

Overview of projects module

Projects modules 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.

Besides to 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.

Projects dashboard

Use this link to create a new project

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

Quickly find a project by entering its serial reference

Projects chart by type

category 1
12

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**

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 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

8|

[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](#)

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

Project types

[new project](#)

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

Group	Name ▲	Description	Short name	Delete
<input type="text" value="A"/>	<input type="text" value="category 1"/>	<input type="text" value="A"/>	<input type="text" value="A"/>	<input type="checkbox"/>
<input type="text" value="A2"/>	<input type="text" value="category 2"/>	<input type="text" value="B"/>	<input type="text" value="B"/>	<input type="checkbox"/>
<input type="text" value="B"/>	<input type="text" value="category 31"/>	<input type="text" value="C"/>	<input type="text" value="CC"/>	<input type="checkbox"/>
<input type="text" value="B2"/>	<input type="text" value="design"/>	<input type="text" value="architect design"/>	<input type="text" value=""/>	

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.

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

Follow to receive email updates

New house	edit mode 	follow  
last view:admin (on Sunday 19th of March 2017 09:03 AM)		
Design	 Alpha et Omega	
Main project		
 Edit extranet page	👤 Owner: user	
 notification	🔒 manage access	
 New task	Status: awarded	

Linked projects
Main data
Tasks
Communication
Logistics
Finance

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

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

Click to enter edit mode and change information in this project page

List followers

The screenshot shows a project page for 'Project design and supply'. The page includes a header with the project name and a 'last view' timestamp. Below the header, there are several sections: 'Design' (with a link to 'Alpha et Omega'), 'Main project' (with a link to 'Edit extranet page'), 'notification' (with an envelope icon), and 'New task' (with a task icon). On the right side, there are buttons for 'edit mode', 'follow', and a followers icon. Below these buttons, there is a section for 'Owner: admin' and a 'manage access' link. At the bottom, there is a yellow bar indicating 'Status: open'. Annotations with callout boxes explain the purpose of various elements: the reference number, the 'edit mode' button, the 'follow' button, the 'Alpha et Omega' link, the 'Owner: admin' section, the 'manage access' link, the 'Edit extranet page' link, the 'notification' link, the 'New task' link, and the 'Status: open' bar.

Project design and supply

last view: admin (on Tuesday 7th of November 2017 09:42 AM)

Design

Main project

[Edit extranet page](#)

[notification](#)

[New task](#)

edit mode

follow

[Alpha et Omega](#)

Owner: admin

[manage access](#)

Status: open

Link to client details

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

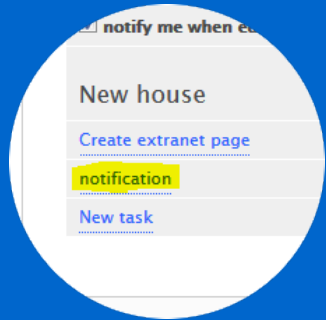
Send a quick message about this project to other system users

Create a task attached to this project

Creator of the project is the owner and is automatically notified when edited. Click to "follow" or "unfollow"

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

Notification



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

notification [x]

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 [x]

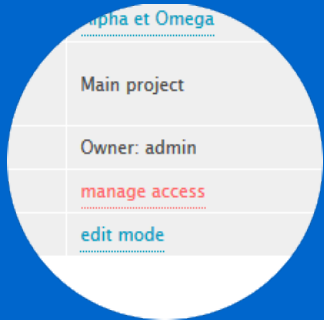
D8.0.1

to user [v]

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

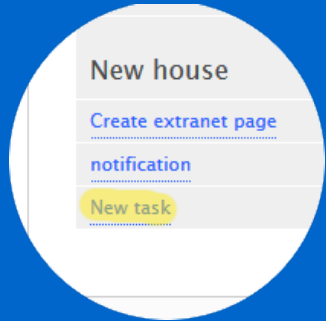


By default users will have access to projects assigned to countries where they have been authorized. This default access can be controlled at project level.

Go to `/ek_admin/access_country` to edit access by countries

The screenshot shows a web application interface with a dialog box titled "access". The dialog box has a close button (X) in the top right corner. Below the title, there is a text block: "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 text are two columns: "Restricted" and "Allowed". The "Restricted" column contains a box with the text "user2". The "Allowed" column contains a box with the text "user". A double-headed arrow is positioned between the two boxes. A light blue callout box with a pointer to the "user" box contains the text: "Click on users to switch from access restriction to authorized access". At the bottom right of the dialog box is a "Save" button. A light blue callout box with a pointer to the "Save" button contains the text: "Click save to confirm".

