PROJECT FEATURES FOR VERSION 3.+

‘Php Web Based Timesheet, And Project Tracking Software’
By: Creative-Dr Sdn. Bhd.

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2. Projects

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

Figure 1: Projects Top Menu

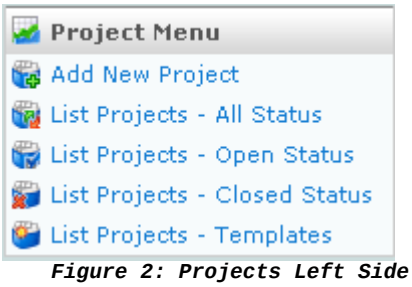


Figure 2: Projects Left Side Menu

2.1 Add New Project

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

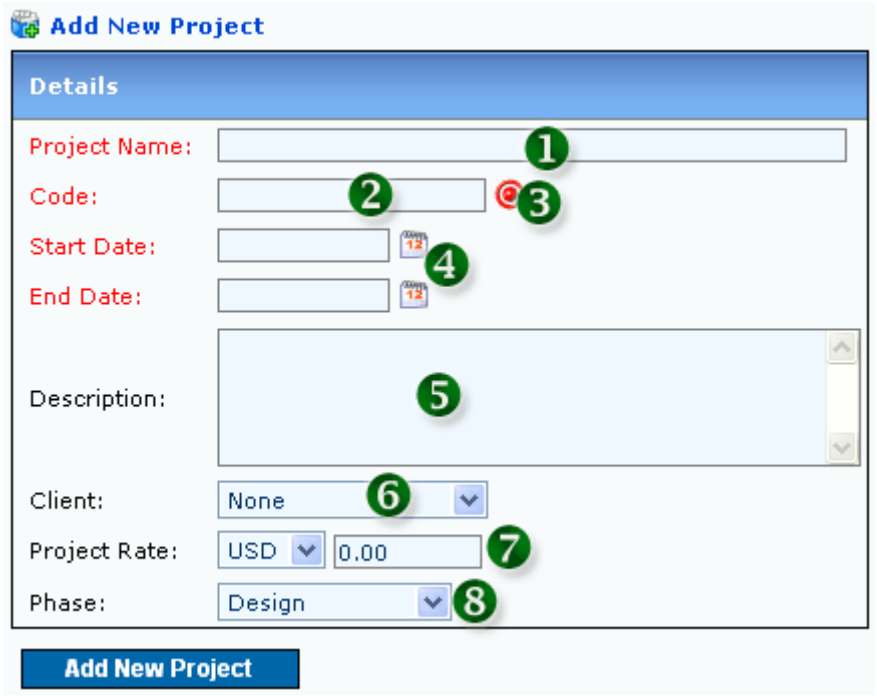


Figure 3: Add New Project

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

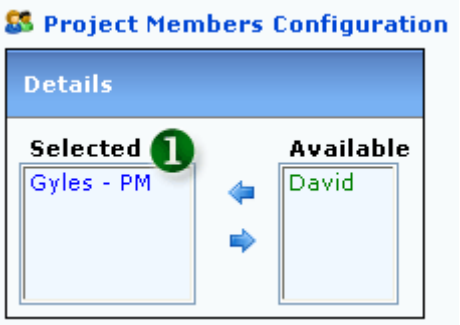


Figure 4: Project Team Members

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

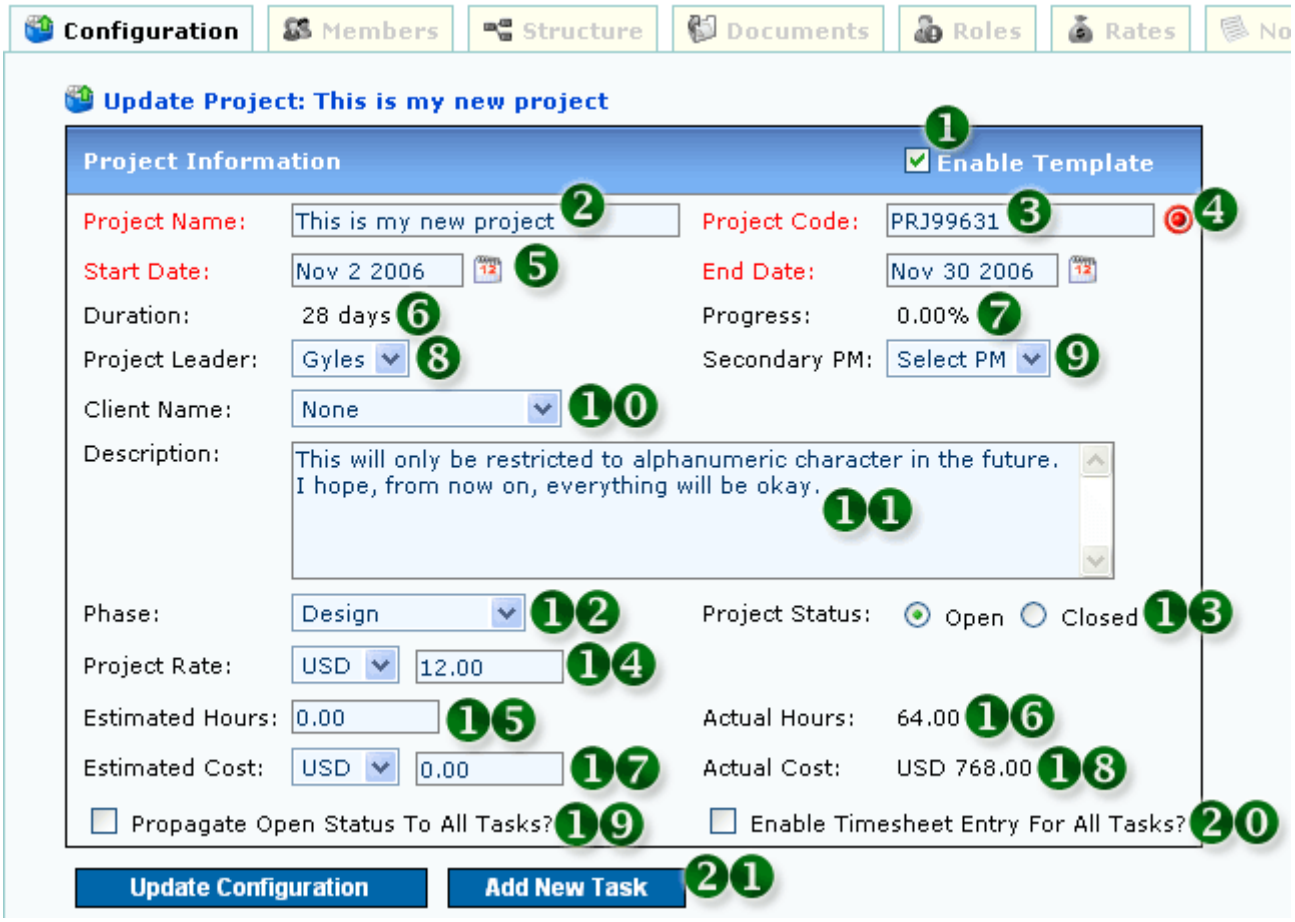


