

Atlas — SA Engagement Tracker

User Manual

A screen-by-screen guide to every feature in the application

Atlas is where the Solution Architect (SA) team tracks opportunities, logs time, forecasts capacity, manages engagement milestones, and keeps notes on every deal — all in one place. This manual walks through every screen in the application, what it is for, and how to use it.

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1. Introduction

1.1 What is Atlas?

Atlas is a single web application the SA organisation uses to run its day-to-day operating rhythm: which opportunities each Solution Architect is engaged on, how many hours they log against each one, whether the team is over- or under-allocated, and where every deal sits in the engagement process (from first scoping call through contract signature). It replaces spreadsheets with one shared, always-current source of truth.

1.2 Who uses it, and for what

Role	What they mainly do in Atlas
Solution Architect (SA)	Logs weekly time against opportunities and internal work, submits the week, checks their own dashboard and upcoming milestones.
SA Lead / manager	Everything an SA does, plus reviews their team's capacity, allocation status and opportunity assignments; edits SA Directory records for their reports.
BU Lead	Read-only view across the pipeline, capacity and engagement data to track business performance.
Admin	Full access — manages users, groups and permissions, opportunities, milestones, and every system setting (countries, activities, billable stages, etc.).

Exactly which of the screens below a given person can see — and whether they can only view or also edit — is controlled by Access Control (Section 15). The sidebar automatically hides pages a person has no access to.

1.3 Core concepts

- **Opportunity** — a sales deal the SA team is engaged on (an account, a deal size, a sales stage, and a process-milestone workflow stage such as SVR or DR2).
- **SA (Solution Architect)** — a person in the SA Directory, with an expertise area, a region/country, a weekly capacity in hours, and usually a lead/manager.
- **Work row** — one line of logged or forecast time: an SA, a week, and either an opportunity or an internal activity (training, admin, etc.), with hours attached.
- **Week submission** — the weekly status of an SA's timesheet: not started, draft (saved but not sent), or submitted. Allocation Status and the automated reminder emails are both built on this.
- **Milestone** — a calendar date tied to an opportunity (most commonly SVR and DR2). **Process milestone** is a different, related idea: a shared, ordered workflow stage (e.g. "4 - SVR") that every opportunity progresses through.
- **Access group** — a named permission set (Admin, SAs, SAs Lead, BU Lead by default). Every person belongs to one or more groups; their effective access to each feature is the highest level granted by any of their groups.

2. Getting started

2.1 Signing in

Atlas uses “email-first” sign-in: type your email address and click Continue. Atlas looks up how your account is configured and shows you the right next step automatically.

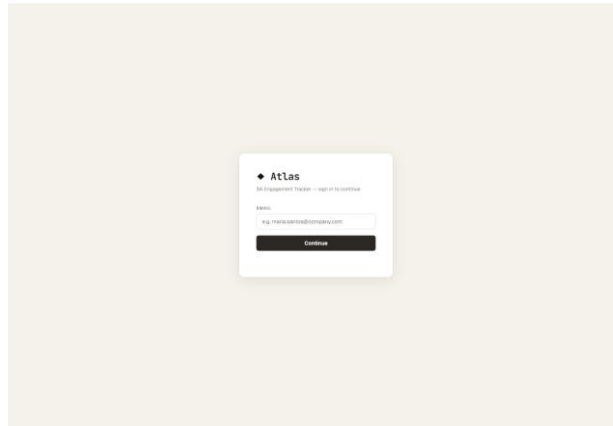


Figure 1 — the sign-in screen

1. Type your email address and select **Continue**.
2. **If your account uses a password:** the password field appears — enter your password and select **Sign in** (or press Enter).
3. **If your account uses Microsoft sign-in:** a “Sign in with Microsoft” popup opens automatically so you can authenticate with your Microsoft 365 account. Nothing else to type in Atlas.

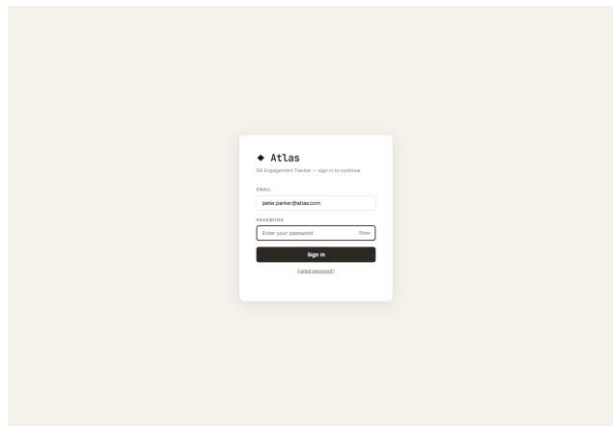


Figure 2 — the password step, revealed after Continue

2.2 First login and forced password changes

NOTE A brand-new account (or one just reset by an admin) is flagged to change its password at next sign-in. After you enter the temporary password, Atlas opens a “Set a new password” screen before it lets you into the app — this step cannot be skipped or closed.

Choose a password of at least 8 characters and confirm it. Once accepted, you are signed in normally.

2.3 Forgot your password?

On the sign-in screen, type your email address and select **Forgot password?**. Atlas always replies with the same message (“If that email belongs to an Atlas account, a reset link is on its way”) whether or not the address is registered — this is intentional and protects account privacy. If you have an account, check your email for the reset link, which opens the same “set a new password” screen described above.

2.4 Changing your password anytime

Once signed in, select **Change password** at the bottom of the sidebar. Enter your current password once, then your new password twice, and confirm.

2.5 Signing out

Select **Sign out** at the bottom of the sidebar. This simply discards your session in the browser — no server-side action is needed, so it takes effect immediately.

3. Navigating Atlas

Every screen in Atlas is reached from the left-hand sidebar, grouped into four sections:

Section	Pages	What it covers
Workspace	Dashboard, My Timesheet	Your personal daily/weekly view.
Opportunities	Opportunities, Milestones, Engagement Notes	The sales pipeline the SA team supports.
Reports	Capacity (includes the Forecast trend), SAs Notes, Opp per SA, Allocation Status	Team-wide staffing and reporting views.
Admin	SA Directory, Settings, Access Control	Directory upkeep and system configuration — Settings and Access Control are visible only to Admins by default.
Help	Help & resources (modal)	Reference material and short training videos — see Section 3.1.

A page you don't have permission to see simply doesn't appear in your sidebar — there's nothing to configure yourself; ask an Admin if you believe you're missing access you need (see Section 15).

NOTE Atlas is a single-page application: pages load instantly without a full browser refresh, and your changes save automatically as you make them — there's nothing to click to save.

NOTE Across every week-based screen — My Timesheet, Dashboard, Capacity, Allocation Status, Milestones, and the SAs Notes cutoff week — the week Atlas treats as “current” and highlights by default is always the upcoming week (today's calendar week + one), not the week in progress, since the SA team plans and allocates ahead of time. You can always navigate back to the present week with the ← arrow on the page you're viewing.

3.1 Help — manual and training videos

The **Help** button (marked with a ? icon) sits at the bottom of the sidebar, below Access Control, and is always visible regardless of your access level. Selecting it opens a small “Help & resources” panel rather than loading an Atlas page:

The screenshot displays the Atlas application interface. On the left is a dark sidebar with the 'Atlas' logo and a list of navigation items: Dashboard, My Timesheet, Opportunities, Milestones, Engagement Notes, Reports, Capacity, SAs Notes, Opps per SA, Timesheet Status, Admin, SA Directory, Settings, Access Control, and Help. The main content area is titled 'Workspace / Dashboard' and shows a 'Dashboard' for user 'Parker, Peter' covering the period 'Sep 14 - Sep 20, 2020'. It features four summary cards: 'Billable this week' (0.0h), 'Internal this week' (8.0h), 'Active Opportunities' (5), and 'Next Key Date' (DR2 - Sep 10). Below these are sections for 'My active opportunities' and 'Next SVR & DR2'. A 'Help & resources' modal is open in the center, listing links for 'User Manual', 'How to provide weekly report', and 'Manage weekly report'. At the bottom of the sidebar, there are buttons for 'Change password' and 'Sign out'.

Figure 3 — the Help & resources panel

- **User Manual** — opens this document as a PDF in a new browser tab, so it's always one click away from inside the app.
- **How to provide weekly report** — a short training video walking a Solution Architect through logging and submitting their own weekly timesheet (My Timesheet, Section 5).
- **Manage weekly report** — a short training video for leads on reviewing and managing their team's weekly submissions (Allocation Status, Section 12).

NOTE Each entry opens a static file (a PDF or a video) in a new browser tab rather than inside Atlas itself — expect your browser's own PDF viewer or video player to take over. If a link doesn't open, check that pop-ups aren't being blocked for the Atlas site. Close the panel with the ✕ or by clicking outside it.

4. Dashboard

Your landing page after sign-in — a quick-glance summary of the current week and what needs attention next.

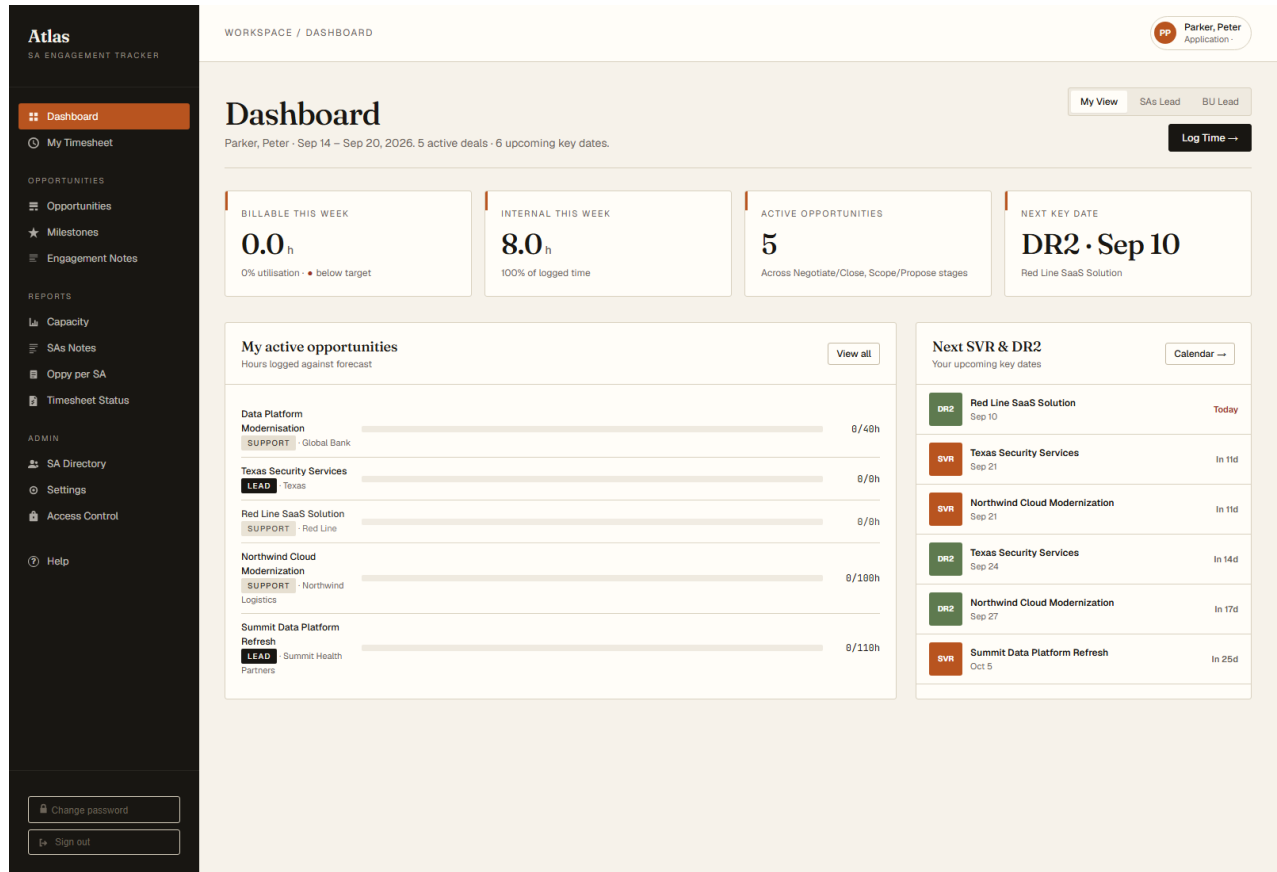


Figure 4 — Dashboard, My View

What you can do here

- **Switch view** with the **My View / SAs Lead / BU Lead** toggle (top right) — available if your access allows it. My View shows your own numbers; SAs Lead aggregates your reporting team; BU Lead shows a pipeline-level summary.
- **Read the four summary tiles:** billable hours logged this week, internal hours logged this week, count of active opportunities, and the next upcoming key date (SVR/DR2).
- **Jump straight into time entry** with the **Log Time →** button, which opens My Timesheet.
- **Scan “My active opportunities”** — hours logged against forecast for each deal you're staffed on, with a **View all** link through to Opportunities.
- **Scan “Next SVR & DR2”** — your (or the team's) nearest upcoming key dates, colour-coded by how soon they land, with a **Calendar →** link through to Milestones.

