

Projects management



Projects module is one of the essential module that manages and centralizes different data about business projects and collaborative work. For each business case you wish to follow-up on medium to long term you can open a project page. The page will keep track of information, documents and gather most of other modules data under a single project page:

- sales and finance;
- reports and communication;
- logistics.

From the project page, you can control information access and distribute tasks.



Projects module is dedicated at following up projects with information sharing and simple tasks management

From a project page you can track different information like status, reports, tasks or cost.

The main project page (/projects/project) will show the latest projects information from where you can search or create projects.

Use this link to create a new project

Projects dashboard

[+ New project](#) [+ Filter search](#)

Extended filter to search projects

Latest projects

- SINGAPORE - [MVL-A-SG-2015_08-AO-20](#) - [2015-08-21]
- SINGAPORE - [MVL-Aa-SG-2014_12-BOD-19](#) - [2014-12-23]
- MALAYSIA - [MVL-Aa-MY-2014_12-AO-18](#) - [2014-12-23]
- CAMBODIA - [MVL-Aa-SG-2014_11-AO-15_sub2](#) - [2014-12-23]
- SINGAPORE - [MVL-Aa-SG-2014_11-AO-15_sub1](#) - [2014-12-23]
- SINGAPORE - [MVL-Aa-SG-2014_11-AO-15](#) - [2014-11-17]
- SINGAPORE - [Aa-SG-12_12-AO-321](#) - [2013-12-15]
- SINGAPORE - [A-SG-5_12-BP-320](#) - [2012-05-01]
- SINGAPORE - [A-BR-1_11-BP-319](#) - [2011-01-16]

Recently viewed projects

- SINGAPORE - [MVL-Aa-SG-2014_12-BOD-19](#) - [admin]

Depending on dashboard design, click on project link to open existing project

My projects

- SINGAPORE - [MVL-A-SG-2015_08-AO-20](#) - [open]
- SINGAPORE - [MVL-Aa-SG-2014_12-BOD-19](#) - [awarded]
- MALAYSIA - [MVL-Aa-MY-2014_12-AO-18](#) - [open]
- CAMBODIA - [MVL-Aa-SG-2014_11-AO-15_sub2](#) - [open]
- SINGAPORE - [MVL-Aa-SG-2014_11-AO-15_sub1](#) - [open]
- SINGAPORE - [MVL-Aa-SG-2014_11-AO-15](#) - [open]
- SINGAPORE - [Aa-SG-12_12-AO-321](#) - [open]
- SINGAPORE - [A-SG-5_12-BP-320](#) - [open]
- SINGAPORE - [A-BR-1_11-BP-319](#) - [open]

My tasks

- 24H - [MVL-Aa-SG-2014_12-BOD-19](#) - [0%]

Search projects

[Search](#)

Quickly find a project by entering its serial reference

Projects chart by type

category 1
12

Page

Create a project category

Create a new project

Project page

Header

Split project

Create a notification

Access control form

New task

Edit task

Extranet

Edit mode

Upload a file

Move a file

Post file from "My Documents"

Data sections

Calendar

Quick search

Extended search

Administration

User access

Access definition

Transfer

Merge

Access control

Serial formatting

Options

Email feeds

Edit categories

To edit the types of project or categories, navigate to:

</projects/types>

Project types

[new project](#)

Group	Name ▲	Description	Ref	Delete
A	General trade	A		<input type="checkbox"/>
B	Item production	B	B	<input type="checkbox"/>
C	Category 1	C	C	<input checked="" type="checkbox"/>
D	Design	Engineering design	D	<input type="checkbox"/>

Save

You can delete existing categories only if they are yet in use

Enter new category details on last line and click 'Save'

This information is used when creating the project unique ref. number

✓ Project type 'design' is created

Data updated

⚠ Project type 'category 1' cannot be deleted because it is used.



Create a new project

</projects/project/new>

Projects are classified by **category** and **country**.

User must have access to the country for which the project is created (see [access settings](#))

You can create sub project linked to a main project. i.e.

