



PROJECT FEATURES FOR VERSION 3.+

'Php Web Based Timesheet, And Project Tracking Software'
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2. Projects

Click the PROJECTS icon at the top menu to access the Project Module.



Figure 1: Projects Top Menu

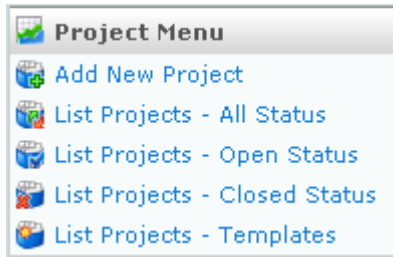
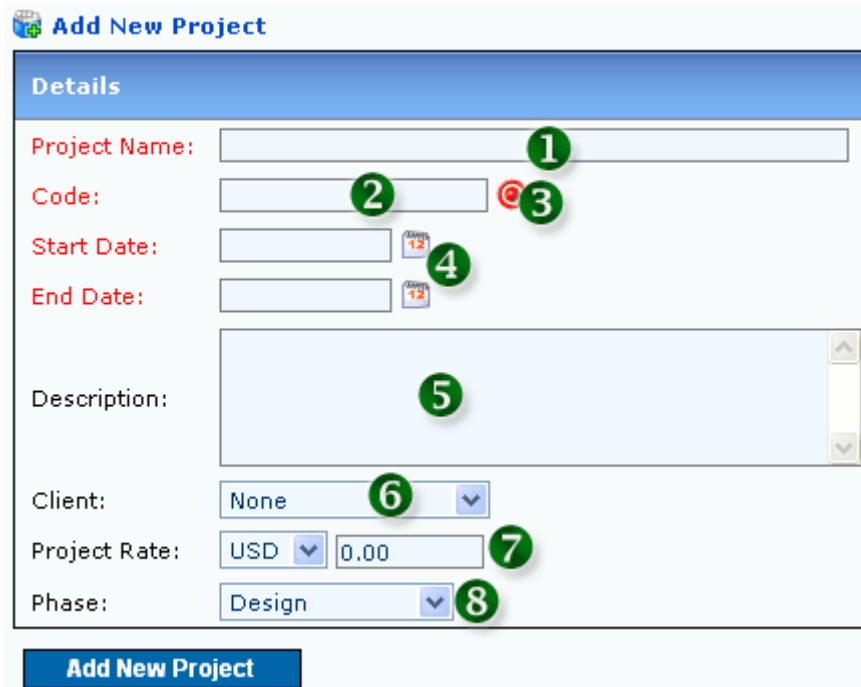


Figure 2: Projects Left Side Menu

2.1 Add New Project

 [Add New Project](#)

Click the " New Project Configuration" Tab to Add New Project



The screenshot shows the 'Add New Project' form with the following fields and callouts:


- 1. Project Name: Text input field.
- 2. Code: Text input field.
- 3. Click to Automate Project Code Generation: Red circular icon with a white 'C'.
- 4. Start Date: Text input field with a calendar icon.
- 5. End Date: Text input field with a calendar icon.
- 6. Description: Large text area.
- 7. Client: Dropdown menu with 'None' selected.
- 8. Project Rate: Currency dropdown (USD) and numerical input (0.00).
- 9. Phase: Dropdown menu with 'Design' selected.

At the bottom of the form is a blue button labeled 'Add New Project'.

Figure 3: Add New Project

1. **PROJECT NAME (MANDATORY):** Only one unique Project Name can exist within the system
2. **PROJECT CODE (MANDATORY):** Only one unique Project Code can exist within the system
3. **CLICK TO AUTOMATE PROJECT CODE GENERATION:** The rules of Project Code auto-generation naming convention can be changed by Admin
4. **START DATE AND END DATE (MANDATORY)**
5. **PROJECT DESCRIPTION**
6. **PROJECT CLIENT**
7. **PROJECT RATE:** Rate per hour charged in timesheet
8. **CURRENT PROJECT PHASE:** Phase value editable by Admin