5. My Timesheet

Where every SA logs their own weekly hours — against opportunities and against internal work.

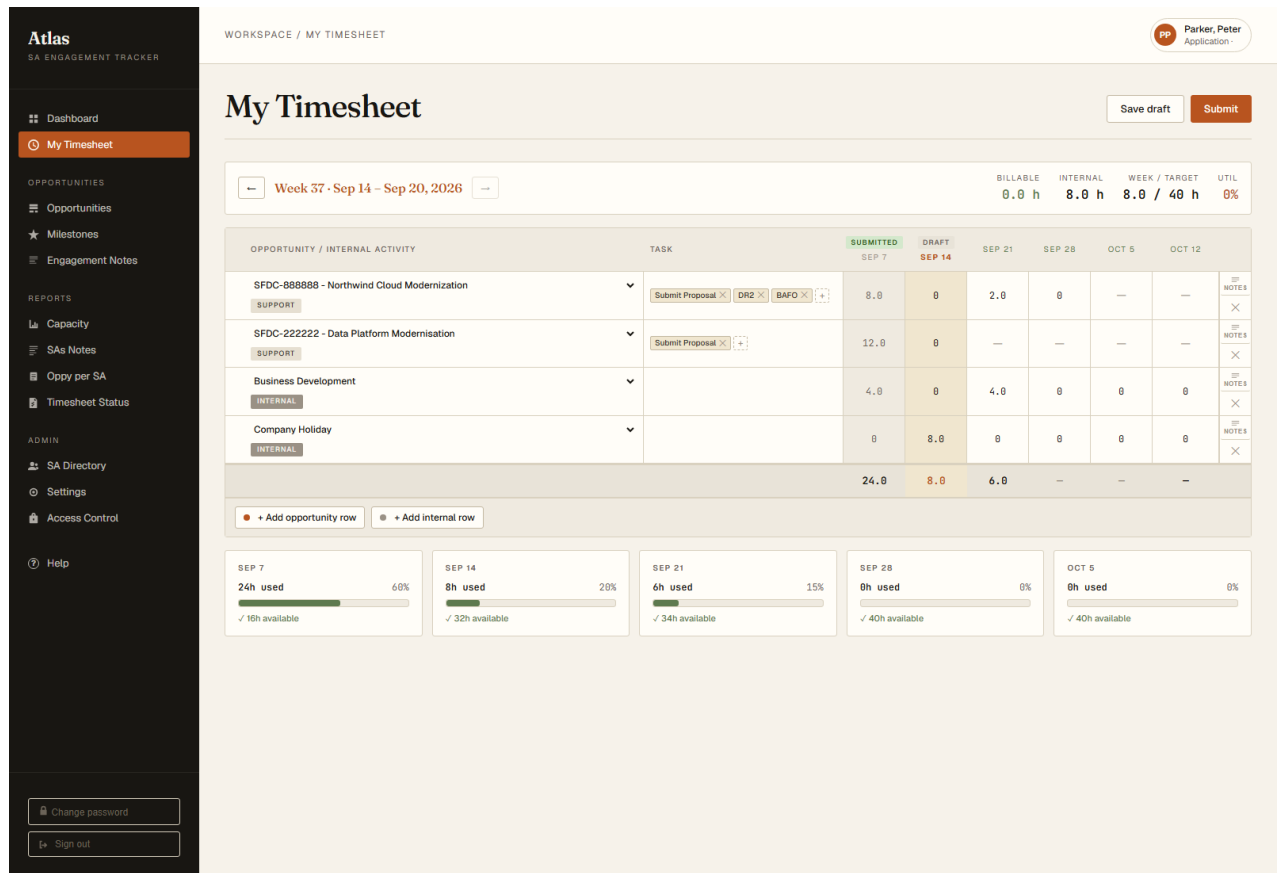


Figure 5 — My Timesheet

What you can do here

- **Move between weeks** with the ← / → arrows next to the week label, or jump using the small week strip (Pending / current / upcoming weeks).
- **Add an opportunity row** with **+ Add opportunity row** — pick from the opportunities you're assigned to (shown in the dropdown as **SFDC-ID - Opportunity Name** so deals with similar names are easy to tell apart), then type hours into each day/week cell.
- **Tag one or more tasks** on an opportunity row by clicking its task chips (e.g. Submit Proposal, DR2) — click + to add another task from the list, or the X on a chip to remove it; a row can carry several tasks at once.
- **Add an internal row** with **+ Add internal row** — for training, admin, PTO, or other non-billable categories defined in Settings → Internal Activities.
- **Track utilisation live:** the header shows billable hours, internal hours, and week total against your weekly target; each week card shows hours used, percentage, and a progress bar against your available capacity.

- **Log engagement notes** on an opportunity row with its **Notes** toggle (next to the row's ✕ button) — these feed the Engagement Notes page (Section 8) and are visible to the whole SA team, unlike the private per-activity notes on internal rows (Section 5.1).
- **Save your work in progress** with **Save draft**, or finalise the week with **Submit** — this is what feeds Allocation Status (Section 12) and the automated reminder emails.

NOTE You can only log hours against opportunities you are already assigned to. Ask your lead or an Admin to add you to the opportunity's SA Team first (see Section 6.2).

NOTE The ← arrow stops working once you reach the configured **Tool start date** (Section 14.8) — there's nothing to submit for weeks before Atlas started tracking them, so they're outside the range you can navigate to at all.

NOTE An hours cell rejects an entry that would push that week's total above your own available hours (set on your SA Directory profile) — the cell reverts and a toast explains how much you're over by. This replaces a flat 40-hour cap, so it now matches part-time or non-standard weekly hours correctly.

NOTE A row — opportunity or internal — disappears from the grid once every week currently in view shows zero hours for it; nothing is deleted from your history, it's just hidden. A row you've just added, or just switched to a different opportunity/activity, stays visible until you log its first hours or navigate to another week, so you have a chance to fill it in.

5.1 Private notes on internal rows

Every internal-activity row also has its own **Notes** toggle, next to the row's remove (✕) button — separate from the opportunity-row Notes covered as Engagement Notes (Section 8). Selecting it opens a small textarea scoped to that activity and that week.

Atlas

SA ENGAGEMENT TRACKER

Dashboard
My Timesheet

OPPORTUNITIES

Opportunities
Milestones
Engagement Notes

REPORTS

Capacity
SAs Notes
Oppy per SA
Timesheet Status

ADMIN

SA Directory
Settings
Access Control

Help

Change password
Sign out

WORKSPACE / MY TIMESHEET

PP

Parker, Peter

Application

My Timesheet

Save draft
Submit

←

Week 35 · Aug 31 – Sep 6, 2026

→

BILLABLE

20.0 h

INTERNAL

12.0 h

WEEK / TARGET

32.0 / 40 h

UTIL

50%

OPPORTUNITY / INTERNAL ACTIVITY	TASK	DRAFT AUG 24	SUBMITTED AUG 31	SUBMITTED SEP 7	DRAFT SEP 14	SEP 21	SEP 28	
SFDC-888888 - Northwind Cloud Modernization SUPPORT	Submit Proposal X DR2 X BAFO X	0	8.0	8.0	0	2.0	0	NOTES X
SFDC-222222 - Data Platform Modernisation SUPPORT	Submit Proposal X	0	10.0	12.0	0	—	—	NOTES X
Business Development INTERNAL		0	12.0	4.0	0	4.0	0	CLOSE X
NOTES — AUG 31 (VISIBLE ONLY TO YOU)								
Weekly Sa notes for the lead								
Save Note								
SFDC-666666 - Red Line SaaS Solution SUPPORT	Submit Proposal X	0	2.0	0	0	—	—	NOTES X
Company Holiday INTERNAL		0	0	0	8.0	0	0	NOTES X
		—	32.0	24.0	8.0	6.0	—	

+ Add opportunity row
+ Add internal row

AUG 24

0h used 0%

✓ 40h available

AUG 31

32h used 80%

✓ 8h available

SEP 7

24h used 60%

✓ 16h available

SEP 14

8h used 20%

✓ 32h available

SEP 21

6h used 15%

✓ 34h available

Figure 5a — Notes panel open on an internal row

- **Visible to you and your lead only** — other SAs never see it; your lead reads it on the dedicated **SAs Notes** page (Section 10), not other SAs.
- **One note per activity per week** — reopening the same row and week shows what you last saved there.
- **Requires logged hours first** — Atlas won't save a note for an activity/week that has no hours logged yet; log the time, then add the note.

6. Opportunities

The list of every sales deal the SA team is engaged on, with its stage, business type, key dates and process-milestone progress. Opens by default on **My Active** — just the active deals you're personally staffed on — since most people only need to see their own pipeline day to day.

The screenshot shows the 'Opportunities' page in the Atlas SA Engagement Tracker. The left sidebar contains navigation links: Dashboard, My Timesheet, Opportunities (selected), Milestones, and Engagement Notes. Below these are Reports (Capacity, SAs Notes, Oppy per SA, Timesheet Status) and Admin (SA Directory, Settings, Access Control, Help). The main content area has a header with 'Opportunities / OPPORTUNITIES' and a user profile 'Parker, Peter Application'. A '+ New Opportunity' button is in the top right. Below the header is a filter bar with 'My Active (5)' selected, and other filters for Active (8), All (9), and various stages. A search bar is present for each column. The table below lists 5 opportunities:

OPPORTUNITY	ACCOUNT	SFDC	STAGE	LED BU	TCV	BUSINESS TYPE	PROCESS MILESTONE	NEXT MILESTONE	START DATE
Data Platform Modernisation	Global Bank	SFDC-222222	NEGOTIATE/CLOSE	CA&I	\$2,000,000	New Logo	10 - Shortlist	11 - Orals	2026-07
Northwind Cloud Modernization	Northwind Logistics	SFDC-888888	NEGOTIATE/CLOSE	CA&I	\$540,000	Expansion	6 - DR2	7 - DR2 Approved	2026-06
Red Line SaaS Solution	Red Line	SFDC-666666	SCOPE/PROPOSE	CA&I	\$5,000,000	Expansion	5 - SVR Approved	6 - DR2	2026-06
Summit Data Platform Refresh	Summit Health Partners	SFDC-999999	SCOPE/PROPOSE	DWS	\$610,000	New Scope	9 - Proposal Submitted	10 - Shortlist	2026-06
Texas Security Services	Texas	SFDC-555555	SCOPE/PROPOSE	CA&I	\$25,000,000	Renewal/Extension	3 - Solution Design	4 - SVR	2026-06

Figure 6 — Opportunities list, default My Active view

What you can do here

- **Filter by stage** using the pill row — My Active (your own active deals), Active (the whole team's), All, or any individual stage (Prospecting, Qualifying, Scope/Propose, Negotiate/Close, Closed - Won, Closed - Lost, Closed - Retired) — each pill shows a live count.
- **Search and filter the table** by opportunity name, SFDC ID, Led BU, TCV, business type, process milestone, or SVR/DR2/close month and year.
- **Open any row** to see its full detail (Section 6.1).
- **Create a new opportunity** with **+ New Opportunity** (Section 6.3) — visible if you have update access to this feature.

