

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%]

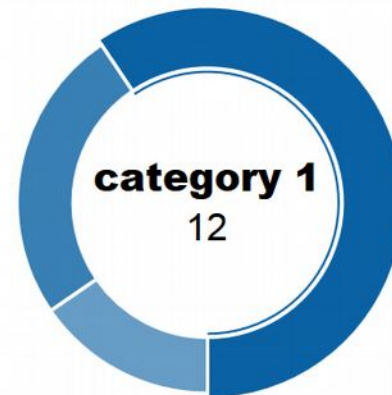
Search projects

I.e. "123" or keyword

Search

Quickly find a project by entering its serial reference

Projects chart by type



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

- [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=""/>	

Save

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

last view:admin (on Saturday 13th of August 2016 04:15 PM)	design
<input checked="" type="checkbox"/> notify me when edited	Alpha et Omega
New house	Main project
↔ Create extranet page	Owner: admin
✉ notification	🔒 manage access
📅 New task	✎ edit mode

☰

Linked projects

Main data

Tasks

Communication

Logistics

Finance

A unique refence that gives quick information: your company shortname, category of proeject, country, year and month of creation and sequence number

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

last view:admin (on Wednesday 13th of January 2016 07:02 PM)		design
<input checked="" type="checkbox"/> notify me when edited	Creator of the project is the owner and is automatically notified when edited	Alpha et Omega
New house		Main project
Create extranet page	If module is available, you can create a extranet page to share information with 3 rd parties	Owner: admin
notification		manage access
New task	Send a quick message about this project to other system users	edit mode

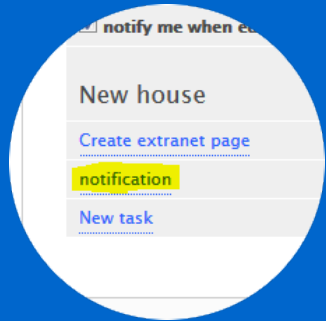
Click to view client details

Create a task attached to this project

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

Click to enter edit mode and change information in this project

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

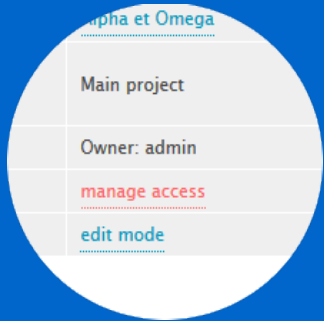
Enter the message



Message is received in internal EK messaging and user email account



Access control

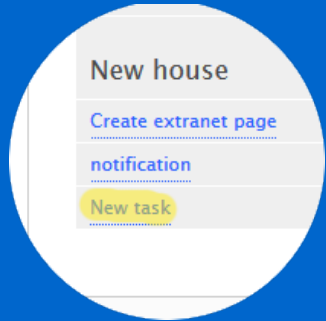


By default users will have access to projects assigned to countries where they have been authorized. This default access can be controlled at project level.

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

The screenshot shows a web interface titled 'access' with a close button (X) in the top right corner. Below the title, a text box states: "By default access is given to users who have access to the country of the project unless custom access has been defined by owner." The interface is divided into two columns: 'Restricted' and 'Allowed', separated by a double-headed arrow. The 'Restricted' column contains a box with the text 'user2'. The 'Allowed' column contains a box with the text 'user'. A light blue callout box with a pointer indicates: "Click on users to switch from access restriction to authorized access". At the bottom right, there is a 'Save' button. A light blue callout box with a pointer indicates: "Click save to confirm".

