

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.

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

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 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

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.

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	
notification	Owner: user	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

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

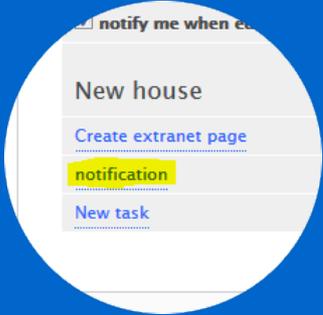
Send a quick message about this project to other system users

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

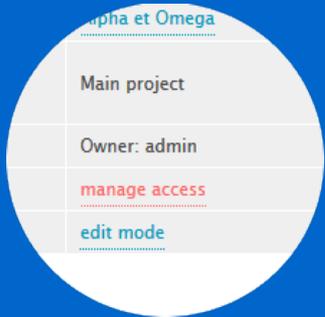
Notification: MVL-D-SG-2016_01-AO-120 [D]

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

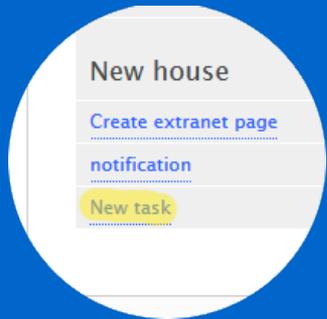


By default users will have access to projects assigned to countries where they have been authorized. This default access can be controlled at project level.

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 contains the following 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 text are two columns: 'Restricted' and 'Allowed'. The 'Restricted' column contains the name 'user2'. The 'Allowed' column contains the name 'user'. A double-headed arrow is positioned between the two columns. A 'Save' button is located at the bottom right of the dialog box. Two callout boxes provide instructions: one pointing to the 'user' in the 'Allowed' column with the text 'Click on users to switch from access restriction to authorized access', and another pointing to the 'Save' button with the text 'Click save to confirm'.

Task



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

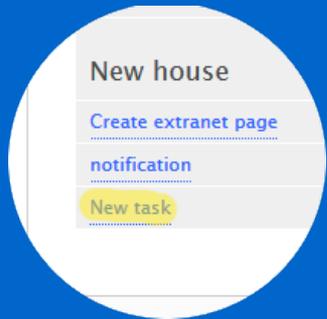
- Project ref.:** MVL-D-SG-2016_01 (Annotation: Name of the event/task)
- Event name:** Proposal (Annotation: Name of the event/task)
- Assigned to *:** user (Annotation: To whom this task is given)
- Task description *:** Prepare quotation for client (Annotation: Short task description)
- Starting *:** 2016-01-05 (Annotation: Start and deadline)
- 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

Footer: Finance

Annotation: Click Record to confirm

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

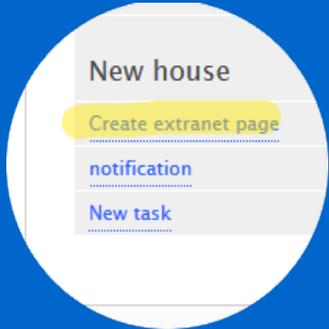
Tasks

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](#))

A screenshot of a web form for creating an extranet page. The form has the following elements:

- Project ***: A dropdown menu showing '120 | open | D-SG-2016_01-AO | New house...'. A callout box points to it with the text 'Reference automatically selected'.
- Short description ***: A text input field containing 'Design house Beach road'. A callout box points to it with the text 'The page title as viewed by external user'.
- No access**: A large empty rectangular box.
- Allowed**: A list containing one entry: 'user2 - Alpha et Omega'. A callout box points to this list with the text 'List of allowed users (attached to an address book entry)'. A double-headed arrow points between the 'No access' and 'Allowed' boxes.
- Create**: A rounded button at the bottom.

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](#)

[notification](#)

[New task](#)

Owner: user

[manage access](#)

