

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

Extended filter to search projects

+ New project

+ Filter search

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%]

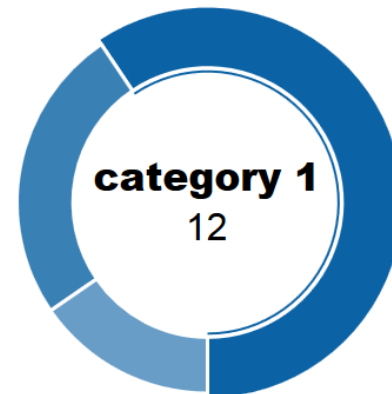
Search projects

I.e. "123" or keyword

Search

Quickly find a project by entering its serial reference

Projects chart by type



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	

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

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

Set the project level.
A project can have 2 levels:
MAIN : is for initial projectst hat 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

8

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:

Section names can be customized in **settings**

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

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

Alpha et Omega

Owner: user

manage access

Status: awarded

Linked projects (1)

Main data

Tasks

Communication

Logistics

Finance

Follow to receive email updates

Open all tabs

Toggle edit

edit mode




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

Project design and supply

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

Split into sub project


Link to client details

follow 


List followers


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


 [notification](#)

 [New task](#)

Send a quick message about this project to other system users

Create a task attached to this project

Owner: [Alpha et Omega](#)

 [manage access](#)

Status: open

Click to change access of other system users to this project.



Split

Main project [split]

Edit extranet page

notification

New task

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

You can change country for sub project

Split form

Split

Create a new sub project with ref 2

Country *

SINGAPORE ▼

Client *

Alpha et Omega ▼

Project name *

Project design and supply

☐ Access
grant access to me only

☒ Notify users

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

You can change client for sub project

You can input a custom name

Create



Notification

Main project [split]