2.1.1 Add New Project Team Members

Click the "  **Project Members** " Tab to Add New Team Members

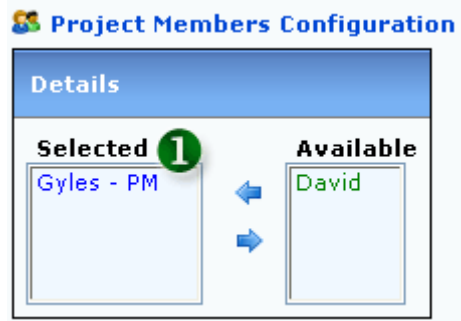


Figure 4: Project Team Members

1. PROJECT CREATOR WILL BE AUTOMATICALLY DEFAULT AS PM:

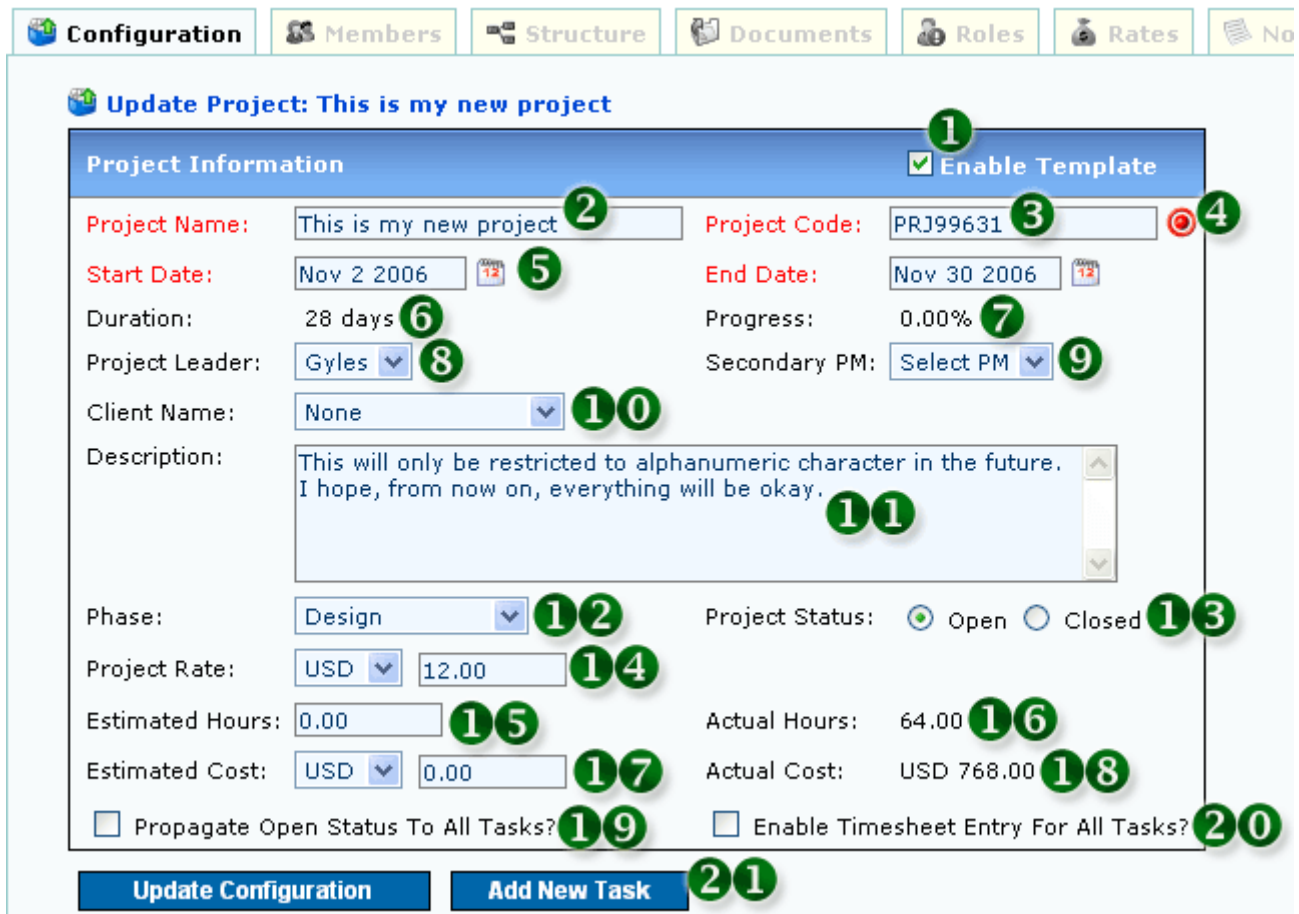
- ◆ New Team Members or Departments can be selected from the "Available" Box
- ◆ Tasks will refer to Team Members in its Projects as reference for its own Team Members. However, if mistakes are made, they can be rectified in the "Update Project" later.
- ◆ Normal Team Members can View Projects, Add Notes, Upload Documents and enter hours in Timesheet to the tasks in Projects. However, they cannot edit projects.
- ◆ PM or Secondary PM are Administrators or Owners of the Projects and have Full Rights to the Projects

2.2 Updating Projects

System will automatically move to Update Project Mode after successful Project Addition.
Projects can also be Updated via links in the List Project section (refer **Listing Projects at 2.6**)

2.2.1 Project Configuration

Click the  **Configuration** Tab to Update Project Configuration




The screenshot shows the 'Update Project: This is my new project' configuration page. It features a top navigation bar with tabs: Configuration, Members, Structure, Documents, Roles, Rates, and No. The main form is titled 'Update Project: This is my new project' and includes a 'Project Information' section. The form contains various fields for project details, each with a numbered callout (1-21) indicating specific features or constraints. The fields include: Project Name (2), Project Code (3), Start Date (5), End Date (4), Duration (6), Progress (7), Project Leader (8), Secondary PM (9), Client Name (10), Description (11), Phase (12), Project Status (13), Project Rate (14), Estimated Hours (15), Actual Hours (16), Estimated Cost (17), Actual Cost (18), and checkboxes for 'Propagate Open Status To All Tasks?' (19) and 'Enable Timesheet Entry For All Tasks?' (20). At the bottom, there are two buttons: 'Update Configuration' and 'Add New Task' (21).