Task



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

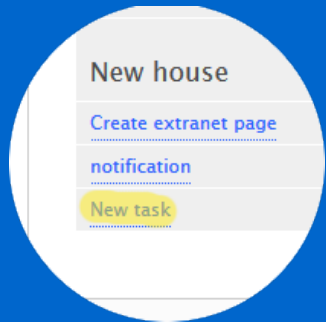
- Project ref.:** MVL-D-SG-2016_01 (Annotation: Name of the event/task)
- Event name:** Proposal (Annotation: Name of the event/task)
- Assigned to *:** user (Annotation: To whom this task is given)
- Task description *:** Prepare quotation for client (Annotation: Short task description)
- Starting *:**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

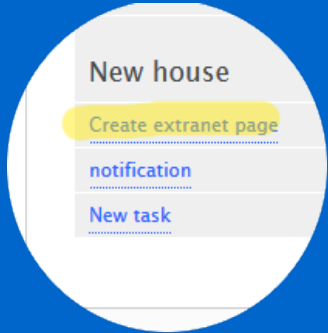
Tasks

Show all columns

Event	Task	From/to	In charge	Status	
Proposal	Prepare quotation for client	2016-01-05 2016-01-08	user	done: 0 %	Edit ▼

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

Extranet



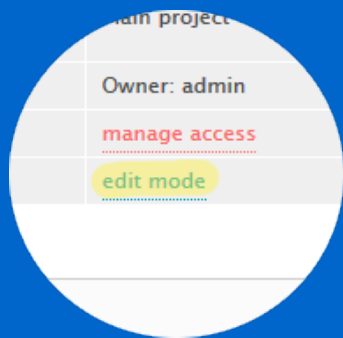
If module is available, you can create a special page to share project information with users that are external to your organization (i.e client).

Note: external users still need to be registered and have the appropriate role (see [extranet tutorial for details of this section](#))

The screenshot shows a form for creating an extranet page. It includes the following elements:

- Project ***: A dropdown menu with the selected value "120 | open | D-SG-2016_01-AO | New house...". A callout box points to this field with the text "Reference automatically selected".
- Short description ***: A text input field containing "Design house Beach road". A callout box points to this field 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)".
- Create**: A button at the bottom of the form.

Edit mode



<input checked="" type="checkbox"/> notify me when edited	Alpha et Omega
New house	Main project
Create extranet page	Owner: admin
<input checked="" type="checkbox"/> notification	manage access
<input checked="" type="checkbox"/> New task	edit mode

Main data

Status: awarded	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

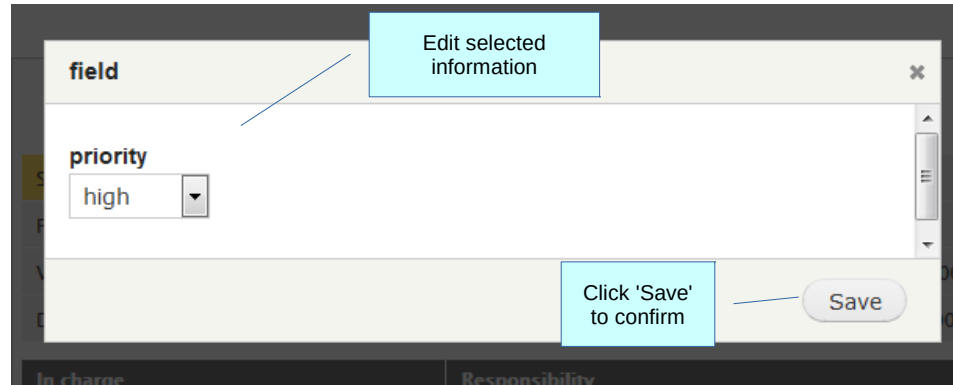
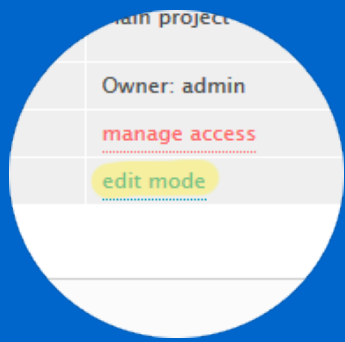
Comments

Suppliers

- Bright Garment Pte Ltd

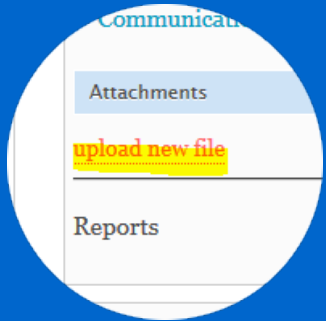
When entering edit mode, click on pencil icon to edit the selected information

Edit mode



A screenshot of a 'Users activity' block. The block title is 'Users activity'. Below the title, there are two sections: '--- [Today] ---' and '--- [Earlier] ---'. The 'Today' section contains one bullet point: '• open (You)'. The 'Earlier' section contains three bullet points: '• open (You)', '• delete excel.jpg (You)', and '• open (You)'. A callout box on the left points to a small icon next to the title with the text 'Click to deactivate activity display'. A callout box on the right points to the activity list with the text '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'.

