



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.

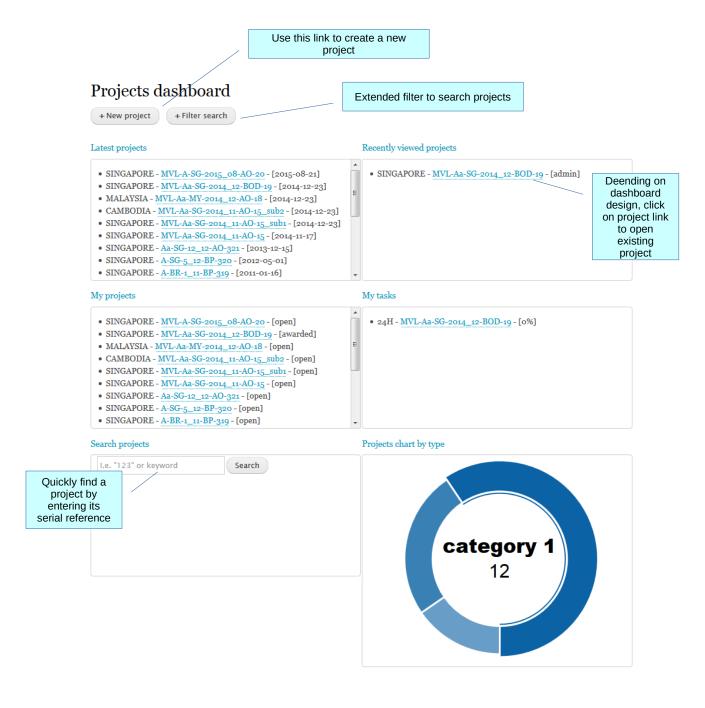




Table of content

```
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

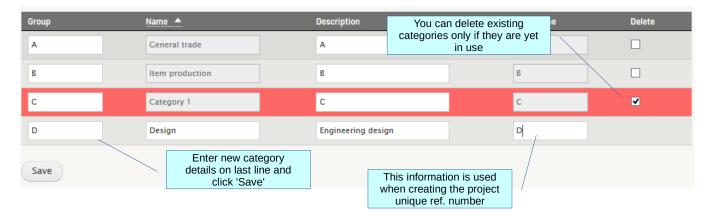
Edit categories

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

/projects/types

Project types

new project





A 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.

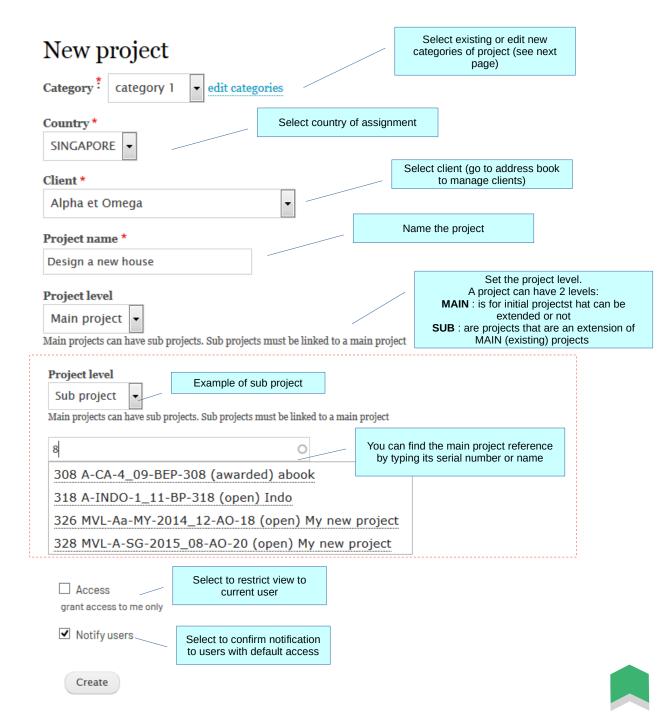
User must have access to the country for which the project is created (see access settings)

You can create sub project linked to a main project. i.e. - when main project is extended geographically (multi countries)

- 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





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)

