

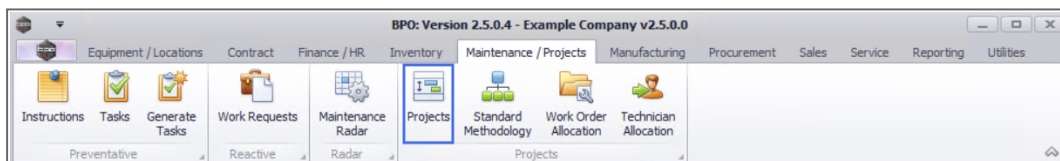
PROJECTS

PROJECTS – APPLY PROJECT METHODOLOGY

When a **Project Methodology** is applied to a project, the layers within the methodology will generate **sub projects** and **work orders** as set up in the methodology.

If there are **resource requirements** specified, then these resources will be requested as specified in the project methodology.

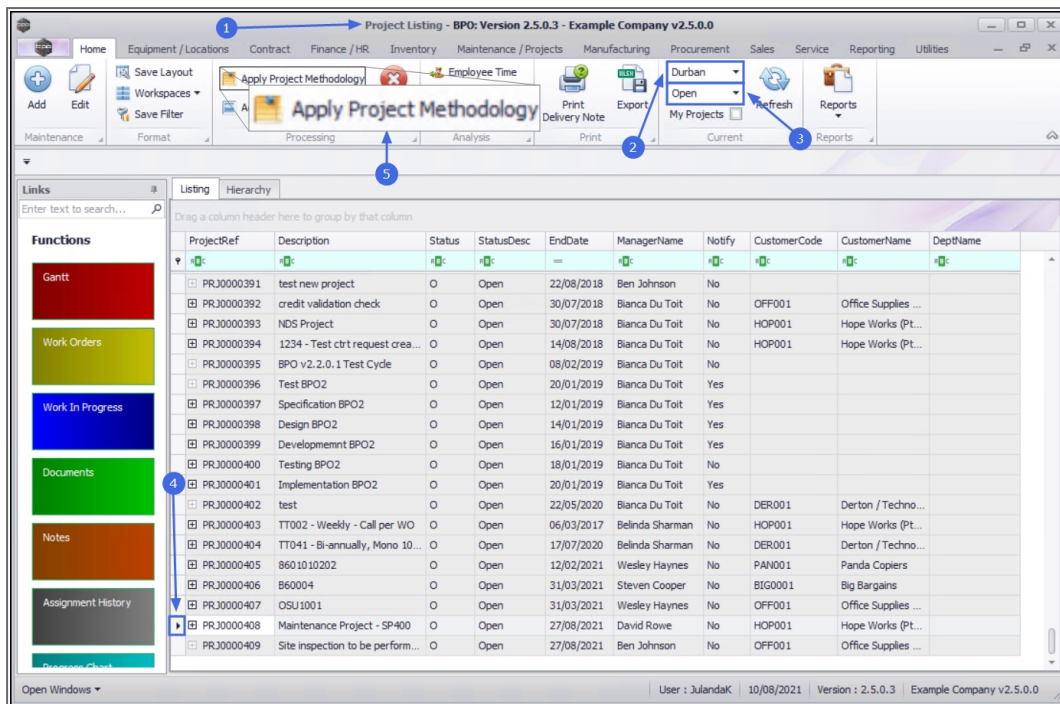
Ribbon Access: *Maintenance / Projects > Projects*



1. The **Project Listing** screen will be displayed
2. Select the **Site** where the project has been created.
 - The example has **Durban** selected.
3. Ensure that the project **Status** has been set to **Open**.
4. Click on the **row** of the **project** you wish to **apply a methodology** to.
5. Click on **Apply Project Methodology**.