- when main project is **extended geographically** (multi countries)
- when main project is **renewed over time**
- when main project as **different clients or different suppliers**

If you do not want to give access by default for users, check **Access box** and **edit access** by user inside project

New project

Category * [edit categories](#)

Select existing or edit new categories of project (see next page)

Country *

Select country of assignment

Client *

Select client (go to address book to manage clients)

Project name *

Name the project

Project level

Set the project level.
A project can have 2 levels:
MAIN : is for initial projects that can be extended or not
SUB : are projects that are an extension of MAIN (existing) projects

Project level

Example of sub project

Main projects can have sub projects. Sub projects must be linked to a main project

You can find the main project reference by typing its serial number or name

308 A-CA-4_09-BEP-308 (awarded) abook

318 A-INDO-1_11-BP-318 (open) Indo

326 MVL-Aa-MY-2014_12-AO-18 (open) My new project

328 MVL-A-SG-2015_08-AO-20 (open) My new project

Access
grant access to me only

Select to restrict view to current user

Notify users

Select to confirm notification to users with default access

Create



Main project information page.

Each project is divided in few sections:

Header

Linked project (if any)

Main data

Tasks


Communication / reports (if module enabled)

Logistics (if module enabled)


Finance / sales (if module enabled)

✓ New project created with ref MVL-D-SG-2016_01-AO-120


120 | Reference: MVL-D-SG-2016_01-AO-120



New house follow 


last view: admin (on Tuesday 31st of March 2020 01:02 PM)

 [Alpha et Omega](#)

Main project [\[split\]](#)

 [Edit extranet page](#) Owner: user

 [notification](#)  [manage access](#)

 [New task](#) Status: awarded

Linked projects (1)

Main data

Tasks

Communication


Logistics

Finance

Follow to receive email updates

Open all tabs

Toggle edit

edit mode 



A unique reference that gives quick information: your company short name, category of project, country, year and month of creation and sequence number

311 | Reference: A-CA-6_09-BP-311

Project design and supply follow List followers

last view: admin (on Tuesday 13th of October 2020 06:24 PM)

Split into sub project Link to client details Alpha et Omega Creator of the project is the owner and is automatically notified when edited. Click to "follow" or "unfollow"

Main project [[split](#)]

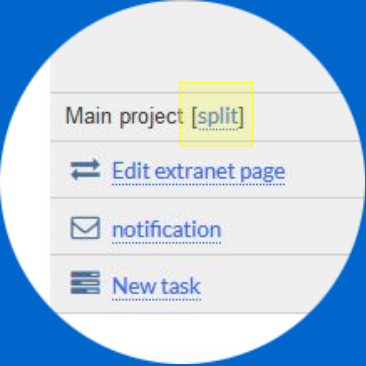
Edit extranet page If module is available, you can create a extranet page to share information with 3rd parties Owner: a

notification manage access

New task Status: open Send a quick message about this project to other system users Click to change access of other system users to this project. Create a task attached to this project



Split



You can split a main project into a sub project directly from main project page.

You can change country for sub project

Split form

The screenshot shows a window titled 'Split' with a close button. The main heading is 'Create a new sub project with ref 2'. The form contains the following fields and options:

- Country ***: A dropdown menu with 'SINGAPORE' selected.
- Client ***: A dropdown menu with 'Alpha et Omega' selected.
- Project name ***: A text input field containing 'Project design and supply'.
- Access**: An unchecked checkbox with the label 'Access grant access to me only'.
- Notify users**: A checked checkbox.
- Create**: A button at the bottom right.

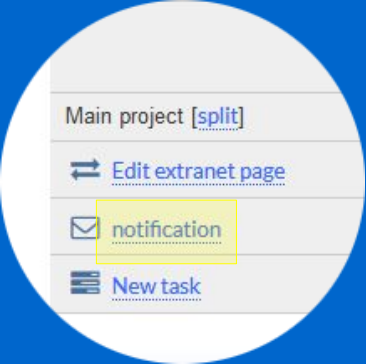
You can change client for sub project

You can input a custom name

As when creating a new project you can set access and notify users



Notification



Project reference: MVL-D-SG-2016_01-AO-120

notification

Send a short notification regarding project MVL-D-SG-2016_01-AO-120 .

user, user2,

priority
 low: normal: high:

I have started a new project

Send note

You can set a priority level

Enter recipients as system users separated by comma

Enter the message

Message is received in internal EK messaging and user email account

Inbox

+ new message

Inbox | Outbox | Archives

Search

search by keyword [Apply]

Date	From	Subject
2016-01-05 08:51	admin	Notification: MVL-D-SG-2016_01-AO-120

Notification: MVL-D-SG-2016_01-AO-120

D8.0.1

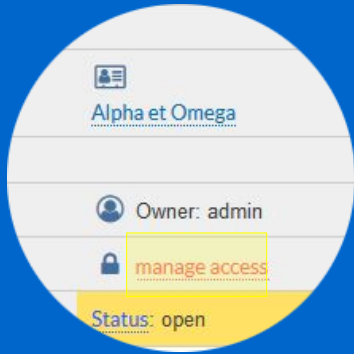
to user

I have started a new project
Project ref.: MVL-D-SG-2016_01-AO-120 [1]

