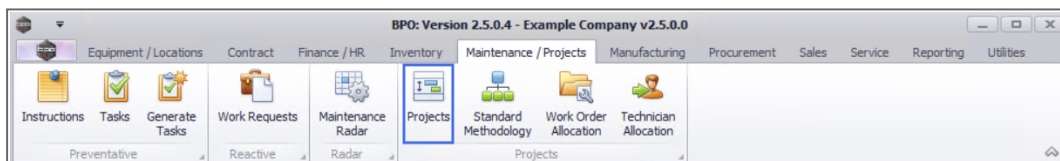# PROJECTS

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***.

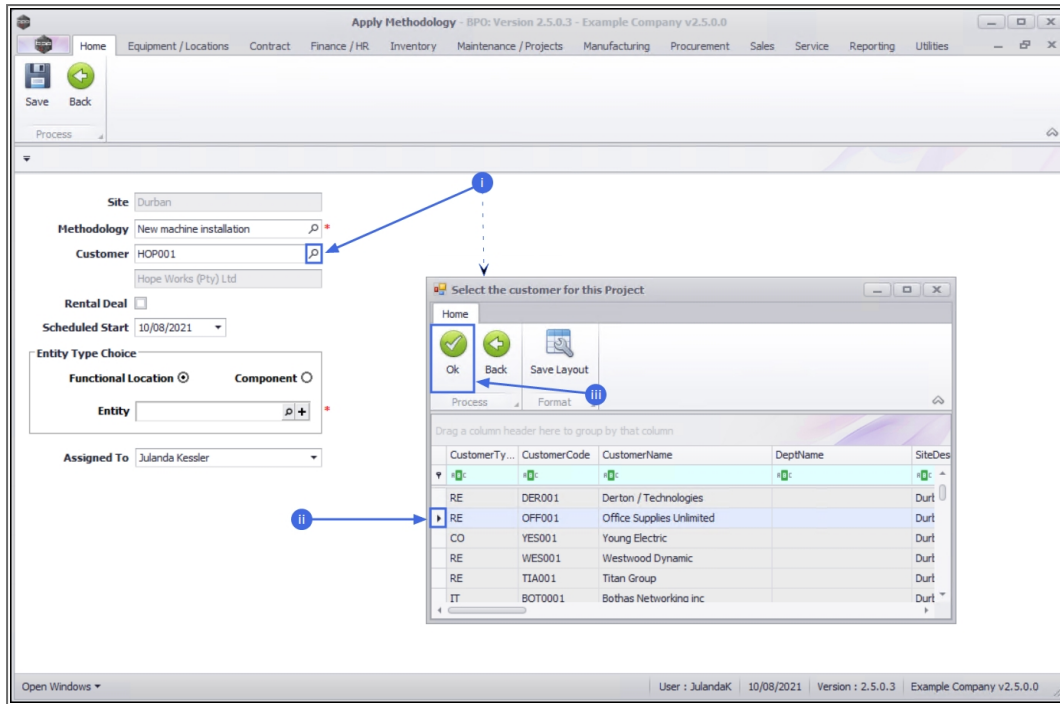⊘ Short cut key: *Right click* to display the *All groups* menu list. Click on *Methodology*.

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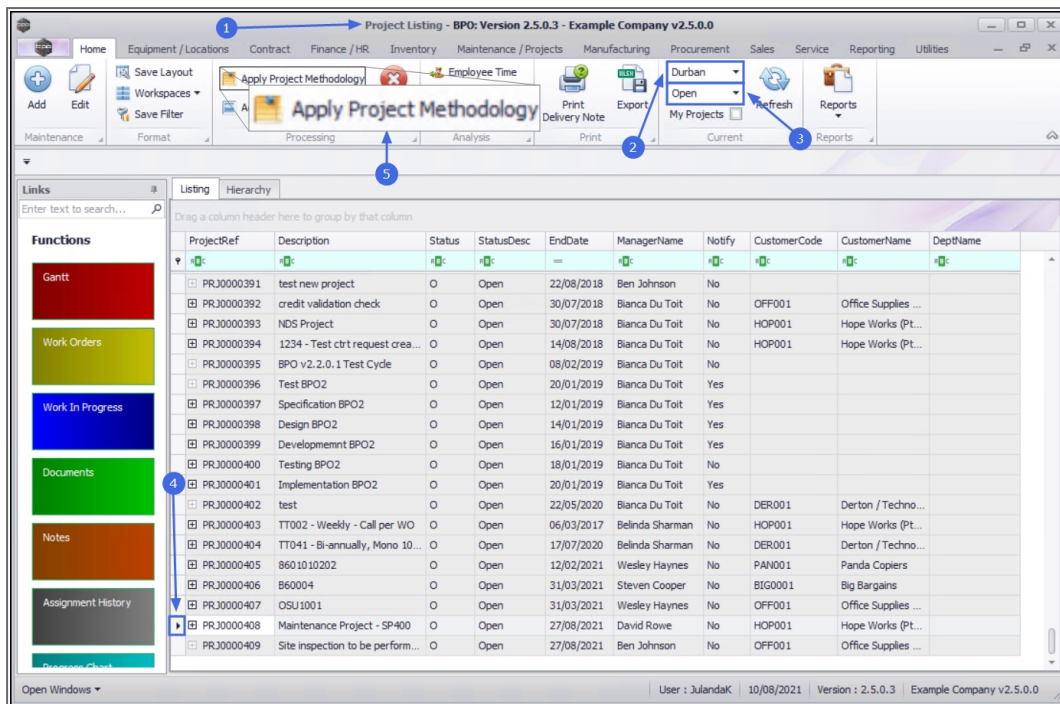
6.   The *Apply Methodology* screen will be displayed.

