

## 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%]

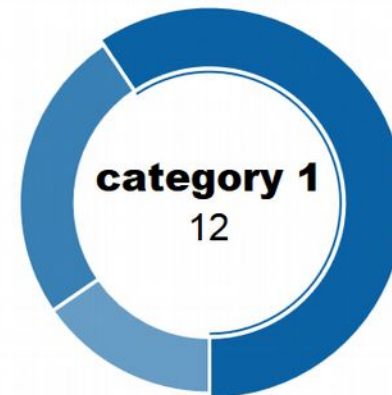
### Search projects

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

## 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	<a href="#">Alpha et Omega</a>	
Main project		
<a href="#">Edit extranet page</a>	Owner: user	
<a href="#">notification</a>	<a href="#">manage access</a>	
<a href="#">New task</a>	Status: awarded	

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

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

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

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

List followers

The screenshot shows a project page for "Project design and supply". The page includes a header with the project name, a "last view" timestamp, and a "Design" category. Below this is a "Main project" section with several action items: "Edit extranet page", "notification", and "New task". On the right side, there are buttons for "edit mode", "follow", and a "List followers" icon. The page also displays the client name "Alpha et Omega", the owner "admin", and a "manage access" link. A yellow bar at the bottom indicates the project status is "open".

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

List followers

Link to client details [Alpha et Omega](#)

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

Owner: admin

[manage access](#)

Status: open

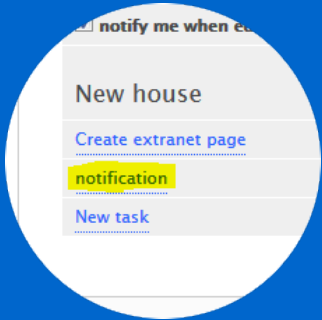
If module is available, you can create a extranet page to share information with 3<sup>rd</sup> parties

Send a quick message about this project to other system users

Create a task attached to this project

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

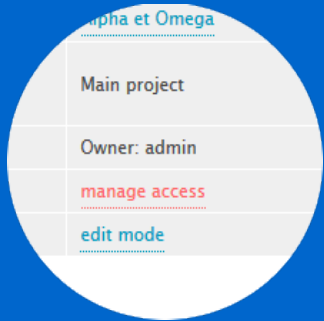
Enter the message



Message is received in internal EK messaging and user email account



## Access control



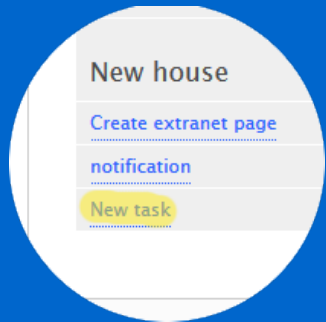
By default users will have access to projects assigned to countries where they have been authorized. This default access can be controlled at project level.

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." Below this text are two columns: 'Restricted' and 'Allowed', separated by a double-headed arrow. The 'Restricted' column contains a box labeled 'user2'. The 'Allowed' column contains a box labeled 'user'. A light blue callout box with a pointer to the 'user' box contains the text: "Click on users to switch from access restriction to authorized access". At the bottom right of the interface is a 'Save' button. A light blue callout box with a pointer to the 'Save' button contains the text: "Click save to confirm".



# Task



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

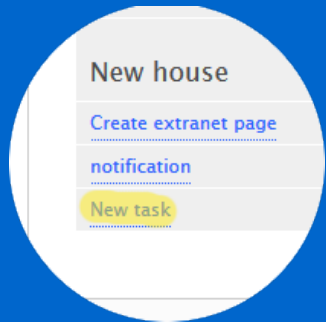
- Project ref.:** MVL-D-SG-2016\_01 (Annotation: Name of the event/task)
- Event name:** Proposal (Annotation: Name of the event/task)
- Assigned to \*:** user (Annotation: To whom this task is given)
- Task description \*:** Prepare quotation for client (Annotation: Short task description)
- Starting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