Figure 5: Project Update Configuration Page

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

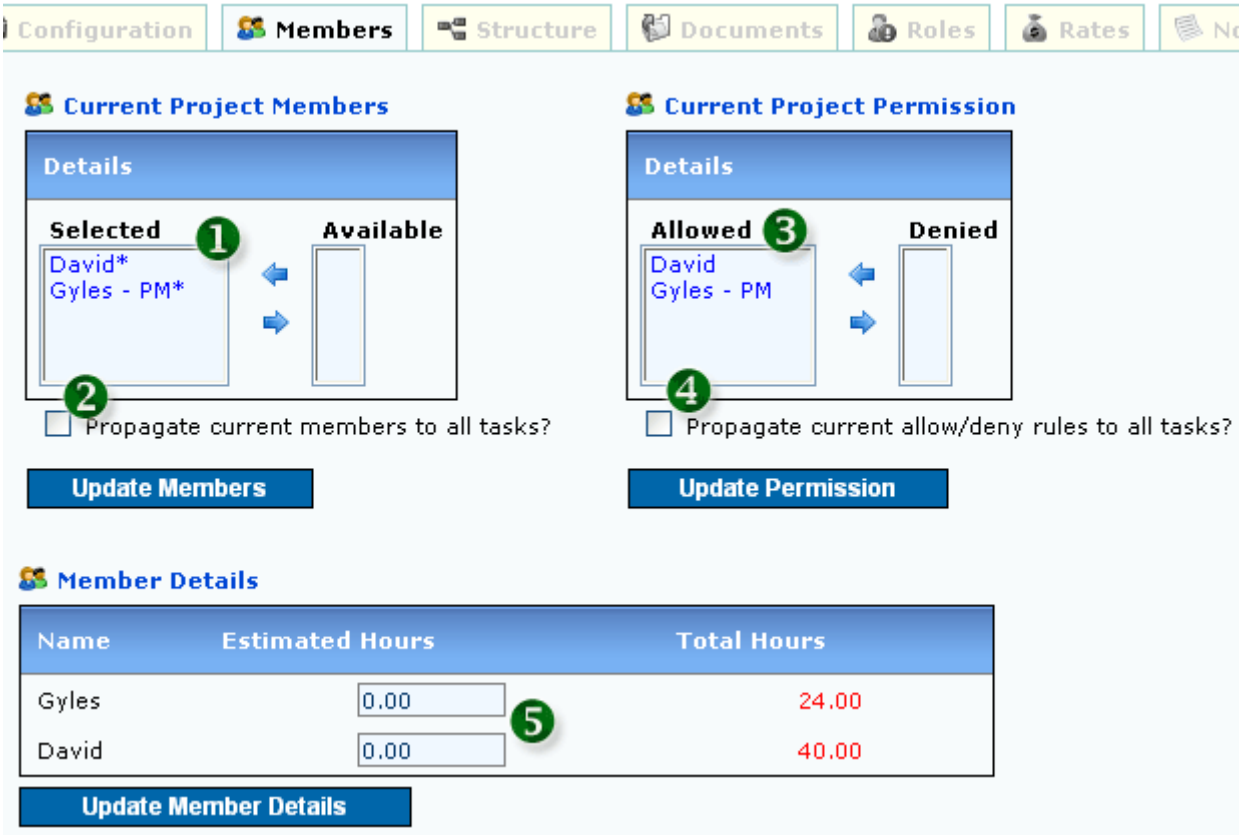


Figure 6: Project Update Team Members Page

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

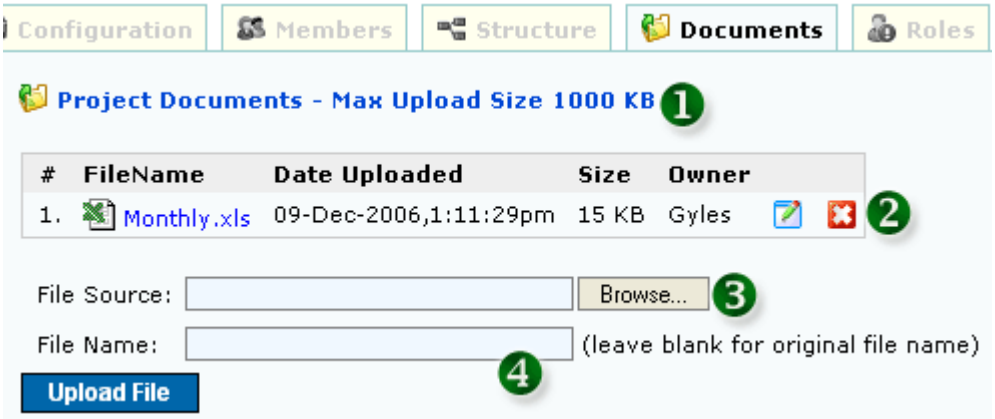


Figure 8: Project Documents

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

