

CMPRO Change Notice

Project Module now uses Module Permissions (Project Management Enhancements)

Overview

The Project Management module now uses module permissions, allowing for better control of what users are or are not allowed to do when working with Project and Project Task screens.

Details

CREATING NEW PROJECTS

The permission to create a project has historically been granted to a user merely by having the *Project Create* screen assigned to their menu. The change to the Project Module described in this notice will now require users to have **Create** permission for the PROJECT module assigned through the *Module Perms by Control Group* screen (see screen captures below).

To help Site Administrators with the transition, when this change is implemented, a role and control group called **PROJECT-CREATE** will be auto-created. The role will be auto-populated with active users that have the *Project Create* screen assigned to their current menu. Site Administrators may then want to initiate other permissions-related actions pertaining to the PROJECT module, including the granting and revoking of long-standing permissions to or from users, as appropriate.

MANAGING EXISTING PROJECTS

Module permissions are only necessary to establish a new project. The ability to manage a project and its tasks coincides with the **Edit Conditions** for the PROJECT module, as defined by the *Module Permissions by Control Group* screen, and shown here for quick reference:

A user may edit a PROJECT record if: (a) they are the Owner or a Team Member; (b) they have been granted the Edit permission; (c) they are an Admin user or have been assigned the EDIT PROJECTS NOT OWNED function (in which case they can edit everything and do anything with records which are not hidden from them by a Proprietary Group).

CREATING NEW PROJECT TASKS

The ability to create a task for a project is determined by a user's permission to edit the desired project (see above for details on editing existing projects), unless the **Allow General Users to Create Tasks** field is set to **Yes** for a given project. When that is the case, any active user that can view a project—as determined by the project's assigned Proprietary Group—may create a task for that project.

MANAGING EXISTING PROJECT TASKS

The ability to manage an existing task is determined by the Edit Conditions for the PROJECT-TASK module as defined by the *Module Permissions by Control Group* screen, shown here for quick reference:

A user may edit a PROJECT-TASK record if: (a) they are Owner; (b) they have been granted the Edit permission for a PROJECT-TASK or a parent PROJECT record; (c) they are the Owner or a Team Member of the parent PROJECT record; (d) they are an Admin user or have been assigned the EDIT PROJECTS NOT OWNED function (in which case they can edit everything and do anything with records which are not hidden from them by a Proprietary Group).

This means that the management of tasks for a project may be delegated using module permissions.

SCREENS AFFECTED

As may be expected by the information presented thus far, several project and project-task screens are affected by this change. They are listed here in this format: Compact Screen Name | Normal Screen Name

- Project Create | Project Management Create
- Project Management Detail
- Project Search | Project Management Search
- Project Task Create | Project Management Task Create
- Project Management Task Detail
- Project Task Search | Project Management Task Search