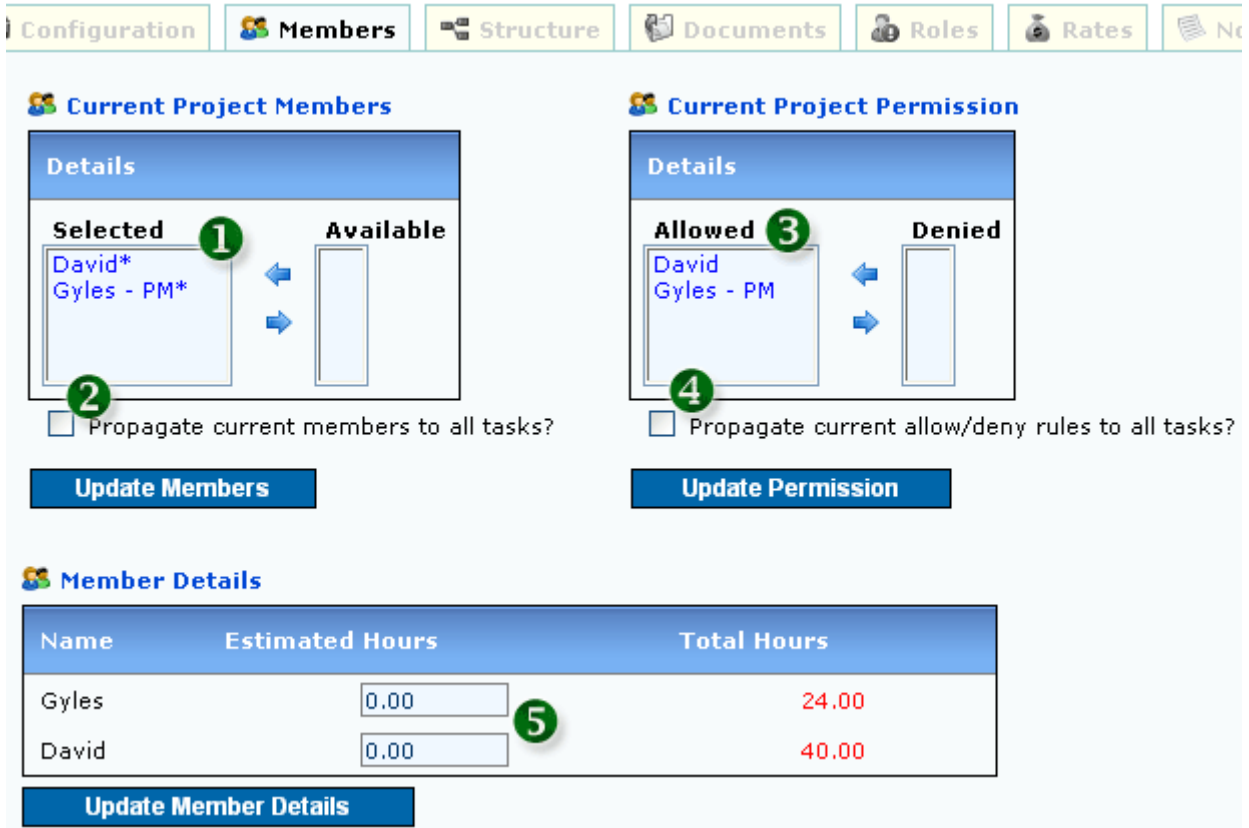
Figure 5: Project Update Configuration Page

1. **ENABLE PROJECT AS TEMPLATE:** This template will appear in the "List Projects - Templates" menu
2. **PROJECT NAME:** Only one unique Project Name can exist within the system
3. **PROJECT CODE:** Only one unique Project Code can exist within the system
4. **GENERATE PROJECT CODE AUTOMATICALLY:** The rules of Project Code auto-generation naming convention can be changed by Admin
5. **START AND END DATE**

6. **PROJECT DURATION:** Days from Start Date and End Date
7. **PROGRESS PERCENTAGE:** Calculated Automatically via average percentage from Tasks in project
8. **PROJECT MANAGER / LEADER SELECTION:** Current PM can be changed with a New PM. Only Users with "Project Manager" Permission will appear in the Selection. This Permission can be set by the Administrator
9. **SECONDARY PROJECT MANAGER / LEADER SELECTION:** Current Secondary PM can be changed or added with a New Secondary PM. Only Users with "Project Manager" Permission will appear in the Selection. This Permission can be set by the Administrator.
10. **PROJECT CLIENT SELECTION:** Client can be added/updated by Administrator
11. **PROJECT DESCRIPTION**
12. **PROJECT PHASES SELECTION:** Phase can be added/updated by Administrator
13. **PROJECT STATUS:** Open or Closed
14. **PROJECT RATE:** Default Project Rate per hour charged in Timesheet.
15. **ESTIMATED TOTAL PROJECT HOURS**
16. **ACTUAL HOURS CHARGED IN TIMESHEET:** Actual Hours charged for Tasks in this Project
17. **ESTIMATED TOTAL PROJECT COST**
18. **ACTUAL COST BASED ON HOURS CHARGED IN TIMESHEET:** Actual Cost charged for Tasks in this Project
19. **CHECK TO PROPAGATE OPEN STATUS TO ALL TASKS:** Only for Projects with "Open" Status. This will change all Tasks Status to "Open". Closed Projects will automatically trigger a "Closed" status in all Tasks
20. **ENABLE TIMESHEET ENTRY FOR THIS PROJECT**
21. **CLICK TO ADD NEW TASK FOR THIS PROJECT**

2.2.2 Project Team Members

Click the " Members" Tab to Update Project Team Members



Current Project Members

Details

Selected **Available**

David*
Gyles - PM*

☐ Propagate current members to all tasks?

Update Members

Current Project Permission

Details

Allowed **Denied**

David
Gyles - PM

☐ Propagate current allow/deny rules to all tasks?

Update Permission

Member Details

Name	Estimated Hours	Total Hours
Gyles	0.00	24.00
David	0.00	40.00

Update Member Details

Figure 6: Project Update Team Members Page

- 1. CURRENT PROJECT MEMBERS:** Members with '*' cannot be removed as they have timesheet hours already charged to the project. Members removed from project members will be automatically removed in Tasks as well. Members added to Projects will NOT be automatically added in Tasks but needs to be Propagated Manually
- 2. PROPAGATE MEMBERS TO TASKS AS WELL:** Members added in project can be automatically added to Tasks by checking this box and clicking "Update Members".
- 3. ALLOW / DENY CURRENT TEAM TO ACCESS PROJECT:** Any Current Team Members can be denied access to the Project and its Tasks.
- 4. PROPAGATE ALLOW / DENY CURRENT TEAM TO TASKS AS WELL:** Propagate the current Allow / Deny Rules to Tasks as well
- 5. PROJECT MEMBERS' ESTIMATED VS ACTUAL HOURS:** This is a Comparison Table for every Team Members in the Project versus their Hours charged in Timesheet

