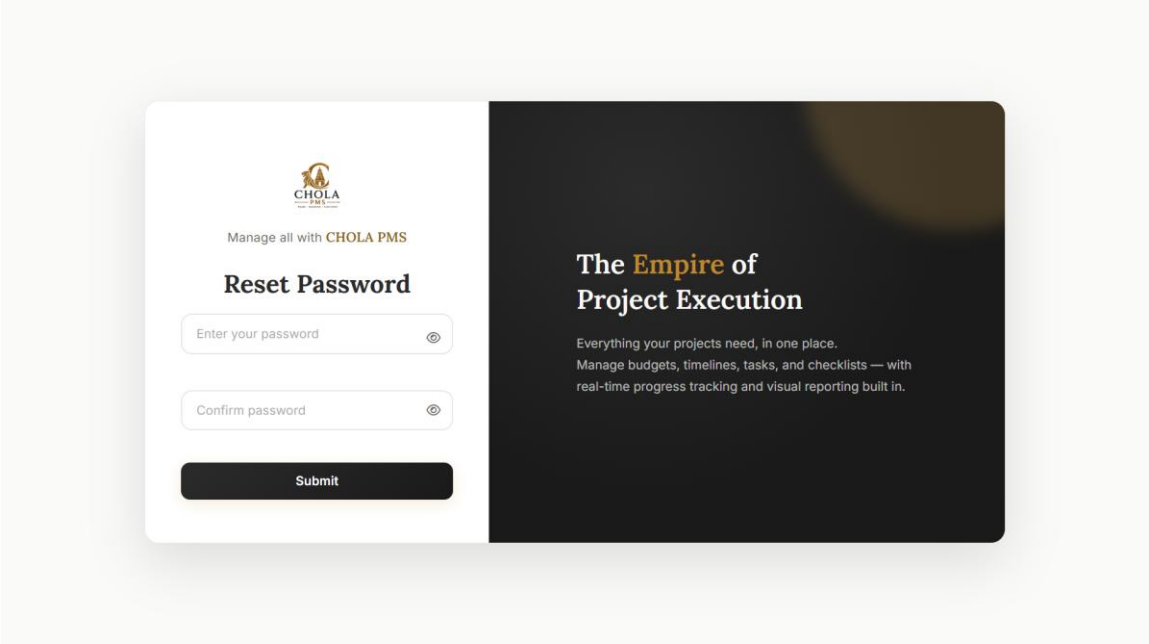
4. Login

Select **Login** from the home page. Enter your registered email ID and password.

Check the **Remember Me** box to skip OTP verification on future logins from the same device. If you have forgotten your password, select **Forgot Password?** on the login page.



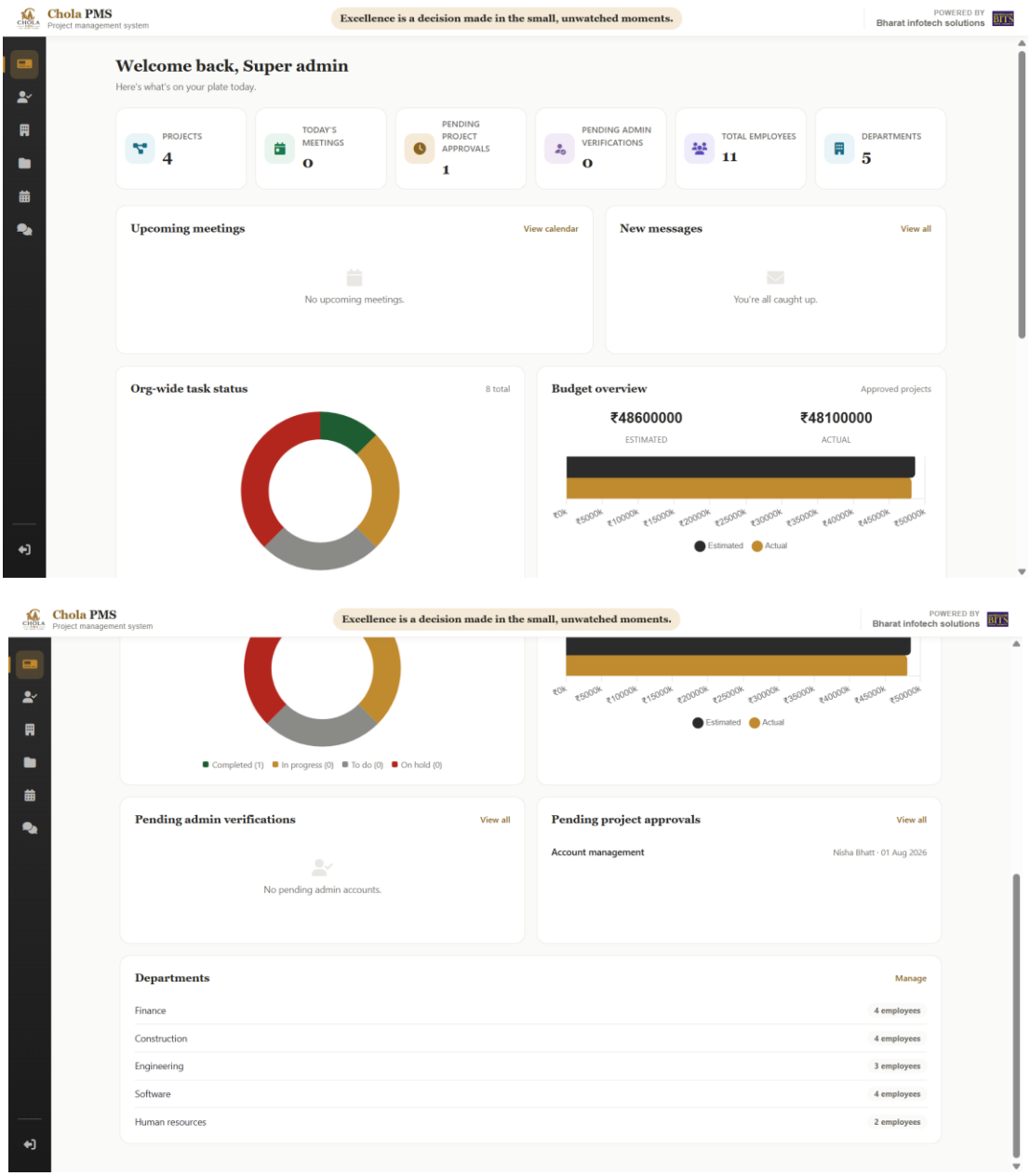
5. Password Reset



6. A password reset link will be sent to your registered email address.
7. Open the link. You will be taken to the password reset page.
8. Enter your new password and re-enter it to confirm.
9. Ensure your password meets all requirements: minimum 8 characters, at least one uppercase letter, at least one digit, at least one special character.
10. Both passwords must match. If they do not, an error message will be displayed.
11. Once reset successfully, log in using your new credentials.