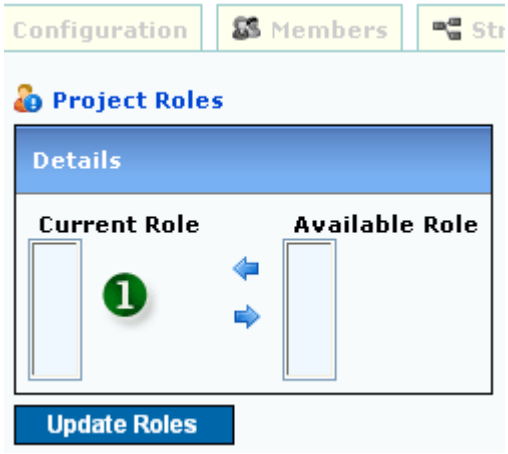


Figure 9: Project Roles

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

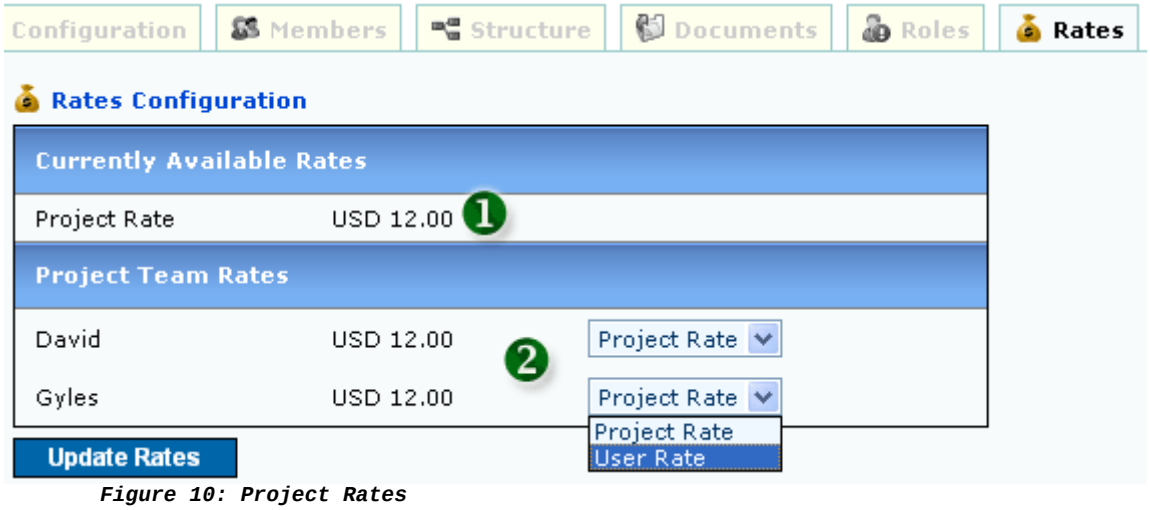


Figure 10: Project Rates

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

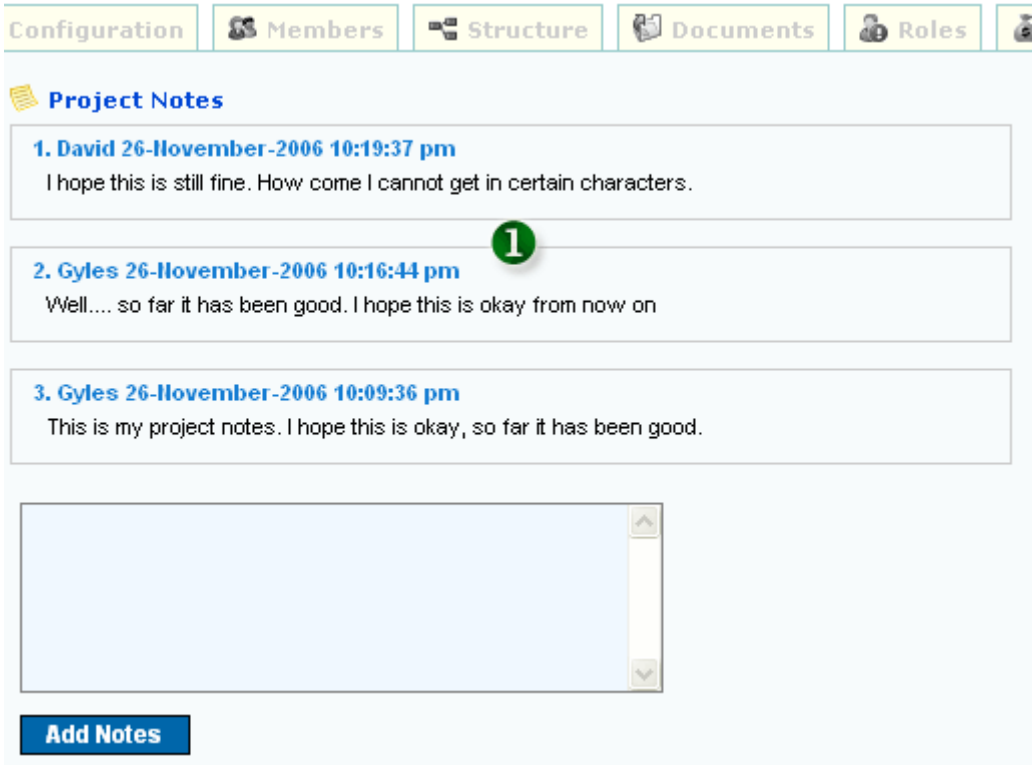


Figure 11: Project Notes

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