2.2.3 Project Structure


Click the " **Structure**" Tab to View the Current Project Structure



Figure 7: Project Structure Page

1. **CLICK LINK TO GO TO DIFFERENT TASKS:** The link in red is the current Project / Task selection

2.2.4 Project Documents

Click the " **Documents**" Tab to View the Currently Shared Project Documents

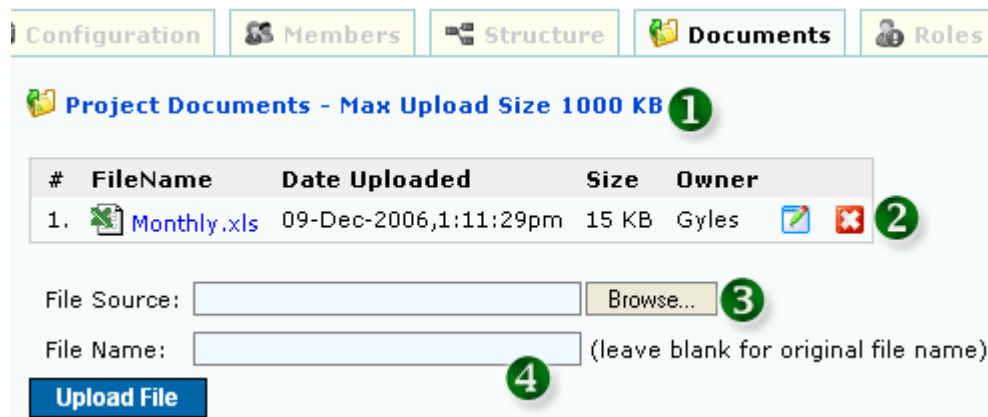



Figure 8: Project Documents

1. **CURRENT ALLOWABLE UPLOAD SIZE:** Changeable by Admin
2. **UPLOADED FILES INFORMATION:** Download, Rename and Delete Files. All Project Team Members can upload files to Project. Only the documents owner can update or delete documents.
3. **SELECT FILE TO UPLOAD:** Files with size that is more than allowable will be ignored during upload
4. **RENAME UPLOADED FILE:** File will assume the original name if there is no value in this field

2.2.5 Project Roles

Click the "  Roles " Tab to Select Available Roles

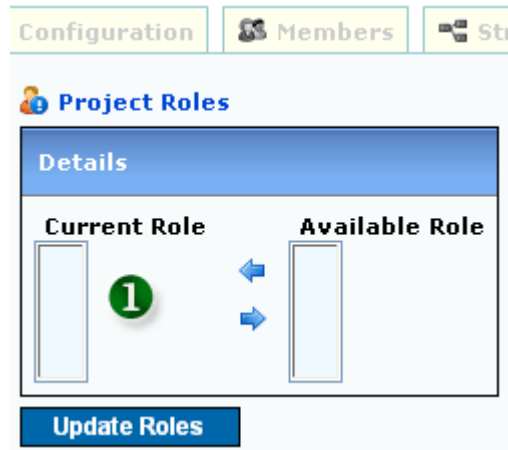



Figure 9: Project Roles

1. AVAILABLE PROJECT ROLES:

- ◆ New Project Roles can be added by Admin. Project Roles serve as an addition to the Default Rate for Users, Projects and Departments in the Project Rates selection.

