PROJECT DOCUMENTATION

Operations Hub

How an equipment distributor brought projects, budgets, quotations, payments, people and fleet into one in-house system with one login.

DURATION	MODULE GROUPS	MODULES	STATUS
6 months	8	31	In use
Discovery to support	Projects to admin	One permission matrix	On the client server

CLIENT	REFERENCE	DURATION
An equipment distributor	PD-Ektra_0003	6 months
CATEGORY	**VERSION**	**PREPARED BY**
Custom Solutions	1.0	Ektra Tech

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01 OVERVIEW

The project at a glance

Operations Hub is the in-house system of an industrial equipment distributor: the place where a project, its budget, its quotation, its payments and its people are recorded once and seen by everyone who needs them.

CLIENT	KIND OF PROJECT	PLATFORM	DURATION
An equipment distributor	In-house web system	Web app, hosted	6 months
DELIVERED BY	**STATUS**	**USERS**	**LIVE LINK**
Ektra Tech	In use	Operations, finance, sales, HR	Private, client network

MODULES
31
In eight groups

PERMISSION LAYERS
3
Sign-in, admin, module matrix

LIVE UPDATES
Every screen
Sockets across workers

02 THE CONSTRAINT

What held the client back

Each department kept its own record of the same business: a project in one file, its budget in another, the quotation in a third, the payments in a fourth. Nothing was in one place, and nobody could see the whole.

- **One project, many files:** budgets, quotations, payments and project logs each had an owner and a format of their own.
- **Late numbers:** revenue and payment positions were assembled by hand when management asked, not read live.
- **People and fleet aside:** hiring, announcements and vehicle bookings ran on messages and shared sheets.
- **No single sign-in:** every tool had its own access, so who could see what was anyone's guess.

03 HOW WE FOUND IT

Discovery

We mapped the company by its records, not its org chart: every number that mattered, where it was born and who read it.

01 **Listed the records.** Projects, batches, budgets with their packages and exchange rates, quotations, payments, revenue targets, vehicles, positions, documents.

02 **Followed the money.** From the quotation to the project budget, to the payment tracking and the revenue report, to the dashboard that management reads.

03 **Drew the permission model.** Three layers: signed in, administrator, and a module by role matrix with create, read, update and delete per module.

04 **Grouped the modules.** Eight groups so the Roles and Permissions screen reads like the company: projects, finance, sales, people, fleet, content, insights, admin.

04 THE SOLUTION

What Ektra built

One system, 31 modules in eight groups, one permission matrix, live updates on every screen, and the reports management asked for rendered as PDF and Excel.

- Projects and operations: projects with files and a log, batches and sub batches, backlog projects, collections and appointments.
- Finance: budgets with packages, items and exchange rates, payment tracking with a project report, revenue reports with targets and schedules.
- Sales: quotations with configurations, customers and a PDF, business development, business lines and the product catalogues.
- People: HR profiles and hiring plans, announcements and groups, open positions with referrals, access requests and issue reports.
- Fleet: vehicles, rent requests and a schedule timeline, with an audit trail that keeps every request.
- Collaboration and insight: boards with per-board membership, chat and group chat, business documents and presentations, dashboards that administrators compose and order.

Permissions you can read: a module is visible in Roles and Permissions the moment it is registered, and its routes enforce the same four checkboxes the screen shows.

The stack

SERVER	DATABASE	WEB APP	LIVE UPDATES
Node.js, Express	**PostgreSQL**	**React, Vite, charts**	**Socket.io across workers**
REPORTS	**NOTIFICATIONS**	**FILES**	**ACCESS**
Headless Chrome PDF, Excel	**Web push, in-app bell**	**Uploads with image processing**	**Three layers, module matrix**

05 MODULES AND FEATURES

What the system holds

The module groups and what each one holds.