[1] http://localhost/Drupal/drupal8/d8_0_1/projects/project/333



Access control



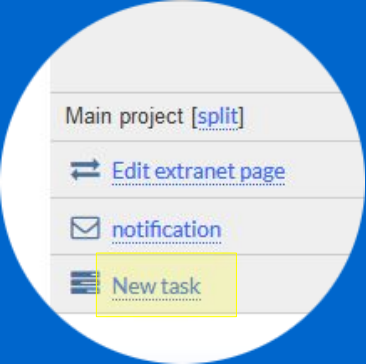
By default users will have access to projects assigned to countries where they have been authorized. This default access can be controlled at project level.


Read the [access definition page](#) for more.

Go to [/ek_admin/access_country](#) to edit access by countries



Task
Open side menu for
recording a new task



Administration 

Set project task Close ✕

Project ref. A-CA-6_09-BP-311 Name of the event/task


Event name
Proposal

Assigned to * To whom this task is given
user

Task description * Short task description
Prepare quotation

Starting * Start and deadline
06 / 25 / 2020

ending:
06 / 30 / 2020



Color Attach custom color to the task


Notification recipients Reminder list of recipients / system users
user,

Notification period Decide if and when a reminder should be send by email
1 day before deadline

Record

Click Record to confirm

Task Details:
follow  
Alpha et Omega
Owner: admin
manage access
Status: open

Task

View task lists

When the task is created:

- an email is sent
- the task will appear in the project dashboard page under “My tasks”
- and in the “Task” section after refreshing the project page.

Data edited for project ref.: MVL-D-SG-2016_01-AO-120 [1]
Field : New task added for: user
Value : Prepare quotation for client
By : admin

[1] http://localhost/Drupal/drupal8/d8_0_1/projects/project/333

My tasks

Active

- test 2 - [A-CA-6_09-BP-311](#) - [0%]
- To do - [MVL-Aa-MY-2014_12-AO-18](#) - [0%]
- lunch appointment - [MVL-Aa-SG-2014_12-BOD-19](#) - [0%]
- seminar - [MVL-Aa-SG-2014_12-BOD-19](#) - [0%]
- Prepare quotation for client - [MVL-D-SG-2016_01-AO-120](#) - [0%]

Completed

- test1 - [A-CA-6_09-BP-311](#)

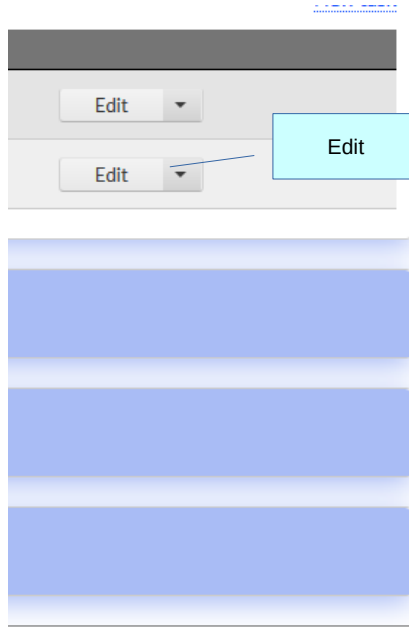
Click on project link in dashboard to view the task

Tasks					
Event	Task	From/to	In charge	Status	
Invoice	test1	2017-05-09 2020-08-11	Myself	done: 100 %	<input type="button" value="Edit"/> ▾
Invoice	test 2	2017-05-09 2020-08-18	Myself	done: 0 %	<input type="button" value="Edit"/> ▾

Click to edit task.
If edited by user assigned to task, the user can change the completion rate.

Task
Edit task

When you click on "edit",
side menu form opens
and task details can be
updated

A screenshot of the 'Set project task' form. The form has a dark header with a pencil icon and the title 'Set project task' and a close button 'X'. The form contains the following fields and controls:

- Project ref. A-CA-6_09-BP-311**: A text field with a callout box 'Select box to delete the task' pointing to it.
- Delete this task**: A checkbox with a callout box 'Slide for completion rate (from 0 to 100)' pointing to it.
- Completion rate ***: A slider control.
- Event name**: A text field containing 'Invoice'.
- Assigned to ***: A dropdown menu showing 'user'.
- Task description ***: A large text area containing 'a description for the things to do'.
- Starting ***: A date field containing '05 / 09 / 2017'.
- ending:**: A date field containing '08 / 18 / 2020' with a close icon.
- Color**: A color selection box showing a green bar.
- Notification recipients**: A text area containing 'admin,'.
- Notification period**: A dropdown menu showing 'Never'.