6. Admin Panel

6.1. Super Admin Dashboard



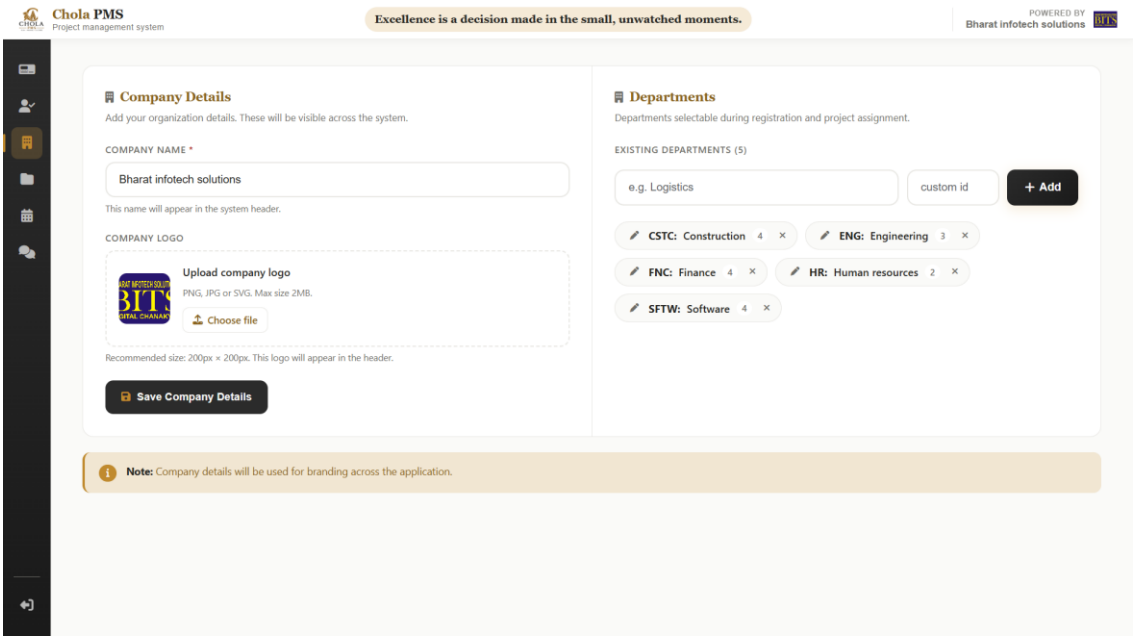
The Super Admin Dashboard provides a centralized overview of the organization's project management activities. It displays key statistics such as total projects, today's meetings, pending project approvals, admin verifications, employees, and departments.

The dashboard also provides Upcoming Meetings, New Messages, Organization-wide Task Status, Budget Overview, Pending Admin Verifications, and Pending Project Approvals for quick administrative action.

The Departments section shows every department and its employee count, with an option to manage departments.

This dashboard gives the Super Admin a quick snapshot of organizational progress, pending actions, resources, communication, and financial status from a single screen.

6.2. Company Details



This page allows the Super Admin to configure the organization's basic information and manage departments within Chola PMS.

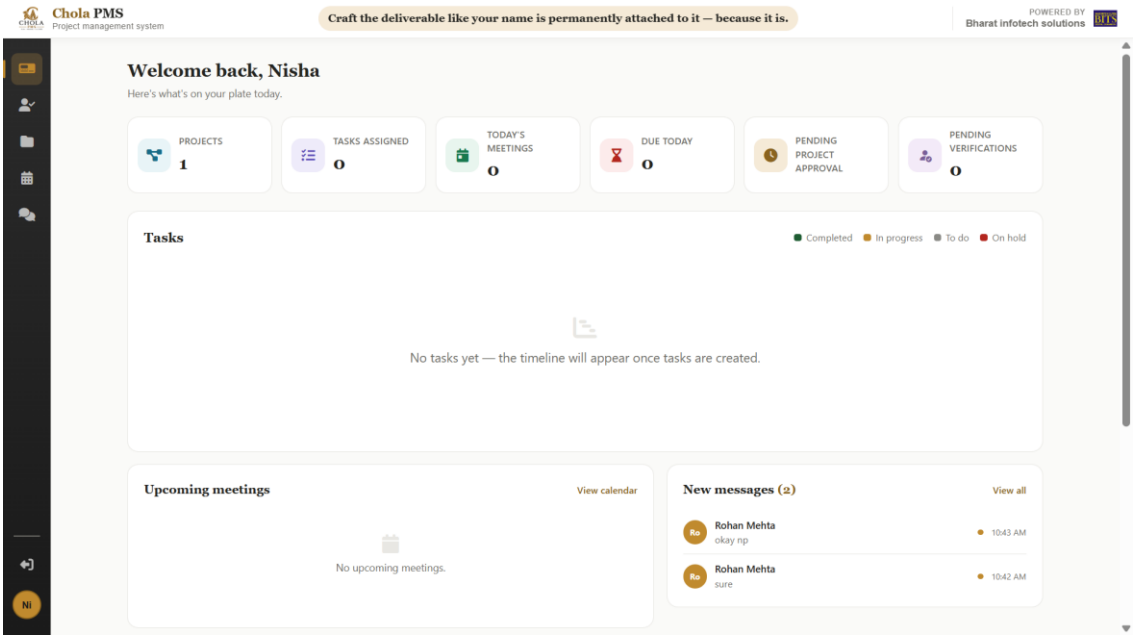
Company Details are used for application branding.

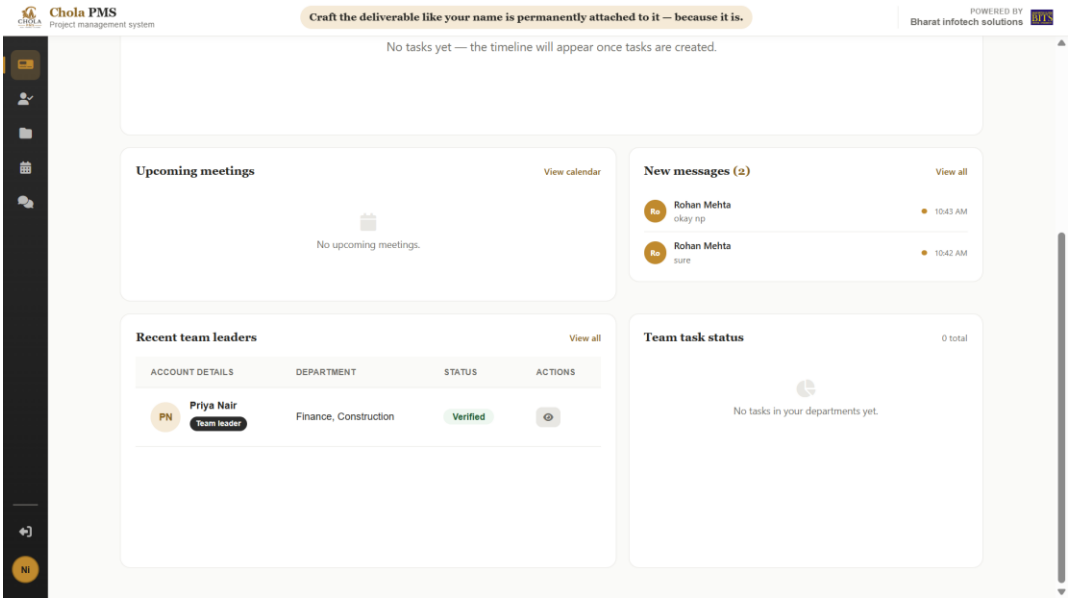
Departments are used during employee registration and project assignment, while the **Department Custom ID** is used in project and task numbering. Each department also displays the number of associated employees.

Select the edit button in the department list to edit a department's name or its custom ID.

