

Perwira Training Project Management Module

Table of Content

Project Management

- Project List
- Access Control
- Project Access
- Tracker Access
- Document Type Access
- Project Tracker
- Aging Rules Management
- Target Rules Management
- Chart Maintenance
- Tracker Update Tracking



Access Control



Acces	s Control Admin							🚯 Home >	Admin > Access Contr
Staff	Access Control Templat	te All Control							
Delete	e Export		·) () (
-	Status 🔶	Name 🍦	Staff_ID 🜲	Superior 🔶	Country_Base 🔶	Base	Access_Control_Template	Active 🜲	Approved 🔶
Edit	Account Approved	Portal Admin (perwira)	admin		Malaysia	Selangor	Super Admin Template	Yes	Yes
	Access Control	Template							
	- Template to d	etermine what function i	s available for th	nis account					
•	Active	account when set to "No	o" cannot login to	o system anvr	ore				
•	Approved		o dannot login k	s system anyn					
b	- Once account v email	t approved by admin, ter	nporary passwo	rd will sent to	user				
	y official								
		•							
						6			
	•								

Access Control

Access Control Template All Control	
dmin Template 👻	
Jpdate Template Remove Template	Save As Template
My Workplace Admin Resource Management Project Management Sales Management	
My Workplace	
My Profile : Permission to view My Profile Yes No	
My Claim : Permission to view My Claim O Yes O No	
My Leave : Permission to view My Leave Yes No	
My Timesheet : Permission to view My Timesheet Yes No	
Web Timesheet : Permission to use Web Timesheet Yes No	
eate New Template	Update Template
Click "Save As Template"	 Select a template from dropdown Set Yes/No for the function to undate
Key in Template Name	 Click "Update Template"
Click Save	





Next

Project Project Management Home ≥ Admin ≥ Project Management > Project List Show 10 v entries Search: New Row Delete Export Project_Name \$ Type/Scope Project_Description ▲ DIGI 1 Yes MY_DIGI MY 2 MY_EDGEPOINT EDGEPOINT Yes MY 3 Yes MY_MAXIS MY MAXIS 4 Yes Previous 1 Managed by admin Create Project • Click "New Row" • Click on the field to edit **Delete Project** Select a row

Project List

Click "Delete"

Edit Project

Select a row

Click on the field to edit

Project Access



Project Access Admin B Home > Admin > Project Access Staff Project Search: Edit Export Project_Name Staffld Name MY_DIGI admin Portal Admin (perwira) MY_EDGEPOINT 1 MY_MAXIS • Managed by Admin • Set by Staff or by Project By Staff Select a row Click "Edit" button • Tick the project name to grant access By Project Select a row Click "Edit" button • Tick the staff name to grant access

Tracker Access





Document Type Access

TOTG My Workplace -	Resource Management -	Project Management -	Sales Management -	Admin Tool -		Q Portal A	Admin (perwira)			
ocument Type .	Access Control Adr	nin			20	Home > Admin > Document	Type Access Control			
Admin Template										
Save										
nvoice										
Read :										
🗿 Yes 🔵 No										
Write :										
Yes No										
Photo										
Read :										
Yes No										
Write : Yes No										
Soloct "	Access Contr	ol Tomplato	"							
	Road or Write	of Template	ourmont tu	20						
• Opuale				he						
							^			
				-			V			
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									1	



Project Tracker



Select a Project		Select a Tracker					_		
				Create N	ew Tracker Duplicate Trac	ker Delete Tracker Ad	d Column Reorder Colum	n Update Column Ad	d Option
Export Import Clear Filtering	Unfreeze All Column	Unhide All Column							
Search : Tracker Access Needed!		Search Reset Data :							
Hudder Addess Heeded.									
Draiget Assass requi	d to prooto	a now trackar							
Project Access requi	ed to create	a new tracker							
Create New Tracker	Duplicate Tra	cker Delete Tracker							
Ofcate fiew fracker	Supileate Trat	Delete Hacker							



Project Tracker (Create New Tracker)

Create New Tracker

- Key in Tracker Name
- Define column needed, existing column name will prompt for selection to avoid duplicate column with similar name created. E.g: Site Id and Site_ID
- After define all the column, click "Create"

Add New Tracker	r			2
Tracker Name :	New Tracker			
Criteria 1 :	Select 🔻	•		Enter Filter
Criteria 2 :	Select 🔻	•		Enter Filter
Criteria 3 :	Select 👻	•		Enter Filter
Criteria 4 :	Select 👻	Ŧ		Enter Filter
Criteria 5 :	Select 🔻	•		Enter Filter
Column	Name	Column Type		Column Color
Site_ID		Textbox	~	
SI		Textbox	~	
Site Pack Date		Textbox	~	
Site Status Site_ID		Textbox	~	
Site_Name		Textbox	~	



Project Tracker (Duplicate Tracker)

