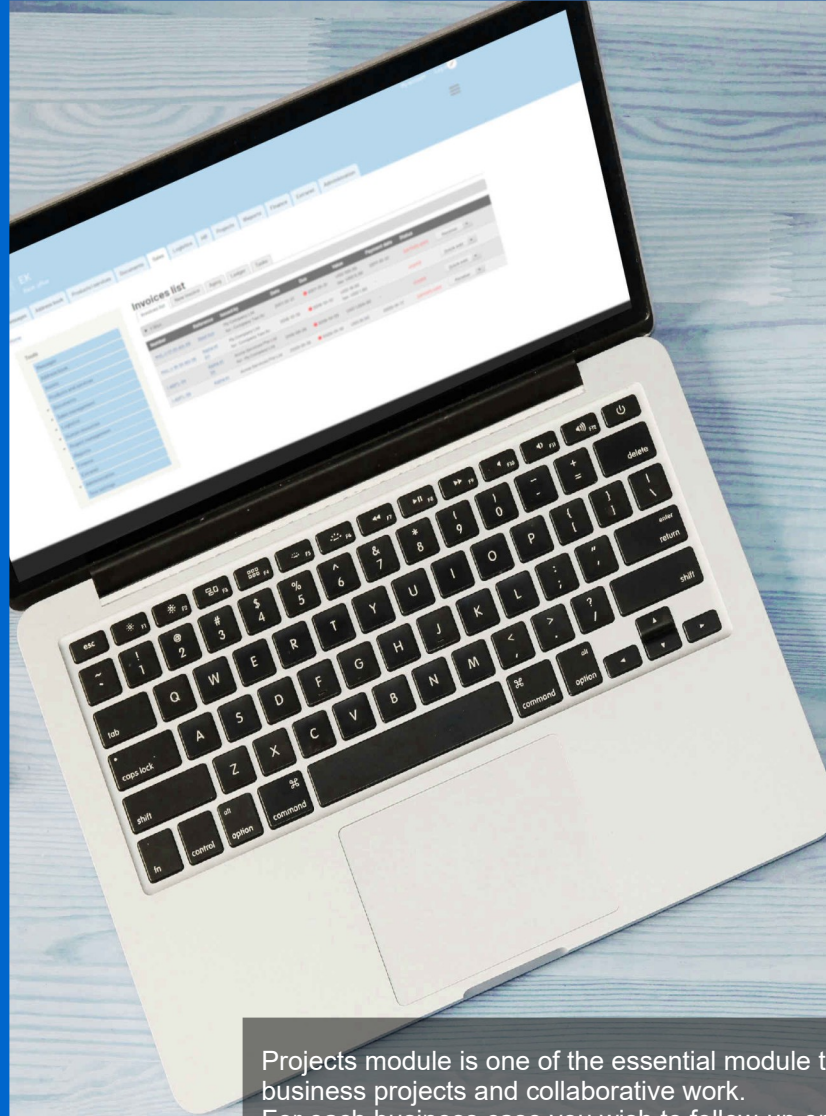


Projects management



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.

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

Page

- Create a project category
- Create a new project
- Project page
 - Header
 - Split project
 - Create a notification
 - Access control form
 - Extranet
 - Edit mode
 - Upload a file
 - Move a file
 - Post file from "My Documents"
- Data sections 1
 - Files & Upload
- Data Section 2
 - New task
 - Edit task
- Data Section 3
- Data Section 4
- Data Section 5
- 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	Unique ref. number	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.



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 *

Category 1

[edit categories](#)

Country *

SINGAPORE

Client *

34 | Alpha et Omega

Project name *

Build a house

Project description *

House building in Joy City

Project level

Main project

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

Select existing or edit new categories of project (see next page)

Select country of assignment

Select client (go to address book to manage clients)

Name the project

Describe the 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

Sub project

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.