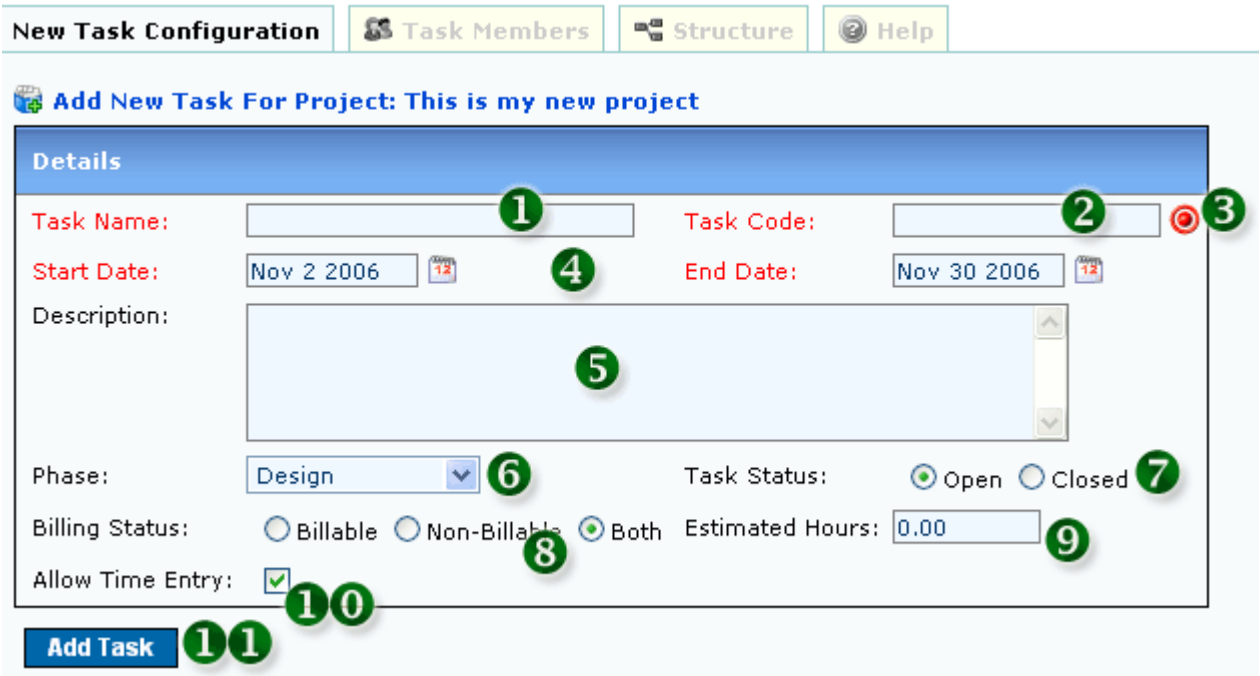


Figure 12: Adding New Task for Project

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

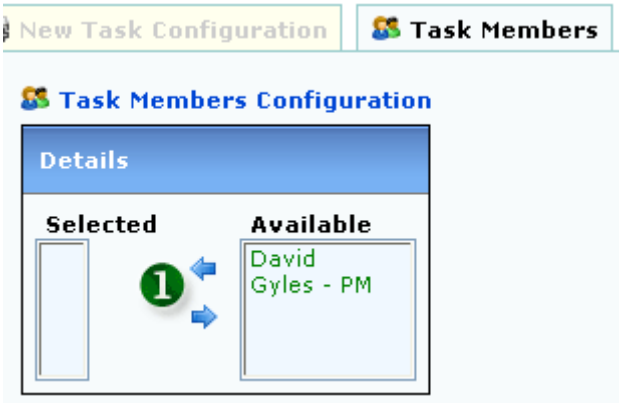


Figure 13: Task Members

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

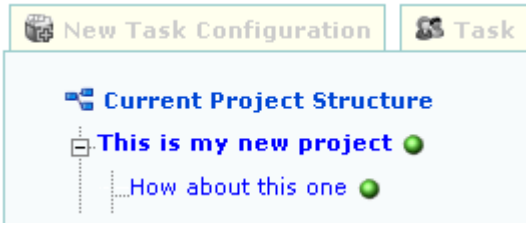


Figure 14: Current Project and Task Structure