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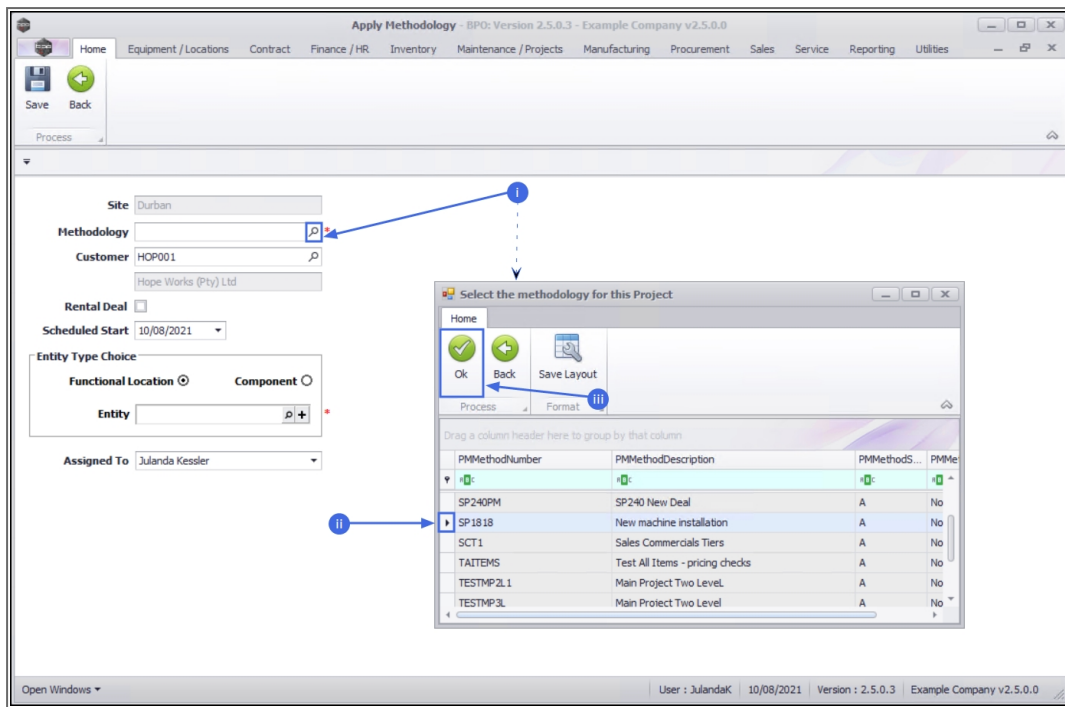
- **Customer:** Click on the *search* button to select the customer you wish to link to this project.
    i. The *Select the customer for this Project* screen will display.
    ii. Click on the *row* of the Customer you wish to link to the project.
   iii. Click on *OK*.

- **Rental Deal:** Select this option <u>only</u> if this is a Cap-italised 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**.