Header

Project title

open

Last viewed: admin (on Wednesday 26th of March 2025 09:36 AM)

Owner: admin



81% data filled

edit mode

Toggle edit



Actions menu

Kapa

Main project [\[split\]](#) [Create extranet page](#) [notification](#) [manage access](#)

Linked project (if any)

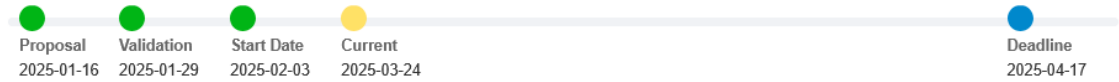
Linked projects 1

Each project is divided in few sections:
Section names can be customized in [settings](#)

Overview Section 1 Section 2 Section 3 Section 4 Section 5

Overview tab

Project Timeline



Priority: **medium**

Description:
Source and supply of material for the city center site [admin] - 2025-03-10



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

137 | Reference: A-MVL-MY-2024_08-Kapa-137

Follow project for notifications



Project title
Last viewed: admin (on Wednesday 26th of March 2025 09:36 AM)

Owner: admin

81% data filled **Edit data**

Project status

List followers

Kapas

Main project [\[split\]](#) [Create extranet page](#) [notification](#) [manage access](#)

Data update indicator

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

Project status

List followers

Link to client details

Split into sub project

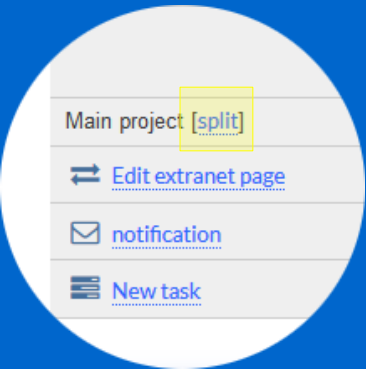
If module is available, you can create an extranet page to share information with 3rd parties

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

Send a quick message about this project to other system users



Split



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

You can change country for sub project

Split form

The screenshot shows a web form titled 'Split' with a close button (X) in the top right corner. The form contains the following fields and options:

- Country ***: A dropdown menu with 'SINGAPORE' selected.
- Client ***: A dropdown menu with 'Alpha et Omega' selected.
- Project name ***: A text input field containing 'Project design and supply'.
- Access**: A checkbox labeled 'Access grant access to me only' which is currently unchecked.
- Notify users**: A checkbox labeled 'Notify users' which is currently checked.
- Create**: A button at the bottom right of the form.

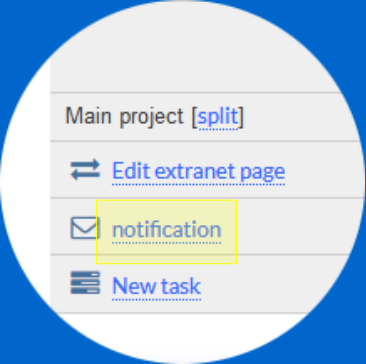
You can change client for sub project

You can input a custom name

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



Notification



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

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

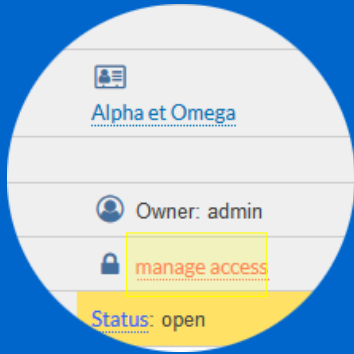
D8.0.1
to user

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.

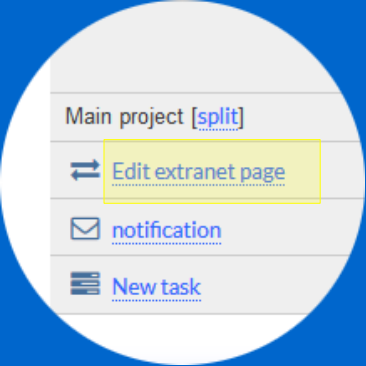
Read the [access definition page](#) for more.

Go to [/ek_admin/access_country](#) to edit access by countries

The screenshot shows a window titled 'access' with a close button. It 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, there are two columns: 'Restricted' containing 'user2' and 'Allowed' containing 'user'. A double-headed arrow is between the columns. A 'Save' button is at the bottom right. Two callout boxes provide instructions: one pointing to the 'user' in the 'Allowed' list 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".