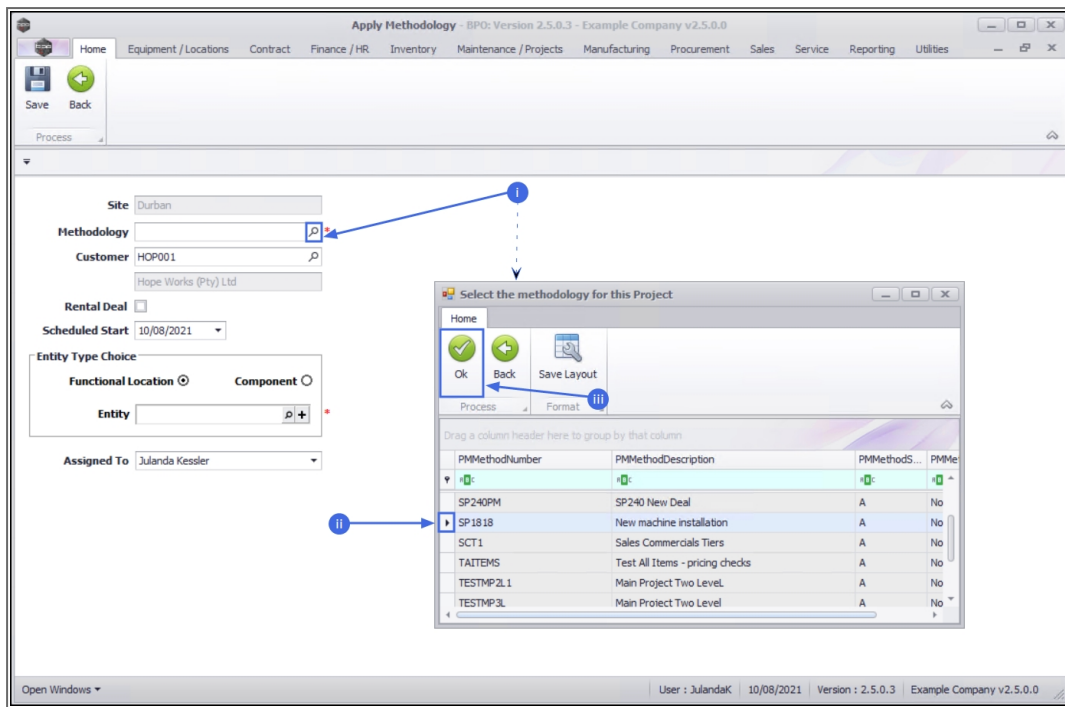


Short cut key: **Right click** to display the **All groups** menu list. Click on **Methodology**.

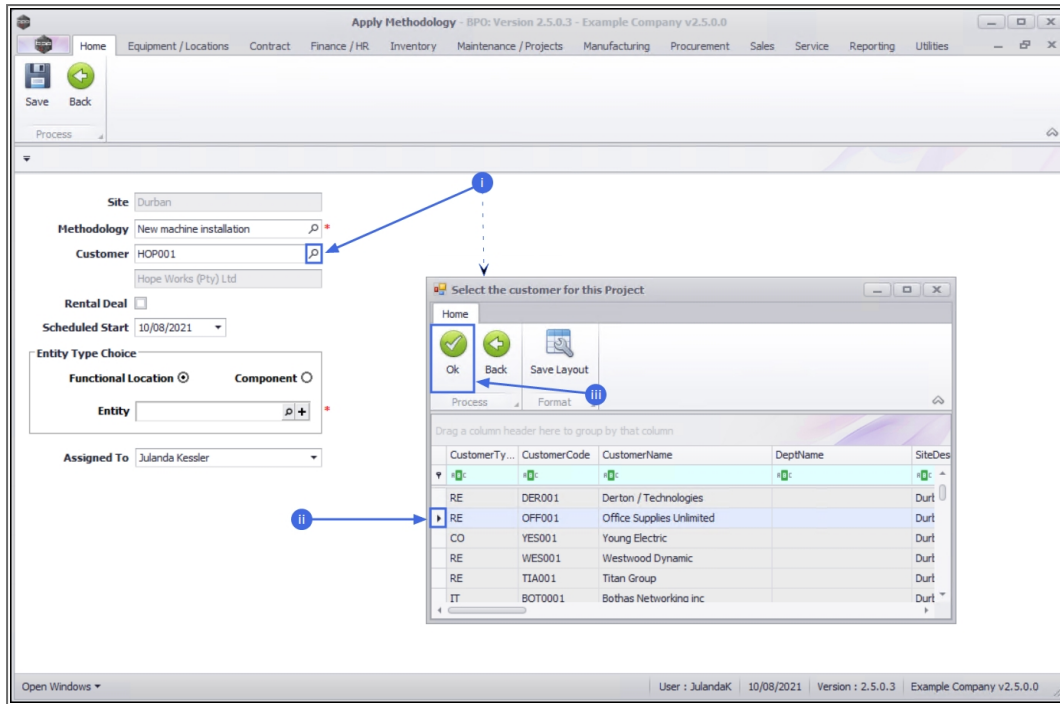


6. The **Apply Methodology** screen will be displayed.

- **Site:** The site will auto populate with the site that was selected on the Project Listing screen.
- **Methodology:** Click on the **search** button to select the methodology you wish to apply.
 - i. The **Select the methodology for this Project** screen will display.
 - ii. Click on the **row** of the methodology you wish to apply to this project.
 - iii. Click on **OK**.



