

Overview of setup Install and create initial system configuration

This module is the base module for [EK management tools](#). It manages global settings, business entities and countries. It also contains other tools needed by other EK modules. For instance, it manages the printing and mail sharing of finance and sales documents

Install main modules

1) Go to
`/admin/modules`

2) Select `ek_admin`

Extend

[List](#) [Uninstall](#)

[Home](#) » [Administration](#)

Download additional [contributed modules](#) to extend your site's functionality.

Regularly review available updates to maintain a secure and current site. Always run the [update script](#) each time a module is updated. Enable the [Update Manager module](#)

Filter by name or description

Enter a part of the module name or description

- ▶ **CORE**
- ▶ **CORE (EXPERIMENTAL)**
- ▼ **EK**

<input checked="" type="checkbox"/>	ek_admin	▼ administration functions module for ek management tools suite Machine name: ek_admin Version: 8.0.2
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3) Click install and
then "Back to site"


Install

Create an external database

Data will be stored into an external database independent from Drupal system database.

Enter database details

Click "Save and continue"

 Application setup is not yet done. Go [here](#) to start

When going back to site, you will see a notification to start the application setup. Click the link or go to /ek_admin/install-external-database

External database configuration

Database type *

MySQL, MariaDB, Percona Server, or equivalent

Database name *

Database name and login

Database username *

Database password

Advanced options

Host *

Host (local or remote)

Port number

Table name prefix

If more than one application will be sharing this database, a unique table name prefix – such as *drupal_* – will prevent collisions.

Save and continue

Database connection settings are recorded in Drupal settings file.

Module tables are created.

You will now be able to create company profile and activate working countries as part of your back-office system.

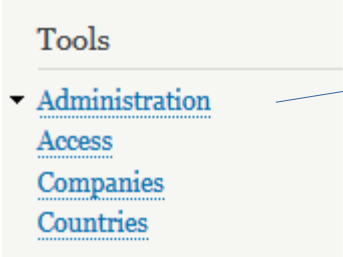
✓ External data connection done. Please verify the default settings file is set back to read only. Starting tables installation.

Installation of Ek_admin module

- Settings table updated
- Company / entity table installed
- Company documents table installed
- Countries table installed
- Countries data updated

You can proceed to further [settings](#).

Continue to back-office settings



Alternatively, you can click on "Administration" in the Tools menu.

Administrate system data

Use private file system to store business entity files.
Go to
“/admin/config/media/file-system”

Default download method

- Public local files served by the webserver.
- Private local files served by Drupal.

Private files

This setting is used as the preferred download method. The use of public files is more efficient, but does not provide any access control.

Administrate system data

On initial installation, The screen will prompt you for creating your first company and working country.

Administrate system data and settings.

+ Global settings

+ Companies

+ Countries

+ Access

Administration links buttons

You have not created any company yet. Go [here](#) to create one.

You have not activated any country yet. Go [here](#) to activate countries.

First company and country links

Country

In /ek_admin/country, you can select to activate or deactivate countries.

List and edit countries

active

Name	Entity	Status (uncheck to deactivate)
CAMBODIA	<input type="text" value="KH office"/>	<input checked="" type="checkbox"/>
Canada	<input type="text" value="Toronto Ltd"/>	<input checked="" type="checkbox"/>
MALAYSIA	<input type="text" value="KL office"/>	<input checked="" type="checkbox"/>
SINGAPORE	<input type="text" value="My co Pte Ltd"/>	<input checked="" type="checkbox"/>

List of active countries

You can set a business entity name

non active

Name	Entity	Status (select to activate)
Argentina	<input type="text"/>	<input type="checkbox"/>
SWEDEN	<input type="text"/>	<input type="checkbox"/>
VIETNAM	<input type="text"/>	<input type="checkbox"/>

List of non active countries

New country

Add a country for the site.

To add a new country select from list. New country is automatically set as active

Record

Click to save changes

Company

After country activation you can create company or business entity. If you have a group of companies, create first the main entity or head office reference.

New company

active

My Co Ltd name MCL

1234
registration number

Gold street
address line 1

#68
address line 2

Greatown city 12345 post code UNITED KINGDOM country

12345
telephone

12345
fax

012345
mobile phone

me@myco.me
email

John
contact

Main company or
business entity
information and
contacts

Company

You have option to add other information for your business entity.

▼ Correspondance address

address line 1
address line 1

address line 2
address line 2

city post code post code UNITED KINGDOM country

telephone
telephone

fax
fax

▼ Images

Upload a logo image
Browse... No file selected.

Upload a signatue image
Browse... No file selected.

▼ Other settings

year
financial year

month. €
financial month

tax no.
income tax no.

pension no.
pension no.

social no.
social security no.

vat ref. no.
vat ref. no.