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

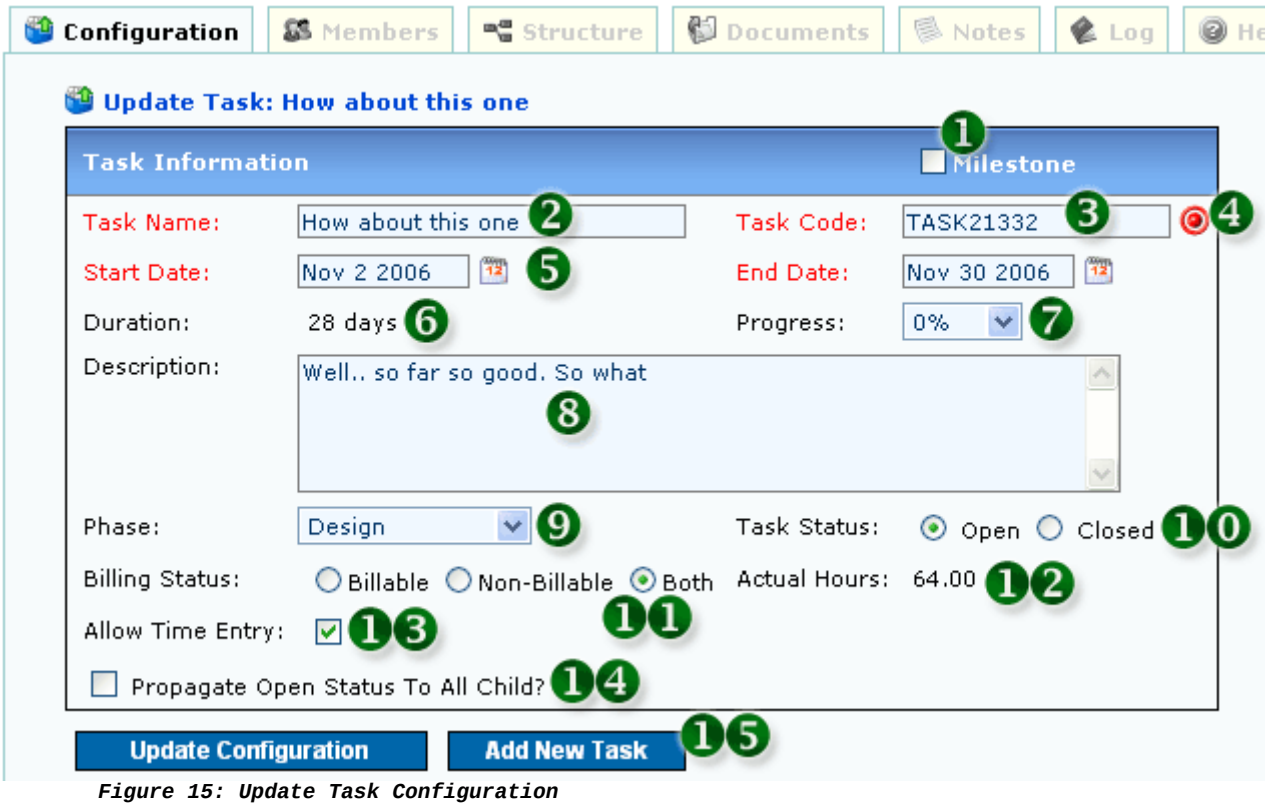


Figure 15: Update Task Configuration

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

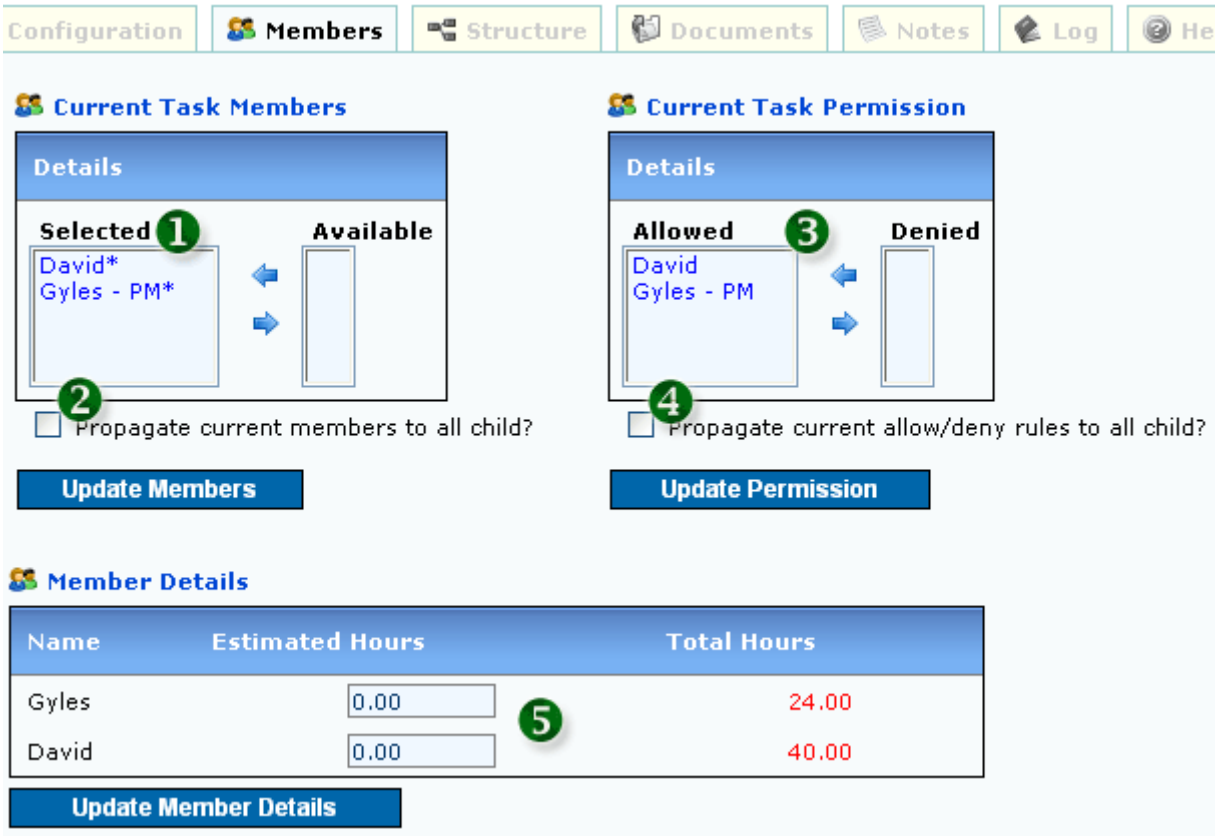


Figure 16: Updating Task Members

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 " " Tab to Update Task Members