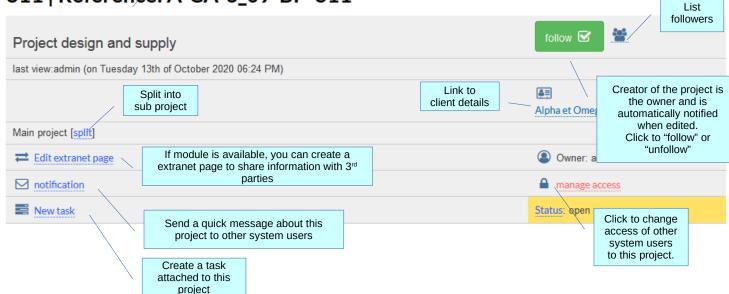






A unique reference that gives quick information: your company short name, category of project, country, year and month of creation and sequence number

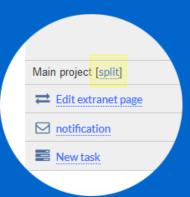
311 | Reference: A-CA-6_09-BP-311



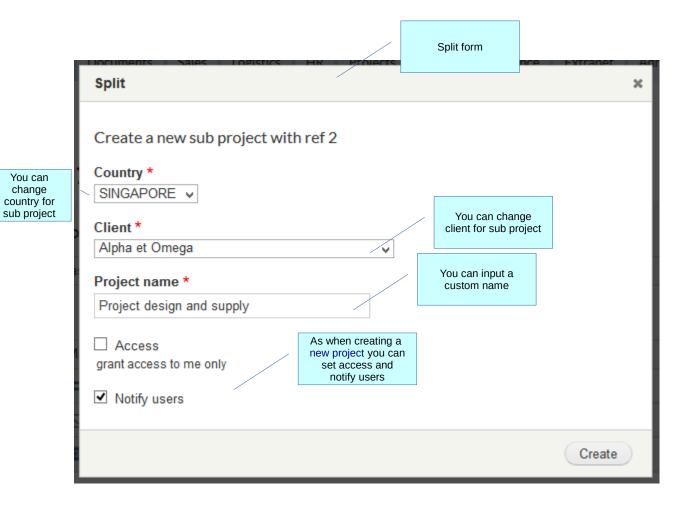




Split



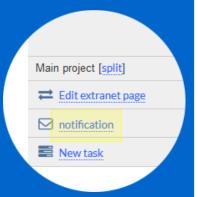
You can split a main project into a sub project directly from main project page.

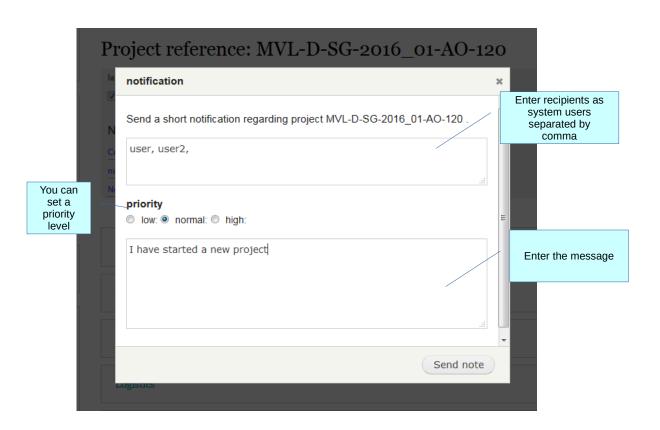






Notification



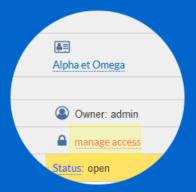








Access control

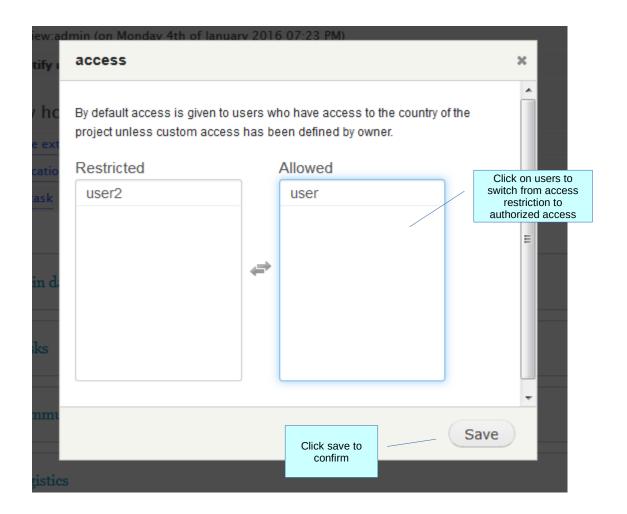


By default users will have access to projects assigned to countries where they have been authorized.