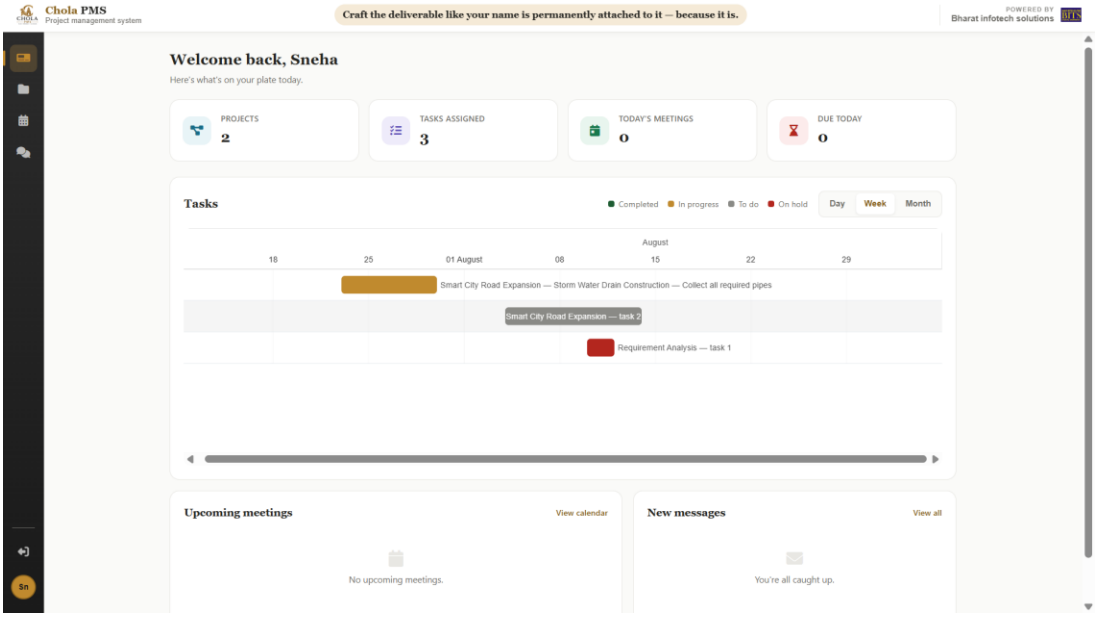
7. Dashboard

7.1. Admin / Team Leader Dashboard



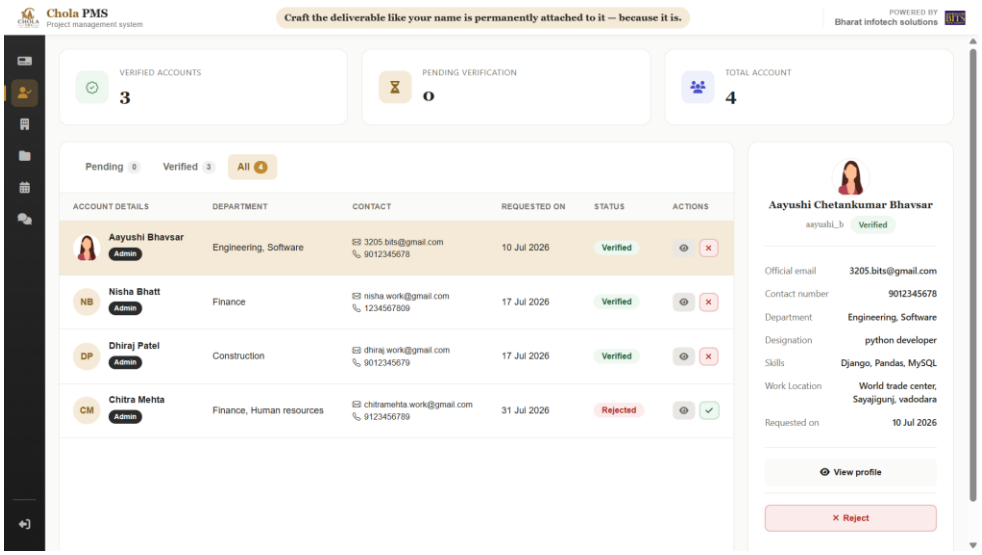


7.2. Member Dashboard



The dashboard provides a quick overview of a user's projects, assigned tasks, meetings, due tasks, pending approvals, and notifications. It also displays the task timeline, upcoming meetings, recent messages, recent team leaders, and department-wise task status for easy monitoring of daily activities.

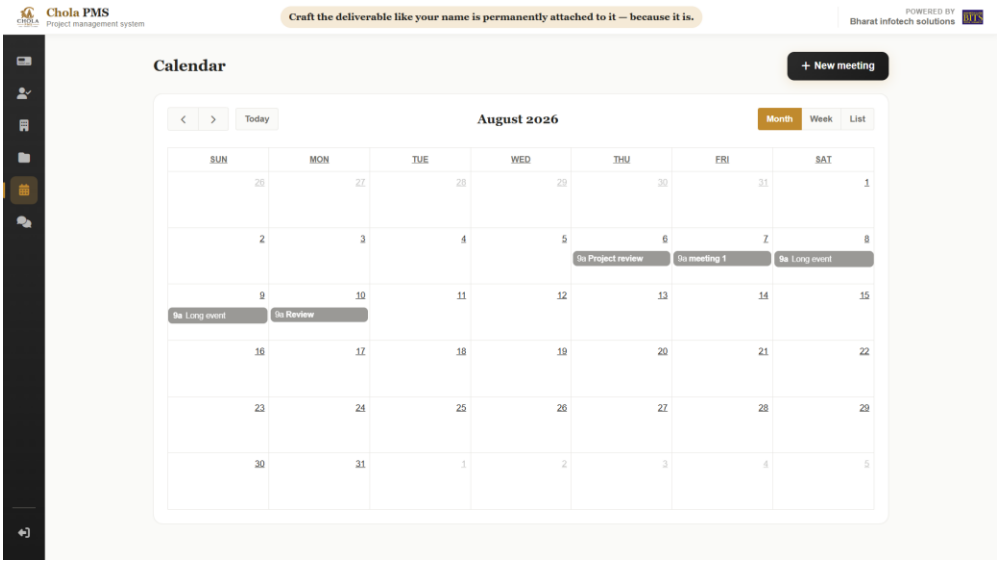
8. Employee Verification



This page allows higher authorities to review and manage employee and admin account verification requests. It provides an overview of verified, pending, and total accounts, along with user details such as department, contact information, designation, and work location.

The reviewer can view profiles, verify or reject accounts, filter the account list by Pending, Verified, or All, and review individual account details before taking action.

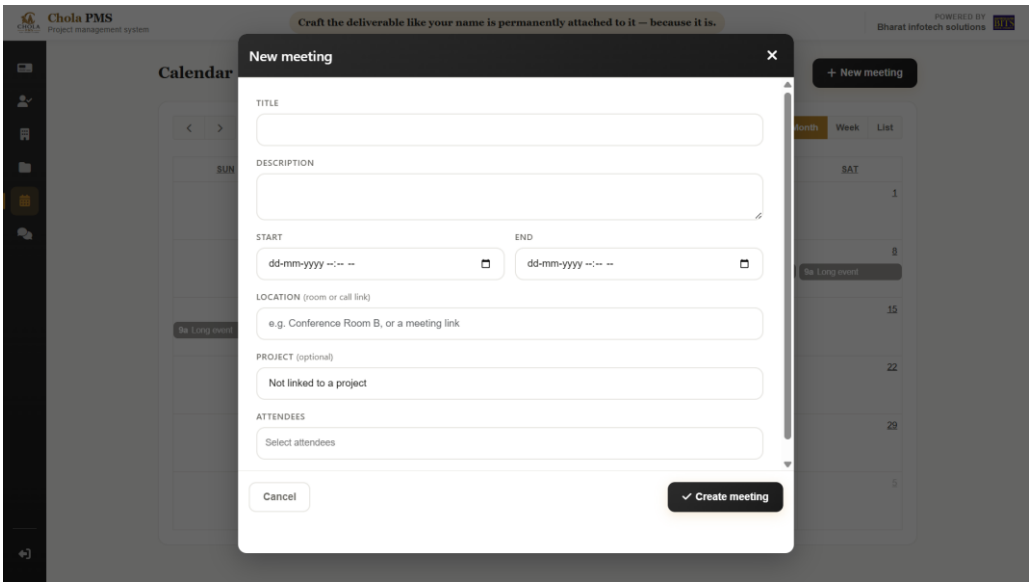
9. Meeting Calendar



The Calendar page allows users to view and manage meetings in a calendar format. Users can switch between Month, Week, and List views and navigate between dates.

