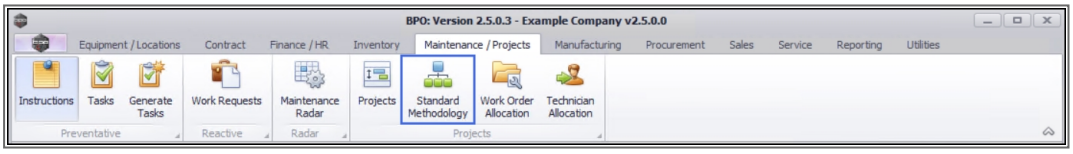
PROJECTS

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*



1. The ***Project Methodology*** screen will be displayed.
2. 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***.

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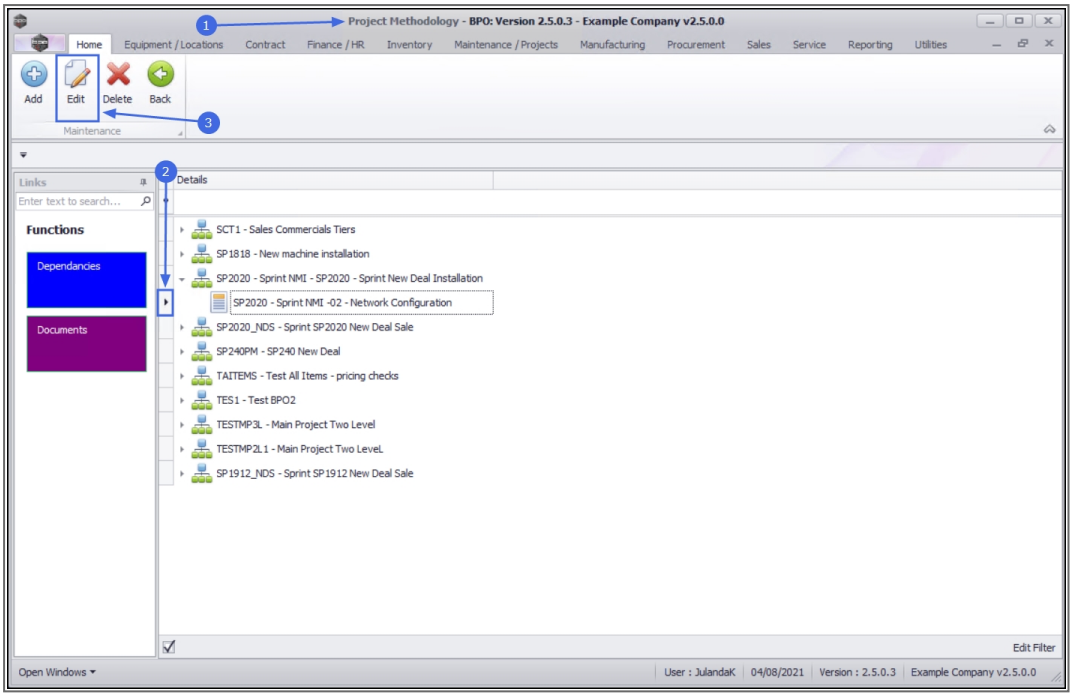

4. The ***Project Methodology Maintain*** screen will be displayed.
5. ***Right click*** on the next available row on the ***External Resources*** frame, to display the ***Process*** menu.
6. Click on ***External Resource*** - Add external resource.