- **Customer:** Click on the **search** button to select the customer you wish to link to this project.
 - i. The **Select the customer for this Project** screen will display.
 - ii. Click on the **row** of the Customer you wish to link to the project.
 - iii. Click on **OK**.



Apply Methodology - BPO: Version 2.5.0.3 - Example Company v2.5.0.0

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back

Process

Site: Durban

Methodology: New machine installation

Customer: HOP001

Rental Deal: ☐

Scheduled Start: 10/08/2021

Entity Type Choice: Functional Location ☒ Component ☐

Entity:

Assigned To: Julanda Kessler

Select the customer for this Project

Home | Ok | Back | Save Layout

Process | Format

Drag a column header here to group by that column

CustomerTy...	CustomerCode	CustomerName	DeptName	SiteDes
RE	DER001	Derton / Technologies		Durt
RE	OFF001	Office Supplies Unlimited		Durt
CO	YES001	Young Electric		Durt
RE	WES001	Westwood Dynamic		Durt
RE	TIA001	Titan Group		Durt
IT	BOT001	Bothas Network Inc		Durt

Open Windows | User: JulandaK | 10/08/2021 | Version: 2.5.0.3 | Example Company v2.5.0.0

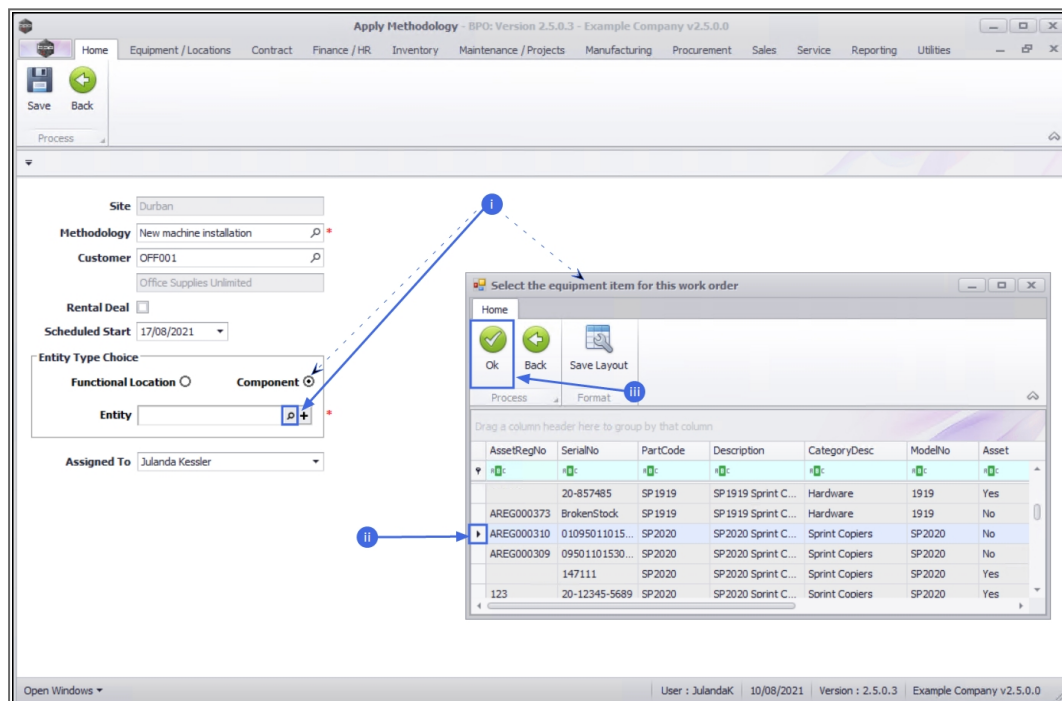
- **Rental Deal:** Select this option only if this is a **Capitalised Deal**¹ (the system will request an internal asset).
- **Scheduled Start:** Type in or click the down **arrow** to select the start date for the project using the calendar function.
- **Entity Type Choice:** Click in the relevant radio button to select whether to link this project to a **Functional Location** or a **Component**.



Note that for a New Deal project you will need to link a Functional Location.