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

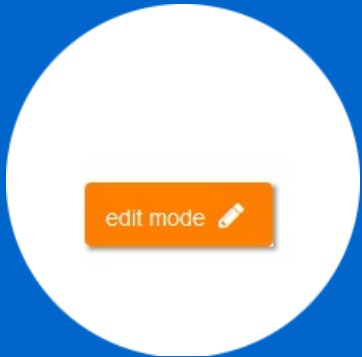
user2 - Alpha et Omega List of allowed users (attached to an address book entry)

Create



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

Section 1



Overview **Section 1** Section 2 Section 3 Section 4 Section 5

Timeline data

Priority: medium
Proposal date: 2025-01-16
Validation date: 2025-01-29
Start date: 2025-02-03
Deadline: 2025-04-17
Completion date: 0000-00-00

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

Suppliers:
• [Prin n Prin Enterprise](#)

Sourcing list

Description:
Source and supply of material for the city center site [admin] - 2025-03-10

Free text

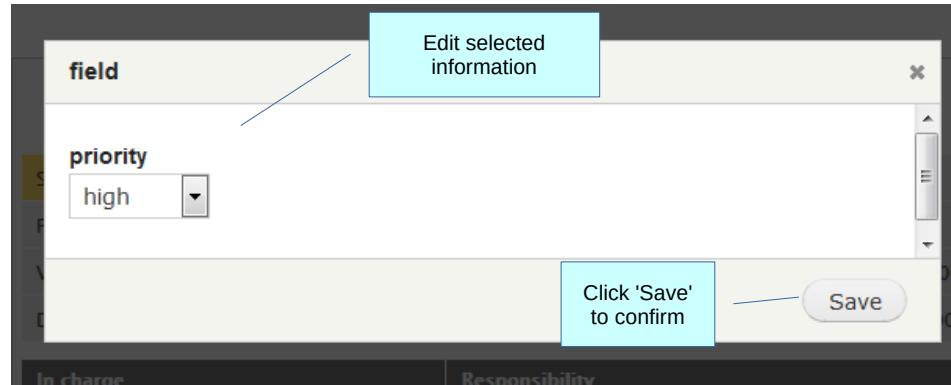
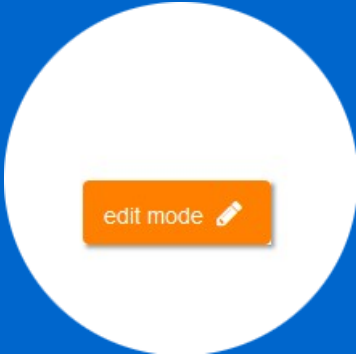
Comments:
Need to source new suppliers for certain items. [admin] - 2025-03-10

Free text

Roles

In charge	Responsibility	Main task
user	Management	full management

Edit mode



Click to toggle Auto update

Users activity

--- [TODAY] ---

- open (You)
- move SiteAccessPlan.pdf (You)
- move Contract.pdf (You)
- move attachment_14.pdf (You)
- open (You)

Update frequency: **Normal** ▾

Sound

Each information update action is recorded and displayed in the activity block.

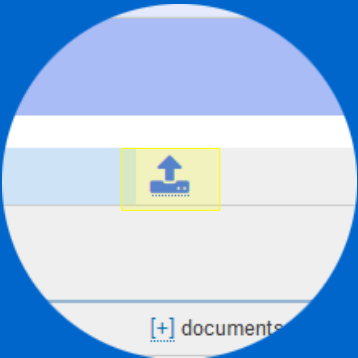
Alternatively all users that have checked the 'notify me' box will receive an email about edited information

Use these options to change the page data update frequency

Click to toggle sound notification



Attach files



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

Upload [Close]

Select file

Browse... pdf_sample.pdf

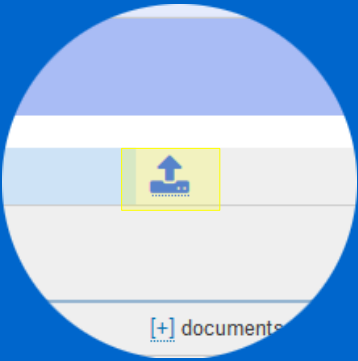
Presentation [Optional folder]

Pdf version for meeting [Add a short description or tag]

Upload [Click to upload]