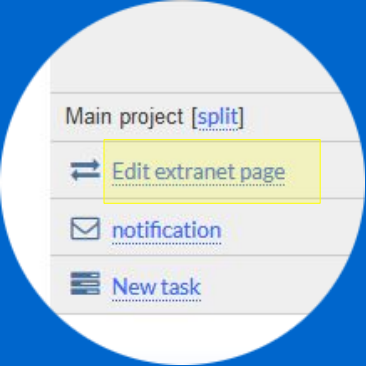
At the bottom right of the form, there is a blue rounded button labeled 'Record'. A light blue callout box labeled 'Click Record to save edit' has a line pointing to the 'Record' button.

Click Record to
save edit

Record



Extranet



If module is available, you can create a special page to share project information with users that are external to your organization (i.e client).

Note: external users still need to be registered and have the appropriate role (see extranet tutorial for details of this section)

A screenshot of a web form for creating an extranet page. The form includes a 'Project' dropdown menu with the value '120 | open | D-SG-2016_01-AO | New house...', a 'Short description' text field containing 'Design house Beach road', and two columns for user access: 'No access' (empty) and 'Allowed' (containing 'user2 - Alpha et Omega'). A 'Create' button is at the bottom. Callout boxes point to the 'Project' dropdown, the 'Short description' field, and the 'Allowed' user list.

Project *
120 | open | D-SG-2016_01-AO | New house...

Short description *
Design house Beach road

No access

Allowed
user2 - Alpha et Omega

Create

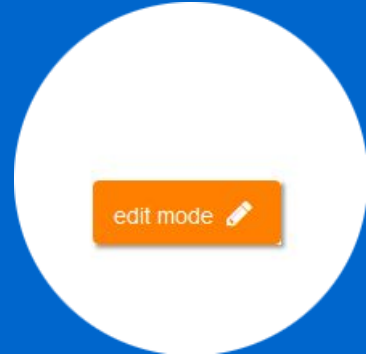
Reference automatically selected

The page title as viewed by external user


List of allowed users (attached to an address book entry)



Edit mode



311 | Reference: A-CA-6_09 PP 311

Project design and supply 

When entering edit mode, click on pencil icon to edit the selected information

follow




last view: admin (on Tuesday 13th of October 2020 06:24 PM)





Alpha et Omega



Main project [\[split\]](#)


 [Edit extranet page](#)

 Owner: admin 

 [notification](#)


 [manage access](#)


 [New task](#)


Status: open 

Linked projects (1)

Main data


Priority: low 

Proposal date: 2014-01-24 

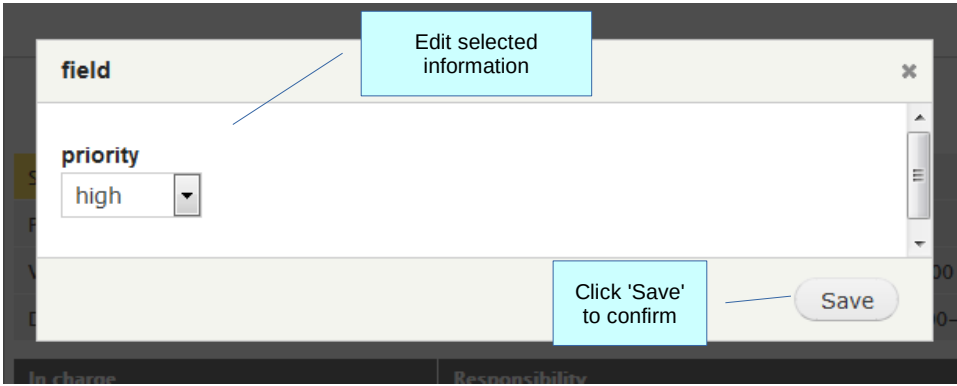
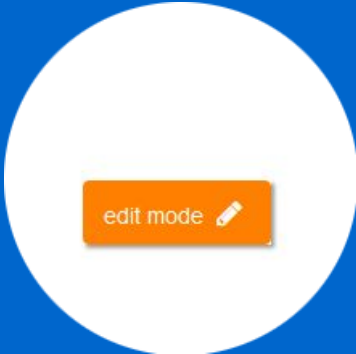
Validation date: 2010-11-16 