Create a meeting: select any day on the calendar to open the new meeting form.

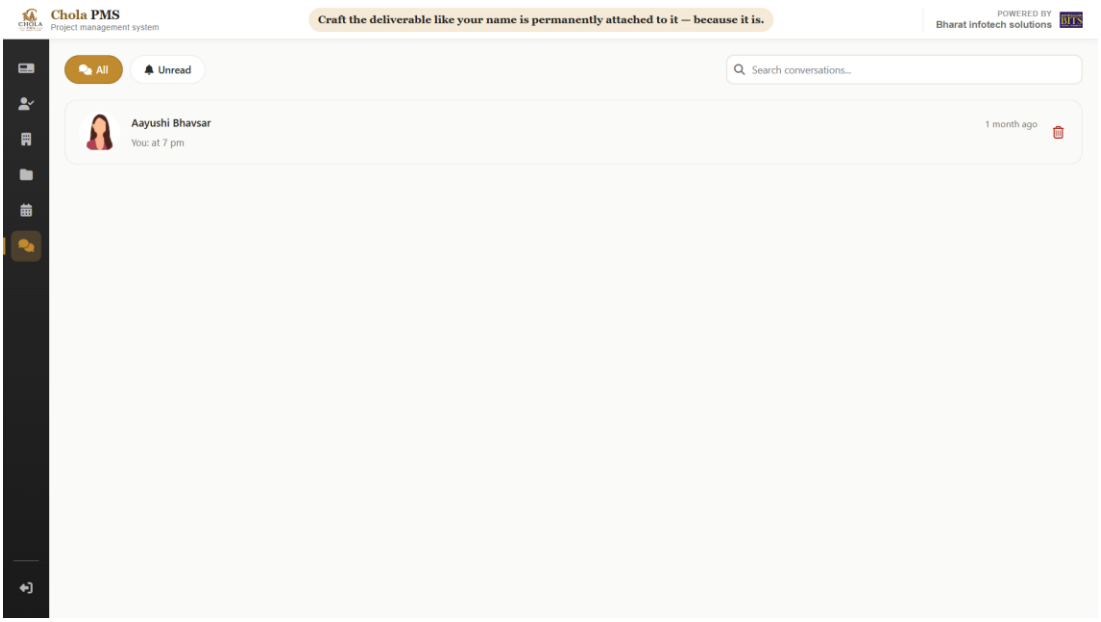
View / edit a meeting: select an existing meeting to view its details or edit it. Users can edit only the meetings they created, while the Super Admin can edit any meeting.



The New Meeting form allows a user to schedule a meeting by providing the title, description, start and end date/time, location, project, and attendees.

After entering the required details, select **Create Meeting** to schedule it. The meeting will then appear on the calendar for the selected date and time.

10. Communication



The Chat List page displays all available conversations. Users can switch between All and Unread conversations and search for a specific conversation using the search bar. A conversation can be opened by selecting it, or removed using the delete option.



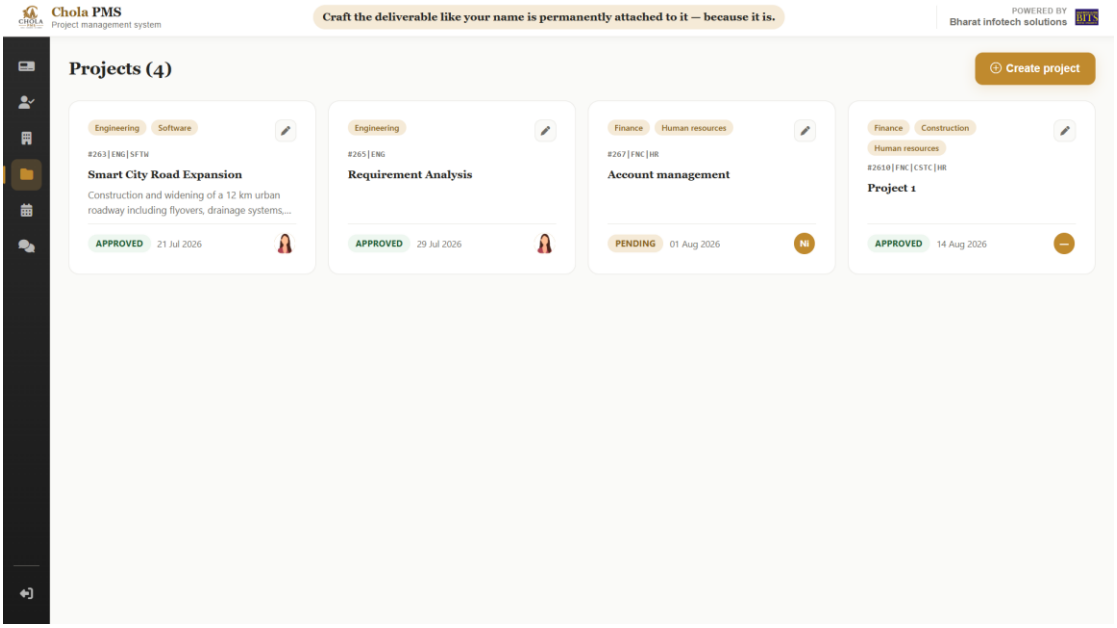
The Chat page provides a real-time conversation interface between users. Users can type and send messages using the message input field. The page also provides options to view the other user's profile and close the conversation.

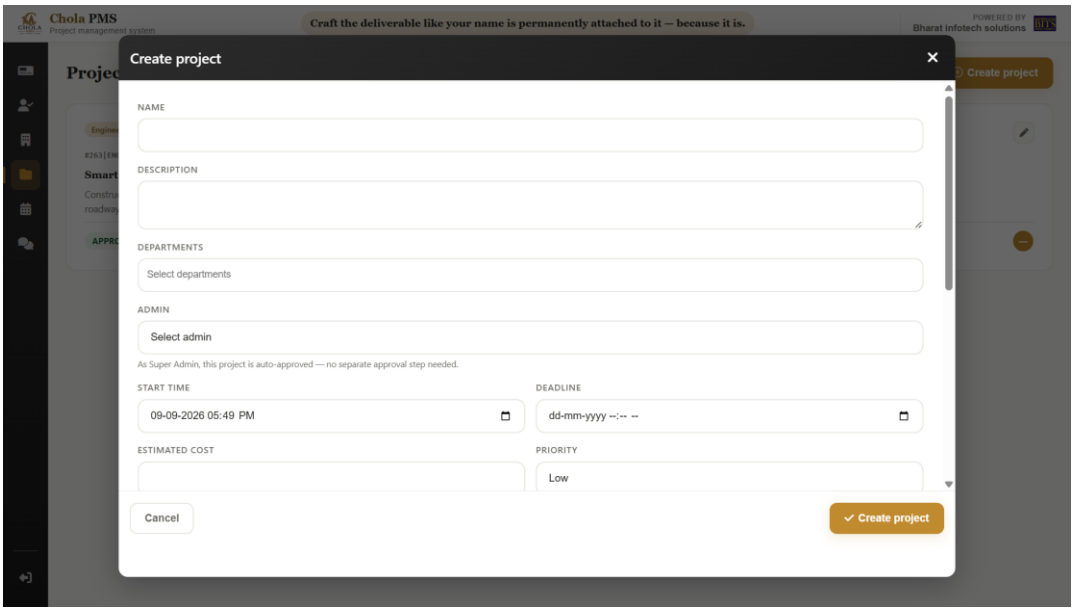
11. Projects

11.1. Project List

This page allows users to view and manage the projects available to them. Each project card displays key information such as the project name, departments, project ID, status, creation date, and assigned Admin.

