

PROJECTS

STANDARD METHODOLOGY - ADD SUB-LAYER(S)

Using a Project Methodology, enables you to set up project *layers*. For instance you can set up a *main project*, with *sub-projects* and *work orders*.

You can assign *Labour*, *Parts* and *Sub-Contractors* per work order.

A Project Methodology can be applied to a *Sales Quote* or to a *current Project*.

When generating, the system will create the *main* project and *sub-projects*, as well as the *work orders*, and request the *assigned resources* as specified.

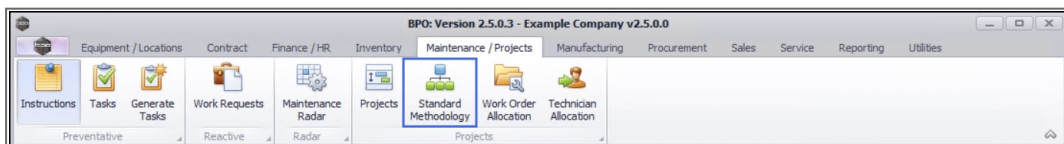
The following needs to be configured:

- **Project Methodology Class**
- Project Work Order specific Bill of Materials for parts required.



Note that the *Auto Apply Task Configuration to WO* [Company Configuration](#) flag must be set to *No*. Both these functionalities, cannot be used simultaneously.

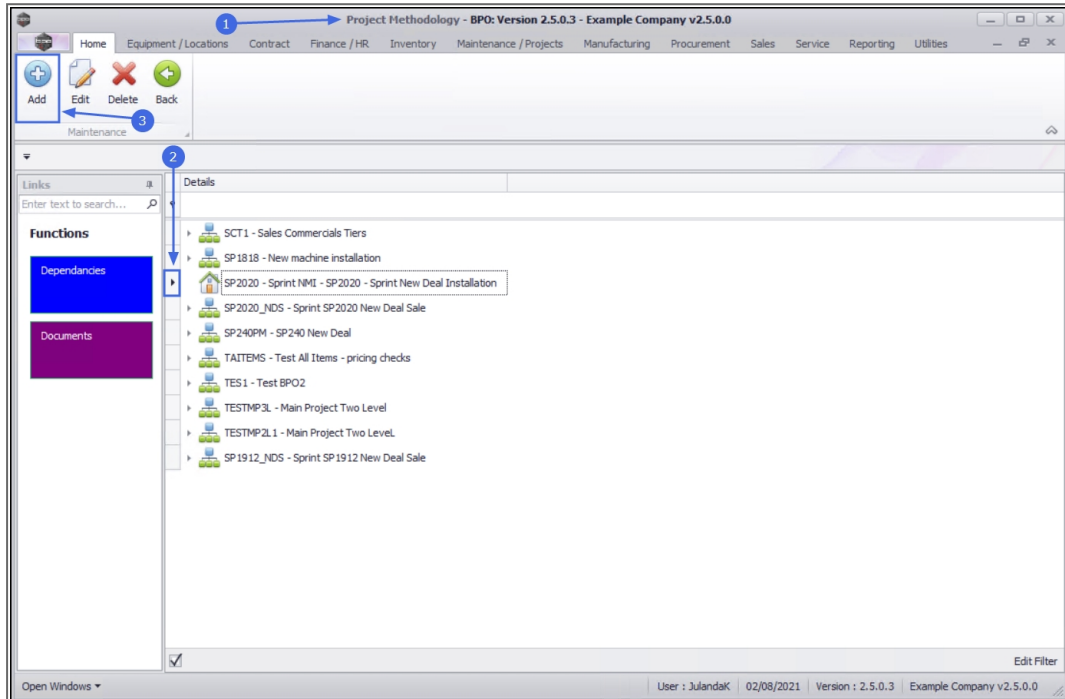
Ribbon Access: *Maintenance / Projects > Standard Methodology*