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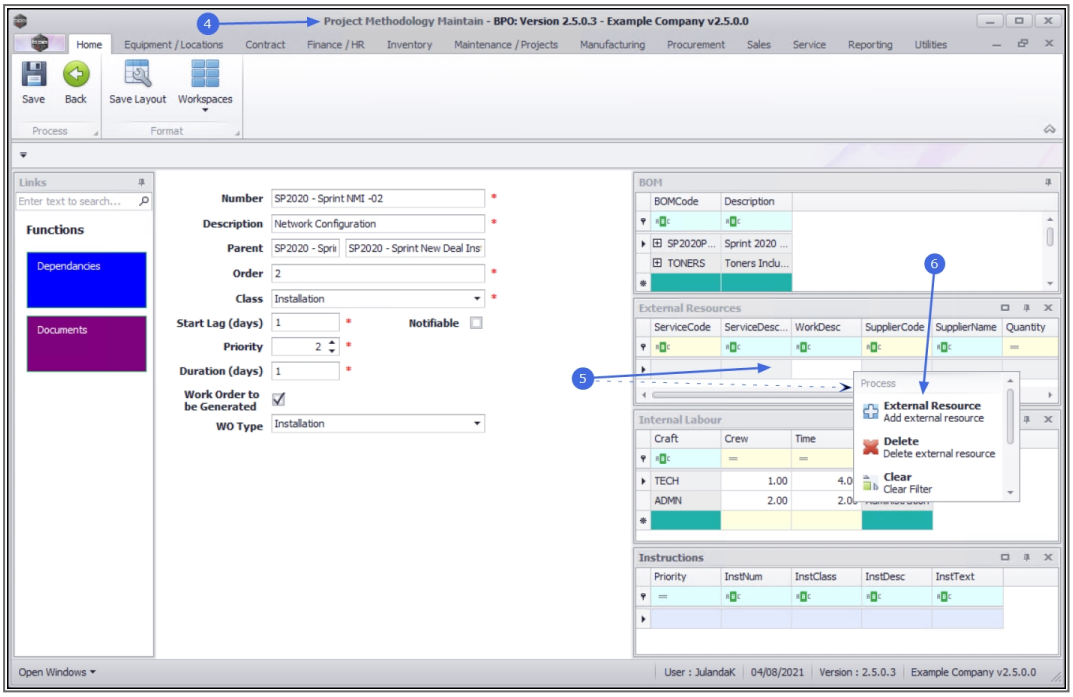

7. The ***Select the supplied service*** screen will be displayed.
8. Click on the ***row*** of the ***external resource*** you wish to ***assign*** to this ***project methodology layer***.
9. Click on ***OK***.

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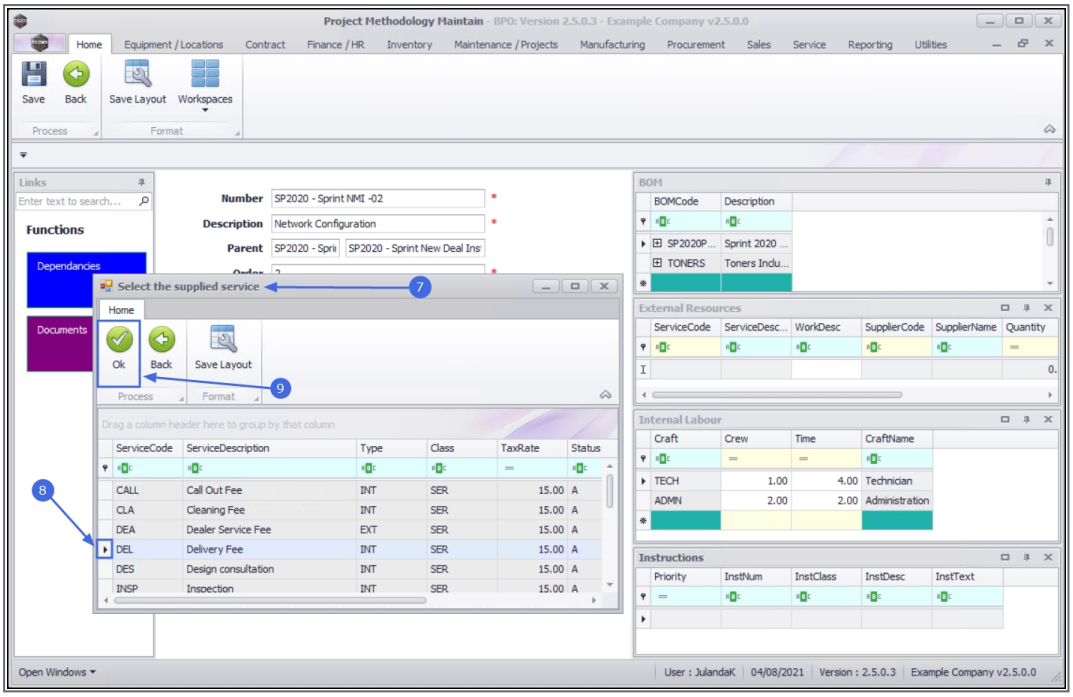

Expand the External Resources frame to display all the fields by click and drag the left side of the frame.