Duplicate Tracker

- Select existing Tracker from other Project to Copy From
- Tracker will follow all the columns in the copied tracker
- Key in New Tracker Name
- Click "Duplicate"

opy From	Digi PO Tracker[MY_DIGI]	*
New Tracker Name	New Duplicate Tracker	
	C	lose Duplicate



Project Tracker (Add, Update, Reorder Column)

Add Column

- Key in Column Name
- Select Column Type
- Click "Add" button

Add New Column

Update Column

- Tick column to remove
- Or Change Column Type / Color
- Click "Apply" button

× Update Column

Drag and drop to change the sequence Click "**Save**" button

•

×

Reorder Column

Reorder Column



Project Tracker (Add Option)



- Create option for dropdown column in tracker
- Click "New Row"
- Select Field
- Key in Option
- New option available for selection in the tracker

No \$	Field		Option \$
1			
2	1st_Finance_Status		Photo
3	1st_Invoice_Finance_Status 1st Invoice_Status		5. Cancelled with Cost
4	2nd_Finance_Status 2nd_Invoice_Status		4. Cancelled
5	3rd_Finance_Status		3. Invoiced
6	4th_Invoice_Finance_Status		2. Completed
7	Acceptance_Document_Status		1. Open
8	Action_pending		Rental
9	ATP_Status		ISDP Clear
10	Authorities_Document Category		CN
	Category_1 Document_Type FAC Status	Previous 1 2 3	4 5 19 Next





Project Tracker (Export, Import, Create and Update)

Export Import

- Click "Export" to export current table into CSV format
- Edit inside exported file
- Click "Import" to import update into tracker

Create New Site 1 Create Multiple Site

- Click "Create New Site" or "Create Multiple Site" in the tracker
- Project Code will be auto generated
- To update tracker, just update the data in the table and click 'Save Changes" button to save

Project Tracker (Upload Document)







Aging Rules Management

- Click "New Row" button
- Select the row created
- Click "Edit" button
- Select Project name
- Select Type
- Key in Title
- Select Date / Internal
- Input Threshold
- Select User to notify
- Click "Update" button

Active :	Yes 🗸	
Project Name:	~ ·	
Туре:	Between 2 Date V	
Title :		
Start Date:	~	
End Date:	~	
Threshold (days):	0	
Users List:	Amin Awatif Bin Abd Aziz Rrindha Sekaran	
	 Farhana Najwa Binti Azman Katheeravan A/L Kusala 	
	Update	



Target Rules Management

	Edit entry			
 Click "New Row" button Select the row created 	Active :	Yes 🗸	A.	
 Click "Edit" button Select Project name Kev in Title 	Project Name:	~		
Key in Target DateKey in Target	Title :	TSSR Submission		
 Select User to notify Click "Update" button 	Target Field:	~		
	Target Date:	05-Oct-2023		
	Target:	100		
	Users List:	Amin Awatif Bin Abd AzizBrindha Sekaran		
		Farhana Najwa Binti Azman Kathoorayan A/L Kusala		
		 Katileeravan A/E kusala Khairi Syazwan Bin Mazuki 		
		Kobendran A/L Durai Retnam		
-		Makawathan Pulananian	-	0
			Update	





Step 1Click "New Row" buttonSelect the row created

- Key in "Chart View Name"
- Key in "Chart View Type"

.

- Select "Project Name"
- Click "View" to define columns

Step 2

- Click "New Row" button
- Select Column
- Input Column Display Name
- Select Series Type
- Select Count Type
- Input Condition if any
- Click Chart Preview

Newly created chart will show in project dashboard

Previous

Next

1

Action	≜ No ♦	Chart_View_Nan	ne 🔶		Chart_View_Type	÷	Project_Name	+	Created_By	
View	1	Test			Total		MY_DIGI			
									Previous 1	
Chart View	v Name : Test									
Chart View Ty	ype : Total									
Project Name	: MY_DIGI									
Chart Pre	eview									
New Row	Delete							Search:		
No *	Column_Name	ŧ	Display_Name	¢	Series_Type	\$	Count_Type	\$	Condition	\$

Tracker Update Tracking



Check create, update, delete history for tracker

Export						Search	:
o =	Туре	Project_Name ♦	Site_ID	Site_Name	Details	♦ Updated_By	Updated_At
1	Create	MY_DIGI				Portal Admin (perwira)	2023-10-24 13:48:50
2	Delete	MY_DIGI			3659	Portal Admin (perwira)	2023-10-24 13:49:56
3	Update	MY_DIGI	4217B	JALAN BARU BATU MAUNG	SOW=>test	Portal Admin (perwira)	2023-10-24 15:29:32
4	Update	MY_DIGI	4217B	JALAN BARU BATU MAUNG	SOW=>	Portal Admin (perwira)	2023-10-24 15:29:47