This default access can be controlled at project

Read the <u>access definition</u> page for more.

level.

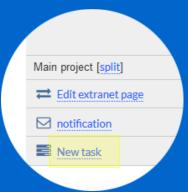
Go to /ek_admin/access_country to edit access by countries

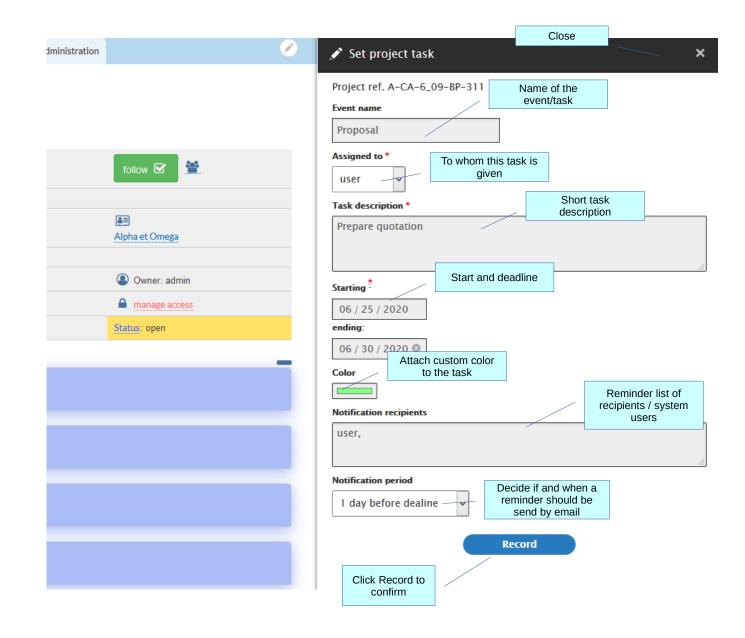






Task Open side menu for recording a new task







Task View task lists

When the task is created:

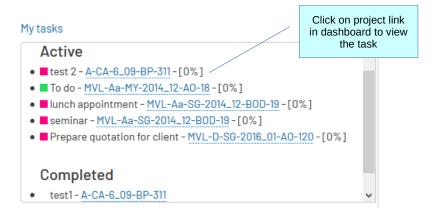
- an email is sent
- the task will appear in the project dashboard page under "My tasks"
- and in the "Task" section after refreshing the project page.

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