NOTE With more than 20 matching opportunities, a page control appears below the table (◀ Prev / page numbers / Next ▶) — the filters and search above still apply across every page, not just the one you're viewing.

6.1 Opportunity detail

Clicking any row opens a detail panel over three tabs: Overview, Edit Details, and SA Team.

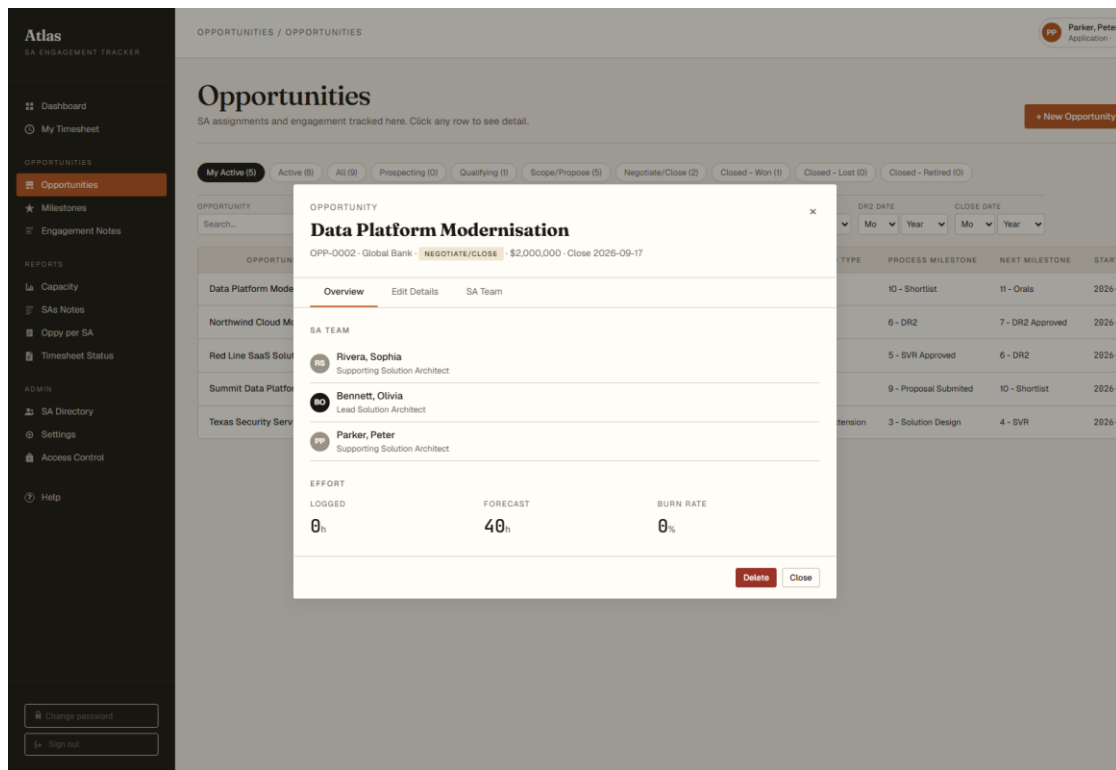


Figure 7 — Opportunity detail (Overview tab)

- **Overview** — the assigned SA Team with each person's role (Lead or Supporting Solution Architect), and an Effort summary: hours logged, forecast hours, and burn rate.
- **Edit Details** — update every field captured when the opportunity was created (account, amount, dates, stage, business type, process milestone, and so on).
- **SA Team** — add or remove Solution Architects and set each one's role on the deal.
- **Delete** — removes the opportunity entirely (blocked if hours have already been logged against it, to protect timesheet history).

NOTE If you only have read access to Opportunities but are on the deal's SA Team, Edit Details still opens for you — but every field is locked except **SVR Date** and **DR2 Date**, so you can keep those two dates current yourself without needing full edit access.

6.2 Assigning SAs to a deal

From the SA Team tab (or the SA Team section of the New Opportunity form), pick a person and a role — **Lead Solution Architect** or **Supporting Solution Architect** — and select **Add**. Every opportunity must keep at least one SA assigned, and exactly one Lead at a time.

6.3 Creating a new opportunity

Atlas
SA ENGAGEMENT TRACKER

OPPORTUNITIES / OPPORTUNITIES

Opportunity
SA assignments and engagement

New Opportunity

OPPORTUNITY NAME: Company — Project name
ACCOUNT: Account name

SFDC ID: SF-XXXXXXX
REGION: LAC

STAGE: Prospecting
LED BU: — Select —

AMOUNT: \$0
BUSINESS TYPE: — Select —

START DATE: mm/dd/yyyy
CLOSE DATE: mm/dd/yyyy

PROCESS MILESTONE: — None —
NEXT MILESTONE: —

SVR DATE: mm/dd/yyyy
DR2 DATE: mm/dd/yyyy

FORECAST HOURS: 0

SA TEAM
No SAs assigned yet.
Anderson, Emma Support Add

Cancel Add Opportunity

Figure 8 — New Opportunity form

Fill in the opportunity name, account, SFDC ID (if it has a Salesforce record), region, sales stage, led business unit, amount, business type, key dates (start, close, SVR, DR2), the process milestone it starts at, and forecast hours — then assign the initial SA team before saving.

7. Milestones

A calendar view of every opportunity's SVR and DR2 dates, four weeks at a time.

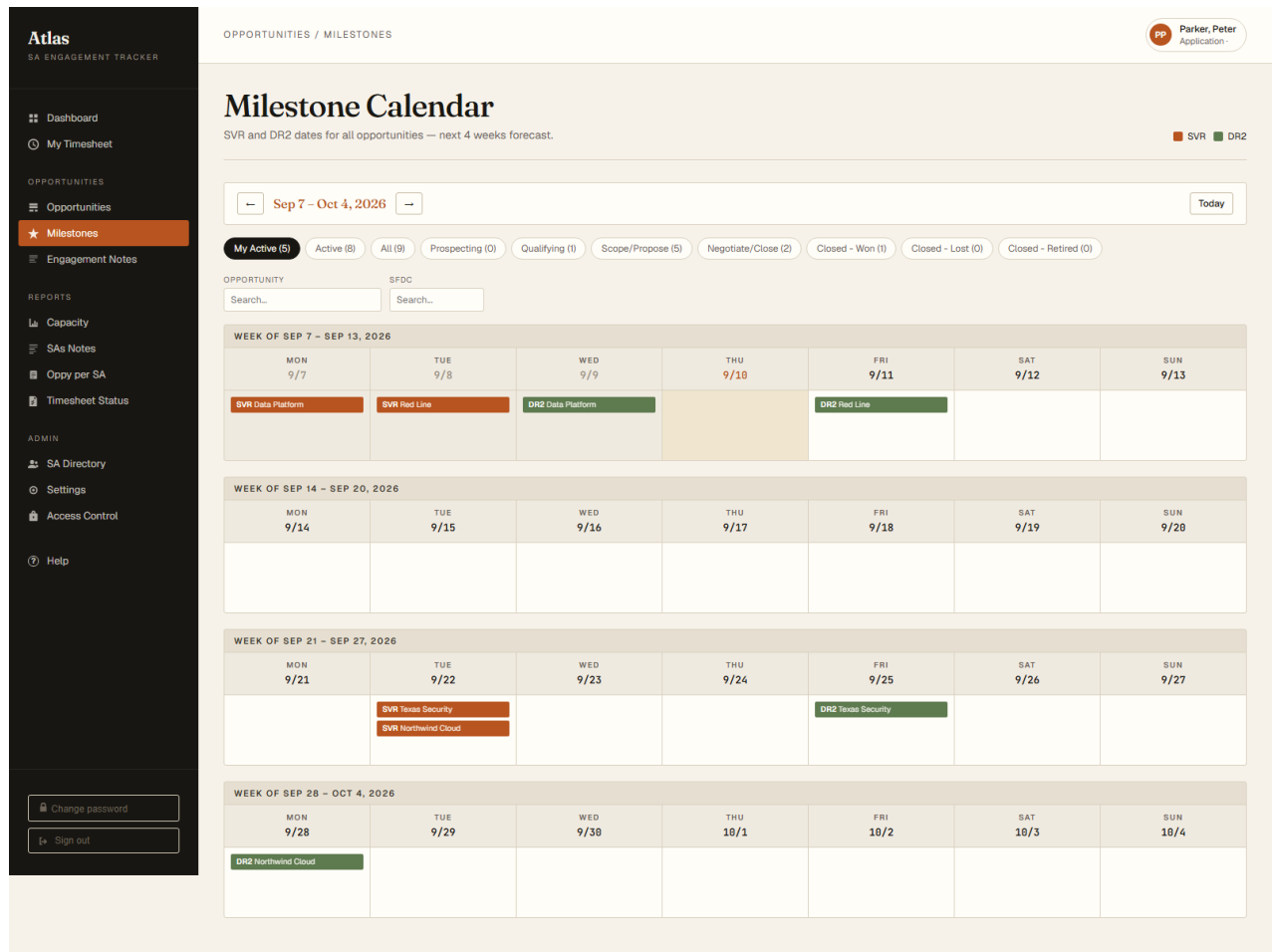


Figure 9 — Milestone Calendar

What you can do here

- **Move between four-week windows** with the ← / → arrows, or jump back to the present with **Today**.
- **Filter by stage** using the pill row (Active, All, and each individual sales stage — Prospecting, Qualifying, Scope/Propose, Negotiate/Close, Closed - Won/Lost/Retired) — the same stage filter as Opportunities (Section 6), each pill showing a live count.
- **Search or filter** the calendar down to one deal using the Opportunity and SFGC search boxes above the grid — handy once there are dozens of opportunities in flight.
- **Read the colour legend** — SVR and DR2 events are colour-coded so you can scan a busy week at a glance.
- **Spot upcoming key dates** for every opportunity in one place, rather than opening each deal individually.