Start date: 2014-11-09 

Deadline: 2014-11-06 

Completion date: 2010-11-16 

Edit mode



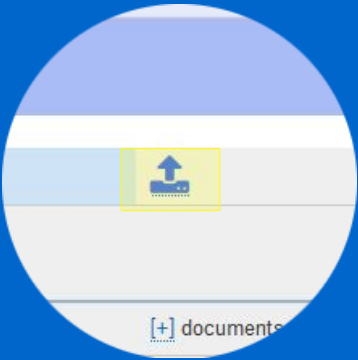
Click to toggle activity display



Each information update action is recorded and displayed in the activity block.
Alternatively all users that have checked the 'notify me' box will receive an email about edited information



Attach files



Upload files by clicking in 'upload new file' in sections of the project page

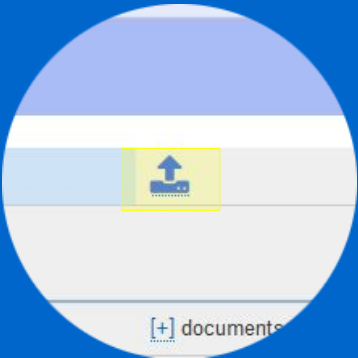
Upload

Select file

pdf_sample.pdf

Click to upload

Attached files



A screenshot of the 'Attachments' interface. It shows a list of files grouped into folders: 'offer', 'images', 'forecast', and 'report'. Each file row includes a file name, a description, and several action icons (trash, lock, email, toggle). Callouts point to various features: 'Open side panel to view info' points to a trash icon; 'Control access to each file [1]' points to a lock icon; 'Click to delete (once deleted, the file name is still visible)' points to a trash icon; 'Send a file by email [2]' points to an email icon; 'Open access to extranet users (needs extranet module)' points to a toggle switch; and 'Side panel info' points to a side panel window.

A side panel window titled 'Side panel info' showing details for a file named 'Proposal draft client.pdf'. The details include: Type: pdf, Size: 7 Kb, Date: 2018-12-26, Uploaded by: admin, Folder: offer, Comment: Draft proposal, and Access granted to: admin, user, user2. A callout 'User access list' points to the 'Access granted to' section.

[1]

A dialog window titled 'access' with a close button. It contains the text: 'By default access is given to users who have access to the country of the project unless custom access has been defined by owner.' Below this, there are two columns: 'Restricted' (an empty box) and 'Allowed' (a list containing 'user' and 'user2'). A double-headed arrow is between the boxes. A 'Save' button is at the bottom right.

Open access to extranet users (needs extranet module)

[2]
This function is opened to all address book emails

A dialog window titled 'mail' with a close button. It has a dropdown menu 'Share this document via email' which is expanded. Below it is a text input field containing 'user@.com, |'. Below that is a 'Please review' section with a text area. At the bottom is a 'Send' button.



Attached files

Side panel options:

When a project is part of multiple sub-projects, files can be moved within linked projects from side panel.

This may change the file access granted by user based on the target projects settings

File Name	Expand	Delete	Lock	Share	Status
[+] Project power point					On
[+] documents zip					On
[+] brochure					On
[+] Invoice					On
deleted by admin 2019-03-01					
[+] yo2					Off
[+] [Partner_user] design					On
[+] tutorial					

File: project-sample.pptx
Type: pptx
Size: 11 Kb
Date: 2018-12-26
Uploaded by: admin
Foder: presentation
Comment: Project power point

Access granted to:

- admin
- user
- user2

Move this file to a linked project

A-CA-6_09-BP-311

Save

Use selection form to move file between linked projects



Attach files alternative

If **Documents module** is enabled, documents in your folders can be posted to a specific project.

(see Documents tutorial for further details)



Click to post to project

A screenshot of a 'project' dialog box. The title bar says 'project'. The main content area shows the filename 'drupal.jpg'. Below it is a 'Project *' dropdown menu with the text '320 | open | A-SG-5_12-BP | new go...'. A callout box points to this dropdown with the text 'Select a project in the list'. Below the dropdown is a list of project sections: '- Select -', 'action plan', 'communication' (highlighted in blue), and 'finance'. A callout box points to this list with the text 'Select the project section'. Below the list is a text input field containing 'new logo for client'. A callout box points to this field with the text 'Add optional comment'. At the bottom right of the dialog is a 'Post' button. A callout box points to this button with the text 'Confirm'. The background shows a file explorer with a file named 'rent-Oct14.txt' and a date '4 JUL. 2015'.