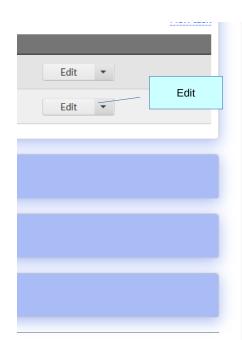


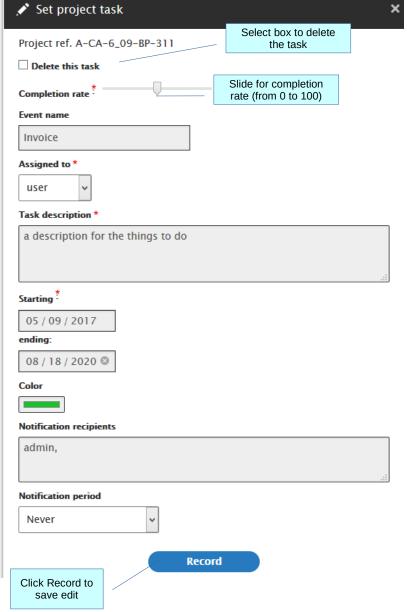




Task Edit task

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

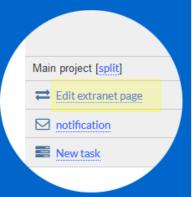






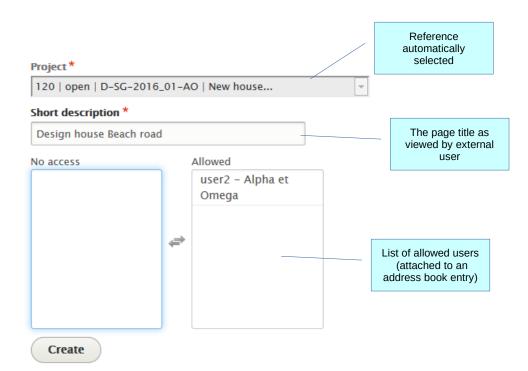


Extranet



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)

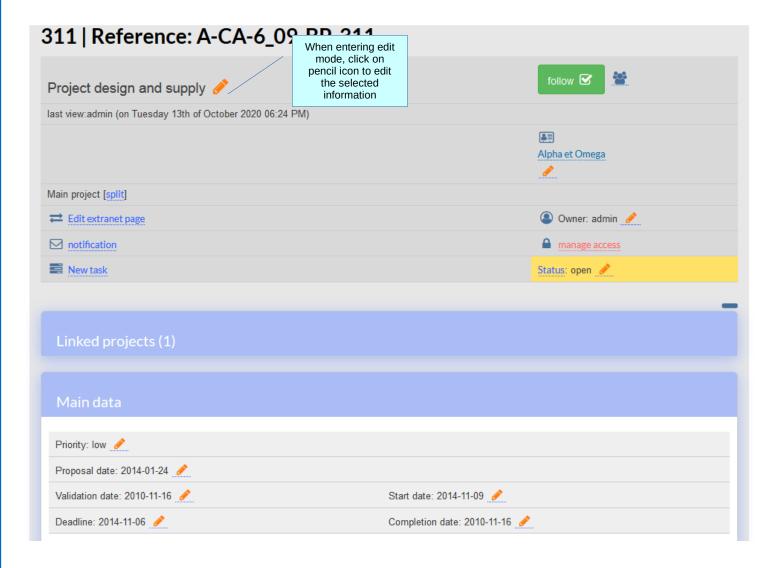






Edit mode

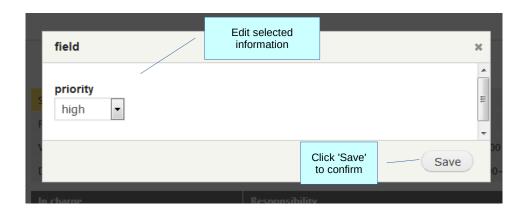






Edit mode



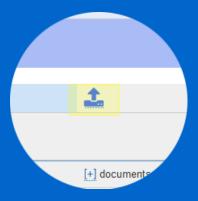


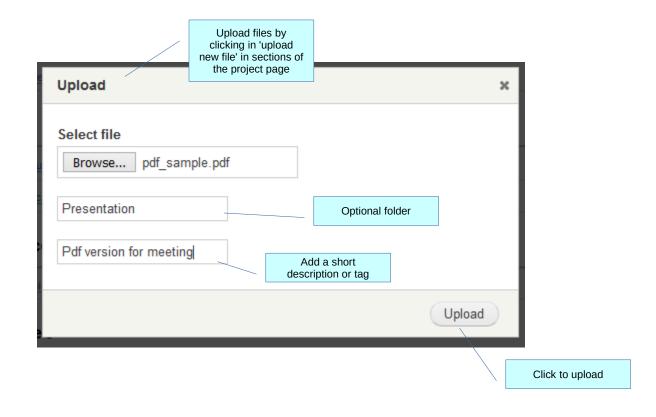






Attach files

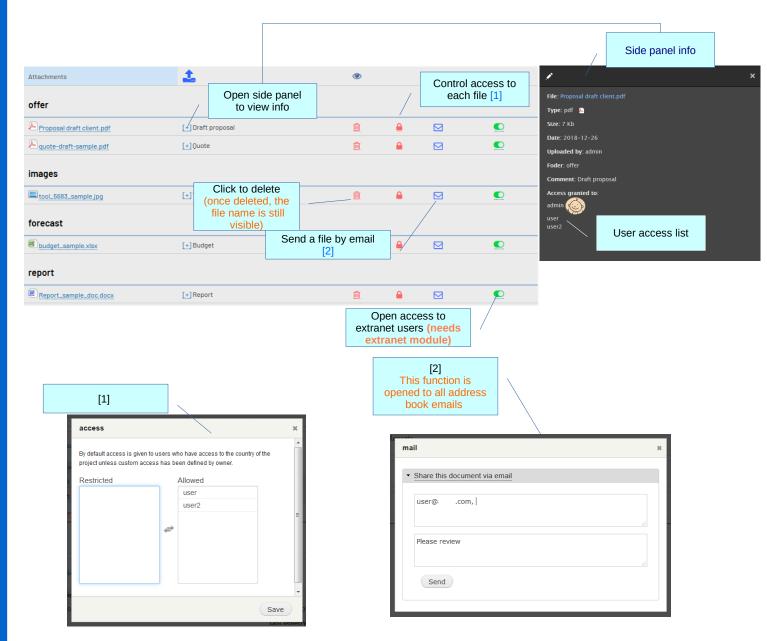