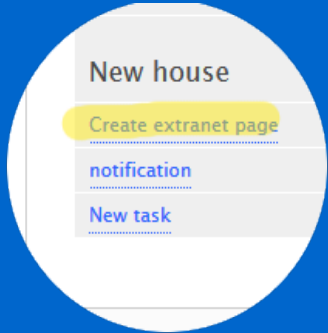
Tasks

Show all columns

Event	Task	From/to	In charge	Status	
Proposal	Prepare quotation for client	2016-01-05 2016-01-08	Myself	expired	<a href="#">Edit</a>

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

# Extranet



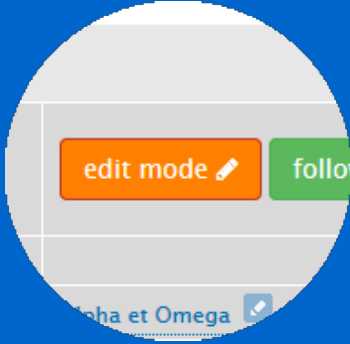
If module is available, you can create a special page to share project information with users that are external to your organization (i.e client).

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 web form for creating an extranet page. The form includes the following fields and callouts:

- 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 located below the "No access" and "Allowed" sections.

Edit mode



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

New house edit mode follow

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

Design Alpha et Omega

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

notification New task

Linked projects

Main data

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

In charge	Responsibility	Main task

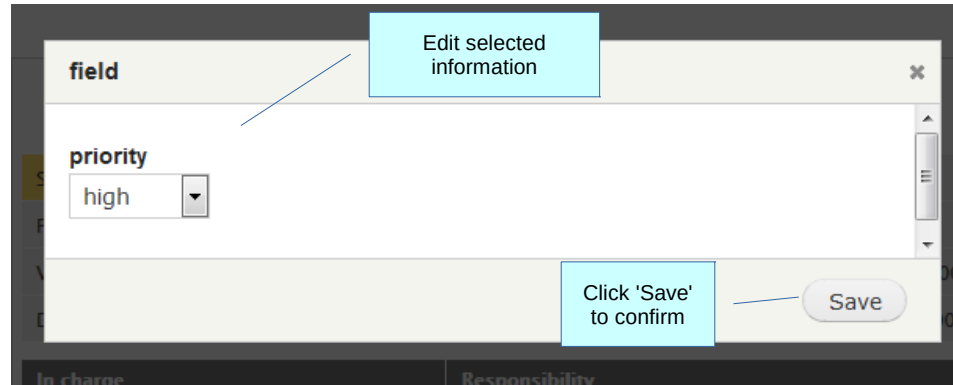
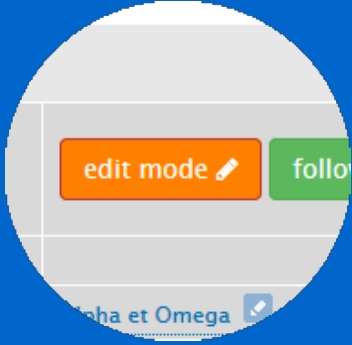
Description

Comments

Suppliers Booknote editions Ltd

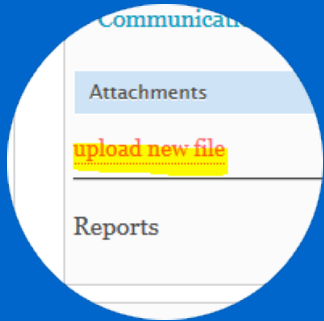
When entering edit mode, click on pencil icon to edit the selected information

# Edit mode



A screenshot of a 'Users activity' block. The block title is 'Users activity' with a blue circle icon to its left. Below the title, there are two sections: '--- [Today] ---' and '--- [Earlier] ---'. The 'Today' section contains a list of activities: 'open (You)', 'open (You)', 'delete excel.jpg (You)', and 'open (You)'. A light blue callout box points to the 'Users activity' title with the text 'Click to deactivate activity display'. Another light blue callout box 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



**upload**

Select file

Browse... Draft proposal.odt

text version

Upload

Annotations:

- Upload files by clicking in 'upload new file' in sections of the project page
- Add a short description or tag
- Click upload