Task

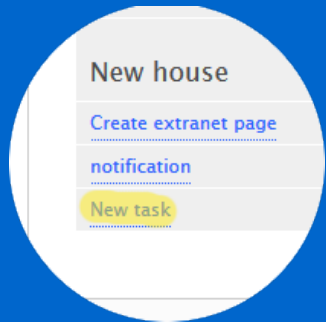


The screenshot shows a web form titled "task" with the following fields and annotations:

- Project ref.:** MVL-D-SG-2016_01. Annotation: "Name of the event/task".
- Event name:** Proposal.
- Assigned to *:** user. Annotation: "To whom this task is given".
- Task description *:** Prepare quotation for client. Annotation: "Short task description".
- Starting *:** 2016-01-05. **ending:** 2016-01-07. Annotation: "Start and deadline".
- Notification period:** 1 day before dealine. Annotation: "Decide if and when a reminder should be send by email".
- Notification recipients:** user. Annotation: "Reminder list of recipients / system users".
- Buttons:** Record, cancel. Annotation: "Click Record to confirm".

At the bottom of the window, the word "Finance" is visible.

Task



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

- Prepare quotation for client - [MVL-D-SG-2016_01-AO-120](#) - [0%]

Click on project link in dashboard to view the task

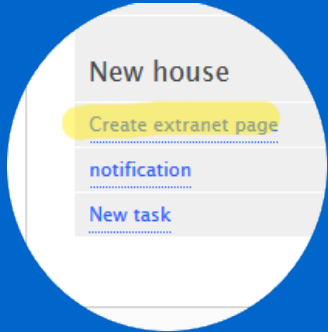
Tasks

Show all columns

Event	Task	From/to	In charge	Status	
Proposal	Prepare quotation for client	2016-01-05 2016-01-08	Myself	expired	Edit

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

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](#))

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

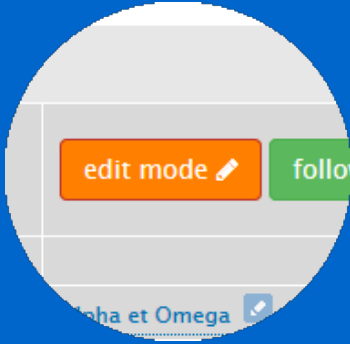
Short description *
Design house Beach road
The page title as viewed by external user

No access

Allowed
user2 - Alpha et Omega
List of allowed users (attached to an address book entry)

Create

Edit mode



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

New house edit mode follow

last view:admin (on Sunday 19th of March 2017 09:03 AM)

Design Alpha et Omega

Main project Edit extranet page Owner: user manage access Status: awarded

notification New task

Linked projects

Main data

Priority: low	
Proposal date: 2016-01-02	
Validation date: 0000-00-00	Start date: 2016-04-22
Deadline: 2016-01-08	Completion date: 0000-00-00

In charge	Responsibility	Main task

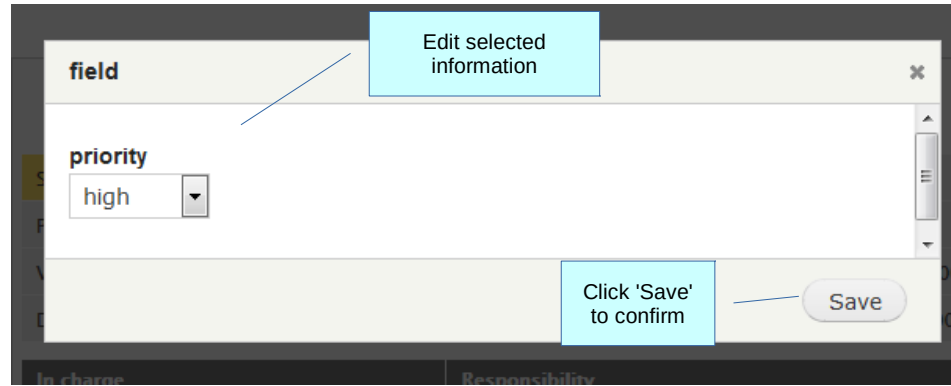
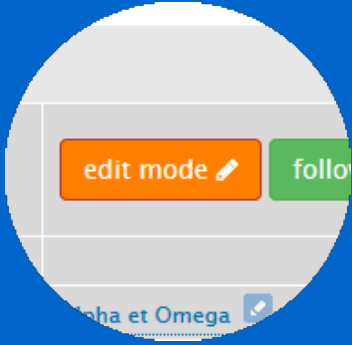
Description