Secondary address and contact (used in company documents, I.e invoice)

Logo and signature images (private file system)

Other legal and financial information

Company

Once created, the company will be listed in companies list. You can edit information and perform other tasks.

Manage companies

Companies list

+ Excel list

+ Global settings

Download list in excel format (requires external library)

Manage global settings (i.e. libraries, sessions, etc...)

id	Name	Status	
1	My Co Ltd	active	Edit

Edit entity information

Manage finance parameters (requires finance and sales modules)

Attach documents to entity

Print entity label (requires external library)

Edit

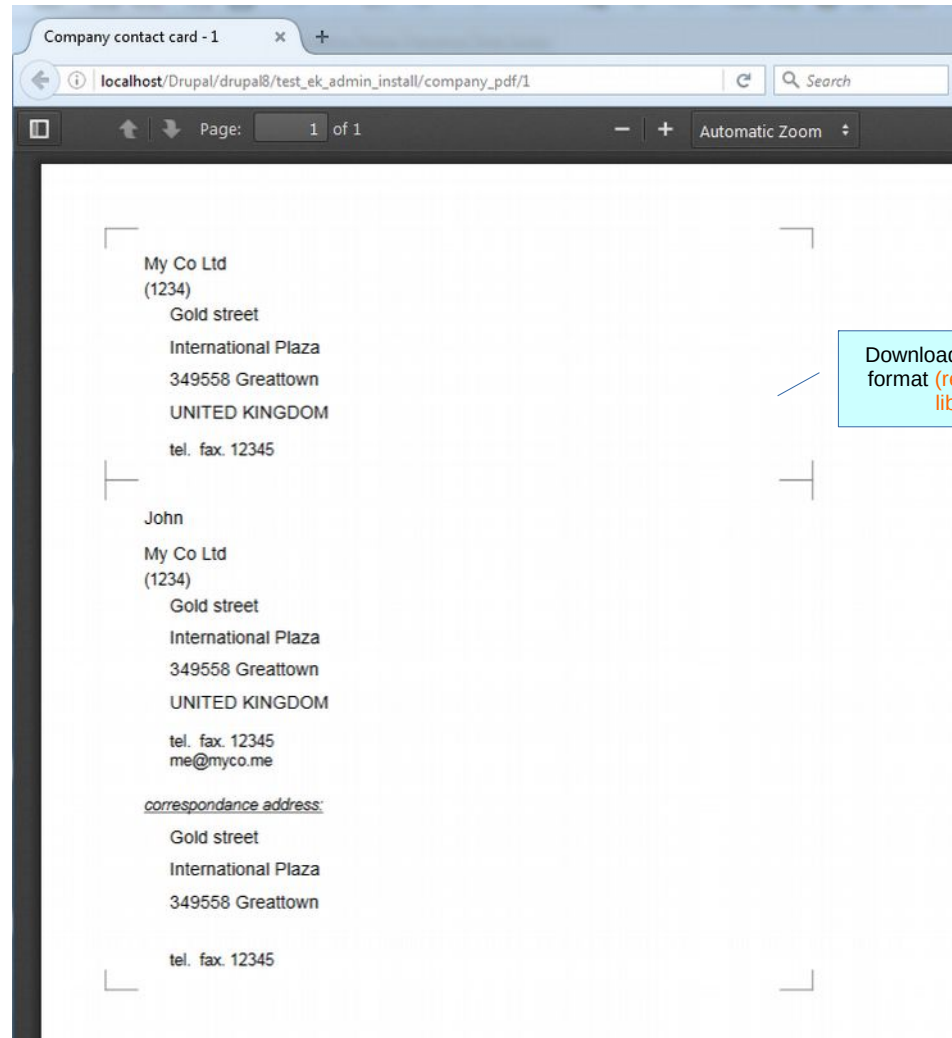
Finance parameters

Attached documents

Print label

Company

Export business entity data / label in Pdf format



Attached documents

You can attach documents per business entity and control access.

Manage companies documents

Actions: delet and access control

List

 text.txt	2012-09-02	comment		 access
 contact.pdf	2015-02-21	list		 access
 kwsp.jpeg	2015-03-29	deleted by admin	[-]	
 drupal.jpg	2015-03-29	logo		 access
 b5.jpg	2016-02-04	deleted by admin	[-]	

Select file: No file selected.

Use form to upload new document

access

By default access is given to users who have access to the company unless custom access has been defined by owner. Use "Ctrl C" to select multiple users in the box below.

- admin
- user
- user2

Access control form

Global settings

Global settings

With remote database configuration indicates if ssl encryption is active

✓ Info: ssl database connection active

Use key for cron:

Drupal Cron key for indication only (used when launching custom EK cron tasks from server)

ek_validation
An installation key if you need to manage number of entities and users

system installation id

The installation key address

validation url address for support and installation

https Site connection protocol

Connection type

Name of backup directory and file when launching cron backup from server

Backup full path to directory

Backup file name(s) separated by comma

Backup recipients email addresses separated by comma

Emails addresses to send backup files at the end of cron job

✓ Excel library installed

✓ FPdf library installed

✓ TcPdf library installed

Indicated that needed libraries are installed EK currently uses following libraries: **phpexcel** (for excel formats downloads), **FPDF** and **TcPdf** (for Pdf documents generation), **Vsword** (for Word documents generation).