Edit extranet page

notification

New task

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

Enter recipients as system users separated by comma

You can set a priority level

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

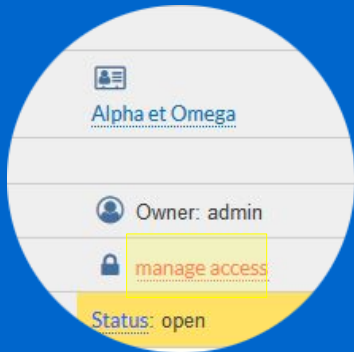
to user

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



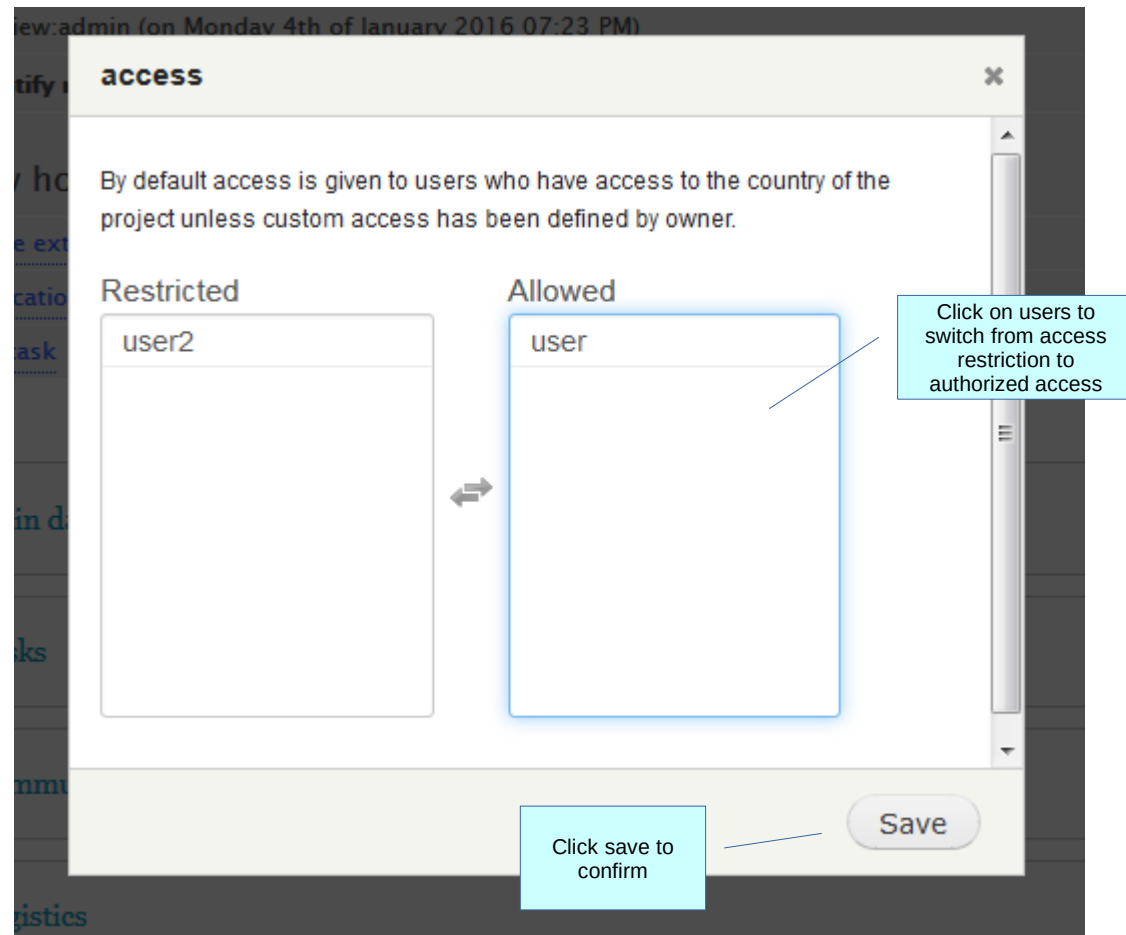
Access control



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


Main project [split]
Edit extranet page
notification
New task

Administration

follow ☒ 


 Alpha et Omega

 Owner: admin

 manage access

Status: open

Close

 Set project task

Project ref. A-CA-6_09-BP-311

Name of the event/task

Event name

Proposal

Assigned to *

user

To whom this task is given

Task description *

Prepare quotation

Short task description

Starting *


06 / 25 / 2020

Start and deadline

ending:

06 / 30 / 2020

Color



Attach custom color to the task

Notification recipients

user,

Reminder list of recipients / system users

Notification period

1 day before deadline

Decide if and when a reminder should be send by email

Record

Click Record to confirm

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 %	Edit
Invoice	test 2	2017-05-09 2020-08-18	Myself	done: 0 %	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

The screenshot shows a 'Set project task' form with the following fields and annotations:

- Project ref.** A-CA-6_09-BP-311
- ☐ **Delete this task** (Annotation: Select box to delete the task)
- Completion rate** * (Annotation: Slide for completion rate (from 0 to 100))
- Event name**
Invoice
- Assigned to** *
user
- Task description** *
a description for the things to do
- Starting** *
05 / 09 / 2017
- ending:**
08 / 18 / 2020
- Color**
Green
- Notification recipients**
admin,
- Notification period**
Never
- Record** button (Annotation: Click Record to save edit)



Extranet

Main project [split]

Edit extranet page

notification

New task

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)

Project *

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

Reference
automatically
selected

Short description *

Design house Beach road

The page title as
viewed by external
user

No access

Allowed

user2 - Alpha et
Omega

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

Create



Edit mode

edit mode 

311 | Reference: A-CA-6_09 PP 211

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 

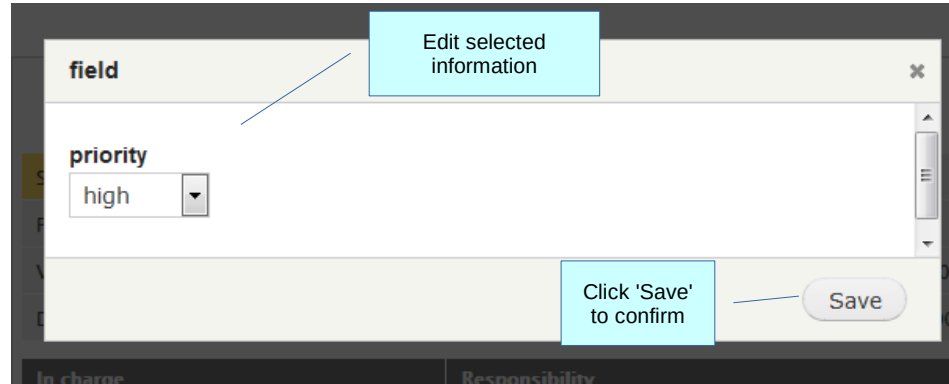
Start date: 2014-11-09 

Deadline: 2014-11-06 

Completion date: 2010-11-16 

Edit mode

edit mode 



A screenshot of a web application's 'field' edit form. The form has a title bar 'field' with a close button 'x'. Inside, there is a 'priority' label and a dropdown menu currently showing 'high'. At the bottom right, there is a 'Save' button. A light blue callout box points to the form area with the text 'Edit selected information'. Another light blue callout box points to the 'Save' button with the text 'Click \'Save\' to confirm'.