Example 2

**upload**

Select file

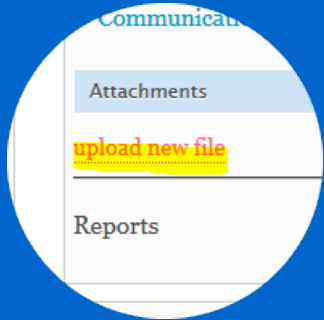
Browse... Draft proposal.pdf

pdf version

file uploaded Draft proposal.pdf

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

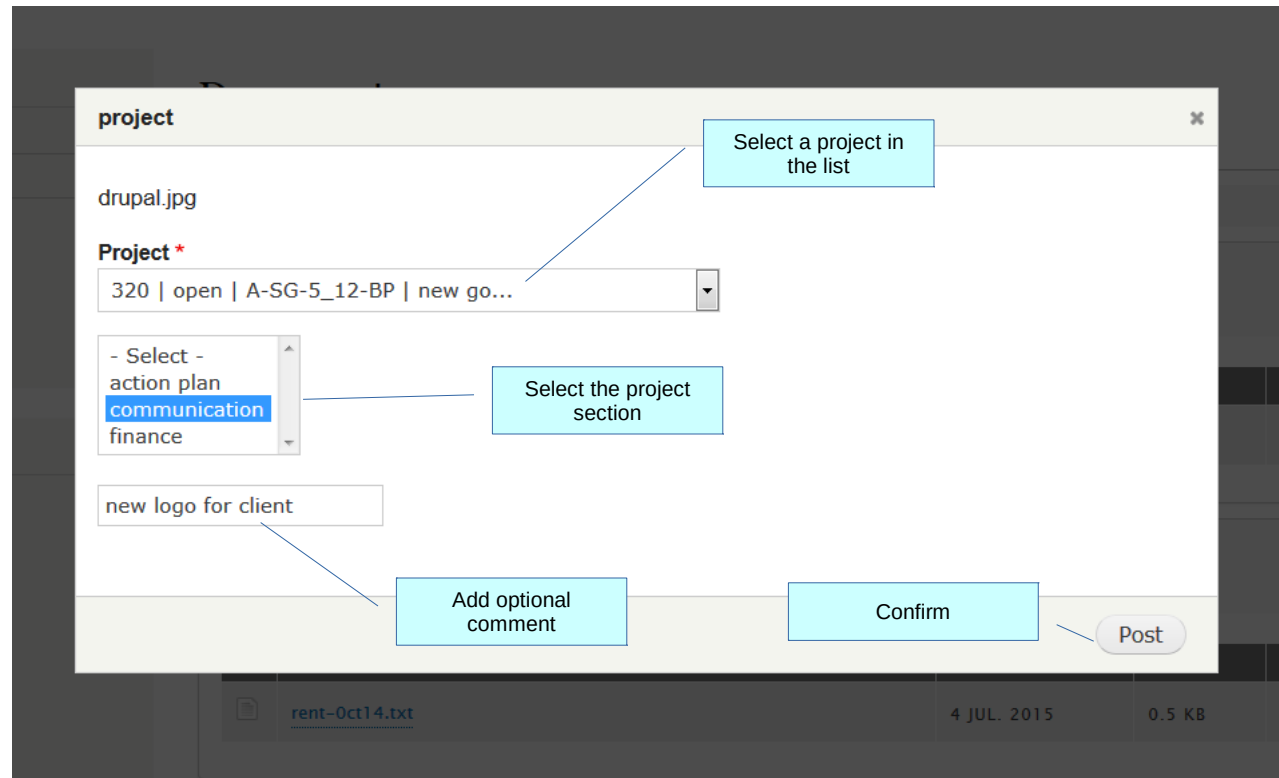
## Attach files alternative

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 window. The window title is 'project'. It shows a file named 'drupal.jpg' and a 'Project \*' dropdown menu with the text '320 | open | A-SG-5\_12-BP | new go...'. Below the dropdown is a list of project sections: '- Select -', 'action plan', 'communication', and 'finance'. The 'communication' section is highlighted. Below the list is a text input field containing 'new logo for client'. At the bottom right, there is a 'Post' button. Callout boxes point to the dropdown menu with the text 'Select a project in the list', to the 'communication' section with the text 'Select the project section', to the text input field with the text 'Add optional comment', and 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					
<a href="#">Draft proposal.pdf</a>	pdf version				
<a href="#">Draft proposal.odt</a>	deleted by admin 2016-01-06				