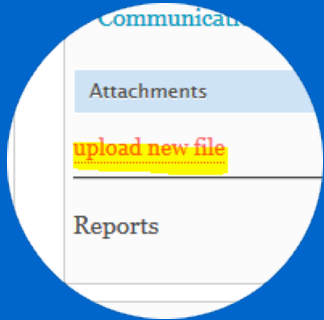
Attach files



This screenshot shows the 'upload' dialog box in a web application. The dialog has a title bar 'upload' and a close button. It contains a 'Select file' section with a 'Browse...' button and the filename 'Draft proposal.odt'. Below this is a text input field containing 'text version'. At the bottom right is an 'Upload' button. Three light blue callout boxes provide instructions: one points to the dialog title, another points to the text input field with the text 'Add a short description or tag', and a third points to the 'Upload' button with the text 'Click upload'.

This screenshot shows the 'upload' dialog box after a successful upload. The 'Select file' section now shows 'Draft proposal.pdf' instead of .odt. The text input field contains 'pdf version'. A red message 'file uploaded Draft proposal.pdf' is displayed below the text field. The 'Upload' button is still present at the bottom right. A light blue callout box labeled 'Example 2' points to the dialog title.

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. It contains the following elements:

- A file name 'drupal.jpg'.
- 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'.
- A list of project sections: '- Select -', 'action plan', 'communication' (highlighted in blue), and 'finance'. A callout box points to the 'communication' section with the text 'Select the project section'.
- 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'.

At the bottom of the screen, there is a status bar with the text 'rent-Oct14.txt', '4 JUL. 2015', and '0.5 KB'.

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

- Communication
- Logistics
- Finance

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

Communication

Attachments

Draft proposal.pdf	pdf version	[x]	[access]	[mail]
Draft proposal.odt	deleted by admin	[-]		

[upload new file](#)

Reports

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

Reports examples

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	open	print
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Finance

Delivery order examples

Communication

Logistics

Finance

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

Finance

Currency	Proposed value	Agreed value	Payment terms	Discount
USD		0		0
Offer validity	Offer deadline	Incoterm	Purchase budget	
0	0		0	
LC status	LC revision / ref	LC expiry	Payment	
		0000-00-00		

Purchase orders

MVL-PO-16-01-ABC-6	USD 860.00	USD 860.00	unpaid	print
Total		USD 860.00		

Quotations

MVL--QU-16-01-AO-3	USD 35,000.00		open	print
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Invoices

MVL-I-16-01-AO-10	USD 35,000.00	USD 35,000.00	unpaid	print
Total		USD 35,000.00		

COS

COS	USD 0.00
Overhead	USD 120.00
Total expenses	USD 120.00

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 which generated versions of Lorem Ipsum. [admin] - 2016-01-06

Attachments

[upload new file](#)

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

Calendar

My tasks

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
31	1	2	3	4	5	6

Prepare quotation for client

Project 200, Proposal

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'

- 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 either enter a keyword such as project title

country

Any

client

Alpha et Omega

supplier

Any

Or use filter criteria by:

- country
- client
- supplier
- category
- status

category

Any

status

Any

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

Url: /projects/settings/users

Users sections access control

Users sections access

Transfer projects

Merge projects

Serial format

For each system user you can select which section of project page they can view

Login	Section 1	Section 2	Section 3	Section 4	Section 5
admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
user2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save

Save settings

Check a box to authorize access

Project settings

2) Ownership transfer

Url: /projects/settings/transfer

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

To transfer projects ownership from one user to another, select current owner first