Select a project in the list

Select the project section

Add optional comment

Confirm



Each section of the project page will aggregate information from other modules that are linked to the project

- Linked projects (1)
- Main data
- Tasks
- Communication ★
- Logistics
- Finance

Communication

Attachments Extranet

presentation Folder Hide deleted files

[project-sample.pptx](#) Project power point Delete Manage access Share on extranet

info

[documents_sample.zip](#) documents zip Delete Send via email Share on extranet

[Brochure_sample.pdf](#) brochure Delete Send via email Share on extranet

Files attached

Attachments Hide deleted files

presentation Brochure_sample.pdf brochure Delete Send via email Share on extranet

[project-sample.pptx](#) Project power point Delete Send via email Share on extranet

info

[documents_sample.zip](#) documents zip Delete Send via email Share on extranet

[Brochure_sample.pdf](#) brochure Delete Send via email Share on extranet

Finance Draft proposal.pdf pdf version Delete Send via email Share on extranet

Note: you can drag documents from one folder to the other


Note: you can drag documents from one section to the other

Reports

RP-2-01_16-8	2016-01-06	Land inspection
RP-2-01_16-9	2016-01-06	Client meeting

Reports examples

If report module is available, report created with project reference will be displayed in this section

- Linked projects (1)
- Main data
- Tasks
- Communication
- Logistics 
- Finance

If **logistics module** is available, logistics documents with project reference will be displayed in this section

Logistics

First shipment	Second	Third	Fourth
0000-00-00	0000-00-00	0000-00-00	0000-00-00
Status		Last delivery	
		0000-00-00	
Delivery orders			
MVL-DO-16-01-AO-2485	Alpha et Omega	2016-01-06	printed print

Delivery order examples

- Linked projects (1)
- Main data
- Tasks
- Communication
- Logistics
- Finance ★

If **finance module** is available, finance documents with project reference will be displayed in this section

Finance

Currency	Proposed value	Agreed value	Payment terms	Discount
USD		0.00		0.00
Offer validity	Offer deadline	Incoterm	Purchase budget	
0	0		0.00	
LC status	LC revision / ref	LC expiry	Payment	
		0000-00-00		

Purchase orders

MVL-PO-16-04-BGP-12	EUR 8,618.98	USD 9,072.61	●	partially paid
Total		USD 9,072.61		

Quotations

MVL--QU-16-01-AO-3	USD 35,000.00		open
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COS

COS	USD 0.00
Overhead	USD 241.00
Total expenses	USD 241.00

Internal memos

MVL-EM-16-11-10	USD 90.00	USD 90.00	●	
MVL-EM-16-02-7	USD 22.00	USD 22.00	●	
MVL-EM-16-02-6	EUR 164.00	USD 205.00	●	
Total		USD 317.00		

Comments

Comments

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum. [admin] - 2016-01-06

Attachments

Attachment	Content	Download	Share	Print	Mail	Refresh
b4.jpg	b	🗑️	🔒	📧	🔄	
b5.jpg	b5	🗑️	🔒	📧	🔄	
payment_receipt.txt	uploaded via myemail@mydomain.com	🗑️	🔒	📧	🔄	🔄

Finance info example

Note: you can drag documents from section 5 to section 3

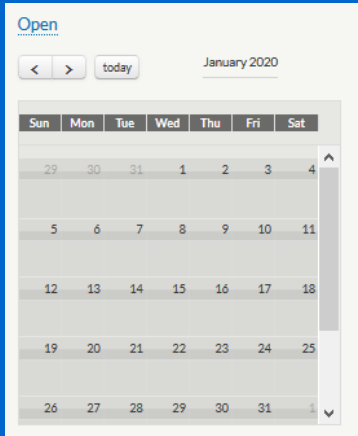
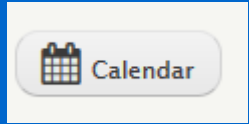
Communication

b4.jpg
image
🗑️
🔒
📧
🔄



Calendar

Calendar link opens as side panel



You can filter display by:

- tasks
- submission dates
- validation dates
- start date
- deadline
- completion date

Close panel

My account Log out

Calendar

My tasks

September 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

ference: MVL-Aa-SG-2014_12-BOD-19

name

in (on Saturday 19th of September 2020 10:41 AM)

Best Outlet Distribution Ltd

Owner: user

manage access

Status: awarded

To do

Prepare quot

Calendar in project will display main data date like project deadline and tasks



Search

There are 2 options to search for projects:

1) Quick search:

Input serial reference in search box in the Project Dashboard

Search projects

Enter ref. And click 'Search'

311

Search

- Project design and supply - [A-CA-6_09-BP-311](#)
- Poulet sur le toit - [A-CA-6_09-BP-311_sub1](#)

Search results



Search

There are 2 options to search for projects:

2) Extended search
</projects/search>

+ Filter search Click on Filter search button

Filtered search

Search with keyword, ref No.