Status: awarded

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

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

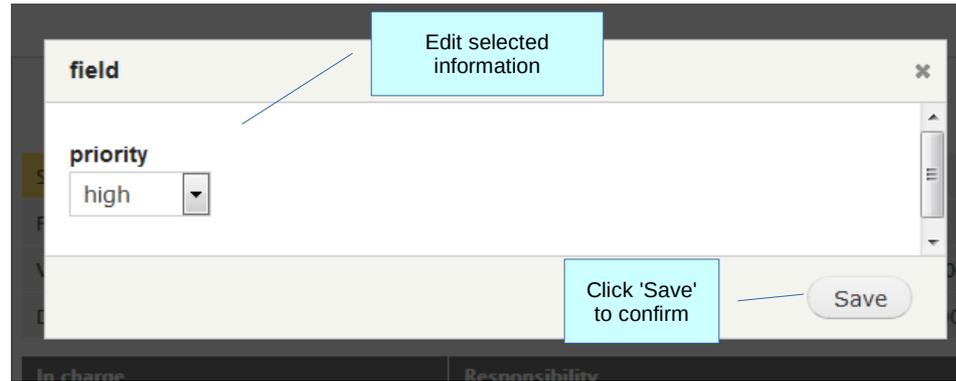
Description

Comments

Suppliers

- Booknote editions Ltd

Edit mode



Click to deactivate activity display

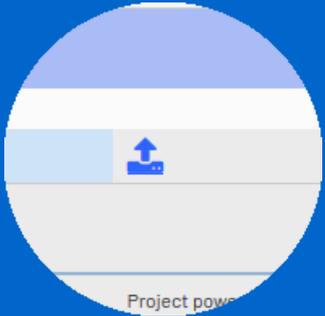
[Users activity](#)

- [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



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

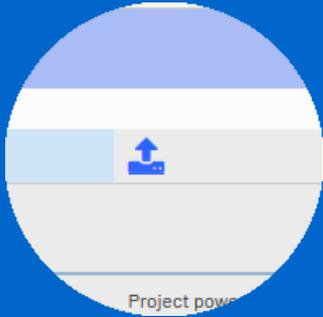
Upload

Select file

pdf_sample.pdf

Click to upload

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. The dialog has a title bar 'project' and a close button. Inside, there is a file name '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', and 'finance'. A callout box points to 'communication' 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, there is a 'Confirm' button and a 'Post' button. A callout box points to the 'Post' button with the text 'Confirm'.

Select a project in the list

Select the project section

Add optional comment

Confirm

Post

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 Extranet

Upload new file Hide deleted files

presentation Folder Manage access Share on extranet

 [project-sample.pptx](#) Project power point Delete Lock Send via email Extranet

info

 [documents_sample.zip](#) documents zip Delete Lock Send via email Extranet

 [Brochure_sample.pdf](#) brochure Delete Lock Send via email Extranet

Files attached Delete Send via email

Attachments Extranet

presentation Brochure_sample.pdf brochure Delete Lock Send via email Extranet

 [project-sample.pptx](#) Project power point Delete Lock Send via email Extranet

info

 [documents_sample.zip](#) documents zip Delete Lock Send via email Extranet

 [Brochure_sample.pdf](#) brochure Delete Lock Send via email Extranet

Finance Draft proposal.pdf pdf version Delete Lock Send via email Extranet

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

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

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

- 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

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

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

File Name	Content	Download	View	Share	Print
b4.jpg	b				
b5.jpg	b5				
payment_re...txt	uploaded via myemail@mydomain.com				