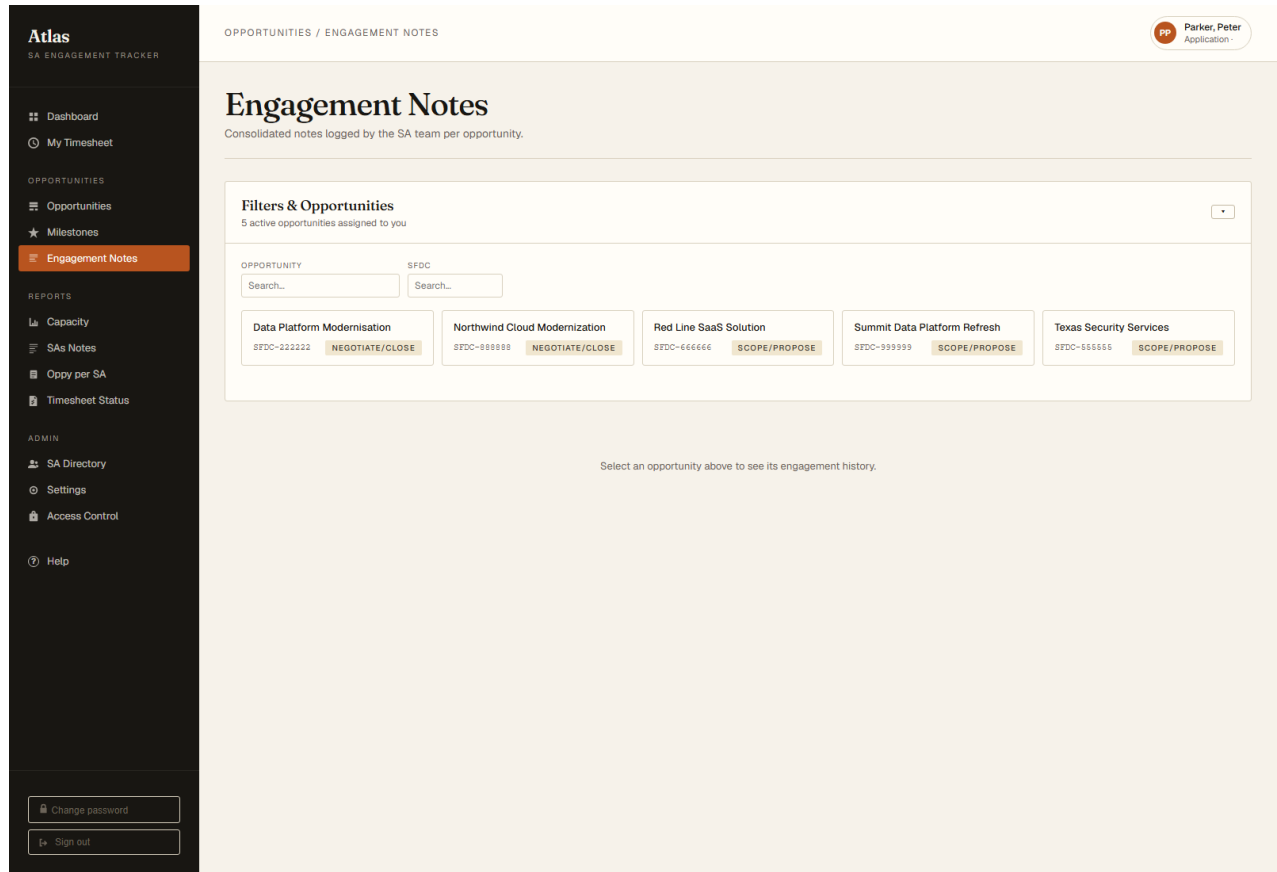
NOTE The ← arrow stops working once you reach the configured Tool start date (Section 14.8) — the same limit as My Timesheet.

NOTE This calendar is distinct from Process Milestones in Settings (Section 14.6), which defines the ordered workflow stages themselves (Discovery → SVR → Proposal → Contract, etc.) rather than calendar dates.

NOTE An opportunity's Close date isn't shown here or on the Dashboard's upcoming-dates list — it remains a field on the opportunity itself and is still searchable/filterable on Opportunities (Section 6).

8. Engagement Notes

A running log of notes for each opportunity — general engagement log entries (calls, meetings, decisions) — so context on a deal isn't lost between the people working it.



Atlas
SA ENGAGEMENT TRACKER

OPPORTUNITIES / ENGAGEMENT NOTES

Parker, Peter
Application

Engagement Notes

Consolidated notes logged by the SA team per opportunity.

Filters & Opportunities
5 active opportunities assigned to you

OPPORTUNITY: Search... SFDC: Search...

OPPORTUNITY	SFDC	STAGE
Data Platform Modernisation	SFDC-222222	NEGOTIATE/CLOSE
Northwind Cloud Modernization	SFDC-888888	NEGOTIATE/CLOSE
Red Line SaaS Solution	SFDC-666666	SCOPE/PROPOSE
Summit Data Platform Refresh	SFDC-999999	SCOPE/PROPOSE
Texas Security Services	SFDC-555555	SCOPE/PROPOSE

Select an opportunity above to see its engagement history.

Change password
Sign out

Figure 10 — Engagement Notes, opportunity picker

The picker above defaults to your own active opportunities, shown as a grid of cards (name, SFDC ID, and stage). Type into the Opportunity or SFDC search boxes to search across every opportunity in the system, not just your own — clearing the search returns to your default list. Select a card to see that opportunity's full note history, newest entry first, with a running entry count.

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Oppy per SA

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OPPORTUNITIES / ENGAGEMENT NOTES

Parker, Peter

Application

Engagement Notes

Consolidated notes logged by the SA team per opportunity.

Filters & Opportunities

5 active opportunities assigned to you

OPPORTUNITY

SFDC

Search...

Search...

Data Platform Modernisation

SFDC-222222

NEGOTIATE/CLOSE

Northwind Cloud Modernization

SFDC-888888

NEGOTIATE/CLOSE

Red Line SaaS Solution

SFDC-666666

SCOPE/PROPOSE

Summit Data Platform Refresh

SFDC-999999

SCOPE/PROPOSE

Texas Security Services

SFDC-555555

SCOPE/PROPOSE

Data Platform Modernisation

Global Bank

NEGOTIATE/CLOSE

8 total entries

Copy Notes

Notes

4 entries

Bennett, Olivia

new not

2026-09-08

Bennett, Olivia

another note

2026-08-28

Bennett, Olivia

this is a note ZZZZ for the deal lead

2026-08-28

Parker, Peter

this is a note for the deal lead

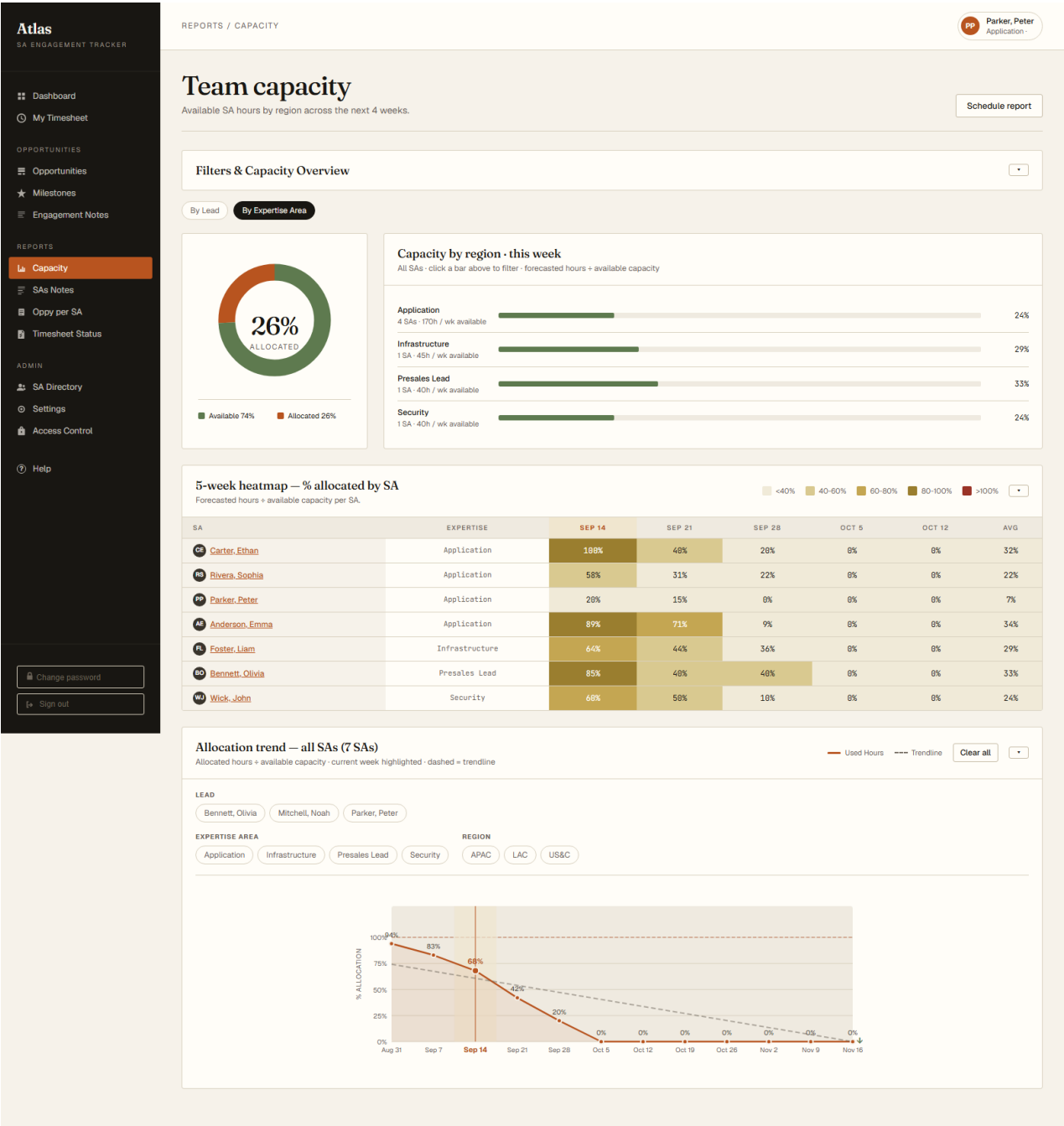
2026-08-15

Figure 11 — Engagement Notes for a selected opportunity

- **Copy Notes** copies the whole history for that opportunity to the clipboard as plain text (SFDC ID, opportunity name, then each entry's date, author, and text) — handy for pasting into an email or a Salesforce update.
- This page is read-only: entries are logged from **My Timesheet**, on the Notes panel of the opportunity row you're working (Section 5), not from here — and once saved, a note can't be deleted, only added to.

9. Capacity

A team-wide view of available versus allocated hours, for planning ahead — and, one scroll further down, the forward-looking allocation trend that used to be its own Forecast page.



- **Read the allocation donut** — the percentage of total team capacity currently allocated, this week.
- **Read “Capacity by region”** — SA count and weekly hours available for each expertise area, with a bar showing percentage allocated.
- **Read the 5-week heatmap** — percentage allocated per SA per week, colour-coded from under-40% up to over-100%, so over- or under-staffing jumps out visually.
- **Click an SA's name** in the heatmap to open their **Weekly Allocation** breakdown — every opportunity or internal activity they're on, hours per week for the current week plus the next four, a Total row, and a “% of available” row so you can see exactly what's driving their allocation percentage.
- **Export or schedule a report with Schedule report** (top right).

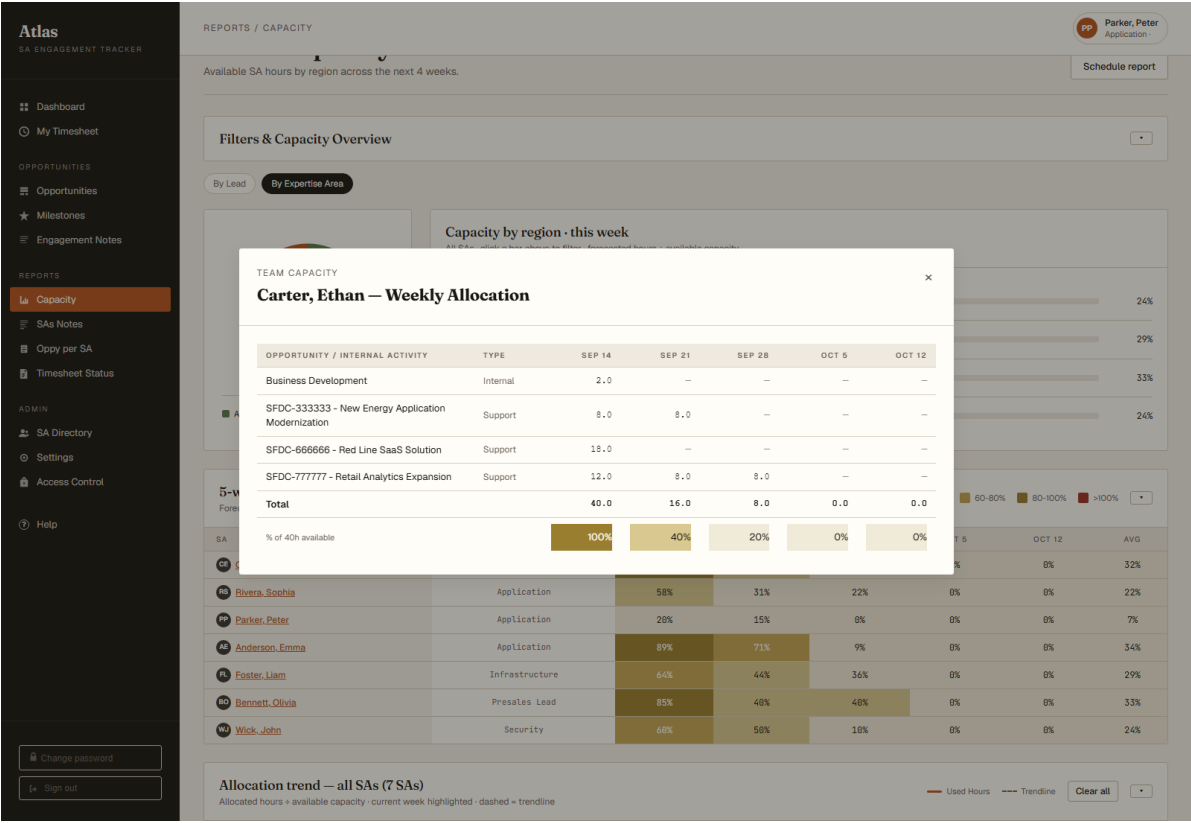


Figure 13a — Weekly Allocation modal for one SA

NOTE The overview and the heatmap are each their own collapsible panel — click a panel's header (or the ▼ arrow) to collapse or expand it. Atlas remembers each panel's state per browser, so your preferred layout sticks across visits.