2.2.6 Project Rates

Click the "  Rates " Tab to Assign Rates to Project Members

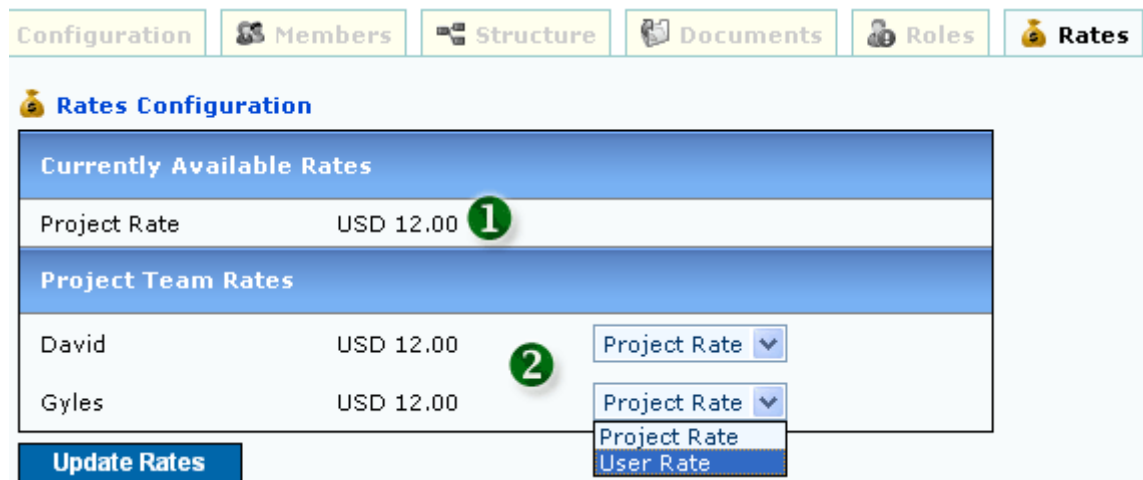

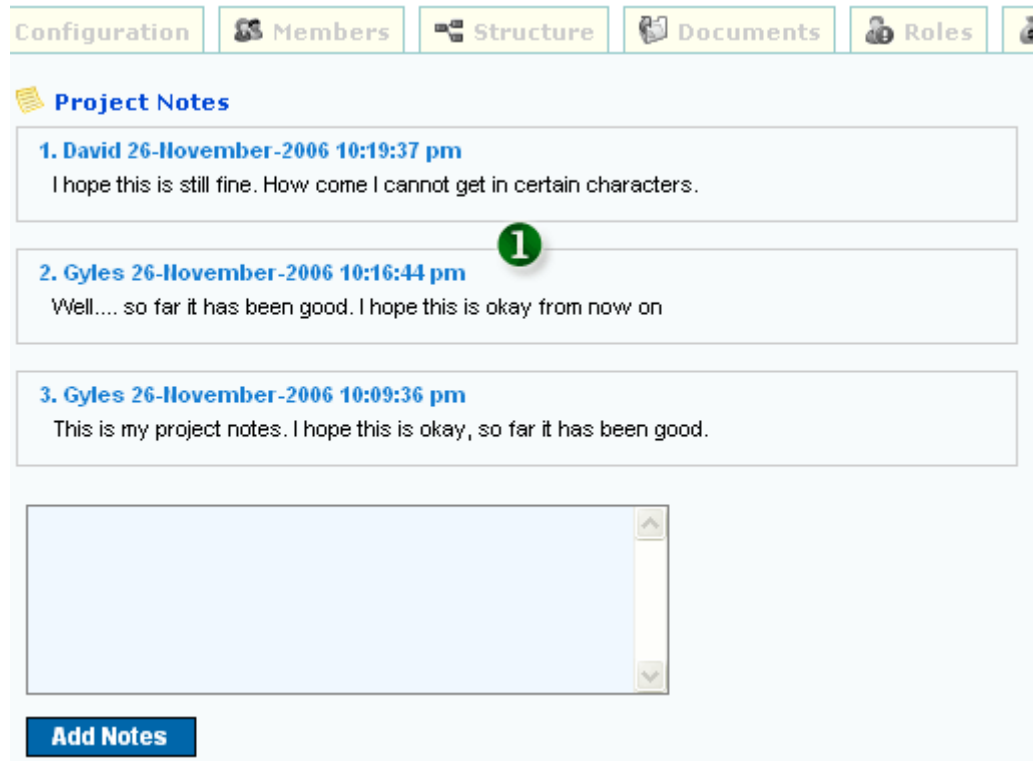


Figure 10: Project Rates

1. **DEFAULT PROJECT RATE:** Changeable in Project Configuration
2. **AVAILABLE RATES:** More rates can be added via Project Roles

2.2.6 Project Notes

Click the " **Notes**" Tab to Share Notes regarding the Project



Project Notes

- 1. David 26-November-2006 10:19:37 pm**
I hope this is still fine. How come I cannot get in certain characters.
- 2. Gyles 26-November-2006 10:16:44 pm**
Well.... so far it has been good. I hope this is okay from now on
- 3. Gyles 26-November-2006 10:09:36 pm**
This is my project notes. I hope this is okay, so far it has been good.

Add Notes

Figure 11: Project Notes

1. CURRENT PROJECT NOTES

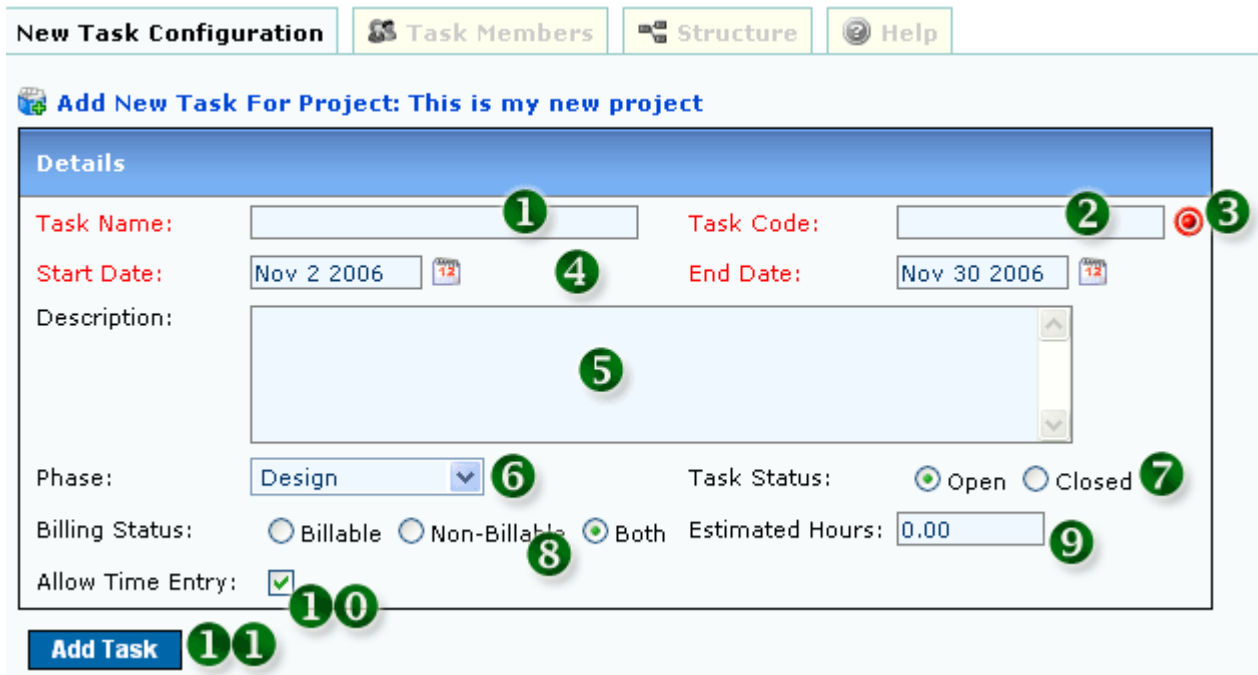
- ◆ Project Notes cannot be deleted or updated as it serves as a 'Log' for every Project Team Members
- ◆ All Team Members who have access to the Project can add Notes