The screenshot shows a dialog box titled "Upload" with a close button (X) in the top right. Below the title bar, there is a "Select file" section. It contains a "Browse..." button followed by a text field containing "pdf_sample.pdf". Below this, there are two text input fields. The first contains "Presentation" and is annotated with a callout box labeled "Optional folder". The second contains "Pdf version for meeting" and is annotated with a callout box labeled "Add a short description or tag". At the bottom right of the dialog is a rounded "Upload" button, which is annotated with a callout box labeled "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]

Callouts:

- 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:

1) 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

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

The screenshot displays the 'ATTACHMENTS' section of a software interface. It is divided into two main areas: a list of attachments and a detailed view for a selected file.

Attachments List:

- Mail:**
 - attachment_13.pdf [+]
 - attachment_14.pdf [+]
- Contract:**
 - sample3.pdf [+]

File Details (sample3.pdf):

- File: sample3.pdf
- Type: pdf
- Size: 33 Kb
- Date: 2025-03-17
- Uploaded by: user
- Foder: Contract
- Comment: news
- Access granted to: admin, user, user2

Actions and Callouts:

- Click [+]** to open side panel (points to the '+' icon next to 'sample3.pdf' in the Contract section).
- Edit the file comment.** (points to the 'Edit comment' section).
- Use selection form to move file between linked projects** (points to the 'Move this file to a linked project' section).
- Link a file to a purchase, i.e. an invoice. Purchase must be linked to the project first.** (points to the 'Attach this file to a purchase' section).

Move this file to a linked project:

- Dropdown: A-MVL-MY-2024_08-Kapa-137
- Save button

Attach this file to a purchase:

- Dropdown: PO-MVL-8
- will replace any existing attachment
- Save button



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' and a close button. Inside, there is a file name 'drupal.jpg' and a 'Project *' dropdown menu. The dropdown menu is open, showing options: '- Select -', 'action plan', 'communication', and 'finance'. Below the dropdown is a text input field containing 'new logo for client'. At the bottom right of the dialog is a 'Post' button. Callout boxes with light blue backgrounds and black borders point to various elements: 'Select a project in the list' points to the dropdown menu, 'Select the project section' points to the 'communication' option, 'Add optional comment' points to the text input field, and 'Confirm' points to the 'Post' button.



Section 2

Tasks management

Show all columns Create new task [New task](#)

Event	Task	From/to	In charge	Status	
Task No1	Do something	2025-03-03 2025-03-31	user	<div style="width: 50%;"></div>	Edit ▾

Task list for the project

Delete

Close

Set project task

Project ref. A-MVL-MY-2024_08-Kapa-137

Delete this task

Completion rate* Progress

0 %

Event name Name of the event/task

Task No1

Assigned to* To whom this task is given

user ▾

Task description* Short task description

Do something

Starting* Start and deadline

03 / 03 / 2025 📅

ending

03 / 31 / 2025 📅

Color Attach custom color to the task

Notification recipients Reminder list of recipients / system users

enter users names separated by comma (autocomplete enabled).

Notification period Decide if and when a reminder should be send by email

Never ▾

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 %	<input type="button" value="Edit"/> ▾
■ Invoice	test 2	2017-05-09 2020-08-18	Myself	done: 0 %	<input type="button" value="Edit"/> ▾

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

Section 3

ATTACHMENTS

Upload new file

Hide deleted files

Extranet

Info Folder

Share on extranet

Email_project_14.txt uploaded from email admin@exemple.com

Mail

Manage access

Send via email

SiteAccessPlan.pdf Access plan

Contract.pdf Signed with client

Files attached

Delete

Drag and Drop

Info Contract.pdf Signed with client

Email_project_14.txt uploaded from email admin@exemple.com

Mail

SiteAccessPlan.pdf Access plan

Contract.pdf Signed with client

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

Section 3

Section 4 Contract.pdf Signed with client

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

REPORTS

Reports examples

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

Section 4

First shipment: 2025-02-06
Second: 2025-02-12
Tird: 0000-00-00
Fourth: 0000-00-00

Status: In time
Last delivery: 2025-03-28

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

RECEIVING ORDERS

MVL-RR-18-07-BP-13	Bekalan PIT Sdn Bhd2018-07-01	open	print
--------------------	-------------------------------	------	-----------------------