Users with appropriate permissions can create a new project or edit an existing project's details. Select a project to view its detailed information.





The Create Project form allows authorized users to define all project-related information, including project details, departments, timelines, budget, priority, and other project settings.

The departments selected determine which teams are involved in the project and their participation in project activities.

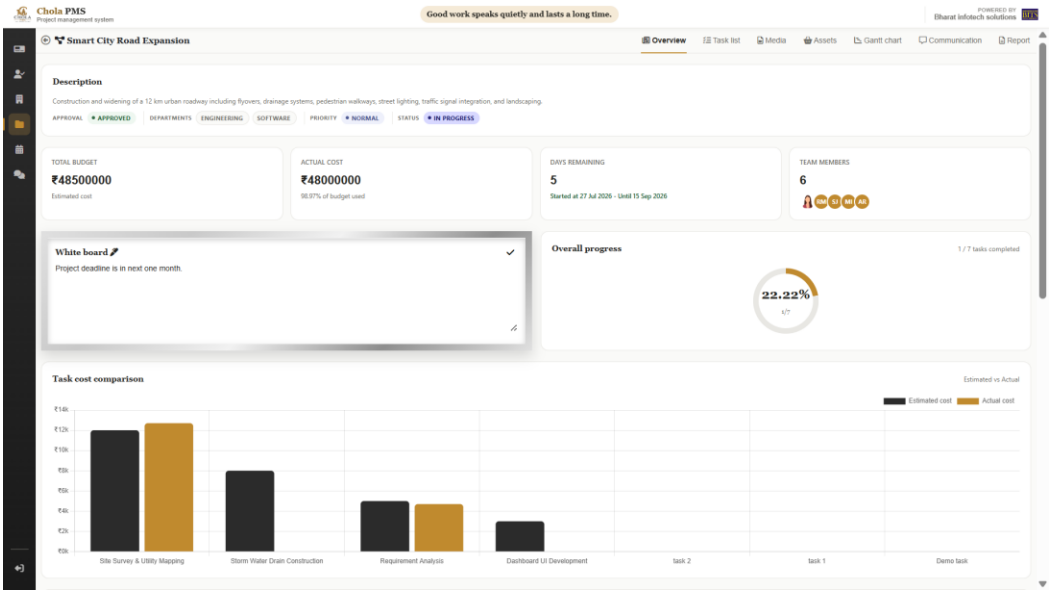
Review meetings can be scheduled automatically by defining the review frequency (number of days between meetings), the total number of reviews, the meeting time range, and the week-off days to exclude from the schedule.

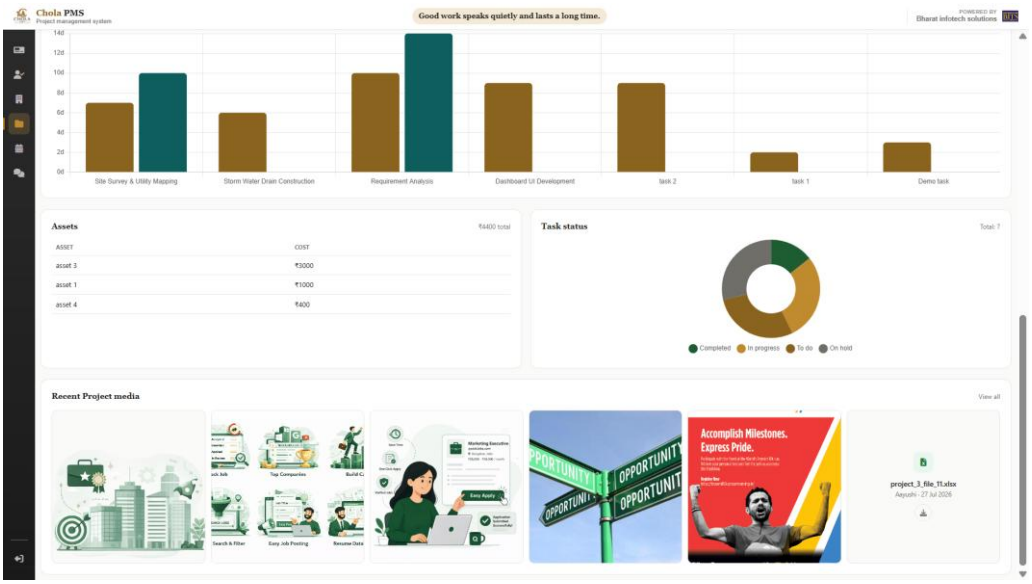
The Super Admin can also customize who can view the project budget, ensuring financial information is accessible only to selected project members.

11.2. Project Overview

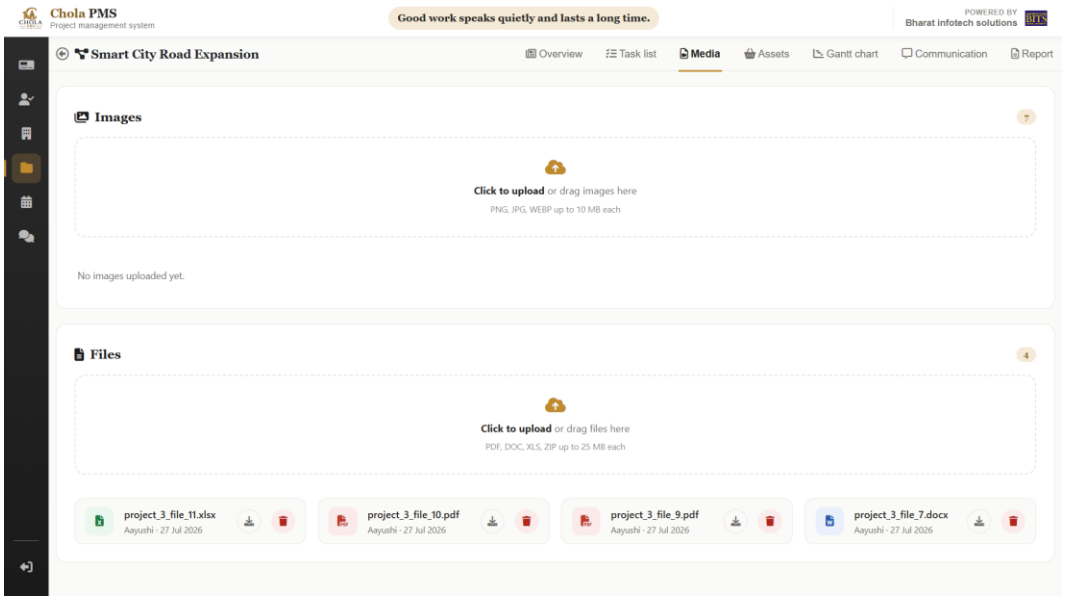
The Project Overview page provides a centralized view of the project's current status, progress, financial position, team, tasks, assets, and project media.