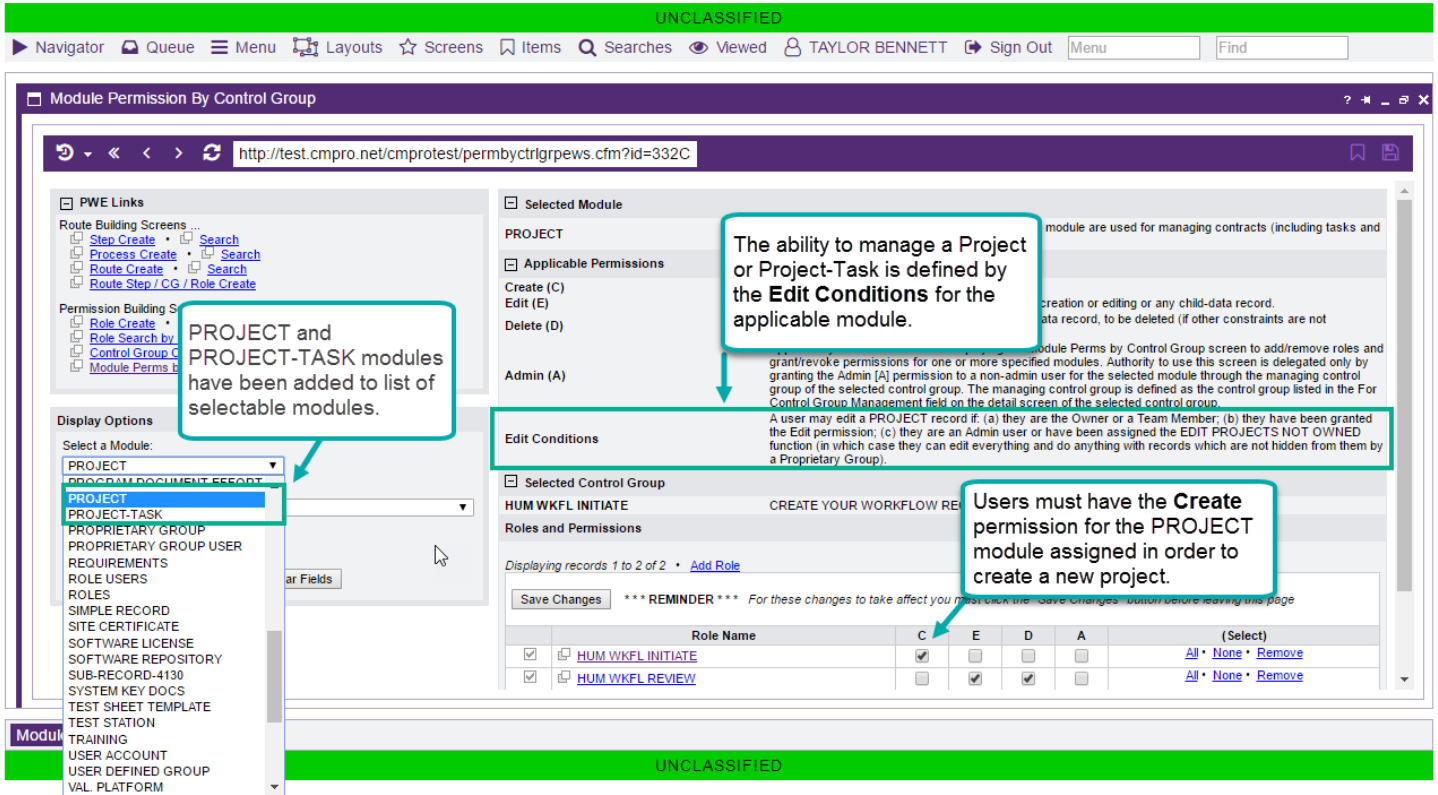
Along with this enhancement, there are a few changes to screen functionality as indicated on the screen captures below.

Availability

The changes described herein will be available with the release of C-BN-0116.

Screen Captures and Elements

MODULE PERMISSIONS BY CONTROL GROUP SCREEN



The screenshot shows the 'Module Permission By Control Group' interface. A callout box points to the 'Select a Module:' dropdown menu, which now includes 'PROJECT' and 'PROJECT-TASK' alongside other modules. Another callout points to the 'Applicable Permissions' section, which lists 'Create (C)', 'Edit (E)', and 