MODULE	WHAT IT DOES	STATUS
G1 Projects and operations	Projects, batches, sub batches, backlog, collections, project log, appointments	In use
G2 Finance	Budgets, packages and items, exchange rates, payment tracking, revenue reports	In use
G3 Sales	Quotations, business development, business lines, product catalogues	In use
G4 HR and people	HR profiles, hiring plans, messages and announcements, open positions, referrals	In use
G5 Fleet and logistics	Vehicles, rent requests, schedule timeline	In use

MODULE	WHAT IT DOES	STATUS
G6 Content and collaboration	Boards, chat, group chat, business documents, company presentations	In use
G7 Insights and reporting	Composable dashboards, revenue and project reports as PDF and Excel	In use
G8 Admin and system	Users, roles and permissions, organisation, modules, access requests, issue management	In use

Features worth a line

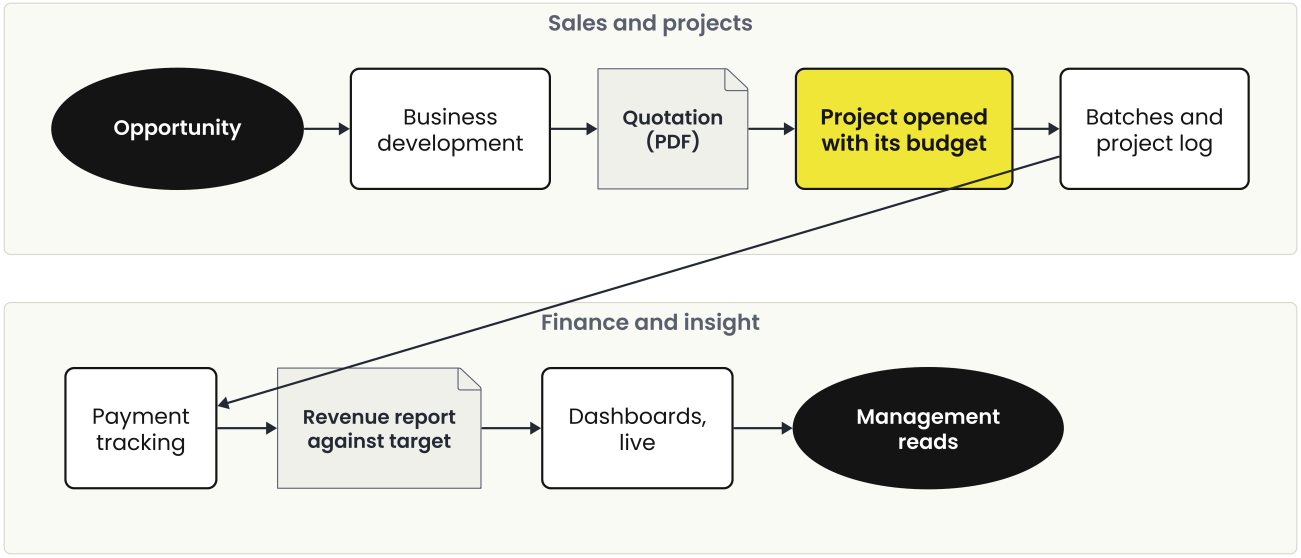
- One login, one sidebar, one permission matrix
- Budgets in several currencies with exchange rates
- Revenue targets and schedules per business line
- Push notifications and an in-app bell
- Dashboards composed by administrators and reordered
- Payment tracking with a project report
- Quotation PDF from the system
- Home page sections and news managed in the system

06 HOW IT WORKS

The flow, start to end

The spine of the system is the money path of a project; the other groups hang off it.

FROM OPPORTUNITY TO REVENUE REPORT



People, fleet and collaboration modules run beside the spine under the same permission matrix.

01 **Win it.** Business development records the opportunity; a quotation is configured and sent as a PDF.

02 **Budget it.** The project is opened with its budget: packages, items, exchange rates, the expected margin.

03 **Run it.** Batches and sub batches track the work; the project log records every event and every amount paid.