Attached files









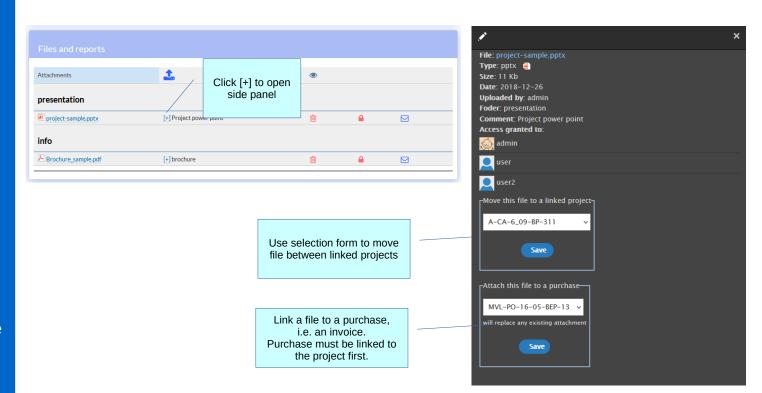
Attached files

Side panel options:

1) When a project is part of multiple subprojects, 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

2) with sales module installed, you may have option to attach a file to sales document (i.e. purchase)



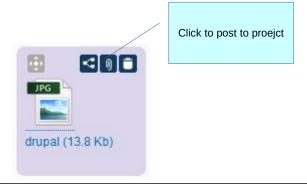


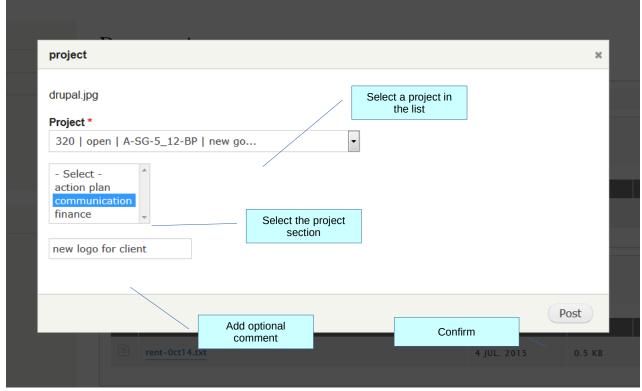


Attach files alternative

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

(see Documents tutorial for further details)





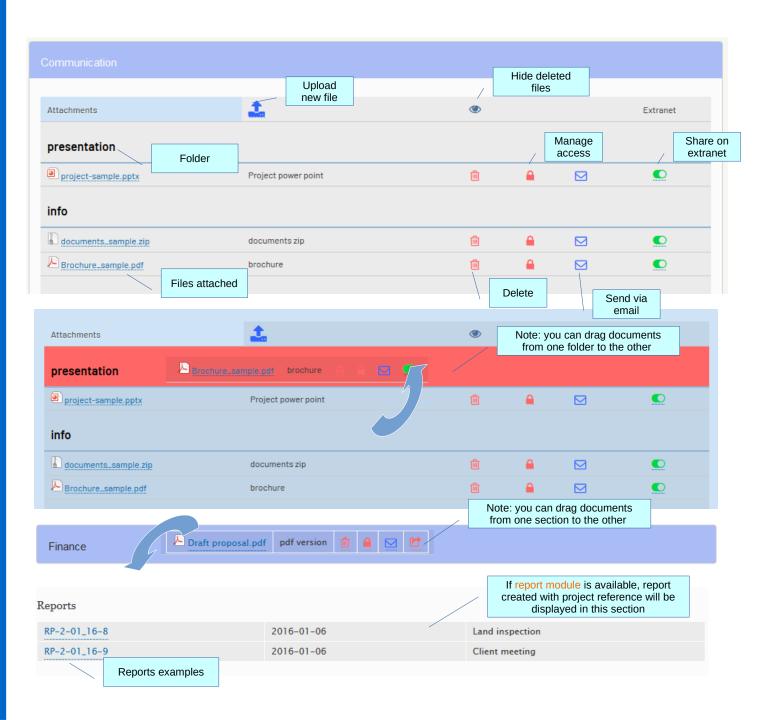