'Delete (D)'. A third callout points to the 'Edit Conditions' section, which contains a detailed text block explaining the conditions for editing a PROJECT record. A fourth callout points to the 'Roles and Permissions' table, specifically to the 'C' (Create) column for the 'HUM WKFL INITIATE' role.

PROJECT and PROJECT-TASK modules have been added to list of selectable modules.

The ability to manage a Project or Project-Task is defined by the Edit Conditions for the applicable module.

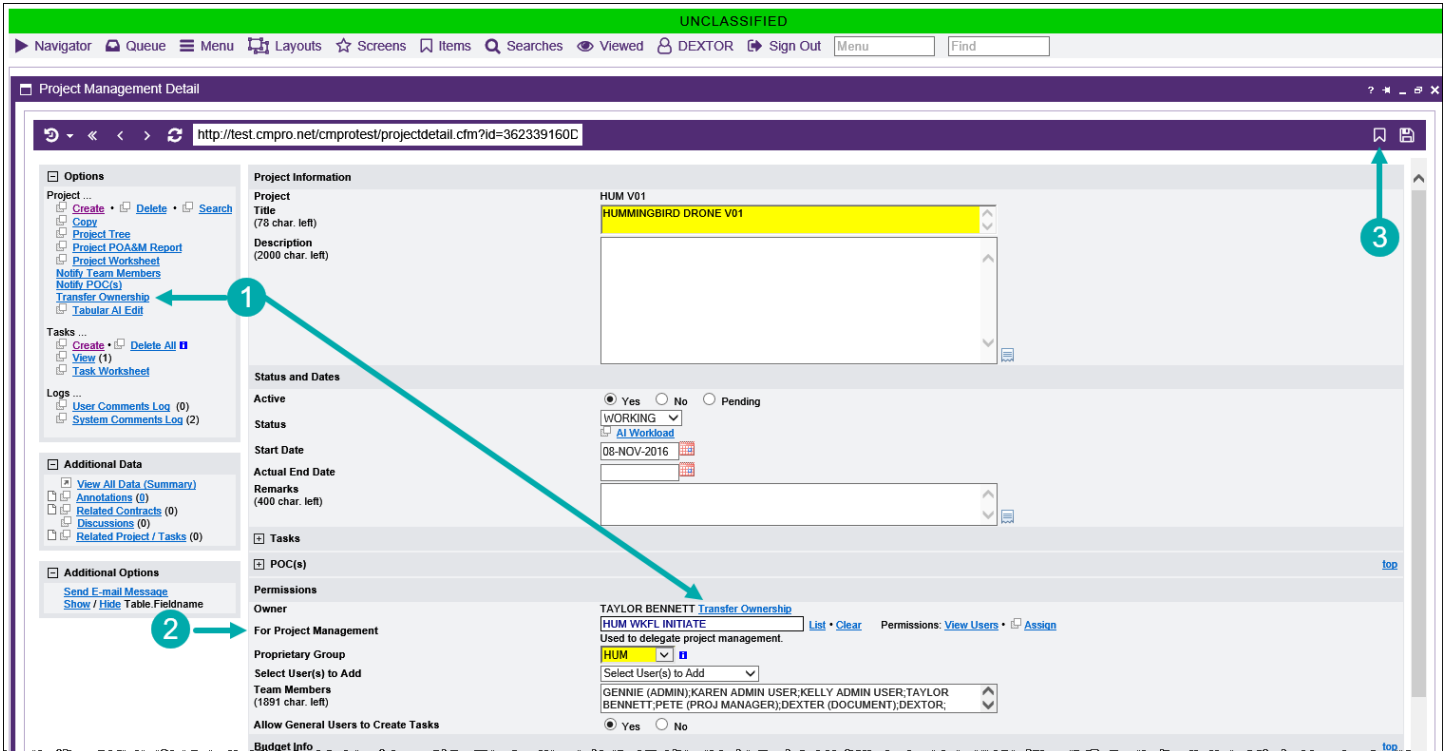
Users must have the Create permission for the PROJECT module assigned in order to create a new project.