04 **Collect it.** Payment tracking follows every milestone; the project report shows what is due and what is in.

05 **Read it.** Revenue reports against targets and schedules; dashboards read the same tables live.

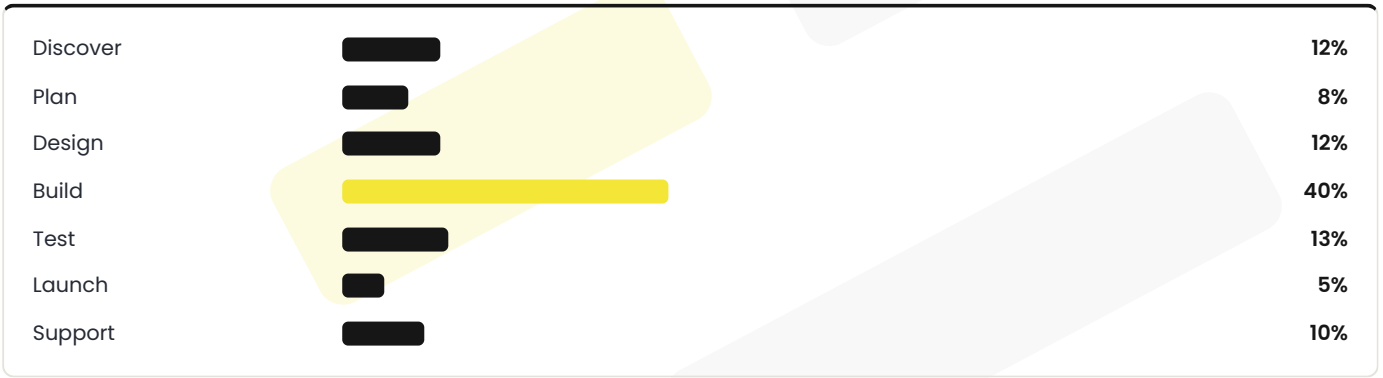
07 PROJECT STEPS

6 months, seven phases

Every Ektra project runs the same seven phases; here is what each one did for Operations Hub and the share of the 6 months it took.

PHASE	WHAT WAS DONE	SHARE	TIME
01 Discover	Listed every record and who reads it Followed the money from quotation to revenue report	12%	3 weeks
02 Plan	Eight module groups and their order of delivery The data model and the API per group	8%	2 weeks
03 Design	One shell, one table and form pattern for every module Dashboards and reports designed on real numbers	12%	3 weeks
04 Build	Projects, finance and sales first, then people, fleet and collaboration Reports as PDF and Excel, push notifications	40%	11 weeks
05 Test	A CRUD audit across every module and role Live updates proven on a second screen	13%	3 weeks
06 Launch	Production deployment Users, roles and the first dashboards set up	5%	1 week
07 Support	Modules added and regrouped as the company asked Boards, chat and announcements extended	10%	3 weeks

