

vtigersolutions Projects Modules for vtiger CRM 5.1.x Documentation

Version 0.9

An always updated version of this document can be found online at:

http://docs.vtigersolutions.com/doku.php?id=vtigersolutions_projects_modules



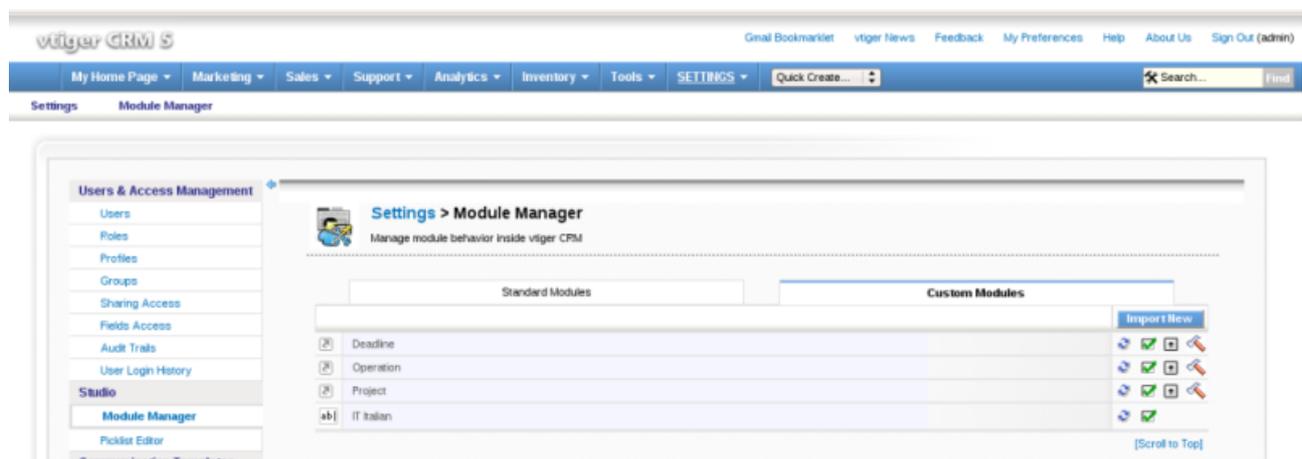
The concept

We have developed a set of three new modules for vtiger CRM, to deal with Projects tracking / management inside vtiger. **Project** module (master), **Operations** module (1st detail), **Deadlines** module (other detail).

Installation instructions

All 3 modules are made with vllib, and are Module Manager ready. This means that you simply have to install via Admin Panel, Module Manager, the .zip packages of the modules. The correct sequence of installing is either Operation or Deadline first, then the other detail Module, and Project module (master) last,

Once installed, the new modules will be available under the “Tools” section of the Main Menu. (The installation order will reflect himself on the modules order in the sub-menu tab).



Standard Modules	Custom Modules
<input checked="" type="checkbox"/> Deadline	
<input checked="" type="checkbox"/> Operation	
<input checked="" type="checkbox"/> Project	
<input checked="" type="checkbox"/> IT Italian	

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We are also going to release a few .php scripts, which need to be run after installing the modules, to add some additional relatedlists which are not being created directly while installing the modules. To run the scripts please simply access them via browser: put the script in the main folder of your vtiger installation, and type the file name in the browser url window. i.e. <http://localhost/vts/510-vts/branches/510-project/VtlibUpdateRelatedModules.php> where <http://localhost/vts/510-vts/branches/510-project/> will be replaced by the actual path of your vtiger install.

The screenshot shows the 'Project Information' page for 'Progetto 1' in the vtiger CRM. The page is updated as of 27 Aug 2009. It features several sections: Project Information, Custom Information, Description Information, Deadlines, and Operations. A TAG CLOUD widget is visible on the right side.