9.1 Forecast trend

Below the heatmap, a third panel carries the forward-looking trend line of team allocation, out to twelve weeks — this used to be its own “Forecast” page in the sidebar; it's now folded into Capacity since the two views are read together so often.



Figure 16 — Allocation trend panel

- **Filter** by lead, expertise area, or region to see a subset of the team — this panel keeps its own filters, separate from the overview above.
- **Read the trend chart** — percentage allocation (forecast hours ÷ available capacity) per week, with the current week highlighted and a dashed trendline projecting forward.
- **Spot capacity risk early** — a trendline heading toward or past 100% is the cue to hire, re-balance, or push back on new deals.
- **Clear all** resets this panel's Lead / Expertise Area / Region filters back to everyone.

NOTE Because Forecast is no longer a separate page, its own Access Control permission has folded into Capacity's — anyone with Read or Update access to Capacity (Section 15.3) sees this panel too.

10. SAs Notes

A lead's view of the private notes their team has logged against internal-activity rows in My Timesheet (Section 5.1) — the same notes, just gathered in one place instead of opened one timesheet week at a time.

The screenshot displays the 'SAs Notes' page in the Atlas SA Engagement Tracker. The left sidebar contains a navigation menu with categories: Dashboard, My Timesheet, OPPORTUNITIES (Opportunities, Milestones, Engagement Notes), REPORTS (Capacity, SAs Notes, Oppy per SA, Timesheet Status), and ADMIN (SA Directory, Settings, Access Control, Help). The 'SAs Notes' section is currently selected. The main content area shows the title 'SAs Notes' and a subtitle 'Your direct reports — 2 SAs in scope'. A date range filter is set to 'Through Week 37 · Sep 14 – Sep 20, 2026', and a dropdown menu shows 'SA: All SAs'. A card for 'Parker, Peter' is expanded, showing '1 note across 1 activity'. The expanded view displays a table with one entry: 'BUSINESS DEVELOPMENT (1)' for the week of 'Week 35 · Aug 31 – Sep 6, 2026', with the note 'Weekly Sa notes for the lead'.

Figure 12a — SAs Notes, expanded for one SA

What you can do here

- **Move the cutoff week** with the $\leftarrow$ / $\rightarrow$ arrows next to “Through Week ...” — the page shows every note logged in that week or earlier.
- **Filter to one SA** with the dropdown on the right, or leave it on **All SAs** to see everyone in your scope.
- **Expand or collapse each SA's card** to reveal their notes grouped by internal activity, newest week first, with the count of notes per activity shown next to its name.

NOTE Who's “in scope” depends on your group, not just your access level: anyone with access to this page sees their own direct reports (people whose SA Directory record names them as lead) plus their own notes, UNLESS they belong to a group whose name starts with “BU” (like the default BU Lead group) — that sees every enabled SA. Being an Admin does not, by itself, widen the scope to everyone. The page header states how many SAs are in scope for you.

11. Opp per SA

The flip side of Capacity: how many active deals each SA is carrying, week by week. The sidebar labels this page **Oppy per SA**.

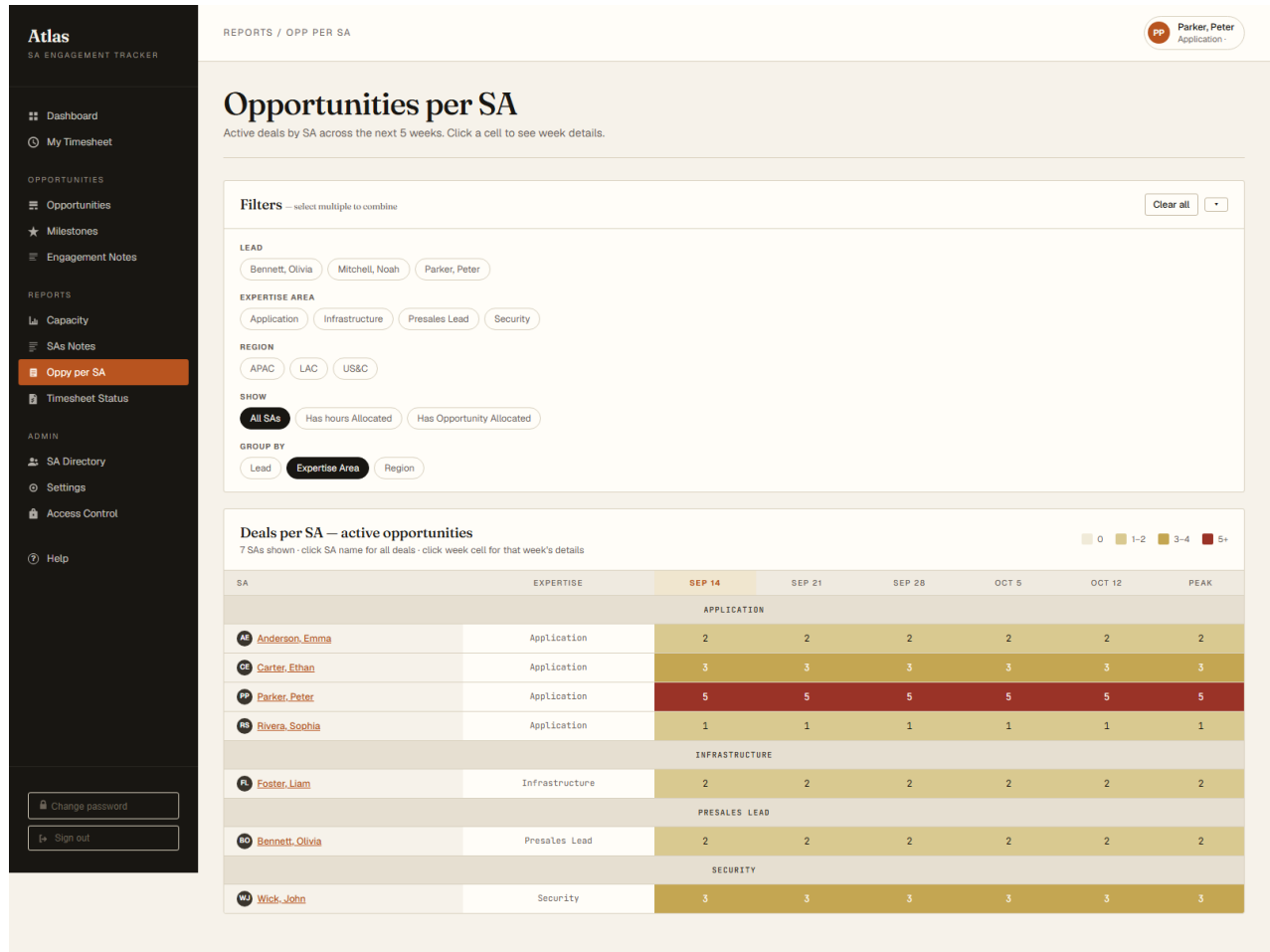


Figure 14 — Opportunities per SA

What you can do here

- **Filter** by lead, expertise area, or region, and narrow the list to SAs who currently have hours or opportunities allocated.
- **Group by** lead, expertise area, or region.
- **Read the grid** — one row per SA, one column per week, showing the count of active opportunities (colour-coded 0 / 1–2 / 3–4 / 5+) plus a Peak column.
- **Click a cell** to see that SA's opportunity breakdown for that specific week, or **click an SA's name** to see all of their assignments.

12. Allocation Status

Tracks whether every SA has actually submitted their weekly timesheet — the compliance view behind the automated reminder emails. The sidebar labels this page **Timesheet Status**.

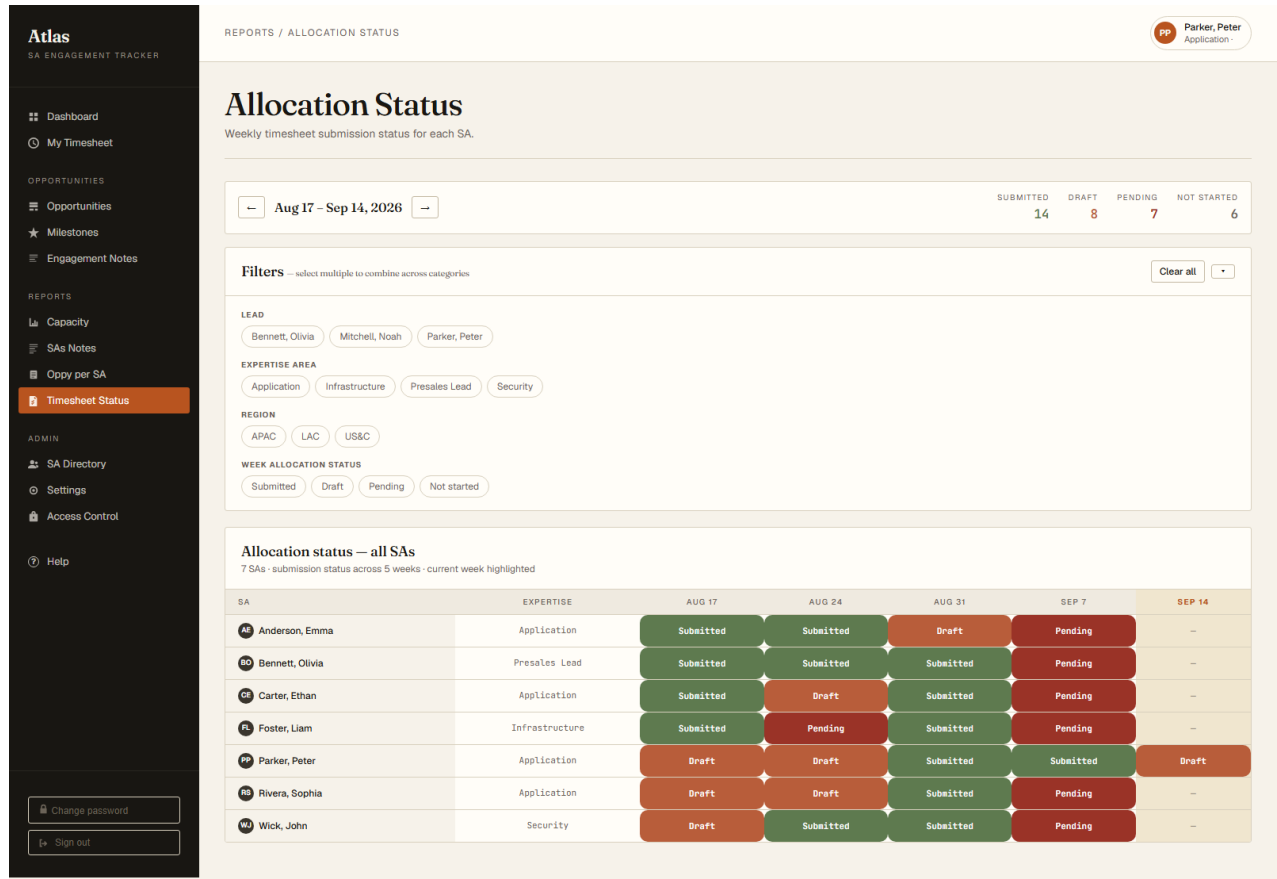


Figure 15 — Allocation Status

What you can do here

- **Move between weeks** with the ← / → arrows; the header tallies Submitted / Draft / Pending / Not started counts for the visible range.
- **Filter** by lead, expertise area, region, or submission status.
- **Read the grid** — one row per SA, one column per week, colour-coded Submitted (green) / Draft (amber) / Pending (red) / not yet due (blank).