You can enter a keyword such as project title for quick search (other filter criteria will be skipped)

country
Any Filter by country

client
Any
Alpha et Omega
Bekalan PIT Sdn Bhd
Best Outlet Distribution Lt

supplier
Any
Maxis
International NewCo
Booknote editions Ltd Multiple choices for clients or suppliers

category
Any

status
Any Filter by category or status

Date Click the box for optional filter by date

Starting
01 / 01 / 2016

ending
12 / 04 / 2017

Apply Reset Export listv

[Excel](#)

Reference	Date	Name	Country	Category	Status	Archive
A-CA-6_09-BP-311	2014-01-16	Project design and supply	SINGAPORE	category 2	awarded	no
A-CA-6_09-BP-313	2009-06-01	Deco and supply	SINGAPORE	design	completed	no
MVL-Aa-SG-2014_11-AO-15_sub2	2014-12-23	Consulting service	CAMBODIA	category 2	open	no
MVL-Aa-MY-2014_12-AO-18	2014-12-23	Repair and maintenance	MALAYSIA	category 1	open	no
MVL-D-SG-2016_01-AO-120	2016-01-04	New house	SINGAPORE	design	awarded	no

Search results:
Click on the link to open the project page

Option to set archive status on/off with projects.
An archived project will not appear in selections lists



Project settings

Settings are available for administrator to control projects structure and access:

1) sections access control

</projects/settings/users>

Users sections access control

Users sections access Transfer projects Merge projects Access control Serial format

Block file access level at page level

Check this box if you want that all blocked user per project are automatically denied access to files in that project

For each system user you can select which section of project page they can view

Access

Login	Section 1	Section 2	Section 3	Section 4	Section 5
[1] admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[2] user	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[3] user2 (Blocked)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Login blocked

Save

Check a box to authorize access

Save settings



Project settings

2) Ownership transfer

</projects/settings/transfer>

- Users sections access
- Transfer projects
- Merge projects
- Access control
- Serial format

To transfer projects ownership from one user to another, select current owner first

user

After selection, display of projects owned by "user"

▼ List

<input checked="" type="checkbox"/>	Reference	Name	Country
<input checked="" type="checkbox"/>	A-CA-12_09-BP-317	test get	CAMBODIA
<input checked="" type="checkbox"/>	A-CA-4_09-BEP-308	abook	CAMBODIA

Select which project(s) to transfer

Transfer to *

user2

Choose destination user and click "Confirm transfer"



Project settings

3) Merge

</projects/settings/merge>

When merging existing main projects, the serial reference are not edited. Only the level of source project is modified and linked to destination project.

- Users sections access
- Transfer projects
- Merge projects
- Access control
- Serial format

Merge one project as sub project of another project

This process will merge one project as sub project of existing project.

Project to be merged * 326 MVL-Aa-MY-2014_12-AO-18 (open) Repair and

Select the source project

You are merging MVL-Aa-MY-2014_12-AO-18 (Repair and maintenance), MALAYSIA

Project destination * 313 A-CA-6_09-BP-313 (completed) Deco and supp



4) Extract access summary

/projects/settings/access_admin

This pages extract access status per user for selected projects. It helps validating access per user.

Users access by project

Users sections access Transfer projects Merge projects Access control Serial format

Select user you want to check access for

user

country client supplier

category status

Optional filter tags

Apply Reset

Reference	Date	Name	Country	Category	Status	
A-CA-6_09-BP-311	2014-01-16	Project design and supply	SINGAPORE	Design	open	access denied
A-CA-6_09-BP-313	2009-06-01	Deco and supply	SINGAPORE	Design	completed	access denied
A-CA-12_09-BP-316	2009-12-20	test ap	SINGAPORE	Design	awarded	access
A-BR-1_11-BP-319	2011-01-16	new folder	SINGAPORE	Item production	open	access
A-SG-5_12-BP-320	2012-05-01	new go	SINGAPORE	General trade	open	owner

Access status:
"owner": user is owner of the project and has access to it;
"access denied" : the user as access to the project country but has ben blocked to access this project;
"access" : default access to the project.