Finance info example

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

Communication

b4.jpg

image

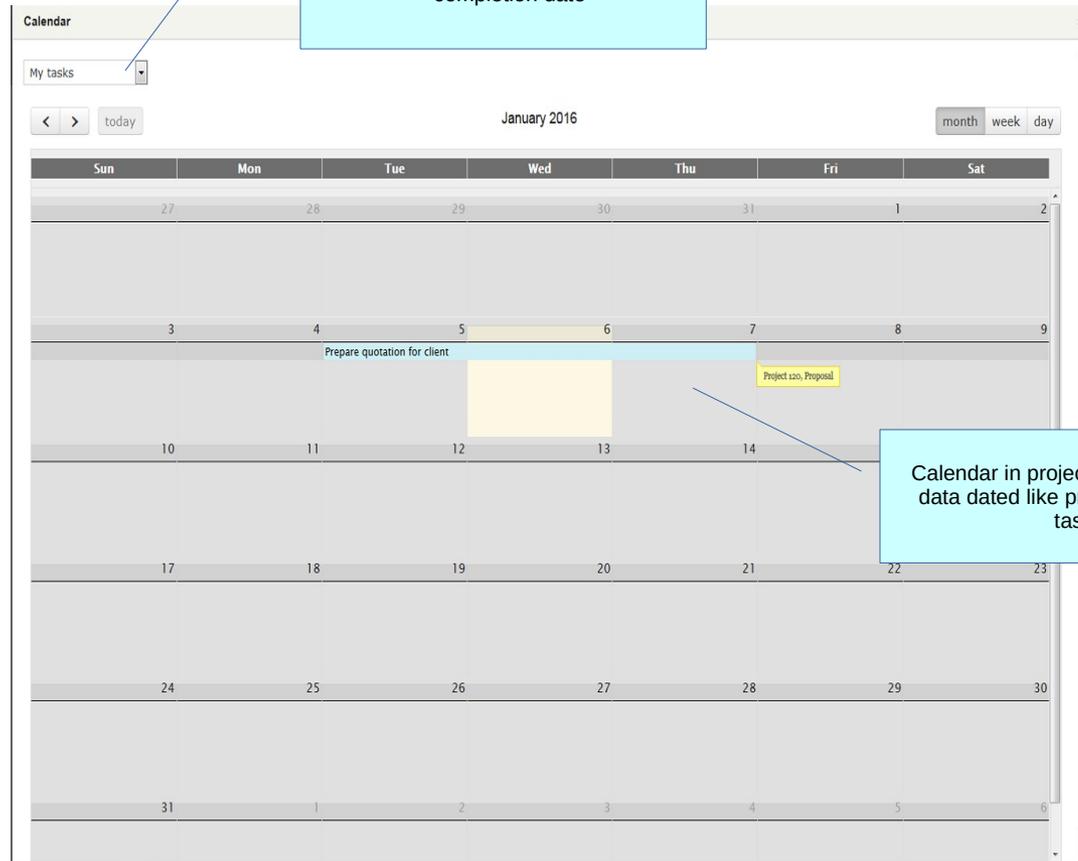
Calendar

+ calendar



expand

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



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"/>				
[2] user	<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.



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 *

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"

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

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

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

First element *

Second element *

Third element *

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

Fourth element *

Fifth element *

Last element *

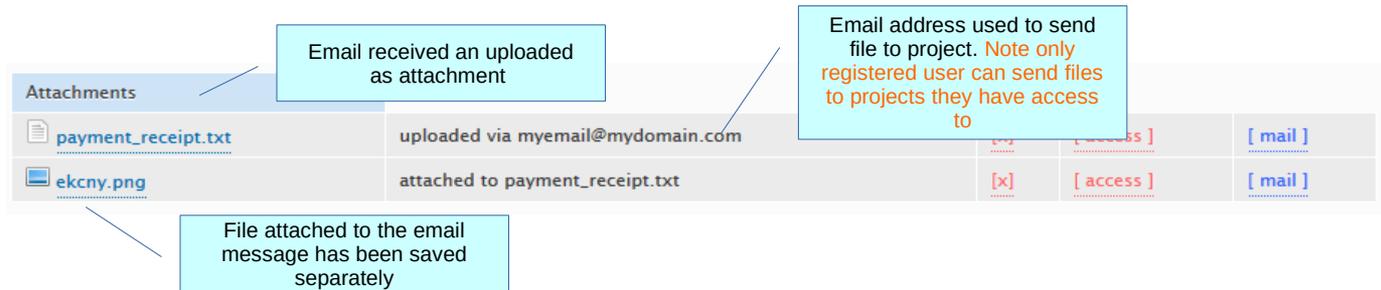
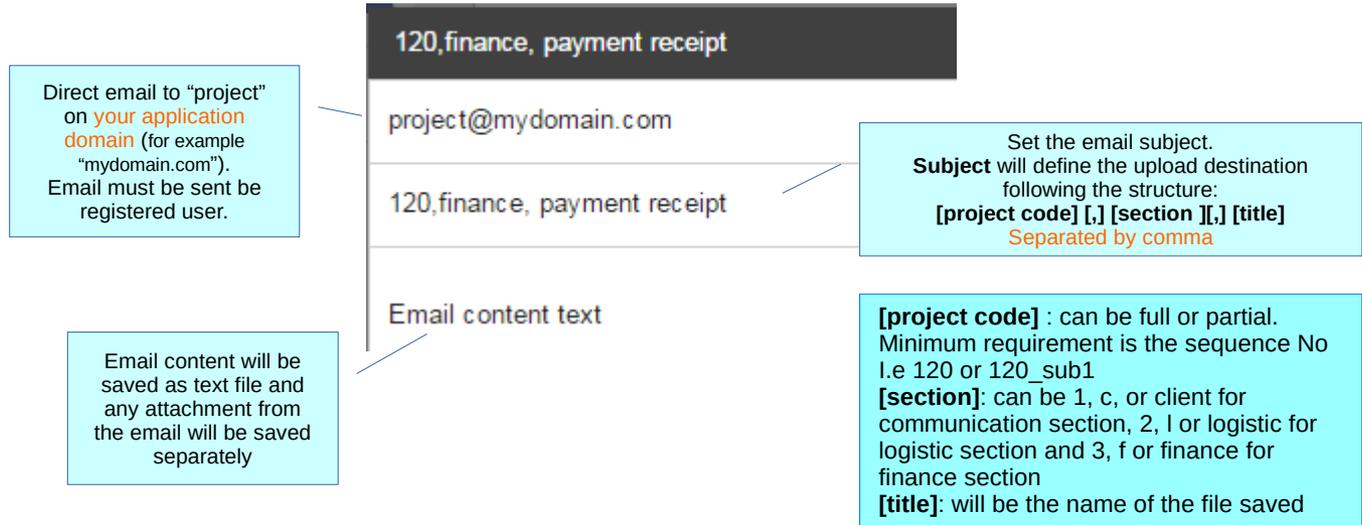
Sequence number cannot be changed

Increment base *

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

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



AREA
Systems

AK