2.3 Adding New Task for Project

Click the " **Add New Task** " Button in the Project Update page to add New Task

2.3.1 Task Configuration

Click the "  **New Task Configuration** " Tab to Update Task Configuration



The screenshot shows the 'New Task Configuration' form with the following fields and callouts:

- 1**: Task Name input field
- 2**: Task Code input field
- 3**: Generate Task Code button (target icon)
- 4**: Start Date input field (Nov 2 2006)
- 5**: Description text area
- 6**: Phase dropdown menu (Design)
- 7**: Task Status radio buttons (Open, Closed)
- 8**: Billing Status radio buttons (Billable, Non-Billable, Both)
- 9**: Estimated Hours input field (0.00)
- 10**: Allow Time Entry checkbox (checked)
- 11**: Add Task button

Figure 12: Adding New Task for Project

1. **TASK NAME:** Only one unique Task Name can exist within the Project
2. **TASK CODE:** Only one unique Task Code can exist within the Project
3. **GENERATE TASK CODE:** Task Code will be generated automatically. The rules of Task Code auto-generation naming convention can be changed by Admin
4. **START AND END DATE**
5. **TASK DESCRIPTION**
6. **TASK PHASES:** Phase can be added/updated by Administrator
7. **TASK STATUS:** Open or Closed
8. **BILLING STATUS:** Enable Billable or Non-Billable Options in Timesheet
9. **ESTIMATED TOTAL TASK HOURS**
10. **ALLOW TIMESHEET ENTRY FOR THIS TASK**
11. **PROCEED WITH ADDING THIS TASK**

2.3.2 Task Members

Click the "  Task Members " Tab to Update Task Team Members

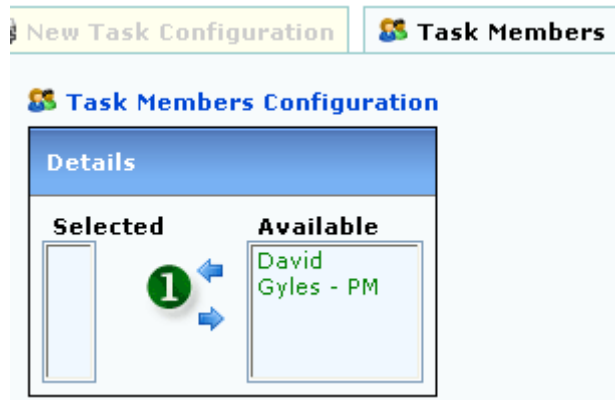



Figure 13: Task Members

1. ADD TASK MEMBERS:

- ◆ List of Available Task Members will be derived automatically from the Project's Team Members
- ◆ Task Members assignments work independently from Project. For example: if a new Team Member is added in the Project, it will not automatically added to its Tasks unless Propagated. This is to maintain Team Members independence so that Project Managers can assign certain Tasks to certain Team Members in the Project only without affecting others.

2.3.3 Task Structure

Click the "  Structure " Tab to View the Current Project and Task Structure

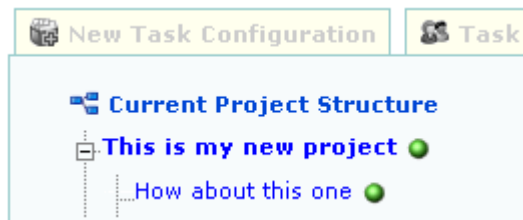


Figure 14: Current Project and Task Structure

2.4 Updating Tasks

System will automatically move to Update Task Mode after successful Task Addition. Tasks can also be Updated via links in the List Project section (refer Listing Projects at 2.6)

2.4.1 Task Configuration

Click the "  Configuration" Tab to Update Task Configuration

Configuration Members Structure Documents Notes Log Help

Update Task: How about this one

Task Information ☐ Milestone

Task Name: How about this one Task Code: TASK21332

Start Date: Nov 2 2006 End Date: Nov 30 2006

Duration: 28 days Progress: 0%

Description: Well.. so far so good. So what

Phase: Design Task Status: ☒ Open ☐ Closed

Billing Status: ☐ Billable ☐ Non-Billable ☒ Both Actual Hours: 64.00

Allow Time Entry: ☒ ☐ Propagate Open Status To All Child?

Update Configuration **Add New Task**

Figure 15: Update Task Configuration

1. MARK TASK AS MILESTONE

2. TASK NAME: Only one unique Task Name can exist within the Project

3. TASK CODE: Only one unique Task Code can exist within the Project

4. GENERATE TASK CODE: Task Code will be generated automatically. The rules of Task Code auto-generation naming convention can be changed by Admin

5. START AND END DATE

6. TASK DURATION: Days from Start Date and End Date

7. PROGRESS PERCENTAGE

8. TASK DESCRIPTION

9. **TASK PHASES SELECTION:** Phase can be added/updated by Administrator
10. **TASK STATUS:** Open or Closed
11. **TASK BILLING:** Billable or Non-Billable Options in Timesheet
12. **ACTUAL HOURS AS CALCULATED FROM TIMESHEET**
13. **ALLOW OR DENY TIMESHEET ENTRY FOR THIS TASK**
14. **CHECK TO PROPAGATE OPEN STATUS TO ALL SUBTASKS:** Only for Tasks with "Open" Status. This will change all Tasks Status to "Open". Closed Tasks will automatically trigger a "Closed" status in all SubTasks
15. **CLICK TO ADD NEW SUBTASK WITH THIS TASK AS PARENT**

2.4.2 Task Members

Click the "Members" Tab to Update Task Members

The screenshot shows the 'Members' tab selected in the top navigation bar. Below the navigation bar, there are two main sections: 'Current Task Members' and 'Current Task Permission'. Each section has a 'Details' box with 'Selected' and 'Available' lists, a checkbox to 'Propagate current members to all child?' (or 'allow/deny rules to all child?'), and an 'Update' button. Below these sections is a 'Member Details' table with columns for Name, Estimated Hours, and Total Hours. The table lists Gyles and David. A green circle with the number 5 is placed over the 'Estimated Hours' column.