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 *

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
- 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

Project settings

4) Reference code format

Url: /projects/settings/serial

- Users sections access
- Transfer projects
- 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 *

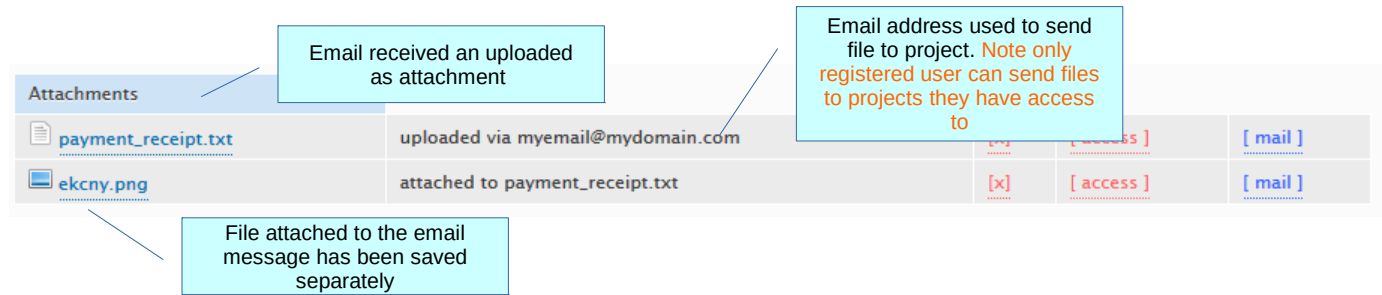
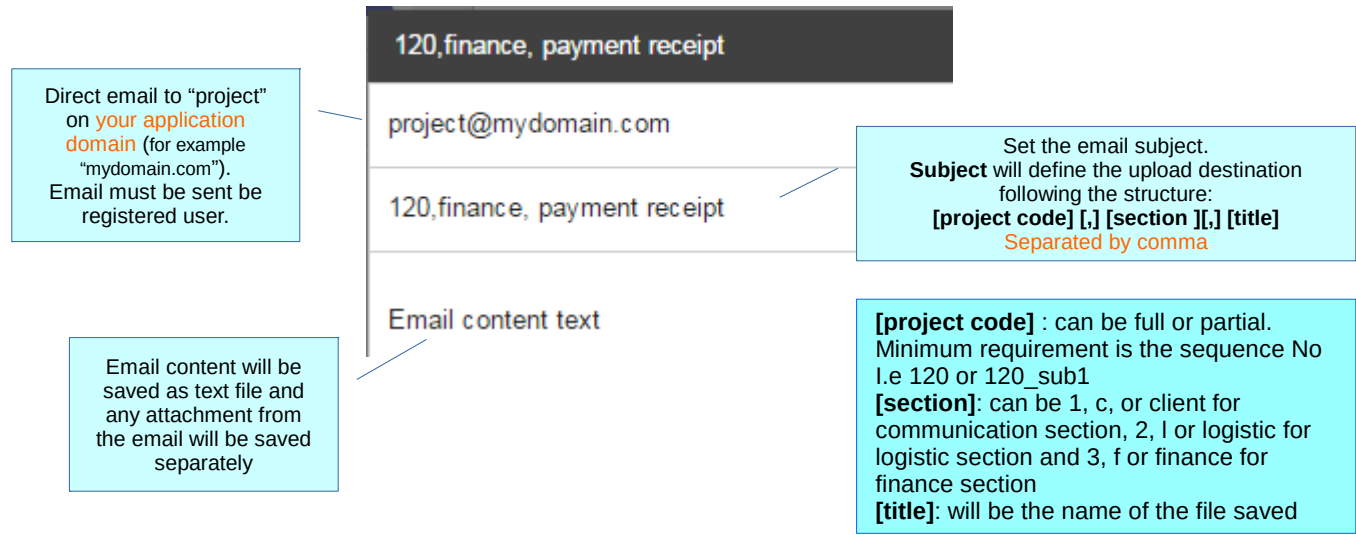
100

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







AREA
Systems

AK