Click to toggle
activity display

Users activity

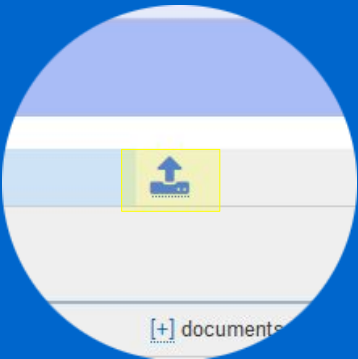
- [Today] ---
- open (You)
- [Earlier] ---
- open (You)
 - delete excel.jpg (You)
 - open (You)

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

Browse...

pdf_sample.pdf

Presentation

Optional folder

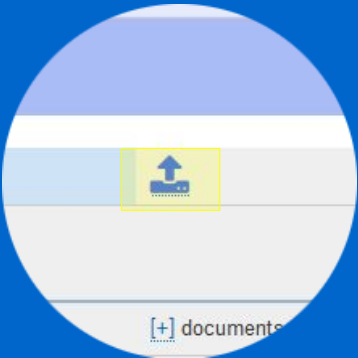
Pdf version for meeting

Add a short description or tag

Upload

Click to upload

Attached files



Attachments

offer

Proposal draft client.pdf Draft proposal

quote-draft-sample.pdf Quote

images

tool_5683_sample.jpg

forecast

budget_sample.xlsx Budget

report

Report_sample_doc.docx Report

Open side panel to view info

Control access to each file [1]

Click to delete (once deleted, the file name is still visible)

Send a file by email [2]

Side panel info

File: Proposal draft client.pdf

Type: pdf

Size: 7 Kb

Date: 2018-12-26

Uploaded by: admin

Foder: offer

Comment: Draft proposal

Access granted to:

admin

user

user2

User access list

Open access to extranet users (needs extranet module)

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

[1]

access

By default access is given to users who have access to the country of the project unless custom access has been defined by owner.

Restricted

Allowed

user

user2

Save

mail

Share this document via email

user@ .com, |

Please review

Send
































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

Extranet				
				
				
[+] Project power point				
[+] documents zip				
[+] brochure				
[+] Invoice				
deleted by admin 2019-03-01				
[+] yo2				
[+] [Partner_user] design				
[+] tutorial				

Use selection form to move file between linked projects



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

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)


A screenshot of a 'project' dialog box. The dialog has a title bar 'project' with a close button. Inside, the filename 'drupal.jpg' is displayed. Below it is a 'Project *' dropdown menu showing '320 | open | A-SG-5_12-BP | new go...'. A callout box 'Select a project in the list' points to this dropdown. Below the dropdown is a list box with options: '- Select -', 'action plan', 'communication' (highlighted in blue), and 'finance'. A callout box 'Select the project section' points to this list. Below the list is a text input field containing 'new logo for client'. At the bottom of the dialog is a 'Post' button. A callout box 'Add optional comment' points to the area above the 'Post' button. Another callout box 'Confirm' points to the 'Post' button. The dialog is overlaid on a dark background showing a file named 'rent-Oct14.txt' with a date '4 JUL. 2015' and size '0.5 KB'.

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

Upload new file

Hide deleted files

Extranet

presentation

Folder

project-sample.pptx

Project power point

Manage access

Share on extranet

info

documents_sample.zip

documents zip

Brochure_sample.pdf

brochure

Files attached

Delete

Send via email

Attachments

Upload new file

Hide deleted files

Extranet

presentation

Brochure_sample.pdf

brochure

project-sample.pptx

Project power point

info

documents_sample.zip

documents zip

Brochure_sample.pdf

brochure

Finance

Draft proposal.pdf

pdf version

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

Logistics

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

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
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Delivery order examples

Purchase orders

Quotations

COS

Internal memos

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

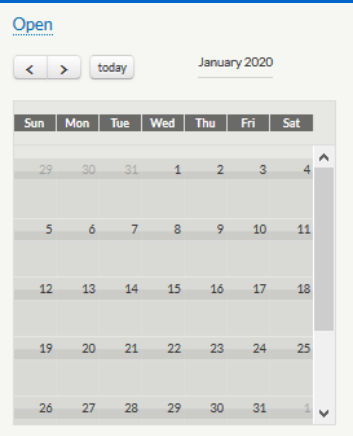
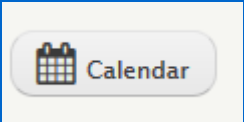
Communication

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



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

< > today

September 2020

month week day

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
To do						
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

Prepare quote

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

name

follow

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

Best Outlet Distribution Ltd

Owner: user

manage access

Status: awarded

data

communication

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

311

Search

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

Enter ref. And click 'Search'

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

Filter by category or status

status

Any

☒ 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

Each section name display can be customized

Login	Section 1	Section 2	Section 3	Section 4	Section 5
Section custom name	Info	Tasks	Files and reports	Logistics	Finance
[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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[3] user2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[55] UserToDelete (Blocked)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Login blocked

Check a box to authorize access per section

Save

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

Select

▼ List

After selection, display of projects owned by "user"

<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"

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.