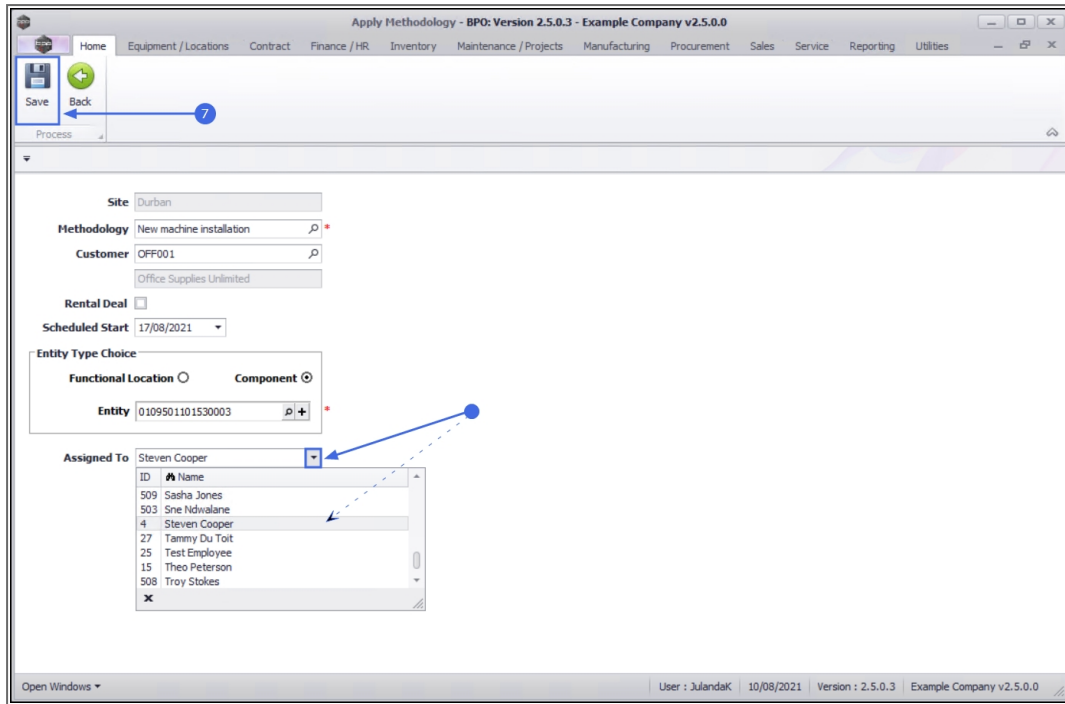
¹A Capitalised Deal would include costs for services rendered. The alternative is a project that is performed for contracted services.

- **Entity:** Click on the **search** button.
 - i. If the Entity Type was **Functional Location**, then the **Select the location item for this work request** screen will display.
 - If the Entity Type was **Component**, then the **Select the equipment item for this work order** screen will display.
 - ii. Click on the **row** of the location / item you wish to link to the project.
 - iii. Click on **OK**.



- **Assigned To:** Click on the down **arrow** to select the relevant employee assigned to the project.

7. When you have finished adding details to the **Apply Methodology** screen, click on **Save**.



Apply Methodology - BPO: Version 2.5.0.3 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back