Comments

Suppliers Booknote editions Ltd

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

Edit mode



Click to deactivate activity display

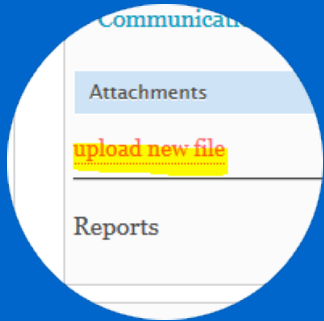
[Users activity](#)

- [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



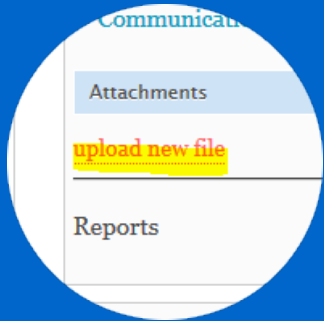
This screenshot shows the 'upload' dialog box with the following elements and annotations:

- upload**: Dialog title.
- Select file**: Section header.
- Browse...**: Button to select a file.
- Draft proposal.odt**: Selected file name.
- text version**: Text input field for a description or tag.
- Upload**: Button to submit the file.
- Annotations:**
 - 'Upload files by clicking in 'upload new file' in sections of the project page' points to the dialog box.
 - 'Add a short description or tag' points to the text input field.
 - 'Click upload' points to the 'Upload' button.

This screenshot shows the 'upload' dialog box after a successful upload. The file name is now 'Draft proposal.pdf'. A red message 'file uploaded Draft proposal.pdf' is displayed below the text input field. The 'Upload' button is still visible.

Example 2

Attach files



Attachments				
Draft proposal.odt	text version	[x]	[access]	[mail]
Draft proposal.pdf	pdf version	[x]	[access]	[mail]

Control access to each file [1]

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

Send a file by email [2]

[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

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

mail

Share this document via email

user@.com, |

Please review

Send

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 proeject

A screenshot of a 'project' dialog box with several annotations. The dialog has a title bar 'project' and a close button. The main content area shows the filename 'drupal.jpg' and a 'Project *' dropdown menu with the selected value '320 | open | A-SG-5_12-BP | new go...'. Below the dropdown is a list of project sections: '- Select -', 'action plan', 'communication' (highlighted in blue), and 'finance'. A text input field contains 'new logo for client'. At the bottom, there are 'Add optional comment', 'Confirm', and 'Post' buttons. Annotations with arrows point to the dropdown menu, the 'communication' section, the text input field, and the 'Post' button.

project

drupal.jpg

Project *

320 | open | A-SG-5_12-BP | new go...

- Select -
action plan
communication
finance

new logo for client

Add optional comment


Confirm

Post

Select a project in the list

Select the project section

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

- Linked projects
- Main data
- Tasks
- Communication 
- Logistics
- Finance

Communication

Attachments					
Draft proposal.pdf	pdf version				
Draft proposal.odt	deleted by admin 2016-01-06				

Annotations:

- Upload new file (points to upload icon)
- Files attached (points to attachment list)
- Delete (points to trash icon)
- Send via email (points to email icon)
- Manage access (points to lock icon)
- Share on extranet (points to share icon)

Reports

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

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

Reports examples (points to table)

Finance

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

Draft proposal.pdf	pdf version				
------------------------------------	-------------	--	--	--	--


- Linked projects
- 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
- 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

Overhead	USD 241.00			
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Total expenses

Total expenses	USD 241.00			
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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	Remove	Lock	Share	Download
b4.jpg	b				
b5.jpg	b5				
payment_ref.txt	uploaded via myemail@mydomain.com				

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

Communication

b4.jpg	image				
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Finance info example

Calendar

+ calendar

January 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	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

expand

- You can filter display by:
- tasks
 - submission dates
 - validation dates
 - start date
 - deadline
 - completion date

The screenshot shows a calendar application window titled "Calendar". At the top left, there is a dropdown menu labeled "My tasks". Below it are navigation buttons: "< > today". The main calendar area is for "January 2016" and has view options for "month", "week", and "day". The calendar grid shows days from 27 to 6. A task "Prepare quotation for client" is displayed as a light blue bar spanning from Wednesday, January 5th to Thursday, January 6th. Another task "Project 120, Proposal" is shown as a yellow box on Friday, January 7th. A blue callout box points to the "Project 120, Proposal" task.