Project settings

5) Reference code format

[/projects/settings/serial](#)

- Users sections access
- Transfer projects
- Merge projects
- Access control
- Serial format

TYPE-TYPE-CID-MM_YY-ABC-123-

You can define the template of project reference code by selecting elements display

First element *

project type

Second element *

project type

Third element *

country code

I.e country code will be displayed as 3rd element

Fourth element *

date

Fifth element *

client code

Last element *

sequence number

Sequence number cannot be changed

Increment base *

100

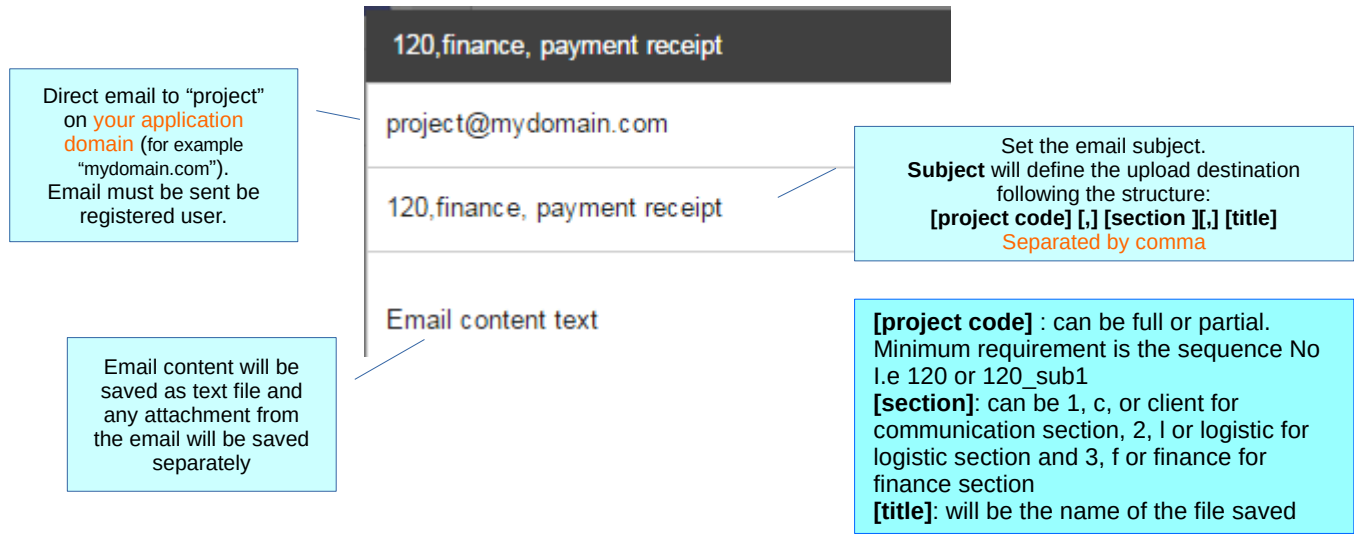
Set the increment base for sequence number count. I.e here next project will start at 101 if none have been created yet

Save



Optional – upload file via email

Based on **server configuration**, you may have option to automatically upload email and attached files to projects



Attachments

payment_receipt.txt	uploaded via myemail@mydomain.com	[x]	[access]	[mail]
ekcny.png	attached to payment_receipt.txt	[x]	[access]	[mail]

Email received an uploaded as attachment

Email address used to send file to project. **Note only registered user can send files to projects they have access to**

File attached to the email message has been saved separately



Access control to project pages definition

There are multiple levels of access control that can be applied

Each sub level restrict previous level

Level 1

Country access
Each user with access to a **country** will access project of that country by default

To control country access level go to :
/ek_admin/access_country

Level 2

Role access
Each user with a role that grant permission "**view project**" will see project page of their countries

To control roles access go to :
</admin/people/permissions>

To change users roles go to :
</admin/people> and edit users profiles


Level 3

Content access
Content view can be controlled by sections and users

To control section access by user go to :
</projects/settings/users>

Level 4

Owner access
Each project can be restricted or granted by owner to other users.

To control section access by user go to a project page and click  **manage access**

Note: a user that do not have **level 1** access above may be granted single access here (country bypass) but **level 2 & 3** will still be applied

Access

You can view a summary of accesses per user

To view summary go to :
/projects/settings/access_admin





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