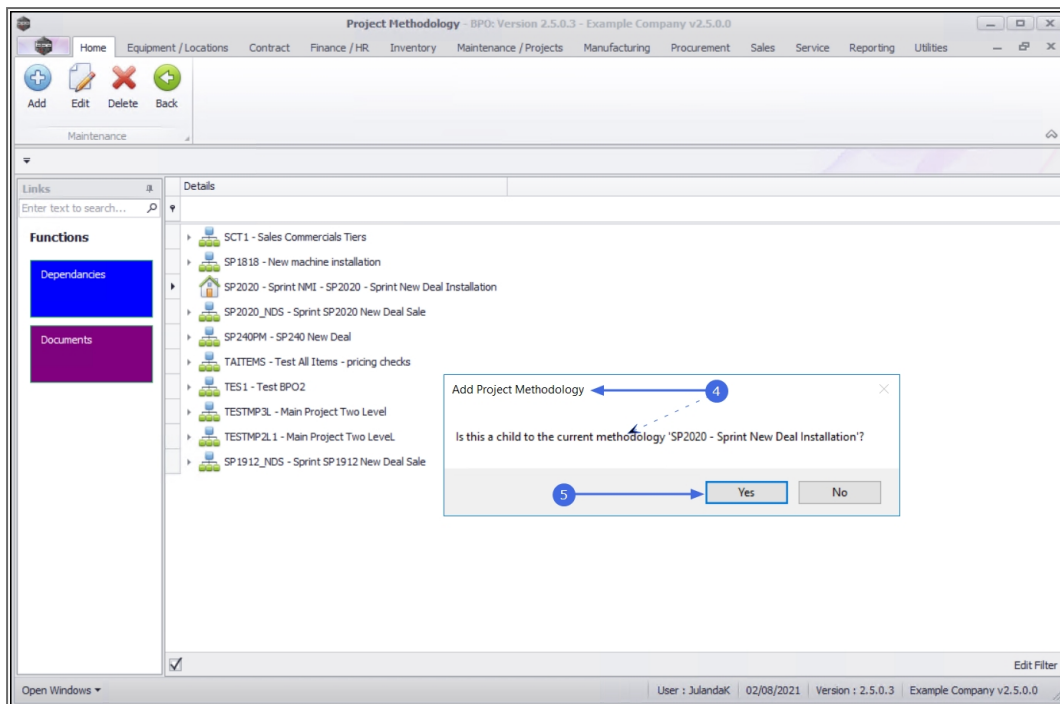
1. The **Project Methodology** screen will be displayed.
2. Click on the **row** of the **main project methodology** that you wish to **add** a **sub level** to.
3. Click on **Add**.



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



4. When you receive the **Add Project Methodology** message;
 - **Is this a child to the current methodology, [methodology name]?**
5. Click on **Yes**.



6. The **Project Methodology Maintain** screen will be displayed.

- **Number:** Type in the project number for the methodology sub-layer.
- **Description:** Type the description for the methodology sub-layer.
- **Parent:** This field will be auto populated with the main / parent methodology layer you have selected.



Note that this field cannot be changed. If the incorrect main layer was selected, click on **Back** to cancel this process and to return to the **Project Methodology** listing screen.

- **Order:** This is the order of the layers within the methodology - as this is the first layer - it will be numbered as **1**.

- **Class:** Click on the down **arrow** to select the methodology class from the menu.
- **Start Lag (days):** Specify the number of **lag days**¹ required. For the first sub-layer/child, the start lag is set to **1**.
- **Notifiable:** Check this option if the project manager needs to be notified.