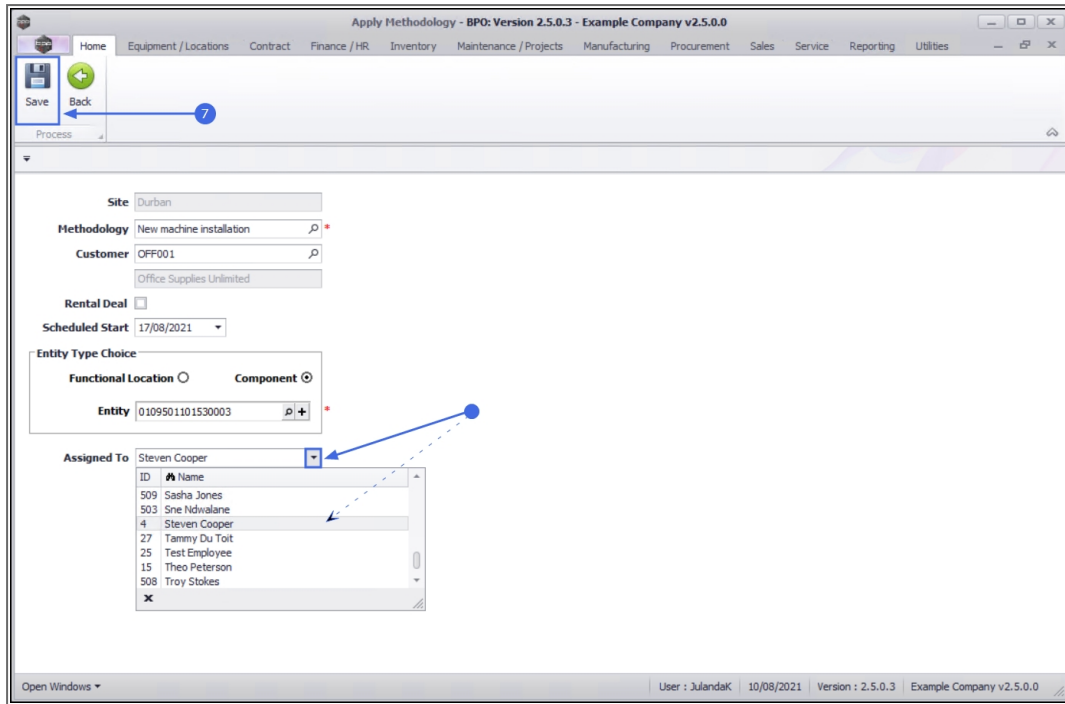> 📝 **Note** that for a New Deal project you will need to link a Functional Location.

---

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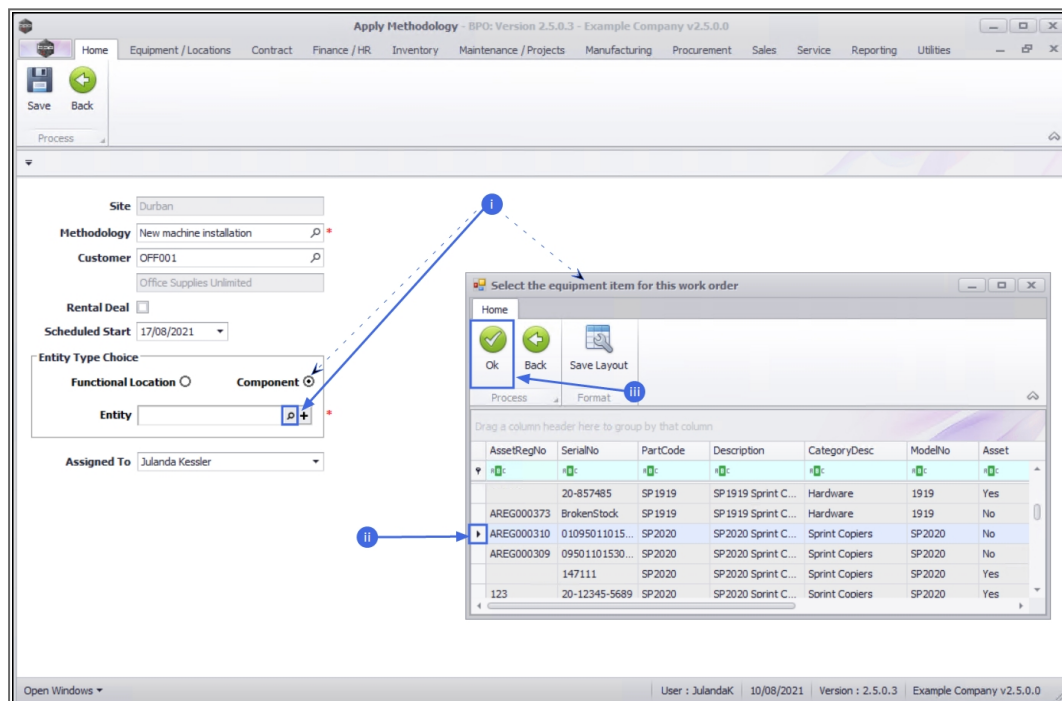
- **Assigned To:** Click on the down *arrow* to select the relevant employee assigned to the project.