Other administration functionalities

You can backup data from any business unit including all data generated by other EK modules like finance, sales or HR for instance.

To do a backup, navigate to:

`/ek_admin/backup/{id}`

Where {id} is the id of your entity record.

End of file mark *

\r\n

Select the End of File format required (depends on the restoration method)

```
#-----  
# Table ek_company  
#-----  
CREATE TABLE `ek_company` (  
  `id` int(10) unsigned NOT NULL AUTO_INCREMENT,  
  `access` varchar(255) DEFAULT NULL COMMENT 'serialized uid list access',  
  `settings` text COMMENT 'holds accounts settings',  
  `name` varchar(45) DEFAULT NULL COMMENT 'company name',  
  `reg_number` varchar(45) DEFAULT NULL COMMENT 'company registration number',  
  `address1` tinytext COMMENT 'address line 1',  
  `address2` tinytext COMMENT 'address line 2',  
  `address3` tinytext COMMENT 'alternate address line 1',  
  `address4` tinytext COMMENT 'alternate address line 2',  
  `city` varchar(250) DEFAULT NULL COMMENT 'city name',  
  `city2` varchar(250) DEFAULT NULL COMMENT 'alternate city name',  
  `postcode` varchar(45) DEFAULT NULL COMMENT 'postcode',  
  `postcode2` varchar(45) DEFAULT NULL COMMENT 'alternate postcode',  
  `country` varchar(45) DEFAULT NULL COMMENT 'country name',  
  `country2` varchar(250) DEFAULT NULL COMMENT 'alternate country name',  
  `telephone` varchar(45) DEFAULT NULL COMMENT 'telephone',  
  `telephone2` varchar(45) DEFAULT NULL COMMENT 'altenate telephone',  
)
```

Backup My Company Ltd data

Click backup button and backup data will be generated as a text file as in the example above, that you can copy and save

You can merge data from another EK system account.

Merging process can be difficult. Make sure you have a backup before starting.

Warning: some information may be lost during the merge process, like information links between tables. Also make sure that the main company id you are merging do not already exist in the destination system.

Merge data

You can merge data from another EK account with the current database. The source file must be a sql format file extracted from the EK account you want to merge with this account. The sql file must include `CREATE TABLE` and `INSERT` scripts of the exact table name you want to merge. Once merged, you cannot undo the merging of data. If you are not sure, backup the current database as safety precaution. Also when merging data you may lose some information links (foreign keys) between tables. You can only correct this manually once merged.

Select file *

ek_company_documents.sql

Load the source sql file containing data

Select a sql file containing the data table to merge

ek_company_documents

Enter the name of the destination table.

```
#SQL
CREATE TABLE `ek_company_documents` (
  `id` int(5) NOT NULL AUTO_INCREMENT,
  `coid` int(5) DEFAULT NULL COMMENT 'company id',
  `fid` int(5) DEFAULT NULL COMMENT 'file managed id',
  `filename` varchar(200) DEFAULT NULL COMMENT 'Name of the file with no path components.',
  `uri` varchar(255) DEFAULT NULL COMMENT 'the URI of the file',
  `comment` varchar(255) DEFAULT NULL COMMENT 'comment',
  `date` int(10) DEFAULT '0',
  `size` int(10) DEFAULT '0' COMMENT 'document size',
  `share` varchar(255) DEFAULT '0' COMMENT 'list of shared uid',
  `deny` varchar(255) DEFAULT '0' COMMENT 'list of denied uid',
  PRIMARY KEY (`id`)
);
INSERT INTO `ek_company_documents` (`id`,`coid`,`fid`,`filename`,`uri`,`comment`,`date`,`size`,`share`,`deny`) VALUES
(1,'1','0','text.txt','private://admin/company1/documents/text.txt','comment','1346515200','55','0','0'),
(4,'1','0','contact.pdf','private://admin/company1/documents/contact_0.pdf','tytytytytyt','1424480760','1146','0','0'),
(5,'1','0','kwsp.jpeg','private://admin/company1/documents/kwsp_3.jpeg','deleted by admin','1427614013','19253','0','0'),
(13,'1','0','drupal.jpg','private://admin/company1/documents/drupal.jpg','logo','1438306184','13751','0','0'),
(15,'1','0','b5.jpg','1454580342','deleted by admin','1454580342','35623','0','0');
```

Ex. of source file

✓ Data have been merged with target table ek_company_documents.



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Systems

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