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

Select the destination project

Click "Confirm merge"



Project settings

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

Any

client

Any

supplier

Any

category

Any

status

Any

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

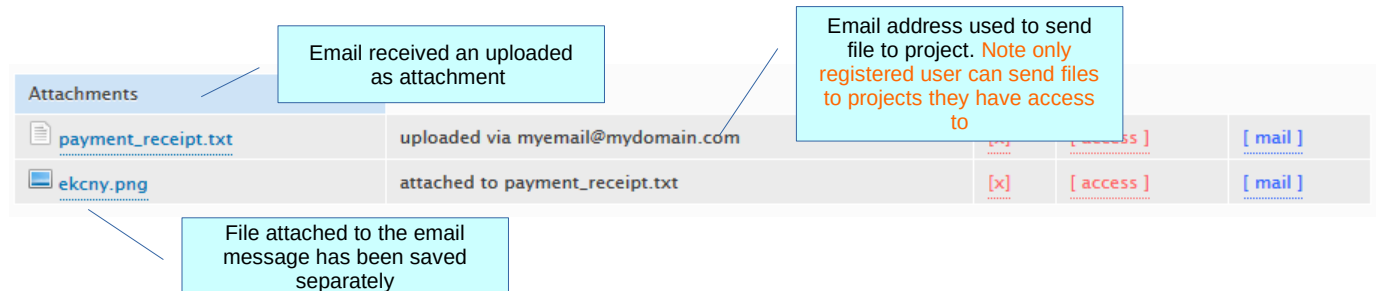
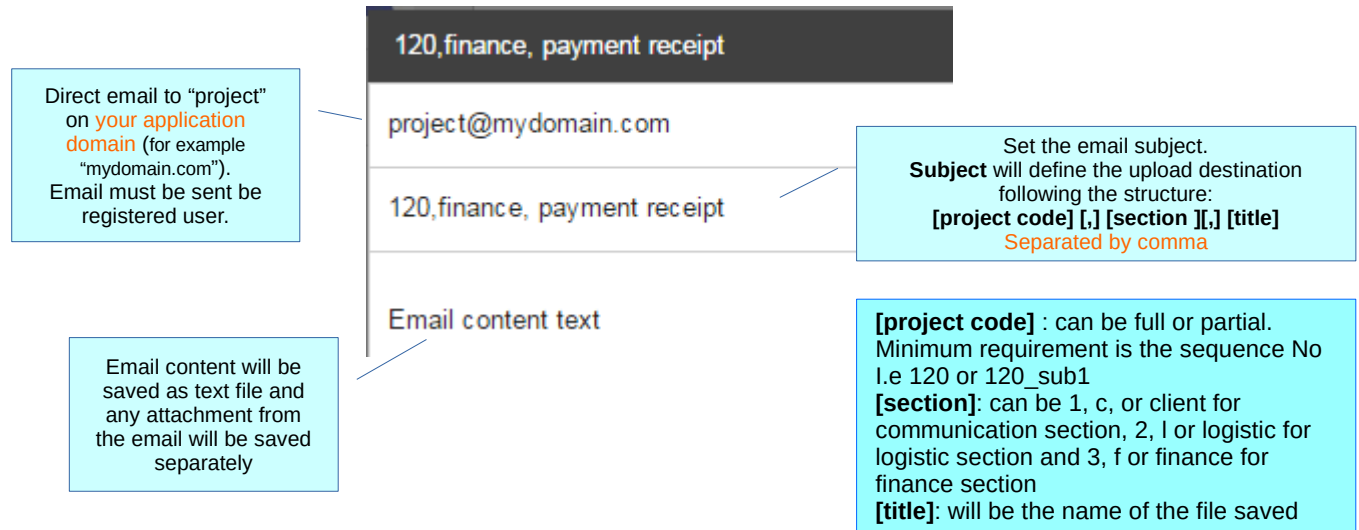
Set the increment base for sequence number count. I.e here next project will start at 101 if none have been created yet

Save



Optional – upload file via email

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



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](#)