It displays key information such as total budget, actual cost, remaining days, team members, overall task progress, and task-wise estimated vs. actual costs. It also provides a task status summary, asset details, and recently uploaded project media, allowing users to quickly assess the overall health and progress of the project.





11.3. Project Media

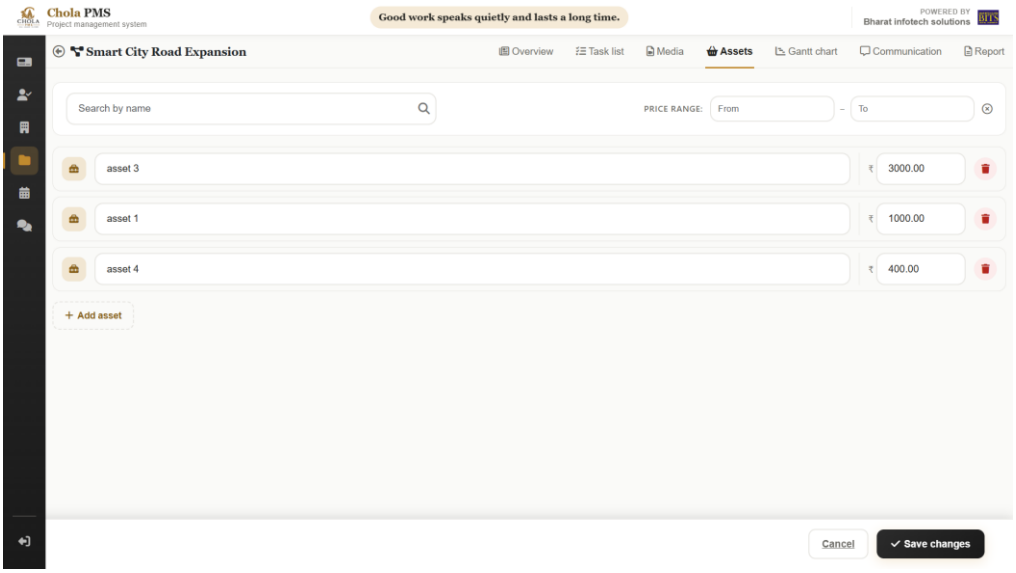


The Media page is where a project's images and files are stored, separate from any individual task's media. Images and files are managed in two independent sections:

- **Images** — select “Click to upload” or drag image files directly onto the panel. Accepted formats are PNG, JPG, and WEBP, up to 10 MB each.
- **Files** — select “Click to upload” or drag files directly onto the panel. Accepted formats are PDF, DOC, XLS, and ZIP, up to 25 MB each.

Each uploaded item shows who uploaded it and when. Files can be downloaded or removed individually using the icons next to each entry.

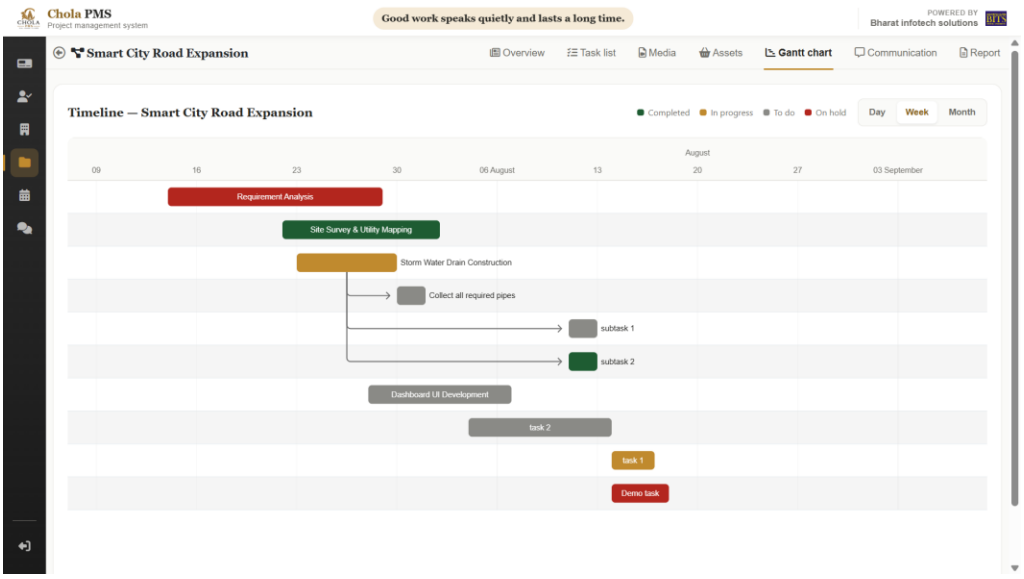
11.4. Project Assets



The Assets page tracks physical or billable items associated with a project — equipment, materials, or any other resource with a cost attached to it.

Use the search bar to find an asset by name, or the Price Range filter to narrow the list by cost. Select “Add asset” to record a new asset with its name and cost, and use the delete icon next to an entry to remove it. Select “Save changes” once you're done to apply your updates.

11.5. Gantt Chart



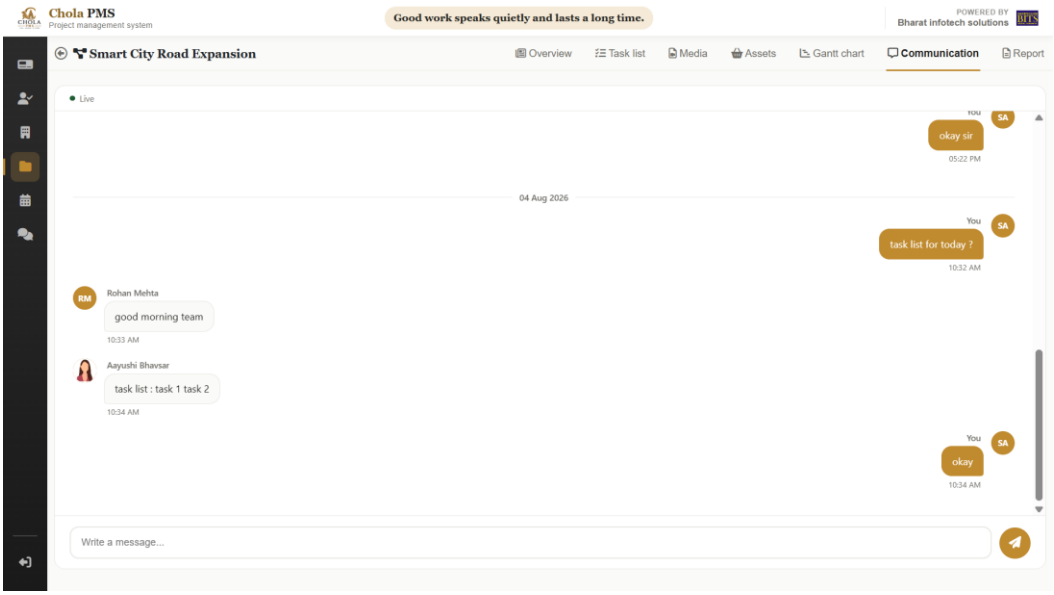
The Gantt chart shows every task and subtask on a single visual timeline, so the overall shape of a project's schedule can be seen at a glance.

Switching views: use the Day, Week, or Month buttons in the top-right corner to change the time scale shown.

Reading the bars: each bar represents a task or subtask, color-coded by status — Completed, In Progress, To Do, or On Hold, as shown in the legend at the top of the chart.

A subtask's bar is connected to its parent task with a connector line, so dependencies between related work are easy to trace.