Calendar in project will display main data dated 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

Url : /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

Url: /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

Check a box to authorize access

Save

Save settings

Project settings

2) Ownership transfer

Url: /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

Url: /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

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

Project to be merged * Select the source project

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

Project destination * Select the destination project

Click "Confirm merge"

Merge one project as sub project of another project

4) Extract access summary

Url: /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

Url: /projects/settings/serial

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

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

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

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 *

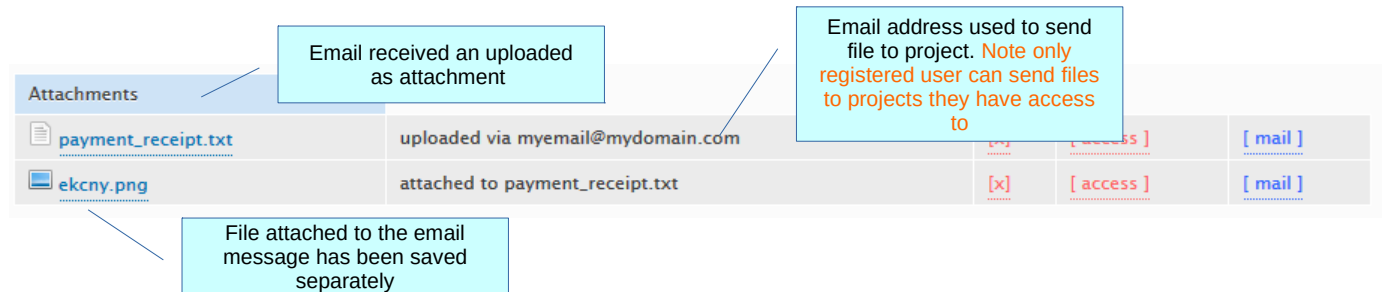
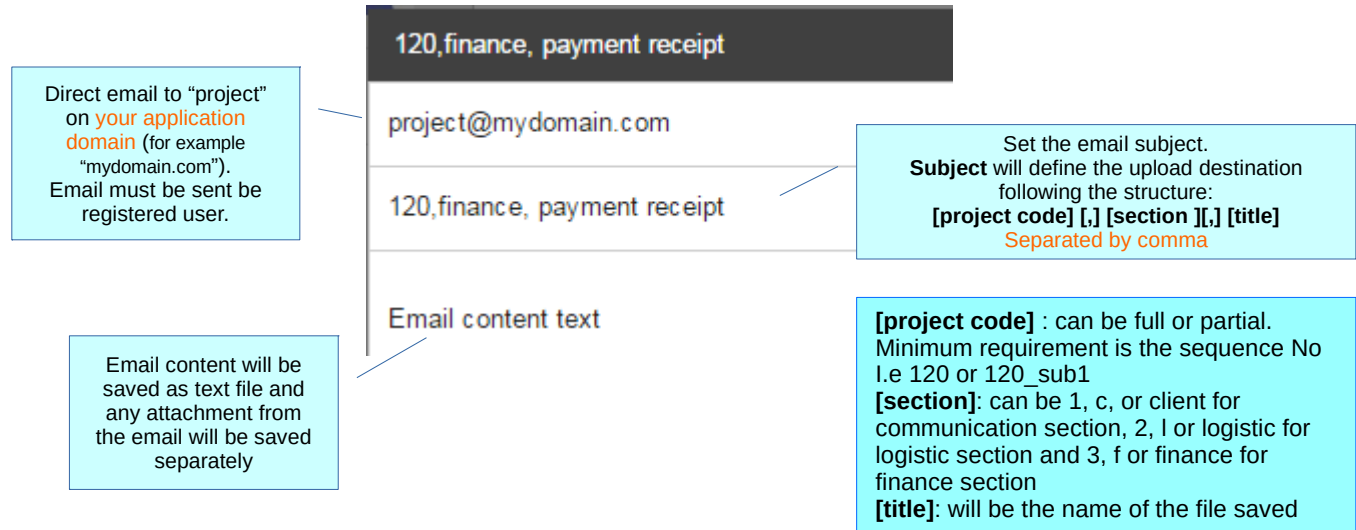
100

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





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