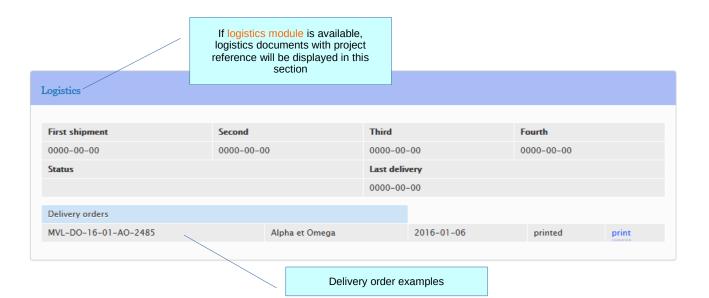
Each section of the project page will aggregate information from other modules that are linked to the project













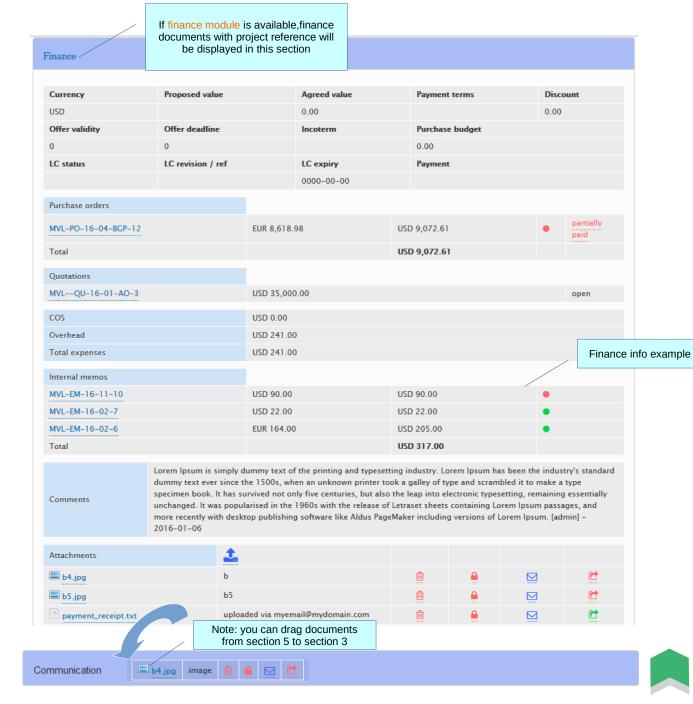
Linked projects (1)

Main data

Tasks

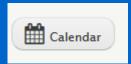
Communication

Logistics

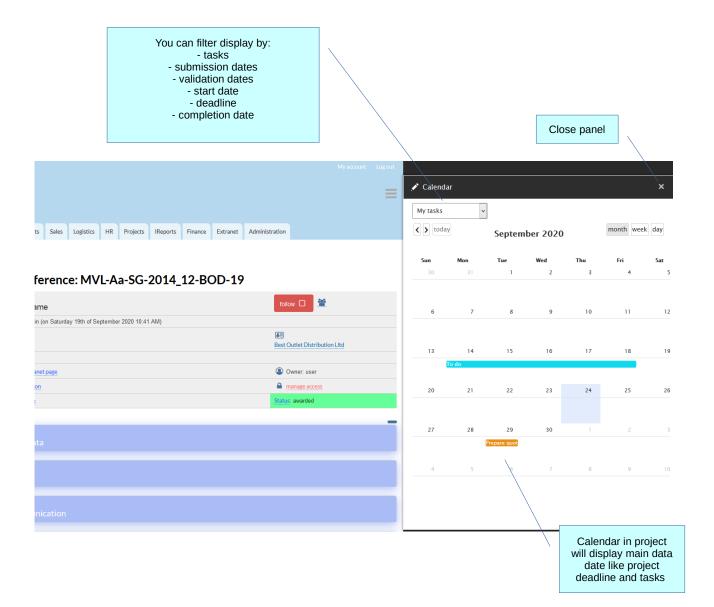


Calendar

Calendar link opens as side panel









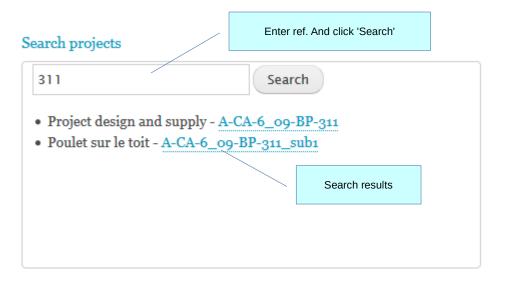


Search

There are 2 options to search for projects:

1) Quick search:

Input serial reference in search box in the Project Dashboard