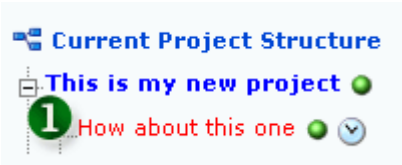
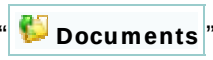


Figure 17: Task Structure

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

2.4.4 Task Documents

Click the "  " Tab to View Task Documents

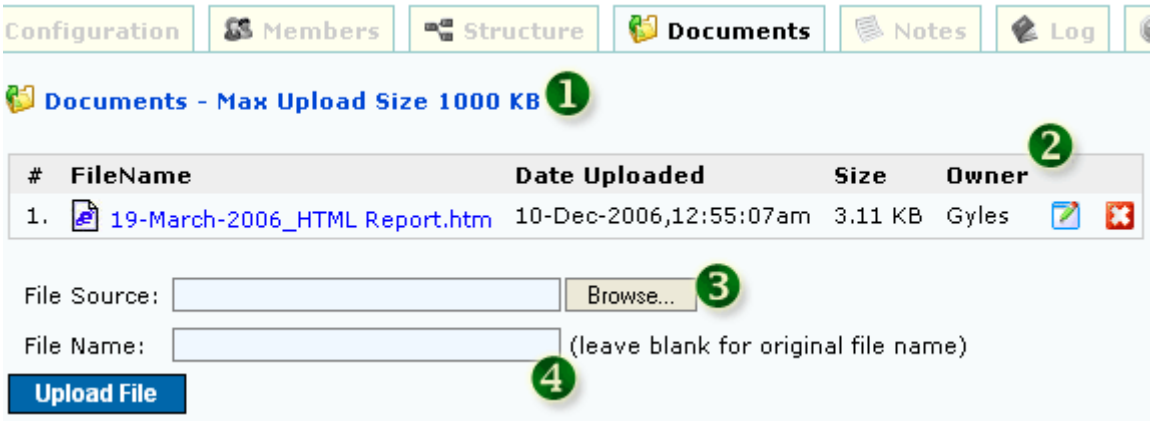


Figure 18: Task Attachments

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 "

" Tab to View Task Notes

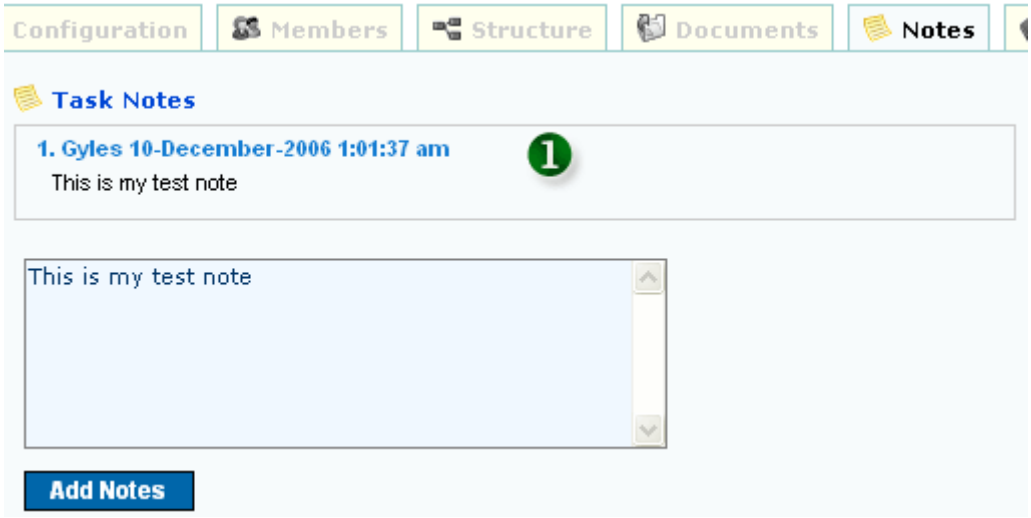


Figure 19: Task Notes

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

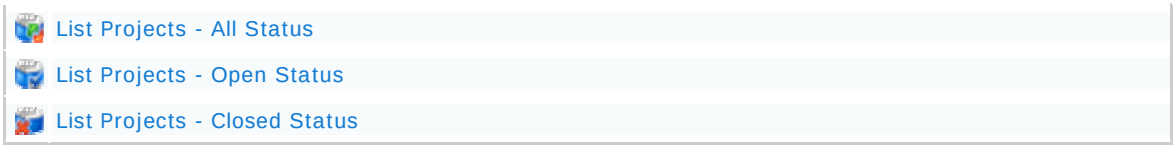
2.5 Adding New SubTask for Task

Click the "