Role Name	C	E	D	A	(Select)
<input checked="" type="checkbox"/> HUM WKFL INITIATE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	All • None • Remove
<input checked="" type="checkbox"/> HUM WKFL REVIEW	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	All • None • Remove

PROJECT and PROJECT-TASK modules added to Module Permissions By Control Group screen.

PROJECT MANAGEMENT DETAIL SCREEN

1. Added a **Transfer Ownership** link to the Options section (left-pane) and to the *Permissions* section (right-pane) to the right of **Owner** field.
2. Added a **For Project Management** field which can be populated on this screen, or initially on the *Project Management Create* screen.
3. Enabled *My Favorite Items* functionality.

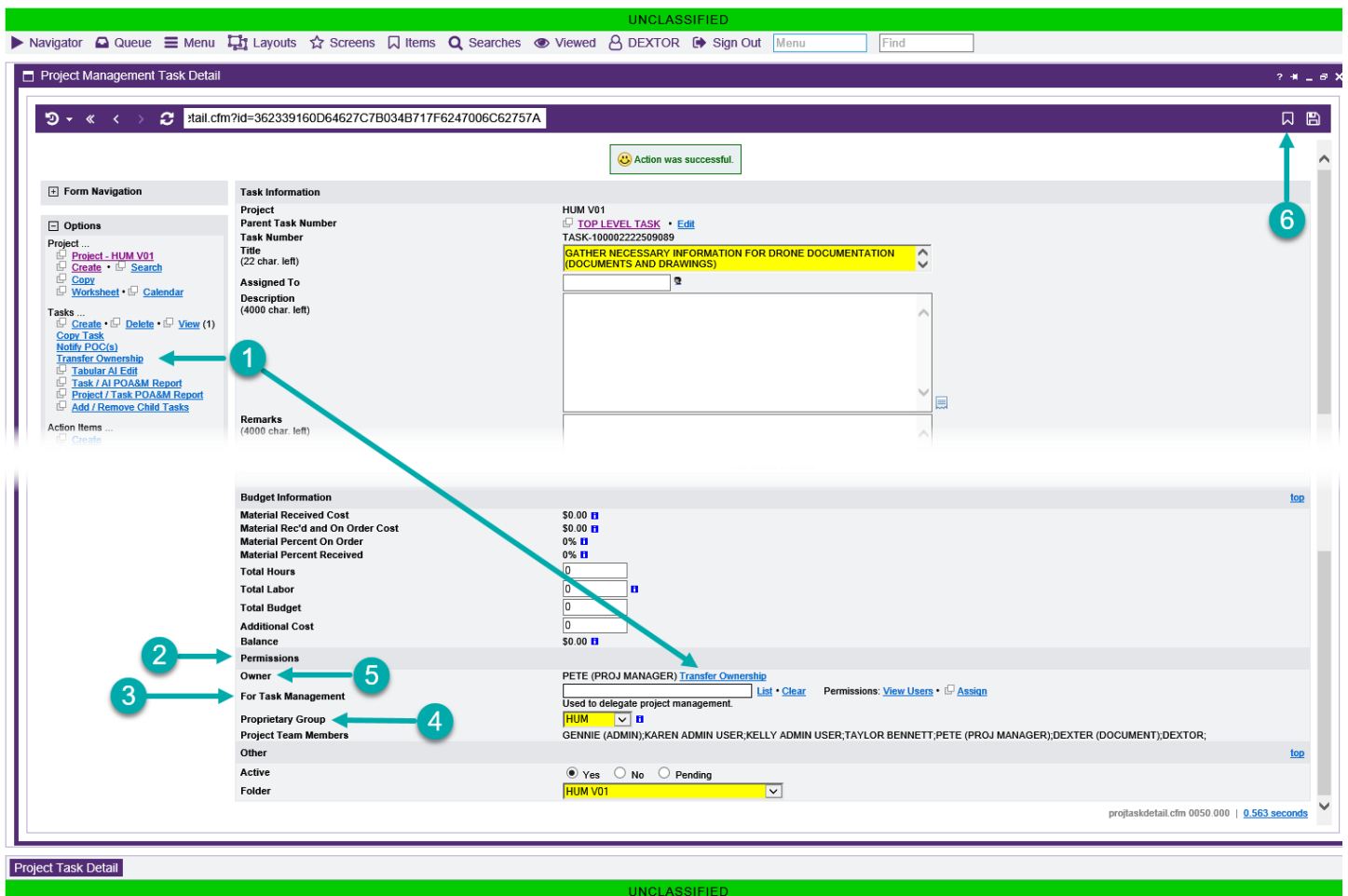


The screenshot shows the 'Project Management Detail' screen. The left-hand 'Options' menu includes a 'Transfer Ownership' link, highlighted with a green circle and arrow labeled '1'. The 'Permissions' section on the right includes a 'For Project Management' field, also highlighted with a green circle and arrow labeled '2'. The top right corner of the browser window features a bookmark icon, highlighted with a green circle and arrow labeled '3'. The main content area displays project information for 'HUM V01' and 'HUMMINGBIRD DRONE V01', including status, dates, and a list of users.

New field and links on the Project Management Detail screen.

PROJECT MANAGEMENT TASK DETAIL SCREEN

1. Added a **Transfer Ownership** link to the *Task* sub-section in the *Options* section (left-pane) and to the newly created *Permissions* section (right pane) to the right of the **Owner** field.
2. Created a *Permissions* section just below *Budget* section (right-pane).
3. Added a **For Task Management** control group field which can be populated on this screen, or initially on the *Project Management Task Create* screen.
4. Relabeled the **Task Manager** field to **Owner**, as a read only field, and moved it from *Other* section to the newly created *Permissions* section.
5. Moved the **Proprietary Group** field from *Other* section to the newly created *Permissions* section (both right-pane sections).
6. Enabled *My Favorite Items* functionality.



The screenshot shows the 'Project Management Task Detail' screen. The interface includes a top navigation bar with 'UNCLASSIFIED' and various utility icons. The main content area is divided into several sections:

- Form Navigation:** Contains 'Options' and 'Tasks' sections. The 'Options' section includes a 'Project - HUM V01' sub-section with a 'Transfer Ownership' link highlighted by annotation 1.
- Task Information:** Displays details for 'HUM V01', including 'Parent Task Number', 'Task Number', 'Title', 'Assigned To', and 'Description'. A 'Remarks' field is also present.
- Budget Information:** Lists financial metrics such as 'Material Received Cost', 'Material Rec'd and On Order Cost', 'Material Percent On Order', 'Material Percent Received', 'Total Hours', 'Total Labor', 'Total Budget', 'Additional Cost', and 'Balance'.
- Permissions:** A newly added section containing:
 - Owner:** 'PETE (PROJ MANAGER)' with a 'Transfer Ownership' link highlighted by annotation 5.
 - For Task Management:** A control group field highlighted by annotation 3.
 - Proprietary Group:** 'HUM' highlighted by annotation 4.
 - Project Team Members:** A list of users including 'GENNIE (ADMIN);KAREN ADMIN USER;KELLY ADMIN USER;TAYLOR BENNETT;PETE (PROJ MANAGER);DEXTER (DOCUMENT);DEXTOR;'. A 'Permissions: View Users' link is also visible.
- Other:** Contains 'Active' (radio buttons for Yes, No, Pending) and 'Folder' (dropdown menu set to 'HUM V01').

Annotation 6 points to a bookmark icon in the top right corner of the browser window.

New links and field arrangement on the Project Management Detail screen.