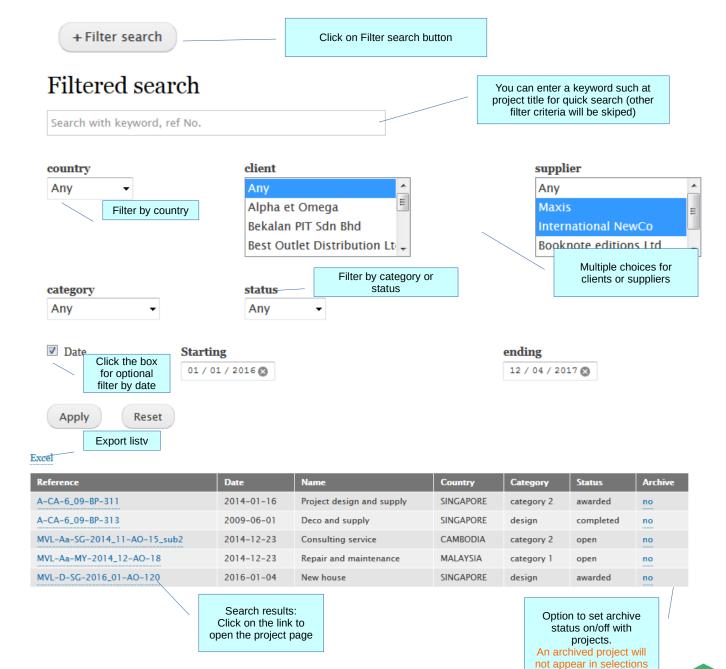




Search

There are 2 options to search for projects:

2) Extended search /projects/search



lists

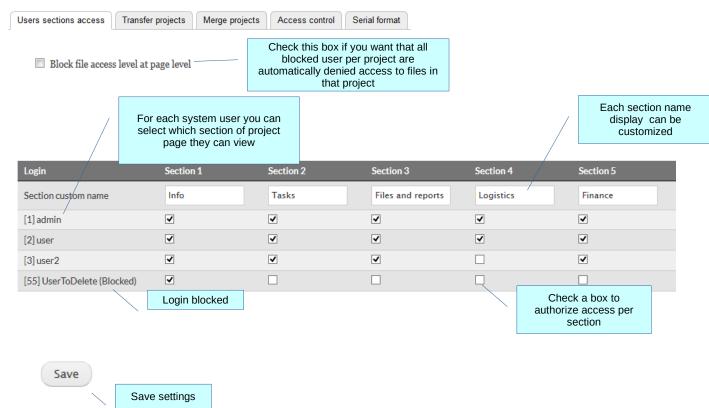


Settings are available for administrator to control projects structure and access:

1) sections access control

/projects/settings/users

Users sections access control

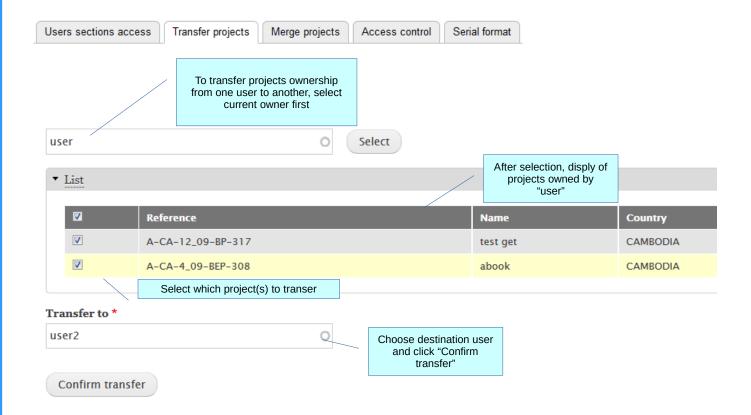






2) Ownership transfer

/projects/settings/transfer



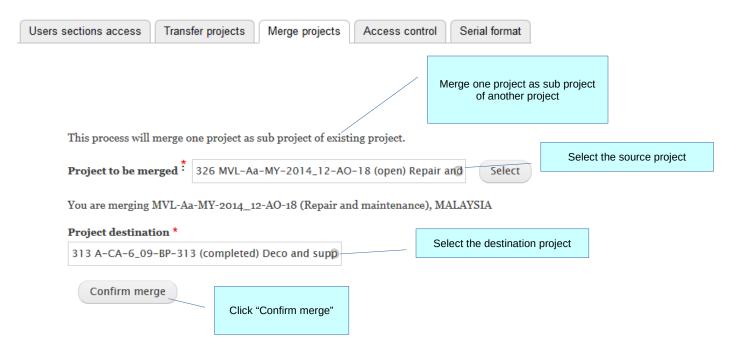




3) Merge

/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.





