

PROJECTS

STANDARD METHODOLOGY - ASSIGN EXTERNAL RESOURCE(S)

An External Resource is a sub-contract service that is required for the Project and can be linked to either a Main or Sub-layer where the Work Order to be Generated has been selected.

For the purpose of this manual, an External Resource has been linked using the *Edit* function on the *Project Maintenance* screen, but can also be linked when creating the project.

Ribbon Access: Maintenance / Projects > Standard Methodology

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- 1. The *Project Methodology* screen will be displayed.
- Click on the *row* of the *methodology layer* you wish to link an *External Resource* to.
- 3. Click on *Edit*.

Short cut key: *Right click* to display the *Maintenance* menu list. Click on *Edit*.





- 4. The *Project Methodology Maintain* screen will be displayed.
- 5. *Right click* on the next available row on the *External Resources* frame, to display the *Process* menu.
- 6. Click on *External Resource* Add external resource.



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- 7. The *Select the supplied service* screen will be displayed.
- 8. Click on the *row* of the *external resource* you wish to *assign* to this *project methodology layer*.
- 9. Click on *OK*.



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Expand the External Resources frame to display all the fields by click and drag the left side of the frame.

- 10. The *Service Code*, *Service Description*, *Work Description* and *Estimated Cost* fields will populate with the selected sub-contract service.
- 11. Click in the *Supplier Code* text box to display an *ellipsis* button.
- 12. Click on the ellipsis button to display the *Select the supplier* screen.



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- 13. Click on the *row* of the *supplier* you wish to assign as the *external resource*.
- 14. Click on *OK*.

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- 15. The *Supplier Code* and *Supplier Name* will populate with the supplier information selected.
 - Quantity: Type in or use the directional *arrows* to select the quantity required.
 - Est Duration: Type in or use the directional *arrows* to select the estimated time (in days) required to perform the task.
 - **Contract Number:** Type in the contract number for the supplier, if required.
- 16. When you have finished adding the details to the *External Resource*, click on *Save*.

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- 17. When you receive the *Project Methodology* message to confirm that;
 - The project methodology : [methodology name] has been saved.
- 18. Click on **OK**.



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Related Topics

• Remove an External Resource

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