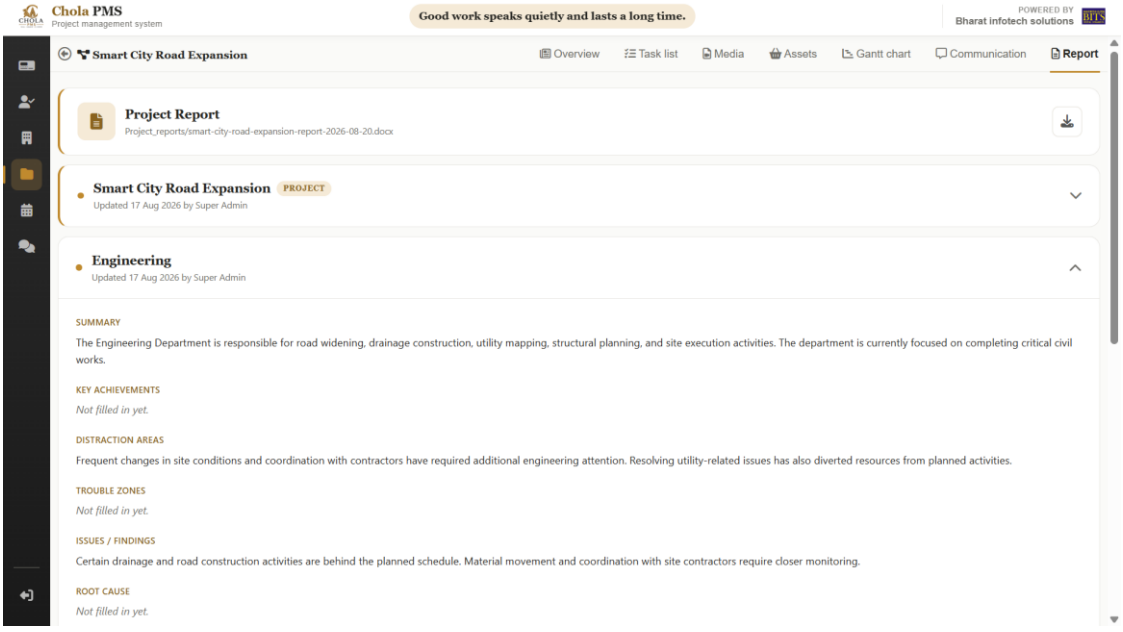
11.6. Project Communication Space



Each project has its own dedicated discussion space, separate from direct messages between individual users. This is where the whole project team — Admin, Team Leader, and Members — can post updates, ask questions, and coordinate in one shared thread.

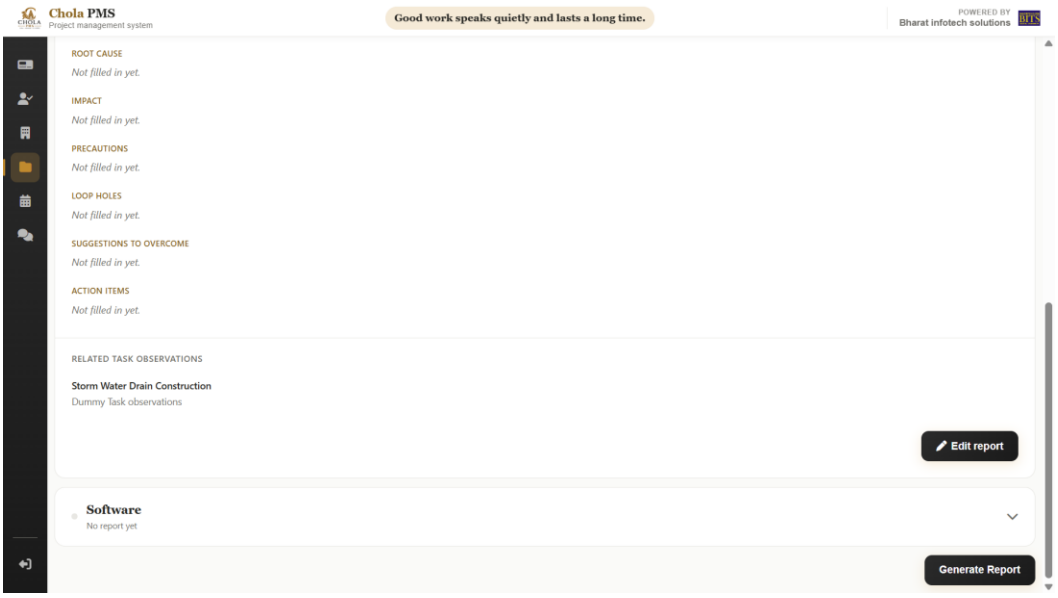
Messages appear in real time as they're sent, grouped by date. Type a message in the field at the bottom of the page and send it to post it to the thread immediately.

11.7. Project Report



The Project Report page lets the team document a structured review of the project, either for the project as a whole or broken down by department.

Each report — project-level or department-level — covers the same set of fields: Summary, Key Achievements, Distraction Areas, Trouble Zones, Issues / Findings, Root Cause, Impact, Precautions, Loop Holes, Suggestions to Overcome, and Action Items. A field left blank shows “Not filled in yet.”



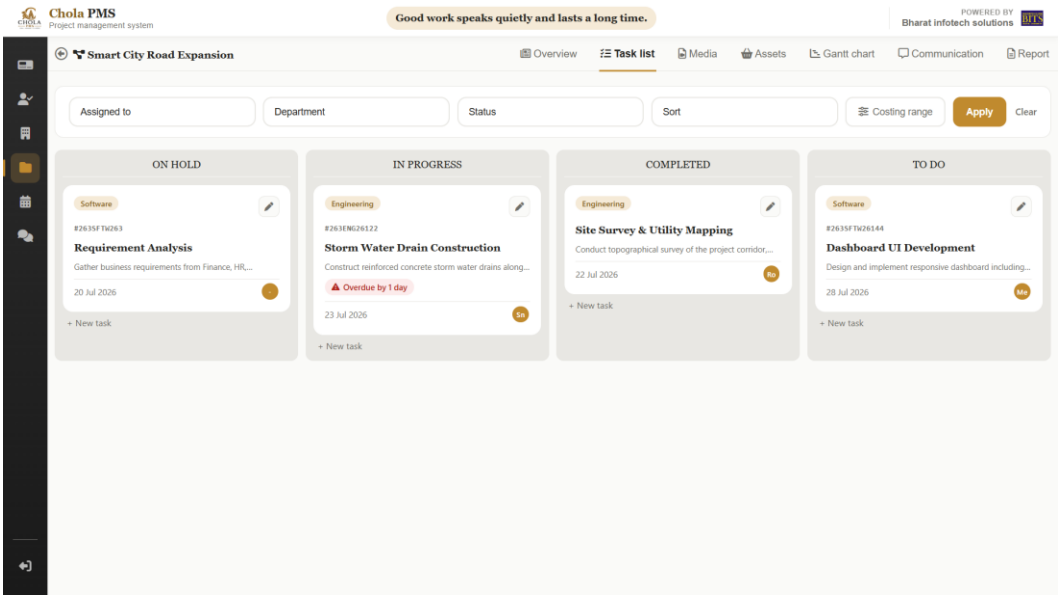
Where relevant, a department's report also lists Related Task Observations — notes pulled in automatically from that department's tasks.

Select **Edit report** on any section to fill in or update its fields. Departments that haven't been reported on yet are shown collapsed with a “No report yet” label.

Once the relevant sections are filled in, select **Generate Report** to produce a downloadable Word document combining every section into a single formatted report.