Current Task Members

Details

Selected 1
David*
Gyles - PM* 2

Available

☐ Propagate current members to all child?

Update Members

Current Task Permission

Details

Allowed 3
David
Gyles - PM 4

Denied

☐ Propagate current allow/deny rules to all child?

Update Permission

Member Details

Name	Estimated Hours	Total Hours
Gyles	0.00 5	24.00
David	0.00	40.00

Update Member Details

Figure 16: Updating Task Members

1. **CURRENT TASK MEMBERS:** Members with '*' cannot be removed as they have timesheet hours already charged to task. Members removed from task members will be automatically removed in

SubTasks as well. Members added will NOT be automatically added in SubTasks but need to be Propagated

2. PROPAGATE MEMBERS TO SUBTASKS AS WELL: Members added in tasks can be automatically added to SubTasks by checking this box and clicking "Update Members"

3. ALLOW / DENY CURRENT TEAM FROM ACCESSING TASK

4. PROPAGATE ALLOW / DENY CURRENT TEAM PERMISSION TO SUBTASKS AS WELL

5. TASK MEMBERS' ESTIMATED VS ACTUAL HOURS

2.4.3 Task Structure

Click the "  **Structure** " Tab to Update Task Members



Figure 17: Task Structure

1. CLICK LINK TO GO TO DIFFERENT TASKS: The link in red is the current Task selection

2.4.4 Task Documents

Click the "  **Documents** " Tab to View Task Documents

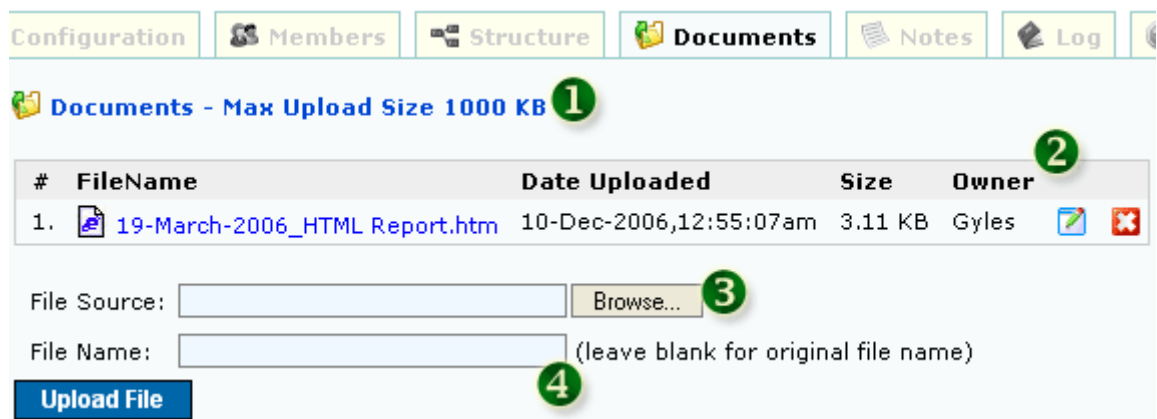


Figure 18: Task Attachments

1. CURRENT ALLOWABLE UPLOAD SIZE: Changeable by Admin

2. UPLOADED FILES INFORMATION: Download, Rename and Delete Files. All Task Team Members can upload files to Task. Only the documents owner can update or delete documents.