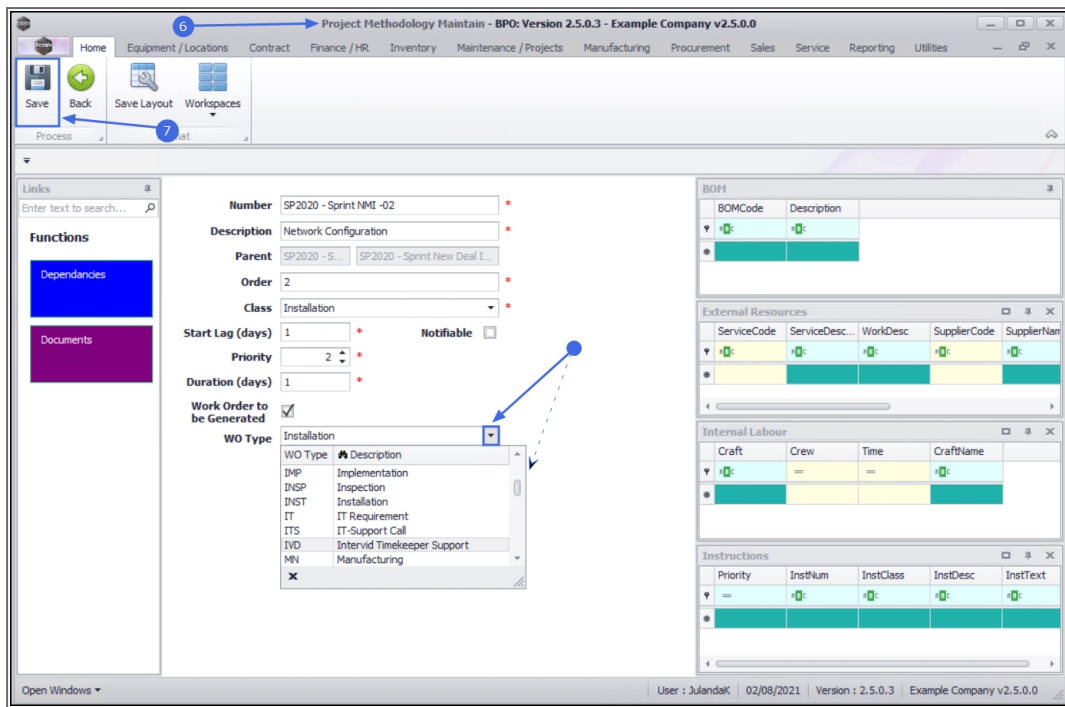
Note that this option is not used by the system. For notifications, assign the project work order(s) to a technician. If the company configuration is set up correctly, the technician will receive an email regarding the assignment.

- **Priority:** Select the **priority level**² for the methodology sub-layer.
- **Duration (days):** Specify how long (in days) this part of the methodology will take to complete.
- **Work Order to be Generated:** *Click* to select this option, if you need to generate Work Orders for this sub-layer.
- **WO Type:** This field can only be accessed when the **Work Order to be Generated** check box has been selected. If you are generating work orders on this sub-layer, click on the down **arrow** to select the work order type from the drop-down menu.

7. When you have finished entering the sub-layer details to the **Project Methodology Maintain** screen, click on **Save**.

¹Lag days refer to the number of days that needs to be waited out before this layer of the project methodology is due.

²1 - Very High 2 - High 3 - Moderate 4 - Low 5 - Very Low



Project Methodology Maintain - 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 Save Layout Workspaces

Process

Links
Enter text to search...