" 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

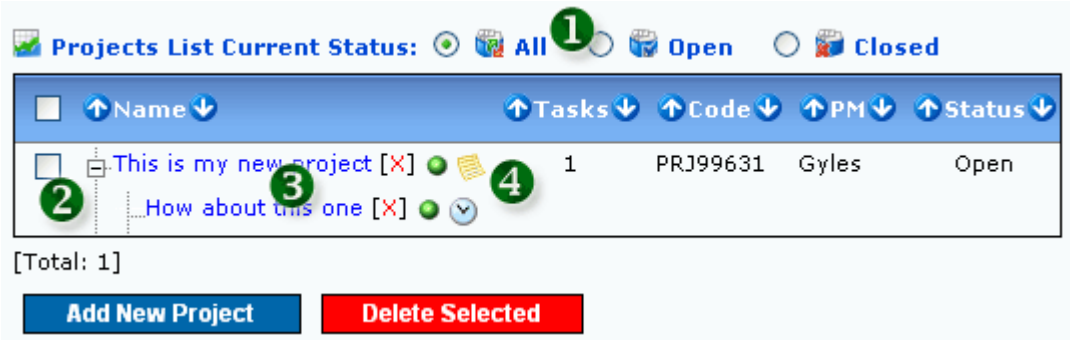


Figure 20: List Projects Page

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.

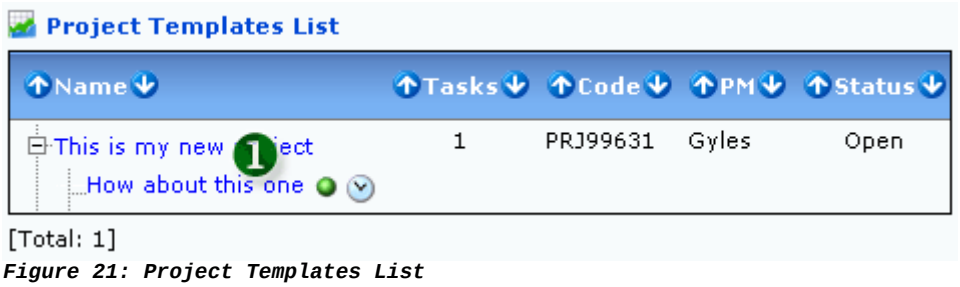


Figure 21: Project Templates List

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

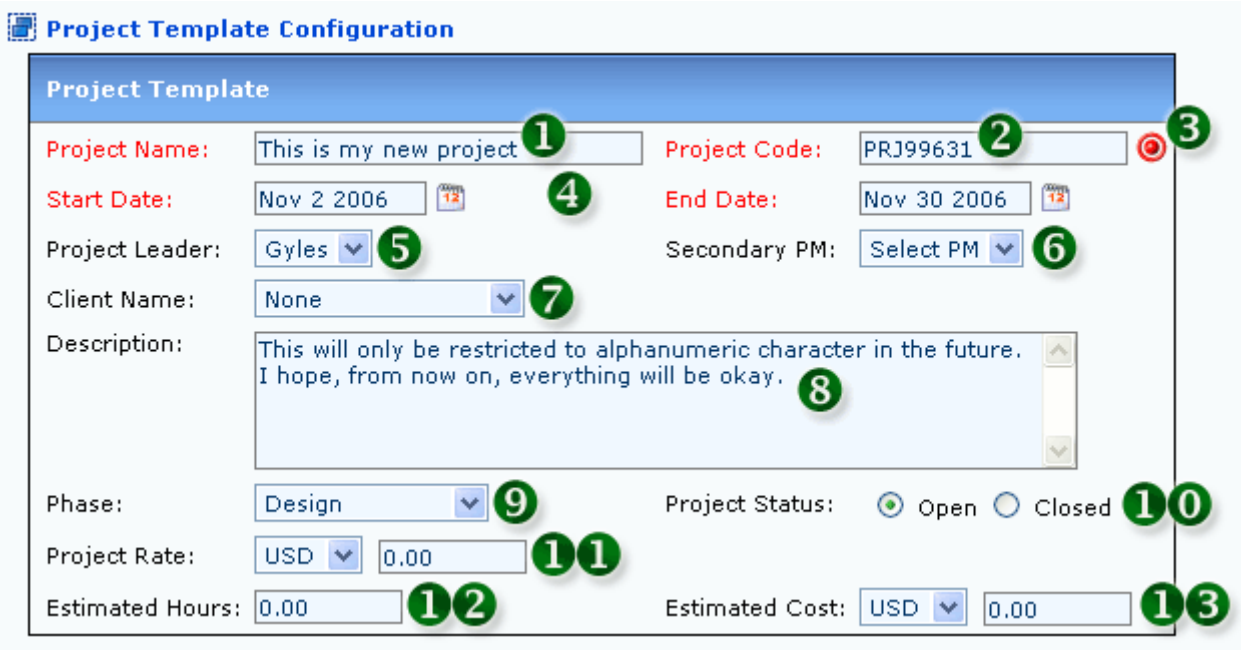


Figure 22: Project Template Editor

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