NOTE Pending timesheets trigger the automated Allocation Checker reminder emails: the SA is emailed on the Sunday the week opens and again (overdue) the following Monday if it's still not submitted; if it's still missing by Tuesday, their lead is emailed instead. Recipients for the weekly summary are managed in Settings → Email Recipients (Section 14.7).

NOTE Weeks before the configured Tool start date (Section 14.8) render blank instead of a false “Pending” — there was nothing to submit before Atlas started tracking submissions — and the ← arrow won't navigate earlier than that week.

13. SA Directory

The roster of every Solution Architect: expertise, region, reporting line, and available capacity. This page now lives under Admin in the sidebar, alongside Settings and Access Control.

Atlas
SA ENGAGEMENT TRACKER

ADMIN / SA DIRECTORY

Parker, Peter
Application

SA Directory

All Solution Architects — profile, reporting line, expertise and available capacity.

Sync hours from country + Add SA

REGION: All US&C APAC LAC EXPERTISE: All Application Infrastructure Presales Director Presales Lead Security Strategy Architect Strategy Director

ENABLED: All Yes No

NAME	EXPERTISE	REGION	COUNTRY	LEAD / MANAGER	AVAIL. HRS/WK	ENABLED	
AU Admin User SA-0001	APPLICATION	US&C	United States	—	40h	NO	Edit X
AE Anderson, Emma SA-032	APPLICATION	APAC	India	Mitchell, Noah	45h	YES	Edit X
BO Bennett, Olivia SA-017	PRESALES LEAD	US&C	United States	Mitchell, Noah	40h	YES	Edit X
CE Carter, Ethan SA-010	APPLICATION	US&C	United States	Bennett, Olivia	40h	YES	Edit X
FL Foster, Liam SA-033	INFRASTRUCTURE	APAC	India	Bennett, Olivia	45h	YES	Edit X
MN Mitchell, Noah SA-029	PRESALES DIRECTOR	US&C	United States	—	40h	NO	Edit X
PP Parker, Peter SA-031	APPLICATION	LAC	Brazil	Mitchell, Noah	40h	YES	Edit X
RS Rivera, Sophia SA-014	APPLICATION	APAC	India	Bennett, Olivia	45h	YES	Edit X
WJ Wick, John SA-009	SECURITY	US&C	United States	Parker, Peter	40h	YES	Edit X

Change password

Sign out

Figure 12 — SA Directory

What you can do here

- **Filter** by region, expertise area, or enabled/disabled status.
- **Edit** any person's profile — name, expertise, region/country, weekly available hours, lead/manager, and enabled status — with the **Edit** button on their row.
- **Add a new SA** with **+ Add SA** — new accounts get a temporary password and are flagged to change it at first sign-in.
- **Sync hours from country** with the dedicated button — resets each SA's weekly available hours to match their country's standard working week (set in Settings → Capacity), useful after a bulk country update.
- **Remove an SA** with the red **X** button — blocked if they have logged hours, opportunity assignments, or reports pointing to them as lead, so historical data is never silently orphaned.

14. Settings

System-wide configuration and reference data, organised into eight tabs. Visible to Admins by default (and to any group granted access — see Section 15).

14.1 Capacity

The screenshot displays the 'Settings @ admin' page for the Atlas SA Engagement Tracker. The 'Capacity' tab is selected, showing a table of weekly working hours and holidays by country. The table includes columns for Country, Hours / Week, and Holidays (Per Yr). A sidebar on the left lists various navigation options, and a right panel shows identity and access settings.

COUNTRY	HOURS / WEEK	HOLIDAYS (PER YR)	
Australia AU	38	10	X
Brazil BR	40	12	X
Colombia CO	40	10	X
France FR	37	11	X
Hungary HU	40	13	X
India IN	45	15	X
Mexico MX	40	8	X
New Zealand NZ	40	12	X
United Kingdom UK	37.5	8	X
United States US	40	11	X

+ Add Country

Save capacity settings

Identity & access

SSO: Microsoft Entra ID
Visibility: All users see all data
Edit rights: SAs edit own time / forecast; managers edit team

Figure 17 — Settings → Capacity

The weekly working hours and annual holiday allowance for each country the SA team operates in. These values are what “Sync hours from country” (SA Directory) and the Capacity page (including its Forecast trend panel) calculate against. + **Add Country** adds a new one; the X button removes one.

14.2 Tasks

Atlas
SA ENGAGEMENT TRACKER

ADMIN / SETTINGS

Settings & admin
System defaults, reference data, and lookup management.

Capacity **Tasks** Billable Stages Expertise Areas Internal Activities Process Milestones Email Recipients Utilization

Tasks
Task types available when logging opportunity time.

ACTIVITY NAME	
BAFO	X
Contract Signature	X
Down Select	X
DR2	X
Due Diligence	X
Final Vendor Selected	X
Orals	X
Others	X
Submit Proposal	X
SVR	X

New activity... **Add**

Change password
Sign out

Parker, Peter
Application

Figure 18 — Settings → Tasks

The list of tasks that can be attached to an opportunity row in My Timesheet (e.g. discovery, solutioning, delivery). Add or remove entries as the team's ways of working evolve.

14.3 Billable Stages

The screenshot shows the 'Atlas SA ENGAGEMENT TRACKER' interface. On the left is a dark sidebar with navigation links: Dashboard, My Timesheet, OPPORTUNITIES (Opportunities, Milestones, Engagement Notes), REPORTS (Capacity, SA's Notes, Oppy per SA, Timesheet Status), and ADMIN (SA Directory, Settings, Access Control, Help). The 'Settings' link is highlighted. At the bottom of the sidebar are 'Change password' and 'Sign out' buttons. The main content area is titled 'Settings & admin' with the subtitle 'System defaults, reference data, and lookup management.' Below this is a horizontal tab bar with 'Capacity', 'Tasks', 'Billable Stages' (selected), 'Expertise Areas', 'Internal Activities', 'Process Milestones', 'Email Recipients', and 'Utilization'. The 'Billable Stages' section contains a table with the following data:

Billable Stages	
Only opportunities in these stages will appear in timesheet & forecast dropdowns.	
STAGE NAME	
Negotiate/Close	☐
Qualifying	☐
Scope/Propose	☐
New stage name...	Add

Figure 19 — Settings → Billable Stages

The sales stages that count as “billable” for utilisation reporting purposes.

14.4 Expertise Areas

The screenshot shows the 'Settings & admin' page in the Atlas SA Engagement Tracker. The left sidebar contains navigation links for Dashboard, My Timesheet, Opportunities, Milestones, Engagement Notes, Reports, Capacity, SAa Notes, Oppy per SA, Timesheet Status, Admin, SA Directory, Settings (highlighted), Access Control, and Help. At the bottom of the sidebar are links for Change password and Sign out. The main content area is titled 'Settings & admin' with a subtitle 'System defaults, reference data, and lookup management.' Below this is a horizontal tab bar with links for Capacity, Tasks, Billable Stages, Expertise Areas (selected), Internal Activities, Process Milestones, Email Recipients, and Utilization. The 'Expertise Areas' section is titled 'Areas of Expertise' with a description 'Used to classify SA specialisation across the directory.' It contains a table with the following data:

AREA NAME	
Application	
Infrastructure	
Presales Director	
Presales Lead	
Security	
Strategy Architect	
Strategy Director	

Below the table is a form with a text input labeled 'New area name...' and an 'Add' button.

Figure 20 — Settings → Expertise Areas

The list of SA specialisations available on SA Directory profiles and used throughout the grouping/filtering controls on Capacity, Opp per SA, and Allocation Status.

14.5 Internal Activities

The screenshot shows the 'Settings & admin' page in the Atlas SA Engagement Tracker. The left sidebar contains navigation links for Dashboard, My Timesheet, Opportunities, Milestones, Engagement Notes, Reports, Capacity, SAs Notes, Oppy per SA, Timesheet Status, Admin, SA Directory, Settings (highlighted), Access Control, and Help. At the bottom of the sidebar are buttons for 'Change password' and 'Sign out'. The main content area is titled 'Settings & admin' with the subtitle 'System defaults, reference data, and lookup management.' Below this is a horizontal tab bar with links: Capacity, Tasks, Billable Stages, Expertise Areas, Internal Activities (selected), Process Milestones, Email Recipients, and Utilization. The 'Internal Activity Categories' section is displayed, with a subtitle 'Categories available when logging non-billable time.' It contains a table with the following categories: Business Development, Company Holiday, Internal Meeting, MBP Support, Other PTO, Pre-Sales Support, Solution Management, Team Meeting, Team Mentoring, Training, and Vacation. Each category has a red 'X' icon in the right column. At the bottom of the table is a form with a text input labeled 'New category name..' and an 'Add' button.

CATEGORY NAME	
Business Development	X
Company Holiday	X
Internal Meeting	X
MBP Support	X
Other PTO	X
Pre-Sales Support	X
Solution Management	X
Team Meeting	X
Team Mentoring	X
Training	X
Vacation	X

New category name..

Figure 21 — Settings → Internal Activities

The non-billable categories available when logging an internal row in My Timesheet (training, admin, PTO, and similar) — the same categories that back the private per-activity notes on My Timesheet (Section 5.1) and the SAs Notes page (Section 10).

14.6 Process Milestones

Atlas
SA ENGAGEMENT TRACKER

ADMIN / SETTINGS

Parker, Peter
Application

Settings @ admin

System defaults, reference data, and lookup management.

Capacity Tasks Billable Stages Expertise Areas Internal Activities **Process Milestones** Email Recipients Utilization

Process Milestones

Define the milestones and their dependencies used to build engagement workflows.

SEQ	MILESTONE	DESCRIPTION	DEPENDS ON	
1	DR1		—	Edit ✕
2	DR1 Approved		1 - DR1	Edit ✕
3	Solution Design		2 - DR1 Approved	Edit ✕
4	SVR		3 - Solution Design	Edit ✕
5	SVR Approved		4 - SVR	Edit ✕
6	DR2		5 - SVR Approved	Edit ✕
7	DR2 Approved		6 - DR2	Edit ✕
8	Submit Proposal		7 - DR2 Approved	Edit ✕
9	Proposal Submitted		8 - Submit Proposal	Edit ✕
10	Shortlist		9 - Proposal Submitted	Edit ✕
11	Orals		10 - Shortlist	Edit ✕
12	Orals Completed		11 - Orals	Edit ✕
14	BAFO Submission		12 - Orals Completed	Edit ✕
15	BAFO Completed		14 - BAFO Submission	Edit ✕
16	Final Vendor Selected		15 - BAFO Completed	Edit ✕
17	Contract Signature		16 - Final Vendor Selected	Edit ✕

+ Add Milestone

Figure 22 — Settings → Process Milestones

The shared, ordered engagement workflow every opportunity moves through — from an early stage like DR1 through Contract Signature. Each milestone can depend on one earlier milestone, enforced so the sequence can never form a loop. **+ Add Milestone** creates a new stage; a milestone in use by an opportunity, or listed as another milestone's dependency, cannot be deleted until that reference is cleared.

14.7 Email Recipients

Atlas
SA ENGAGEMENT TRACKER

ADMIN / SETTINGS

Settings & admin
System defaults, reference data, and lookup management.