DELIVERY ORDERS

MVL-DO-17-11-BO1-2494	Best Outlet store	2017-11-16	posted	print
MVL-DO-17-11-BOD-2495	Best Outlet Distribution Ltd	2017-11-16	posted	print

Delivery order examples

Section 5

Currency: USD
Proposed value: 1,250,000
Offer validity: 2025-02-28
Offer deadline: 2025-02-28

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

Payment Term: 45 days
Payment: 0.00

Incoterm:
LC Status:
LC revision / ref.:
LC expiry: 0000-00-00

COS: USD 0.00

Overhead: 965.00

Total expenses: USD 965.00

ATTACHMENTS



Extranet

Mail

Finance info example

[attachment_13.pdf](#) [+] attached to email

[attachment_14.pdf](#) [+] attached to email

Contract

[sample3.pdf](#) [+] news



Section 5

QUOTATIONS

QU-MVL-15	USD 120.00	printed
---------------------------	------------	---------

PURCHASE ORDERS

PO-MVL-8	USD 800.00	USD 800.00	●	partially paid
--------------------------	------------	------------	---	--------------------------------

Total	USD 800.00
-------	-------------------

PURCHASE ORDERS

I-MVL-20	USD 500.00	USD 500.00	●	paid
--------------------------	------------	------------	---	----------------------

Total	USD 500.00
-------	-------------------

INTERNAL MEMOS

MVL-EM-19-05-36	USD 132.00	USD 132.00	●
---------------------------------	------------	------------	---

Total	USD 132.00
-------	-------------------

Finance info example

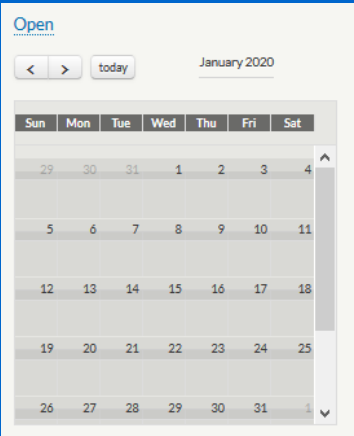
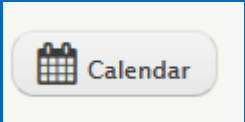
Comments:

Need to issue down payment letter [admin] - 2025-03-10 [admin] - 2025-03-24



Calendar

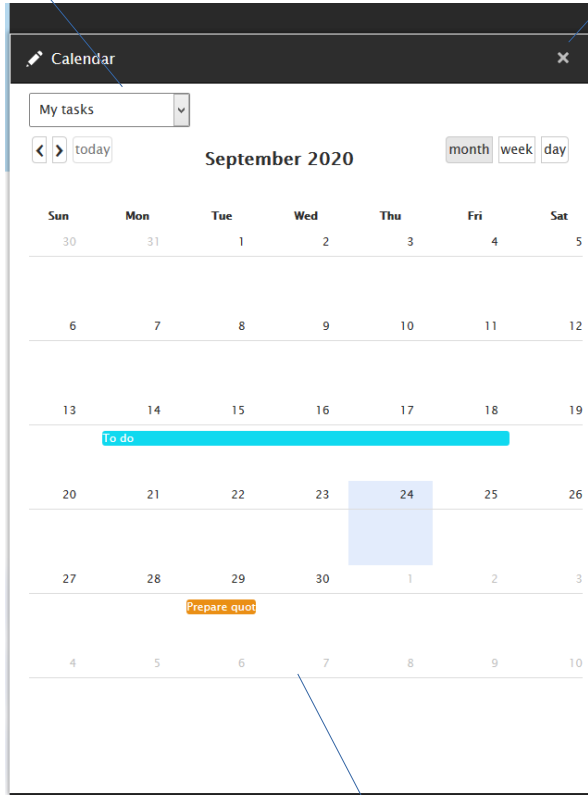
Calendar link opens as side panel



You can filter display by:

- tasks
- submission dates
- validation dates
- start date
- deadline
- completion date

Close panel



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

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
</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, file name, for quick search (other filter criteria will be skipped). To search for **numeric value**, add "#" to any number; i.e. "#123456"