12. Tasks

12.1. Task List

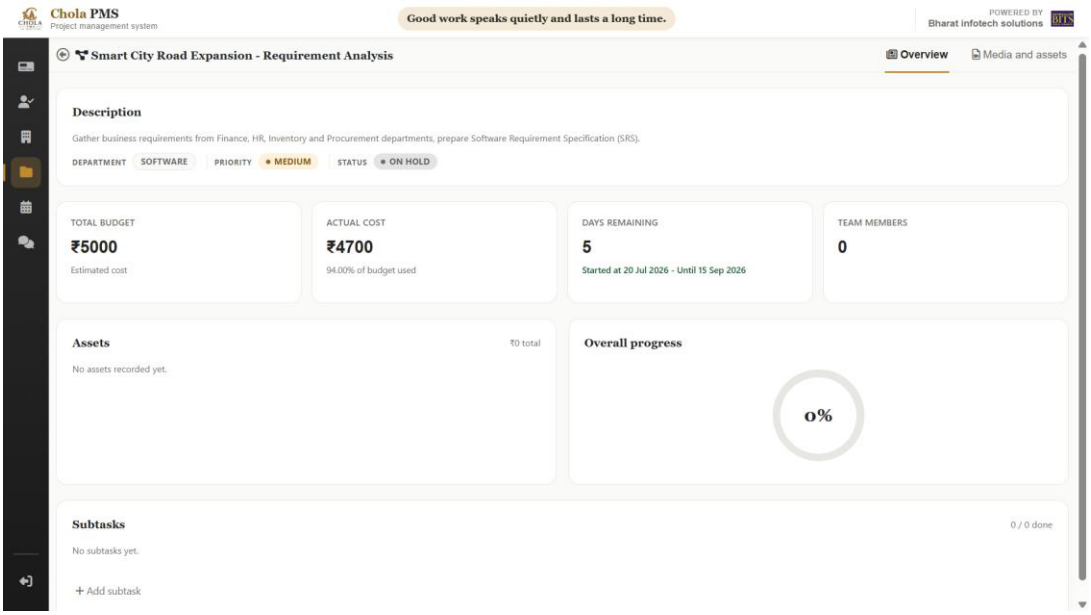


This page allows users to view and manage tasks assigned to them. Users with appropriate permissions can create a new task or edit an existing task's details. Select a task to view its detailed information.

The task list can be filtered by assignee, department, status, date, and cost range to quickly narrow down to the tasks that matter most.

12.2. Task Overview

The Task Overview page shows the full detail behind a single task — its description, department, priority, and status — alongside its budget, timeline, and progress.

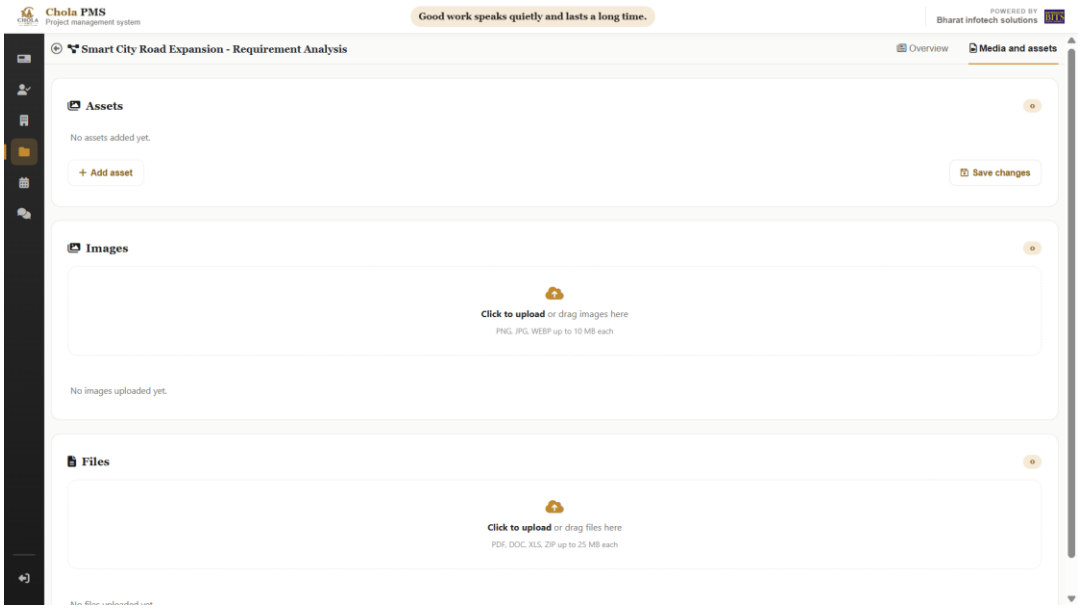


Key figures shown include Total Budget (estimated cost), Actual Cost, Days Remaining, and Team Members assigned to the task. The Assets panel lists any assets recorded specifically against this task, and Overall Progress shows completion as a percentage.

The **Subtasks** section lists any subtasks created under this task, with their own completion count. Select “Add subtask” to break the task down further.

Select **Media and assets** at the top of the page to manage files, images, and assets specific to this task — see Section 12.3.

12.3. Media and Assets



This page manages the assets, images, and files attached to a single task, kept separate from the project-level Media and Assets pages covered in Sections 11.3 and 11.4.

- **Assets** — select “Add asset” to record a new asset against this task, then “Save changes” to apply it.
- **Images** — select “Click to upload” or drag image files onto the panel. Accepted formats are PNG, JPG, and WEBP, up to 10 MB each.
- **Files** — select “Click to upload” or drag files onto the panel. Accepted formats are PDF, DOC, XLS, and ZIP, up to 25 MB each.

13. Troubleshooting / FAQ

I didn't receive my OTP.

Check your spam or junk folder first. If it still hasn't arrived after a few minutes, select “Resend OTP” on the verification page to request a new code.

I forgot my password.

Select **Forgot Password?** on the login page and follow the reset link sent to your registered email — see Section 5, Password Reset.

A project I created isn't showing up as active.

Newly created projects require Super Admin approval before they become active. Check the project's status on the Project List page — it will show as pending until approved.

My uploaded file or image didn't appear.

Confirm the file matches the accepted format and size limit for that upload panel (see Sections 11.3, 11.4, and 12.3 for the specific limits). Files outside these limits will not be accepted.

14. Glossary

Super Admin — The organization-wide administrator responsible for account verification, department management, and project approval.

Admin — Manages projects within their assigned departments, including project setup and Team Leader assignment.

Team Leader — Manages the day-to-day execution of a specific project, including task assignment and tracking.

Member — A team participant assigned to specific tasks within a project.

Department — An organizational unit (e.g., Engineering, Software, Finance) used to scope project and task assignment.

Approval — The status of a project indicating whether it has been reviewed and approved by a Super Admin (Pending, Approved, or Rejected).

Status — The current progress state of a project or task — To Do, In Progress, On Hold, or Completed.

Priority — The urgency level assigned to a project or task — Low, Normal, Medium, or High.

Review Meeting — A meeting automatically scheduled for a project based on a defined frequency, time window, and week-off days.

Asset — A physical or billable item, with an associated cost, tracked against a project or a task.

Gantt Chart — A visual timeline showing every task and subtask across the life of a project.

15. Support & Contact

For issues not covered in this manual, contact your organization's Super Admin, or reach out to Bharat Infotech Solutions support for technical assistance with Chola PMS.

> **Note:** Support contact details (phone/email) have not been supplied for this document and should be added here before distribution.