Capacity Tasks Billable Stages Expertise Areas Internal Activities Process Milestones **Email Recipients** Utilization

WEEKLY ALLOCATION-STATUS EMAIL 1 of 9 SAs receiving

Receiving the email	Not receiving
1 SA receiving the email	8 SAs available to add
PP Parker, Peter Application - LAC X Remove	AU Admin User Application - US&C + Add
	AE Anderson, Emma Application - APAC + Add
	BO Bennett, Olivia Presales Lead - US&C + Add
	CE Carter, Ethan Application - US&C + Add
	FL Foster, Liam Infrastructure - APAC + Add
	MM Mitchell, Noah Presales Director - US&C + Add
	RS Rivera, Sophia Application - APAC + Add
	WJ Wick, John Security - US&C + Add

Change password

Sign out

Figure 23 — Settings → Email Recipients

Who receives the weekly allocation-status summary email. Move people between “Receiving the email” and “Not receiving” with the **Add / Remove** buttons.

14.8 Utilization

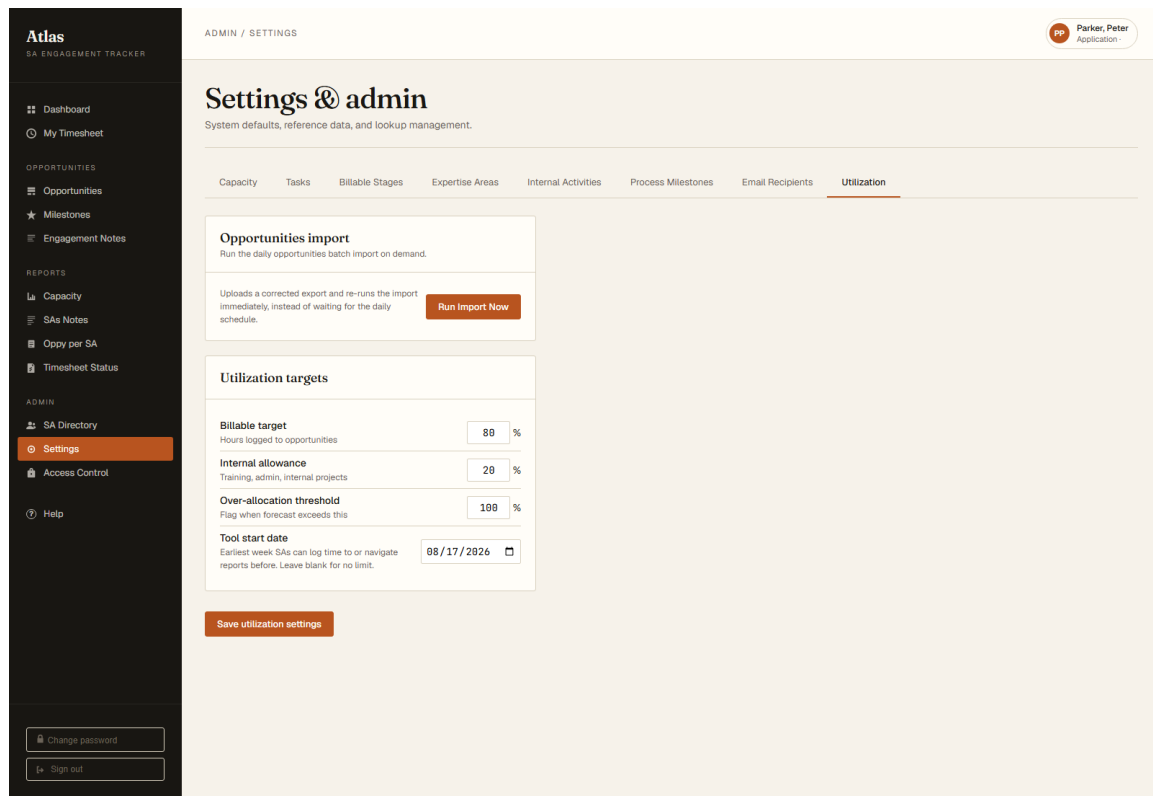


Figure 24 — Settings → Utilization

The targets the whole app measures utilisation against: billable target (the goal share of hours logged to opportunities), internal allowance (training/admin/etc.), and the over-allocation threshold that flags a forecast as too high. Select **Save utilization settings** to apply changes.

Tool start date sets the earliest week anyone can log time to or navigate to on My Timesheet (Section 5), Milestones (Section 7), and Allocation Status (Section 12) — leave it blank for no limit. It exists so weeks before Atlas started tracking submissions don't show up as a false “Pending”: they render blank instead, and the ← arrow on those pages stops one week short of it.

14.9 Opportunities import

A small **Opportunities import** panel sits above Utilization targets on this same tab, for correcting or refreshing opportunity data without waiting for the nightly automated import from Salesforce. Selecting **Run Import Now** opens a three-step dialog:

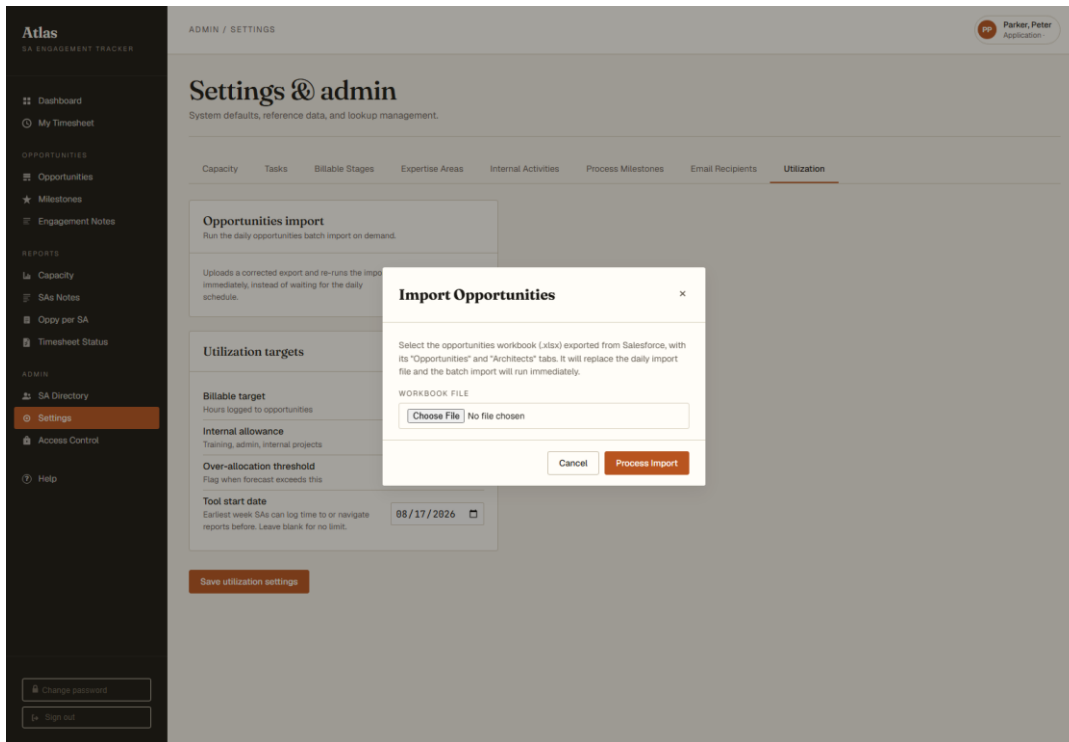


Figure 25 — Step 1: choose the corrected workbook

- **Step 1 — choose file.** Pick the corrected opportunities workbook (the same .xlsx format exported from Salesforce for the nightly job). **Process Import** stays disabled until a file is selected.

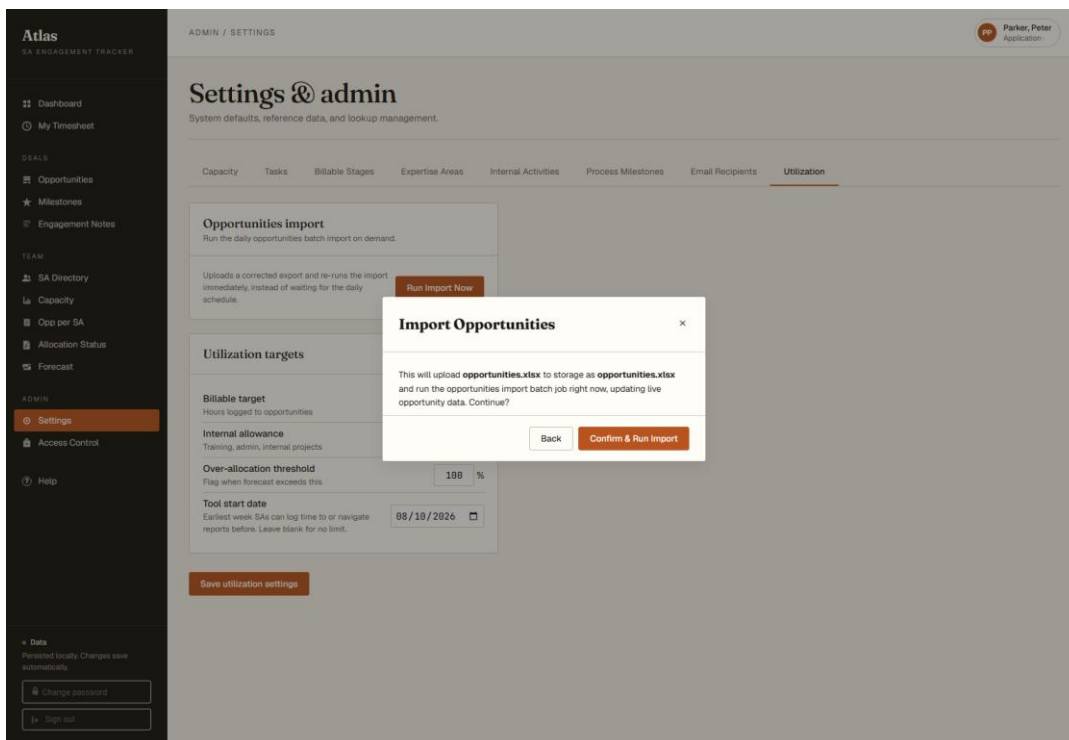


Figure 26 — Step 2: confirm before it runs

- **Step 2 — confirm.** A plain-language warning that this replaces the daily import file and runs the batch job immediately against live opportunity data. **Back** returns to file selection; **Confirm & Run Import** proceeds.

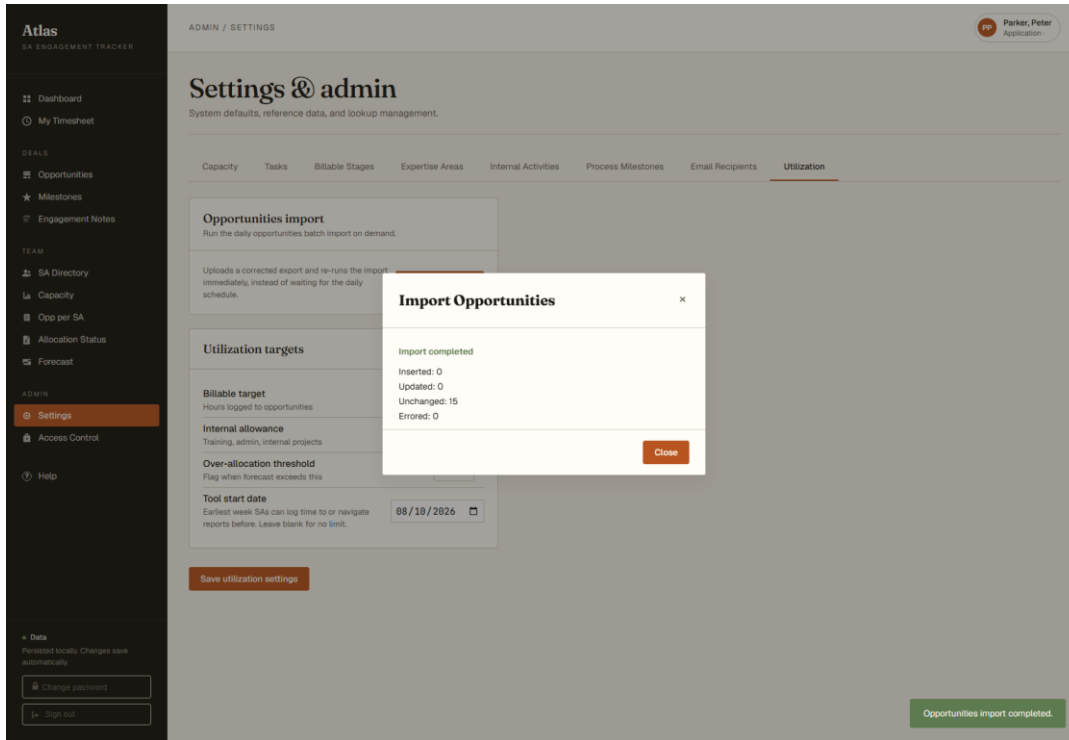


Figure 27 — Step 3: result summary

- **Step 3 — result.** A summary of what the import did — counts of opportunities Inserted, Updated, Unchanged, and Errored — confirmed by a toast in the corner. Select **Close** to dismiss.