Share of the duration

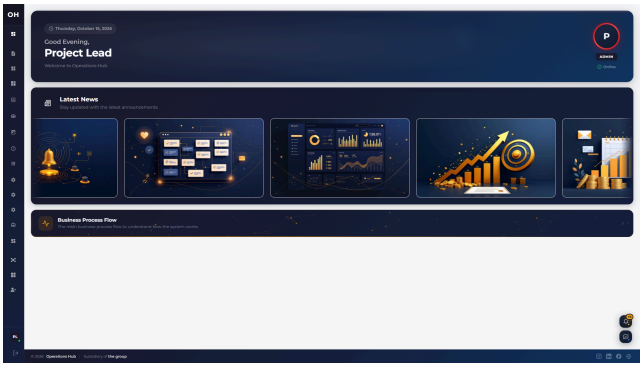


08 SCREENS

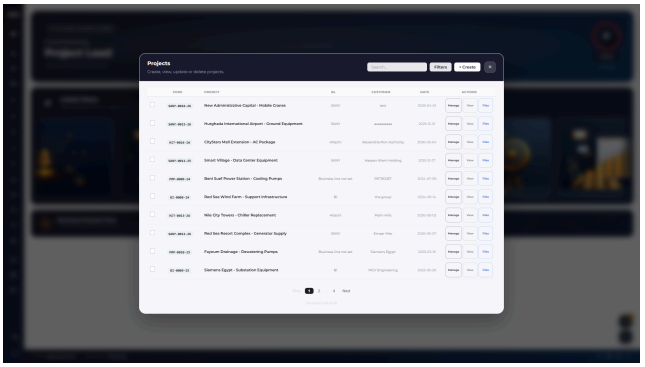
Real screens

Real screens of the delivered system, under the project's new name, with demo data.

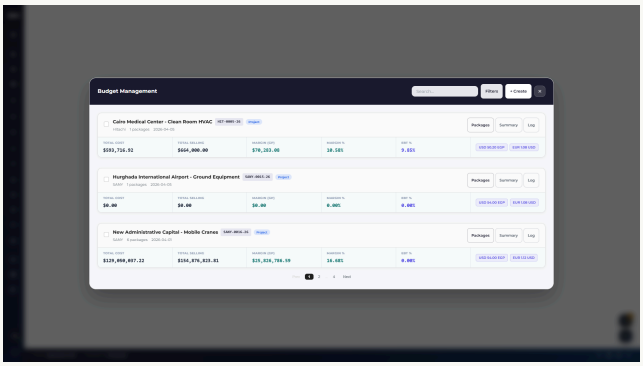
OPERATIONS HUB, AS DELIVERED



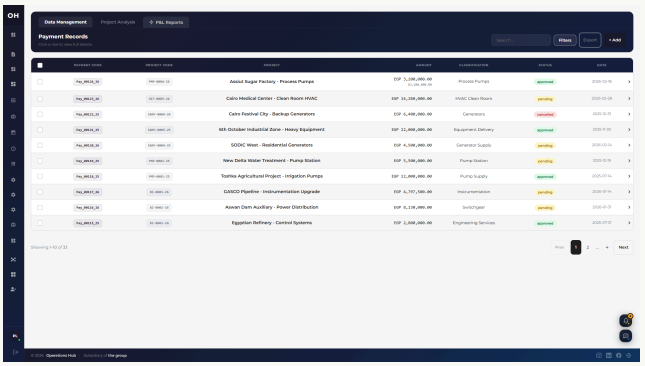
Home: the latest news and the business process flow



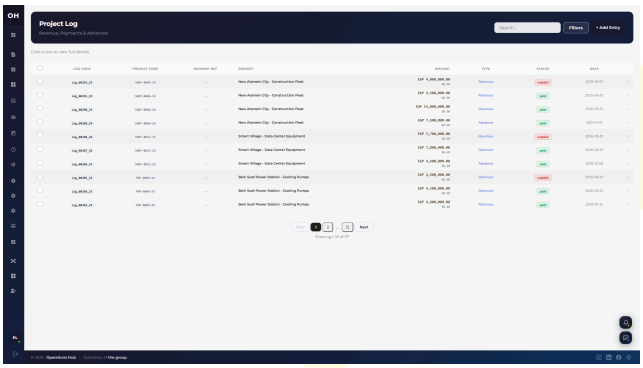
Projects: every project with its owner and status



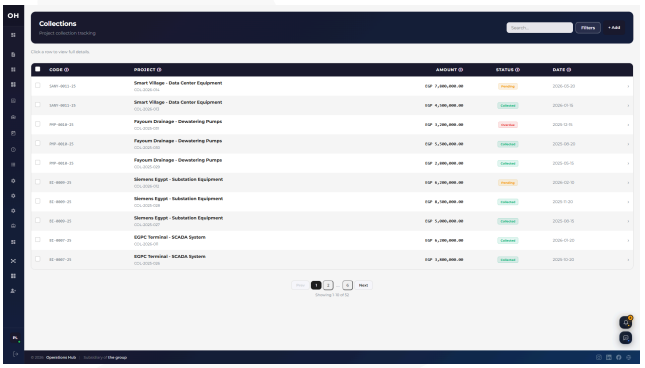
Budgets: packages, exchange rates and the expected margin per project