Project Information

Project name	Progetto 1	Start date	2009-08-27
Target end date	2009-08-27	Actual end date	2009-08-27
Status	in progress	Type	operative
Link To	Studio synthesis	Assigned To	admin

Custom Information

Target budget	1200.00	Project url	vtiger-italia.net
Project priority	high	Progress	--none--
Link To		Created Time	2009-08-27 15:05:03
Modified Time	2009-08-27 16:38:41		

Description Information

Descrizione

Deadlines Showing 1 - 1 of 1

Deadline Name	Milestone	Assigned To	Action
Scadenza 1	yes	admin	edit del

Operations Showing 1 - 1 of 1

Operation Name	Start Date	Type	Assigned To	Action
Operazione 1	2009-08-27	operative	admin	edit del

Future Releases

We want to add gantt support to Project module. We have this on a previous version of this feature, we coded for vtiger 5.0.4. Since we're trying to stick to vtlib framework as much as possible, and at the same time we try to triple test all the things we release, it might take still some time before this goes live.

Progetti Informazioni

Modifica Duplica Elimina

Informazioni Commessa

Nome Progetto	just a test project	Collegata a	Studio Synthesis srl
Assegnata a Utente	user	Data di Creazione	07-07-2009 12:52:56
Data di Modifica	07-07-2009 12:59:57		

Operazioni Seleziona Operazioni Aggiungi Operazioni

Visualizzando 1 - 5 di 5

Nome operazione	Data di inizio	Data di fine	Percentuale di completamento	Azione
prueba	13-07-2009	23-07-2009	10%	modifica canc
Test operazione 1	18-05-2009	20-06-2009	90%	modifica canc
Test operazione 2	18-06-2009	21-06-2009	60%	modifica canc
Test operazione 3	18-06-2009	18-06-2009	--nessuno--	modifica canc
Test operazione 4	18-06-2009	07-07-2009	50%	modifica canc

Scadenze Seleziona Scadenze Aggiungi Scadenze

Visualizzando 1 - 4 di 4

Nome scadenza	Assegnato a	Data	Milestone	Azione
Test scadenza 1	admin	25-06-2009	si	modifica canc
Test scadenza 2	admin	22-06-2009	no	modifica canc
test scadenza 3	admin	18-06-2009	no	modifica canc
Test scadenza 4	admin	18-06-2009	si	modifica canc

That's also a main reason of a 1.0 release without gantt charts: to offer something useful and production ready, now.

We'll do our best to have the new release be just an upgrade of the installed module (no need to reinstall or anything, just upgrade via Module Manager.)

Internationalization

The modules come with English, Italian and Spanish locales. You may add your own language files in the modules languages subfolders to have them ready in your own idioma. Please share your language files with us 😊

Q&A, Support

While this set of modules is released “as it is”, feel free to use the forge tools on vtiger.com forge at <http://forge.vtiger.com/projects/vts-projects/> to ask your questions, share your suggestions, address bugs, ...

Techies Corner

The design of the modules (labels of fields, hierarchy, ...) comes in part from our experience with

<http://www.dotproject.org> software, in part from our experience with vtiger CRM 😊 and in part from our skills in the BPM / project management area. Feedback on desing is almost welcome!

From a very technical point of view, there's only one significant thing we have modified in respect to standard vllib made vtiger custom modules: the way related lists and UITYPE 10 fields work together.

Vllib modules by default are based on many to many relations. This was not what we wanted, since any of our entities in the Detail Modules (Operations and Deadline) has only one parent entity in the Parent module (Project).

At the same time, it is very useful to have the Projects module related list towards Deadlines and Operation “auto-update” when we add a relation to a Project directly in the Detail Module.

To achieve this behaviour (which is not standard vlib modules and related lists behaviour, but is the way some “old” modules work) we needed a small but fundamental change in the vllib module creation script, and some extra code in the new modules php skeleton (hint: look for the get_operations function in the Project.php file).

Credits Time

We want to thank Joe Bordes and the staff @ TSolucio (<http://www.tsolucio.com>) for their continuous help in developing, testing and localizing this and other vtigersolutions projects.

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