3. SELECT FILE TO UPLOAD: Files with size that is more than allowable will be ignored during upload

4. RENAME UPLOADED FILE: File will assume the original name if there is no value in this field

2.4.5 Task Notes

Click the " **Notes**" Tab to View Task Notes

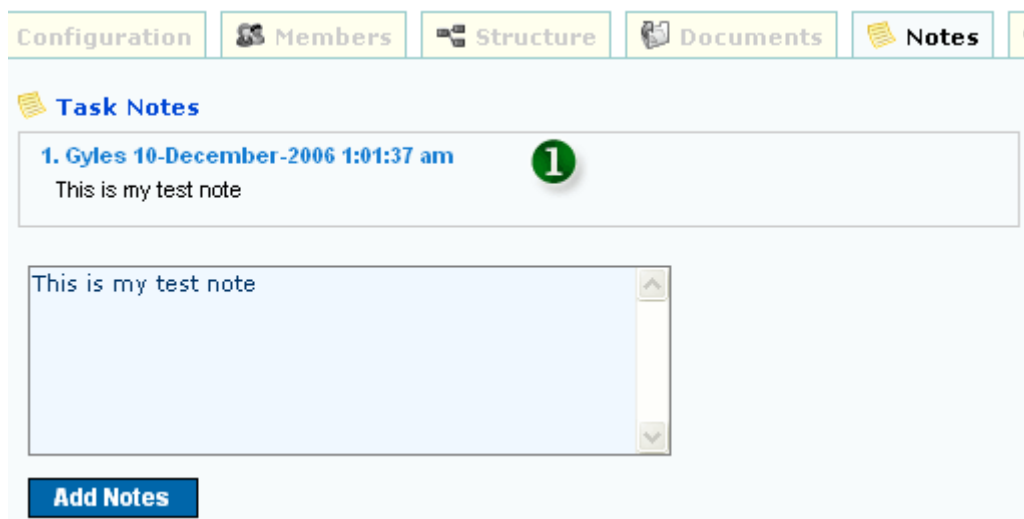



Figure 19: Task Notes

1. CURRENT TASK NOTES

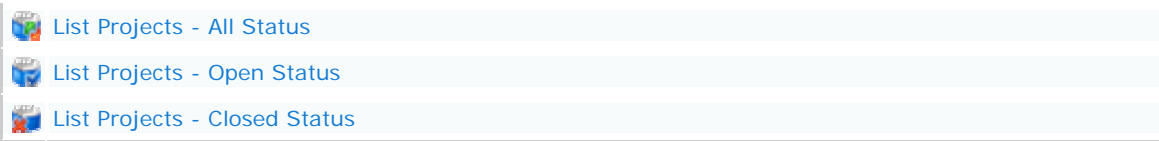
- ◆ Task Notes cannot be deleted or updated as it serves as a 'Log' for every Task Team Members
- ◆ All Team Members who have access to the Task can add Notes


2.5 Adding New SubTask for Task

Click the " **Add New Task**" Button in the Task Update page to add New SubTask

- ◆ Adding new Subtask procedure is Similar to Adding New Task For Projects

2.6 Listing Projects



Click the  **Projects List** Tab to List Projects

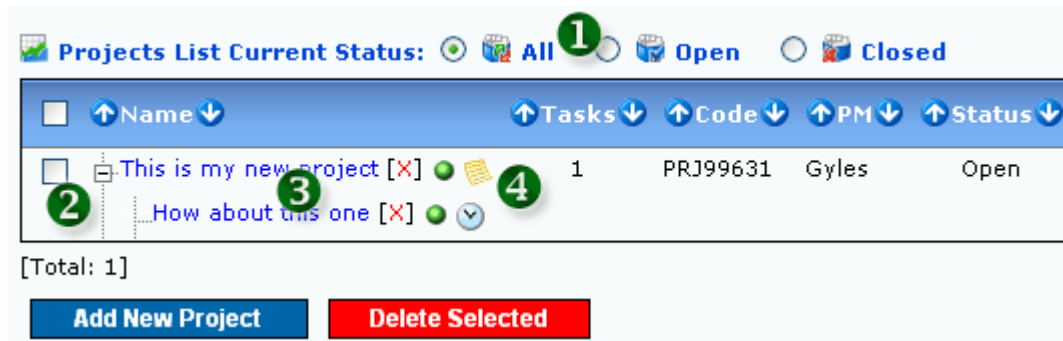










Figure 20: List Projects Page



1. SELECT PROJECT STATUS: All / Open / Closed /
2. CHECK AND CLICK "DELETE SELECTED" TO DELETE PROJECT
3. LINK TO PROJECT EDIT / VIEW: Depending on Project Permission
4. PROJECT STATUS ICONS
 - ◆ [X] Delete Project / Task
 - ◆  Open Projects
 - ◆  Closed Projects
 - ◆  Timesheet Entry Permitted
 - ◆  Timesheet Entry Denied
 - ◆  Projects With Attachment
 - ◆  Projects With Notes

2.7 Listing Templates

 List Projects - Templates

Click the " Project Templates List" Tab to List Templates. Any Project can be made a Template by checking the "Enable Template" checkbox at the Project Edit page.

 **Project Templates List**


↑Name↓	↑Tasks↓	↑Code↓	↑PM↓	↑Status↓
 This is my new 1 ject How about this one 	1	PRJ99631	Gyles	Open


[Total: 1]

Figure 21: Project Templates List

1. CLICK LINK TO EDIT TEMPLATE

2.7.1 Template Editor

Click the " Project Template Editor" Tab to Update Templates. By clicking the Link at the Templates Listing, the Project Template Editor will be loaded automatically

 **Project Template Configuration**

Project Template




Project Name:	<input type="text" value="This is my new project"/> 1	Project Code:	<input type="text" value="PRJ99631"/> 2	 3
Start Date:	<input type="text" value="Nov 2 2006"/>  4	End Date:	<input type="text" value="Nov 30 2006"/> 	
Project Leader:	<input type="text" value="Gyles"/> 5	Secondary PM:	<input type="text" value="Select PM"/> 6	
Client Name:	<input type="text" value="None"/> 7			
Description:	<input type="text" value="This will only be restricted to alphanumeric character in the future. I hope, from now on, everything will be okay."/> 8			
Phase:	<input type="text" value="Design"/> 9	Project Status:	<input checked="" type="radio"/> Open <input type="radio"/> Closed 10	
Project Rate:	<input type="text" value="USD"/> <input type="text" value="0.00"/> 11			
Estimated Hours:	<input type="text" value="0.00"/> 12	Estimated Cost:	<input type="text" value="USD"/> <input type="text" value="0.00"/> 13	

Figure 22: Project Template Editor

1. PROJECT NAME: Only one unique Project Name can exist within the system

2. **PROJECT CODE:** Only one unique Project Code can exist within the system
3. **PROJECT CODE GENERATOR:** Click to automatically generate Project Code. The rules of Project Code auto-generation naming convention can be changed by Admin
4. **START AND END DATE**
5. **PROJECT MANAGER SELECTION:** Listed Users with Project Manager permission only
6. **SECONDARY PROJECT MANAGER SELECTION:** Listed Users with Project Manager permission only
7. **PROJECT CLIENT**
8. **PROJECT DESCRIPTION**
9. **PROJECT PHASES**
10. **PROJECT STATUS:** Open or Closed
11. **PROJECT RATE:** Default Project Rate per hour charged in Timesheet.
12. **ESTIMATED TOTAL PROJECT HOURS**
13. **ESTIMATED TOTAL PROJECT COSTS**