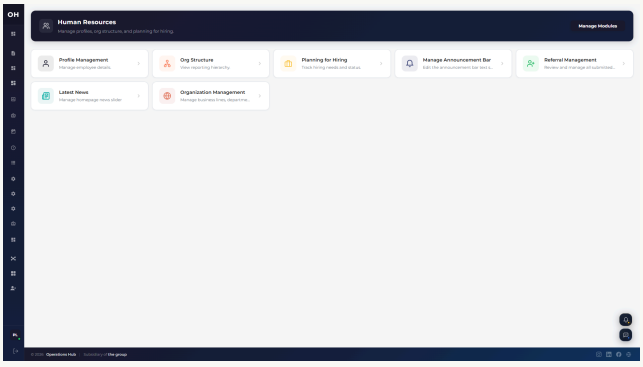
Payment tracking: every payment record with its status



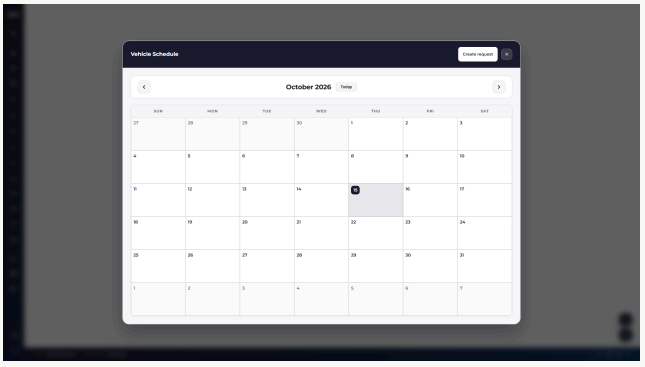
Project log: every event and amount per project



Collections by project



Human resources: profiles, hiring, announcements, referrals



Fleet: the vehicle schedule

09 DELIVERY TIMELINE

26 weeks end to end

The 6 months, phase by phase, from the first conversation to the first weeks in use.

WEEKS 1 TO 3 **Discover**
The record map and the permission model.

WEEKS 4 TO 5 **Plan**
Scope, data model, release plan.

WEEKS 6 TO 8 **Design**
Screens approved group by group.

WEEKS 9 TO 19 **Build**
The system, group by group, on the client server.

WEEKS 20 TO 22 **Test**
Every permission enforced where the screen shows it.

WEEK 23 **Launch: go-live**
The company working in one system.

WEEKS 24 TO 26 **Support**
A system that keeps growing with the business.

10 RESULTS

What changed

The company's records now live in one place, with one login and one set of permissions.

- A project, its budget, its quotation and its payments are one chain, not four files.
- Revenue against target is read from a dashboard, not assembled on request.
- Every module enforces the same create, read, update and delete rights that the Roles and Permissions screen shows.
- Changes reach every open screen live; the bell and push notifications reach the people concerned.

> Time saved per department is not published because it was not measured before and after.

11 SUPPORT AND NEXT STEPS

After launch

In use on the client's server, with a production deployment procedure and a permissions audit behind it.

- **Releases:** a production deployment guide and a process manager configuration; migrations run in order.
- **Permissions audit:** a checklist of every module against the three permission layers, kept with the code.
- **Growth:** new modules register themselves in the matrix and fall into a group, so the screens never break.

Next steps

- More dashboards as management asks for them
- Further HR modules as the people operations grow

End of document
Version 1.0. One system for your whole operation: info@ektra-eg.com.

REFERENCE
PD-EKTRA_0003