Process

Site: Durban

Methodology: New machine installation

Customer: OFF001

Rental Deal: ☐

Scheduled Start: 17/08/2021

Entity Type Choice: Functional Location ☐ Component ☒

Entity: 0109501101530003

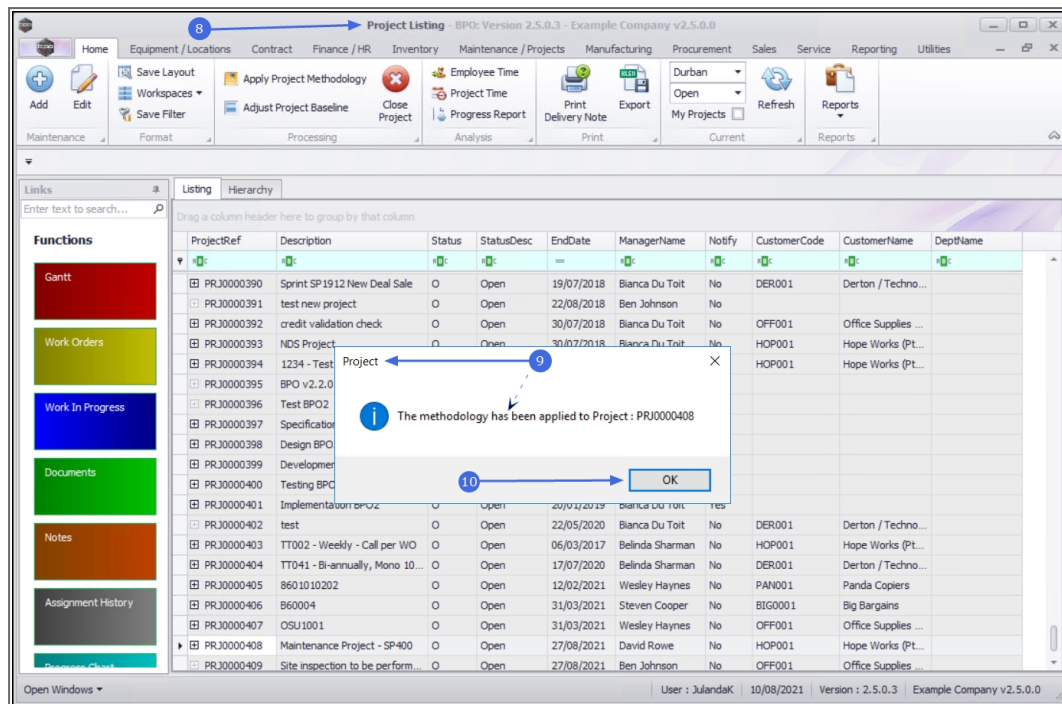
Assigned To: Steven Cooper

ID	Name
509	Sasha Jones
503	Sine Ndwilane
4	Steven Cooper
27	Tammy Du Toit
25	Test Employee
15	Theo Pieterse
508	Troy Stokes

Open Windows

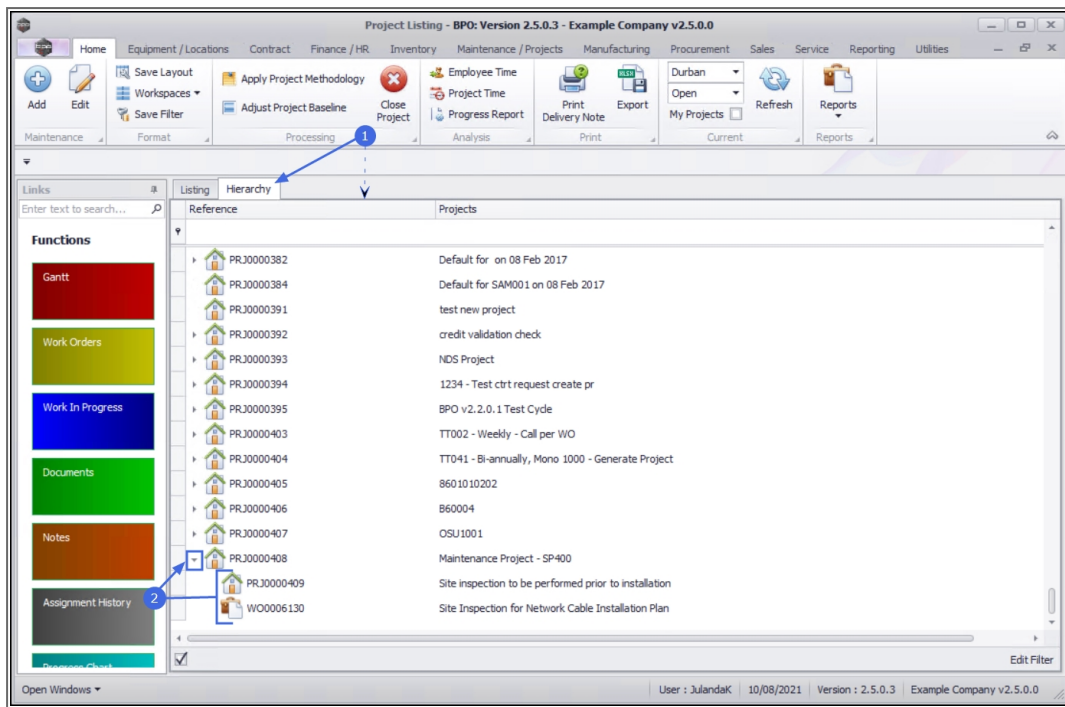
User: JulandaK 10/08/2021 Version: 2.5.0.3 Example Company v2.5.0.0

8. You will return to the **Project Listing** screen.
9. When you receive the **Project** message informing you that;
 - **The methodology has been applied to Project : [project ref number]**
10. Click on **OK**.



VIEW HIERARCHY

1. On the **Project Listing** screen, click on the **Hierarchy** tab to display the **Projects Hierarchy view**.
2. Click on the **tree node** next to the project you have applied the methodology to, to expand the **project layers** for this project methodology.



Related Topics

- [Standard Methodology - Add Main Layer](#)
- [Projects - Work Orders](#)

MNU.158.033