Annotations: Upload new file, Manage access, Share on extranet, Files attached, Delete, Send via email

Reports

<a href="#">RP-2-01_16-8</a>	2016-01-06	Land inspection
<a href="#">RP-2-01_16-9</a>	2016-01-06	Client meeting

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

Finance

<a href="#">Draft proposal.pdf</a>	pdf version				
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Annotation: Note: you can drag documents from section 3 to section 5

- 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
<b>Status</b>		<b>Last delivery</b>	
		0000-00-00	
<b>Delivery orders</b>			
MVL-DO-16-01-AO-2485	Alpha et Omega	2016-01-06	printed <a href="#">print</a>

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**

<a href="#">MVL-PO-16-04-BGP-12</a>	EUR 8,618.98	USD 9,072.61	●	partially paid
<b>Total</b>		<b>USD 9,072.61</b>		

**Quotations**

<a href="#">MVL--QU-16-01-AO-3</a>	USD 35,000.00		open
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**COS**

Overhead	USD 241.00		
<b>Total expenses</b>	<b>USD 241.00</b>		

**Internal memos**

<a href="#">MVL-EM-16-11-10</a>	USD 90.00	USD 90.00	●
<a href="#">MVL-EM-16-02-7</a>	USD 22.00	USD 22.00	●
<a href="#">MVL-EM-16-02-6</a>	EUR 164.00	USD 205.00	●
<b>Total</b>		<b>USD 317.00</b>	

**Comments**

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum. [admin] - 2016-01-06

**Attachments**

Attachment	Content	Download	Share	Print	Mail	Refresh
<a href="#">b4.jpg</a>	b					
<a href="#">b5.jpg</a>	b5					
<a href="#">payment_receipt.txt</a>	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

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 120, 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 href="#">A-CA-6_09-BP-311</a>	2014-01-16	Project design and supply	SINGAPORE	category 2	awarded	<a href="#">no</a>
<a href="#">A-CA-6_09-BP-313</a>	2009-06-01	Deco and supply	SINGAPORE	design	completed	<a href="#">no</a>
<a href="#">MVL-Aa-SG-2014_11-AO-15_sub2</a>	2014-12-23	Consulting service	CAMBODIA	category 2	open	<a href="#">no</a>
<a href="#">MVL-Aa-MY-2014_12-AO-18</a>	2014-12-23	Repair and maintenance	MALAYSIA	category 1	open	<a href="#">no</a>
<a href="#">MVL-D-SG-2016_01-AO-120</a>	2016-01-04	New house	SINGAPORE	design	awarded	<a href="#">no</a>

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

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

### Access

Login	Section 1	Section 2	Section 3	Section 4	Section 5
[1] admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
[2] user	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[3] user2 (Blocked)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Login blocked

Check a box to authorize access

Save

Save settings

# Project settings

## 2) Ownership transfer

Url: /projects/settings/transfer

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

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

user

After selection, display of projects owned by "user"

▼ List

<input checked="" type="checkbox"/>	Reference	Name	Country
<input checked="" type="checkbox"/>	A-CA-12_09-BP-317	test get	CAMBODIA
<input checked="" type="checkbox"/>	A-CA-4_09-BEP-308	abook	CAMBODIA

Select which project(s) to transfer

Transfer to \*

user2

Choose destination user and click "Confirm transfer"



# Project settings

## 3) Merge

Url: /projects/settings/merge

When merging existing main projects, the serial reference are not edited. Only the level of source project is modified and linked to destination project.

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

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

**Project to be merged \***   Select the source project

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

**Project destination \***  Select the destination project

Click "Confirm merge"

Merge one project as sub project of another project

# Project settings

## 3) Access by user and project

Uri:  
/projects/settings/access\_admin

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

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

Select user by name

Filter by project tags

country: Any

client: Any

supplier: Any

category: Any

status: Any

Apply Reset

List of projects

Reference	Date	Name	Country	Category	Status	
<a href="#">A-CA-6_09-BP-311</a>	2014-01-16	Project design and supply	SINGAPORE	category 2	awarded	owner
<a href="#">A-CA-6_09-BP-313</a>	2009-06-01	Deco and supply	SINGAPORE	design	completed	access denied
<a href="#">A-CA-12_09-BP-316</a>	2009-12-20	test ap	SINGAPORE	category 1	awarded	access