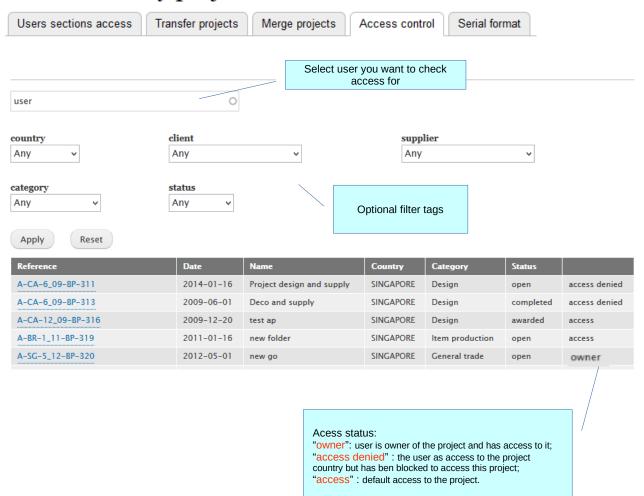


4) Extract access summary

/projects/settings/access_admin

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

Users access by project

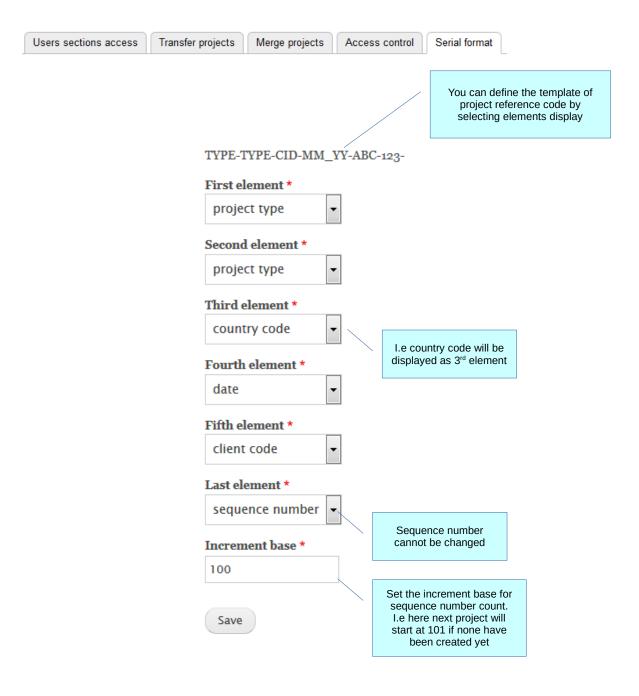






5) Reference code format

/projects/settings/serial

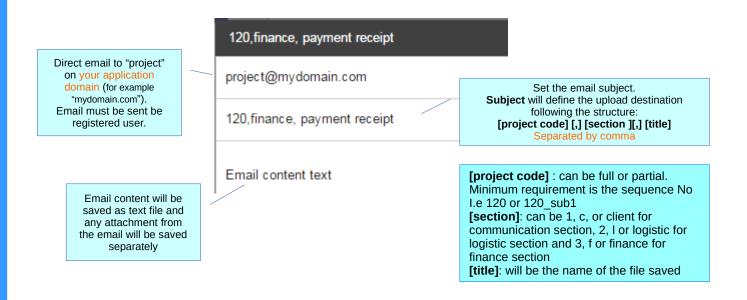


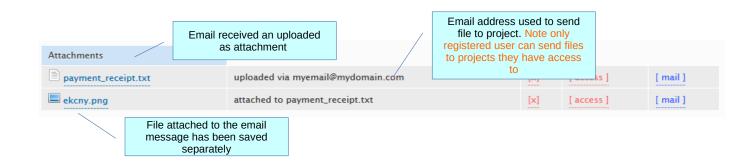




Optional – upload file via email

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 a 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