NOTE This uploads and imports for real — there's no “preview only” mode. It reuses the exact importer the nightly schedule runs (matching by SFDC ID: existing opportunities are updated, unrecognised ones are inserted as new), so running it twice with the same file is safe — a second run reports everything as Unchanged.

15. Access Control

Where Admins manage who can see and do what. Four tabs: Groups, Members, Permissions, and Authentication Model.

15.1 Groups

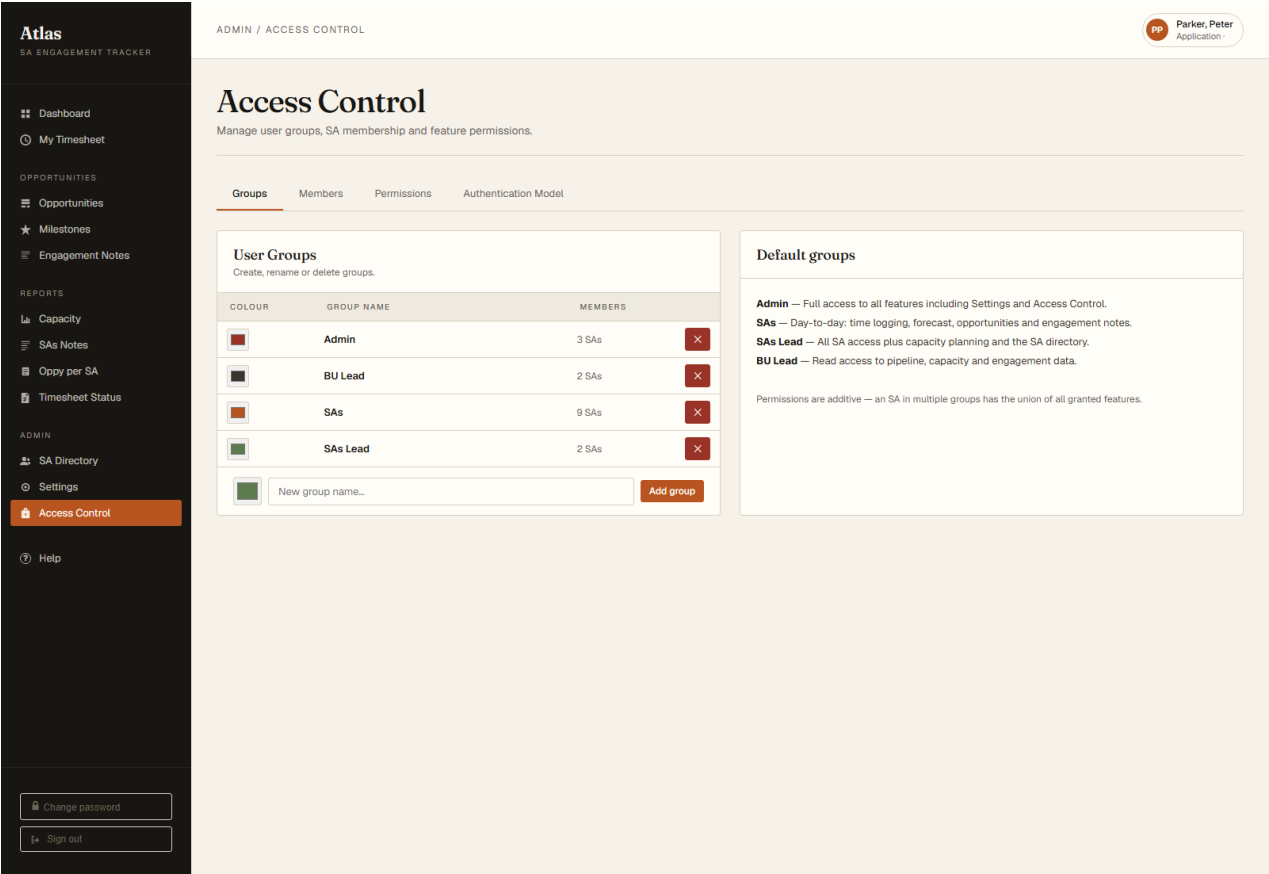


Figure 28 — Access Control → Groups

The named permission sets in the system. Atlas ships with four:

Group	Typical access
Admin	Full access to every feature, including Settings and Access Control.
SAs	Day-to-day: time logging, capacity/forecast, opportunities and engagement notes.
SAs Lead	Everything an SA has, plus capacity planning and the SA Directory.
BU Lead	Read access to pipeline, capacity, and engagement data.

Create a new group by typing a name (and picking a colour swatch) and selecting **Add group**; rename or delete an existing one from its row. Permissions are additive — someone in multiple groups gets the union of everything those groups grant.

15.2 Members

Atlas

SA ENGAGEMENT TRACKER

ADMIN / ACCESS CONTROL

PP

Parker, Peter

Application

Dashboard

My Timesheet

OPPORTUNITIES

Opportunities

Milestones

Engagement Notes

REPORTS

Capacity

SAs Notes

Copy per SA

Timesheet Status

ADMIN

SA Directory

Settings

Access Control

Help

Change password

Sign out

Access Control

Access Control

Manage user groups, SA membership and feature permissions.

Groups

Members

Permissions

Authentication Model

GROUP

SAs Lead

SAs Lead

2 of 9 SAs assigned

In this group

2 SAs in this group

AU

Admin User

Application - US&C

Remove

BO

Bennett, Olivia

Presales Lead - US&C

Remove

Not in this group

7 SAs available to add

AI

Anderson, Emma

Application - APAC

Add

CE

Carter, Ethan

Application - US&C

Add

FL

Foster, Liam

Infrastructure - APAC

Add

MM

Mitchell, Noah

Presales Director - US&C

Add

PP

Parker, Peter

Application - LAC

Add

RB

Rivera, Sophia

Application - APAC

Add

WJ

Wick, John

Security - US&C

Add

Figure 29 — Access Control → Members (SAs Lead group selected)

Choose a group from the dropdown to see who's in it (left) and who isn't (right), and move people between the two lists.

15.3 Permissions

The screenshot shows the 'Access Control' page in the Atlas SA Engagement Tracker. The left sidebar contains navigation links for Dashboard, My Timesheet, Opportunities, Milestones, Engagement Notes, Capacity, SAs Notes, Oppy per SA, Timesheet Status, SA Directory, Settings, and Access Control (highlighted). The main content area is titled 'Access Control' and includes a subtitle 'Manage user groups, SA membership and feature permissions.' Below this, there are tabs for Groups, Members, Permissions (selected), and Authentication Model. A dropdown menu shows 'SAs Lead' as the selected group. The main table, titled 'Feature access — SAs Lead', allows setting permissions for various features. The table has columns for Feature, None, Read, and Update. The 'SAs Lead' group has 'Read' permissions for most features, except for 'Settings' and 'Access Control' which are set to 'None'.

FEATURE	NONE	READ	UPDATE
Dashboard Can view and modify data	None	Read	Update
My Timesheet Can view and modify data	None	Read	Update
Opportunities Can view and modify data	None	Read	Update
Milestones Can view and modify data	None	Read	Update
Engagement Notes Can view and modify data	None	Read	Update
Capacity Can view and modify data	None	Read	Update
Oppy per SA Can view data only	None	Read	Update
Timesheet Status Can view data only	None	Read	Update
SAs Notes Can view and modify data	None	Read	Update
SA Directory Can view data only	None	Read	Update
Settings No access to this feature	None	Read	Update
Access Control No access to this feature	None	Read	Update

Figure 30 — Access Control → Permissions (SAs Lead group selected)

Choose a group, then set its access level for every feature in the app to **None**, **Read** (view only), or **Update** (view and edit) — or use **All Read** / **All Update** to set every row at once. This table is the single source of truth for what each group can do; the sidebar and page controls elsewhere in the app simply reflect it. Forecast no longer has a row of its own — it's covered by the Capacity row, since the Forecast trend now lives on that page (Section 9.1). A group with only **Read** on Opportunities can still nudge SVR/DR2 dates on a deal it's staffed on (Section 6.1) — that one exception isn't controlled from this table.

15.4 Authentication Model

The screenshot shows the Atlas SA Engagement Tracker interface. The left sidebar contains navigation links for Dashboard, My Timesheet, Opportunities, Milestones, Engagement Notes, Reports, Capacity, SA Notes, Oppy per SA, Timesheet Status, Admin, SA Directory, Settings, Access Control (highlighted), and Help. The main content area is titled 'Access Control' with the subtitle 'Manage user groups, SA membership and feature permissions.' Below this are tabs for Groups, Members, Permissions, and Authentication Model (selected). A search bar is present with the text 'Search SAs by name or email...'. A note states: 'Choose how each SA signs in. **Entra ID** sends them straight to Microsoft; **User / Password** uses the Atlas login screen.' Below this is a section titled 'Sign-in method per SA' with a summary: '9 SAs — 0 on Entra ID, 9 on User / Password, 0 blocked'. A table follows with columns SA, EMAIL, and AUTHENTICATION MODEL. The table lists 9 users, all with 'User / Password' as their authentication method.

SA	EMAIL	AUTHENTICATION MODEL
Admin User	admin@atlas.com	User / Password
Anderson, Emma	Emma.Anderson@atlas.com	User / Password
Bennett, Olivia	Olivia.Bennett@atlas.com	User / Password
Carter, Ethan	Ethan.Carter@atlas.com	User / Password
Foster, Liam	Liam.Foster@atlas.com	User / Password
Mitchell, Noah	Noah.Mitchell@atlas.com	User / Password
Parker, Peter	Peter.Parker@atlas.com	User / Password
Rivera, Sophia	Sophia.Rivera@atlas.com	User / Password
Wick, John	John.Wick@atlas.com	User / Password

Figure 31 — Access Control → Authentication Model

A per-person view of how each account signs in — password or Microsoft (Entra ID) — with a search box to find someone quickly. Use this tab to see (and, if you have update access, change) an individual's sign-in method, or to block an account outright regardless of a correct password.

16. Tips & troubleshooting

If you see this...	Try this
A page you expect is missing from the sidebar	You don't have access to that feature yet — ask an Admin to check Access Control (Section 15).
"Can't log time against this opportunity"	You need to be added to that opportunity's SA Team first (Section 6.2) — ask the opportunity's Lead SA or an Admin.
Signed in but the page looks out of date after an update	Hard-refresh your browser (Ctrl+Shift+R) to clear the cached version of the app.
Forgot your password	Use "Forgot password?" on the sign-in screen (Section 2.3).
A weekly reminder email seems wrong or you want to stop/start receiving the summary	Ask an Admin to update Settings → Email Recipients (Section 14.7).
Can't save a note on an internal timesheet row	Log hours for that activity and week first (Section 5.1) — Atlas won't save a note with no hours behind it.
A timesheet row you were filling in disappeared	It has zero hours across every visible week — re-add it with + Add opportunity/internal row (Section 5); nothing was deleted.

For anything not covered here, contact your Atlas Admin.