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

## 4) 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 \***

project type

**Second element \***

project type

**Third element \***

country code

I.e country code will be displayed as 3<sup>rd</sup> element

**Fourth element \***

date

**Fifth element \***

client code

**Last element \***

sequence number

Sequence number cannot be changed

**Increment base \***

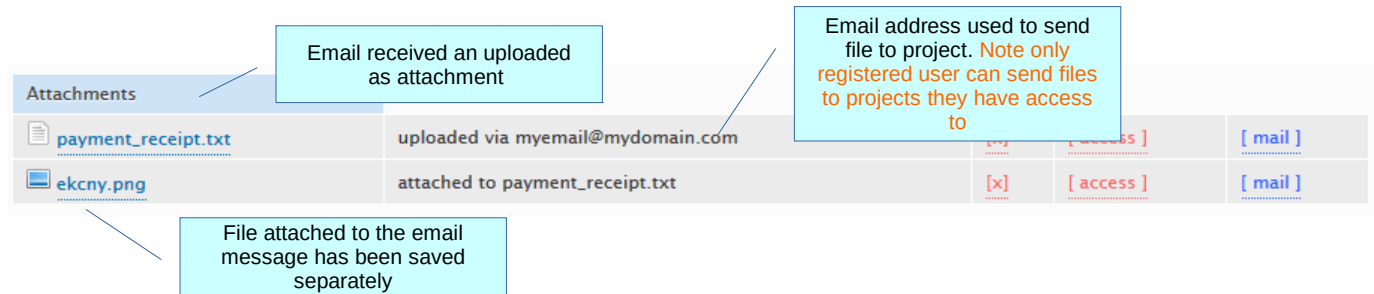
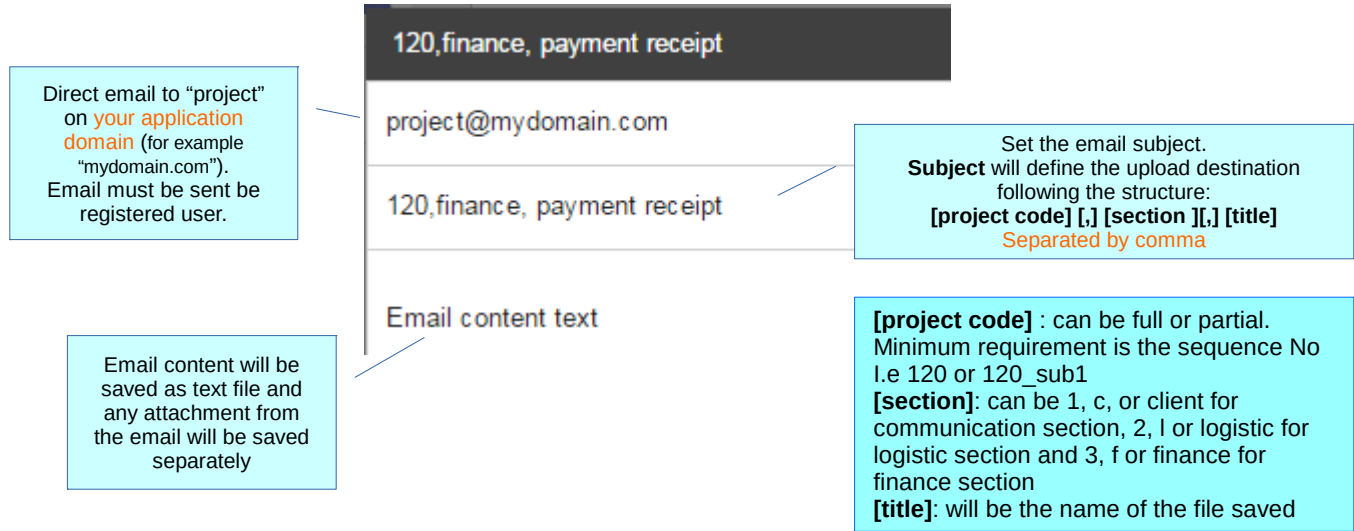
100

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**