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

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*.
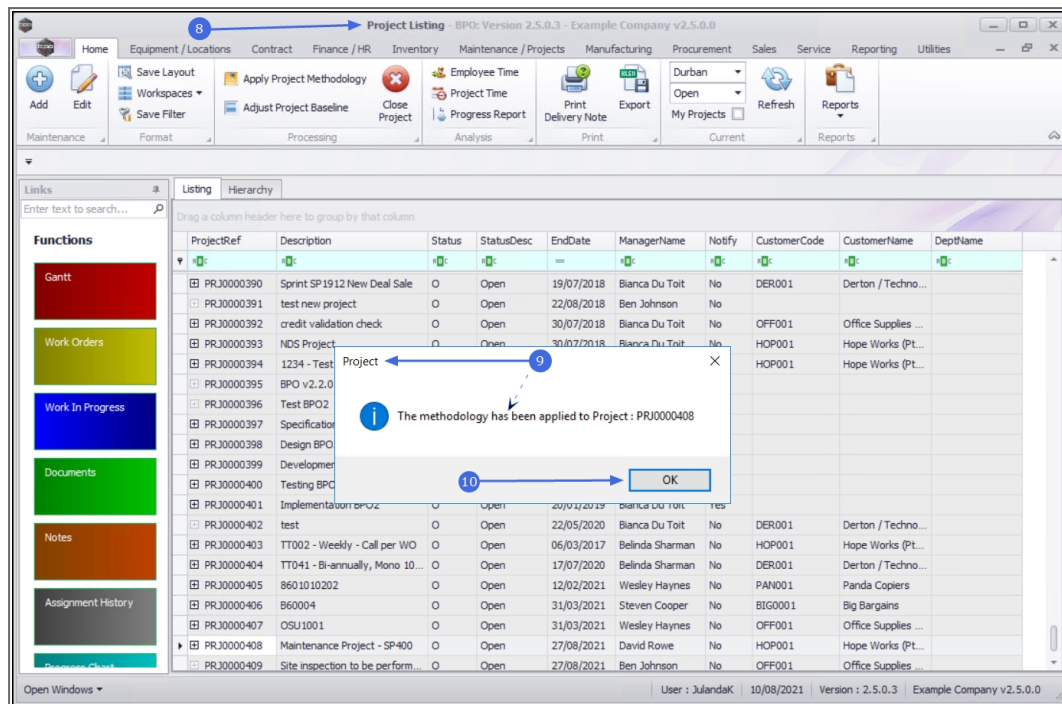
VIEW HIERARCHY

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.
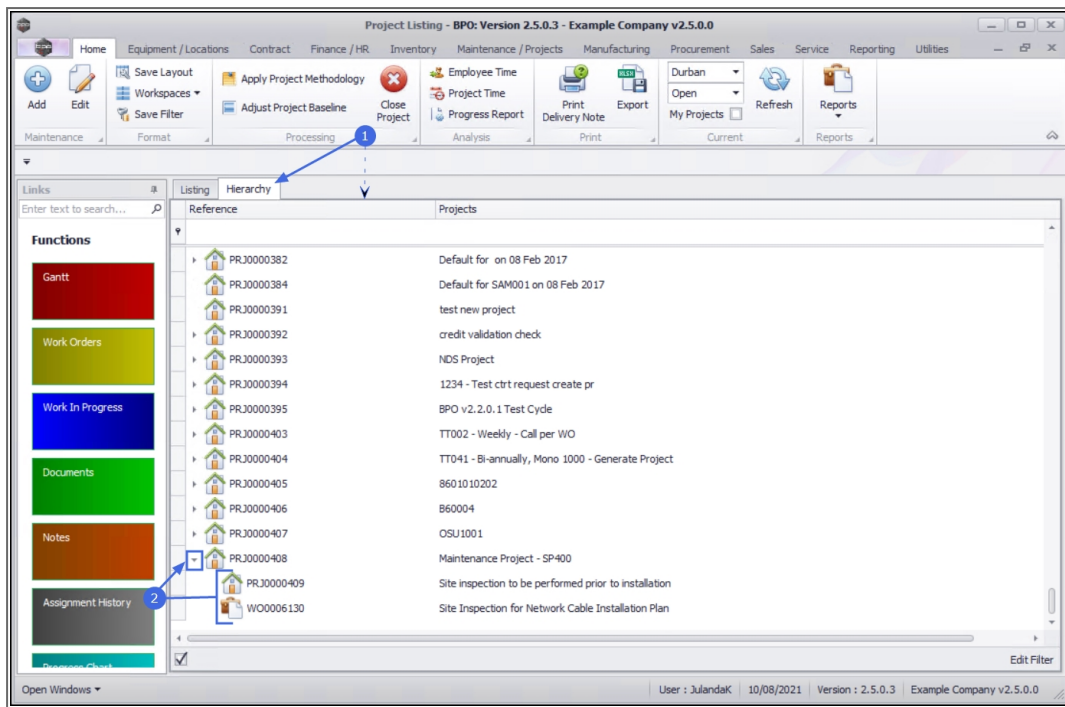
Related Topics

- Standard Methodology - Add Main Layer
- Projects - Work Orders

MNU.158.033