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

category
Any

status
Any Filter by category or status

Multiple choices for clients or suppliers

Date Click the box for optional filter by date
Starting 01 / 01 / 2016

ending 12 / 04 / 2017

Apply Reset
Export list

[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

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

</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

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

Click "Confirm merge"



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 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

[/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

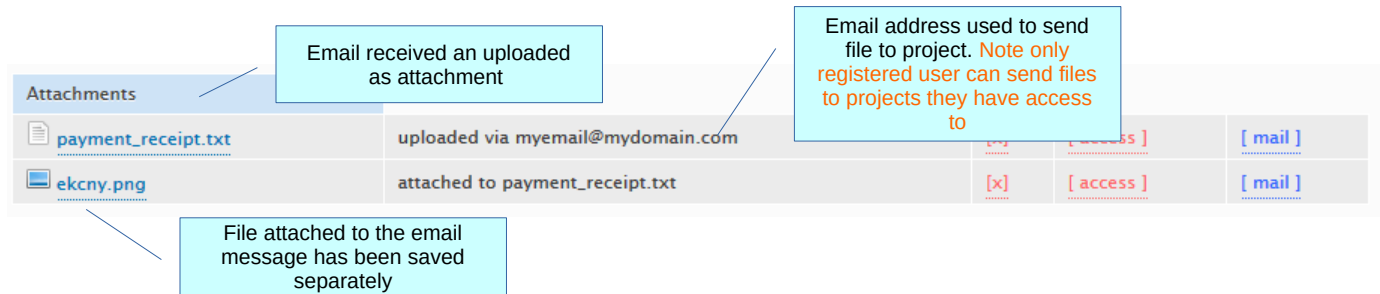
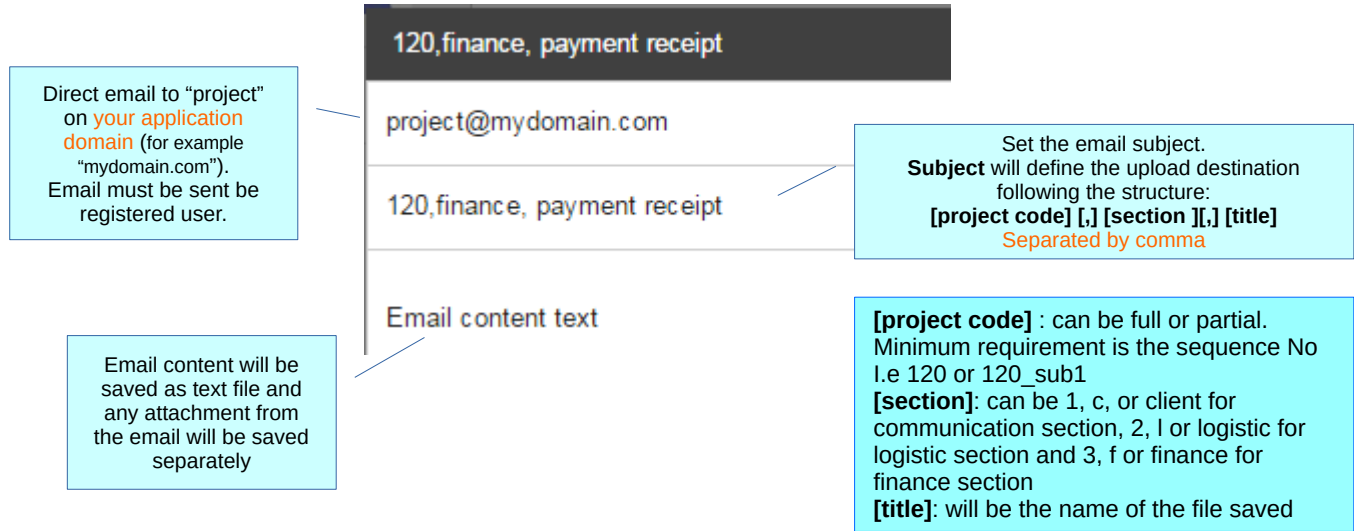
Set the increment base for sequence number count. I.e here next project will start at 101 if none have been created yet

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





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