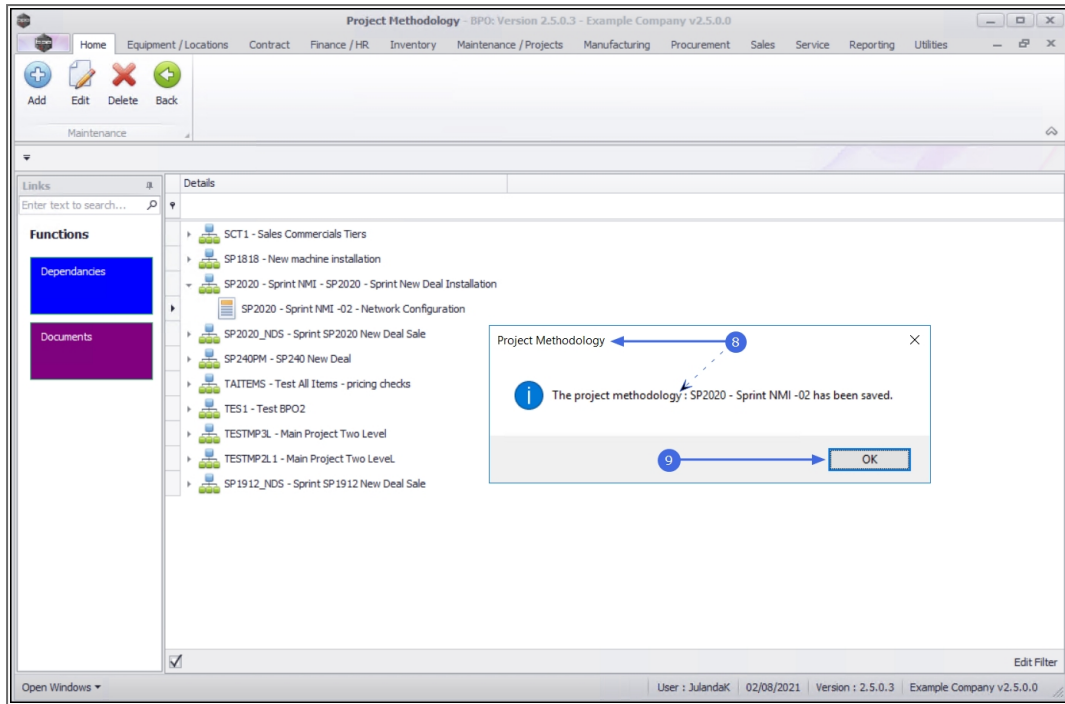
Functions
Dependencies
Documents

Number SP2020 - Sprint NME -02
Description Network Configuration
Parent SP2020 - S... SP2020 - Sprint New Deal I...
Order 2
Class Installation
Start Lag (days) 1 Notifiable
Priority 2
Duration (days) 1
Work Order to be Generated
WO Type Installation
WO Type Description
IMP Implementation
INSP Inspection
INST Installation
IT IT Requirement
ITS IT-Support Call
IVD Intervid Timekeeper Support
MN Manufacturing

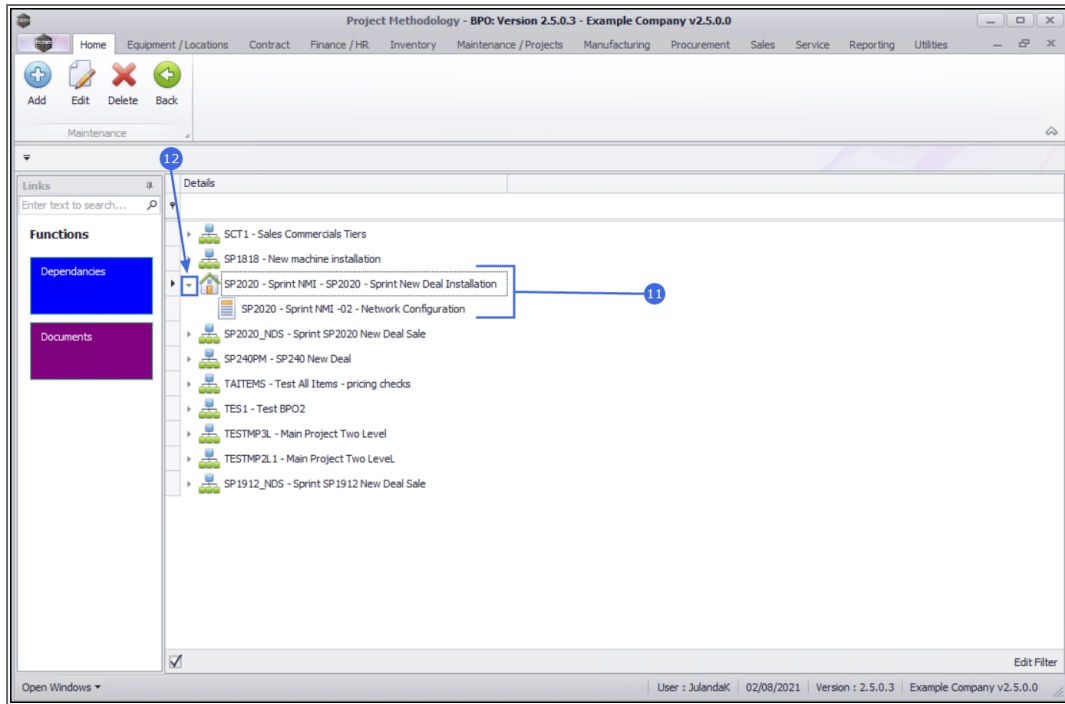
BOM
BOMCode Description
External Resources
ServiceCode ServiceDesc... WorkDesc SupplierCode SupplierName
Internal Labour
Craft Crew Time CraftName
Instructions
Priority InstNum InstClass InstDesc InstText

Open Windows User: JulandaK 02/08/2021 Version: 2.5.0.3 Example Company v2.5.0.0

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



10. The **Project Methodology** listing screen has been updated with the sub-layer.
11. Note the **tree view node expand arrow** in front of the new main project methodology layer to indicate that the main methodology now contains a sub-layer.



Repeat the above process for adding any additional sub- and sub-sub layers.

Related Topics

- [Link a Bill of Materials](#)
- [Link External Resources](#)
- [Link Internal Labour](#)
- [Assign an Instruction](#)

MNU.153.002