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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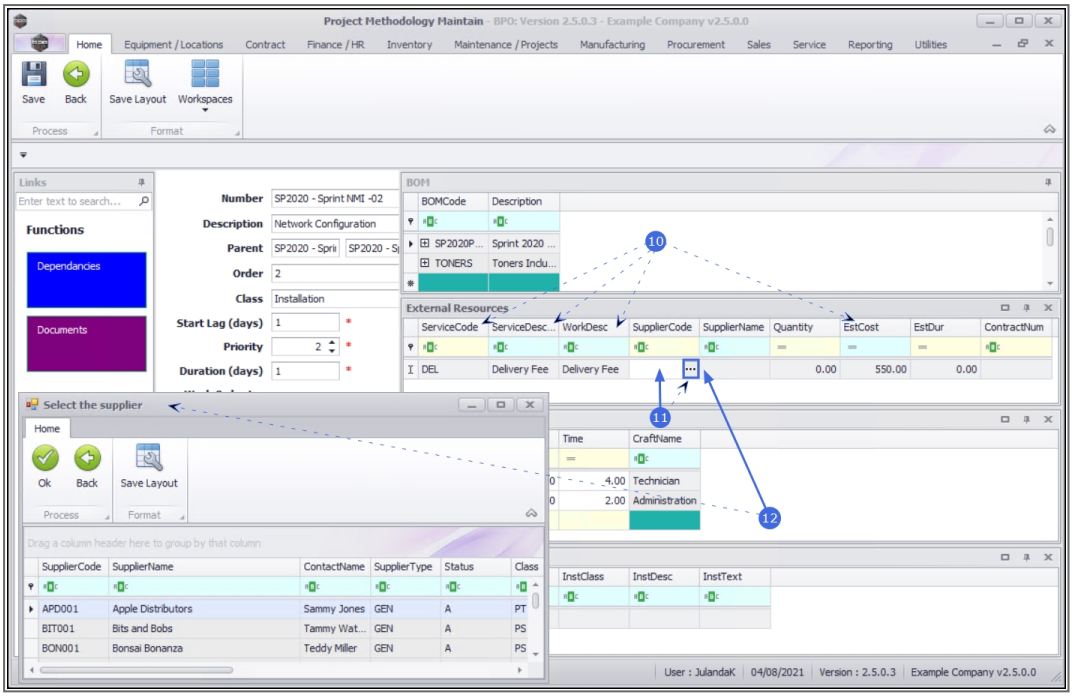
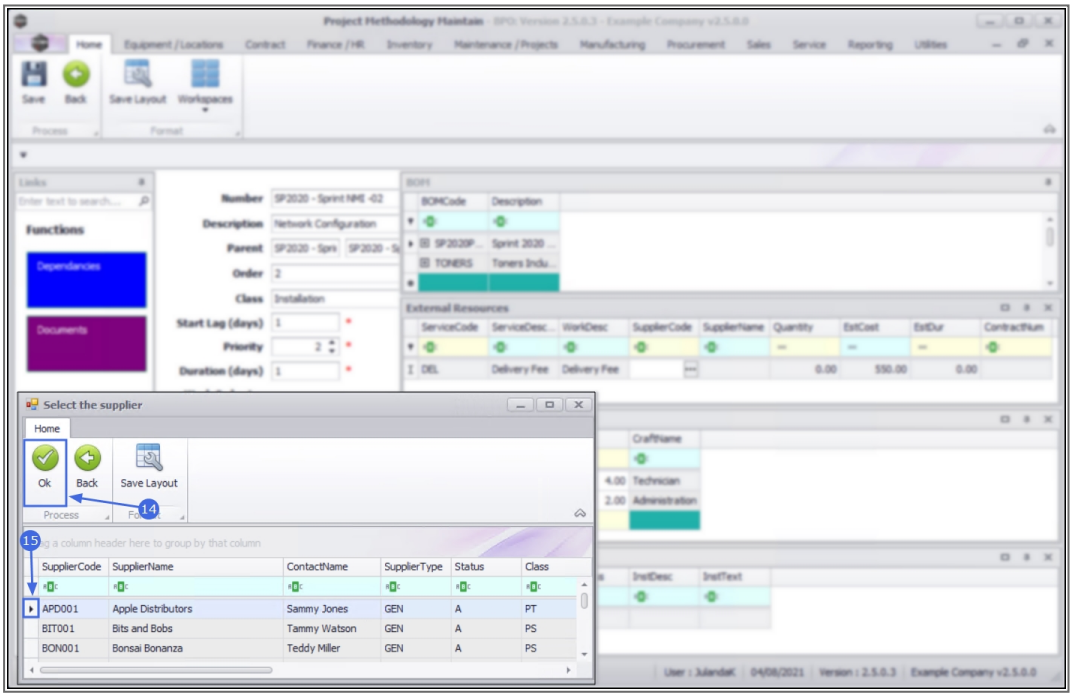


13. Click on the ***row*** of the ***supplier*** you wish to assign as the ***external resource***.
14. Click on ***OK***.



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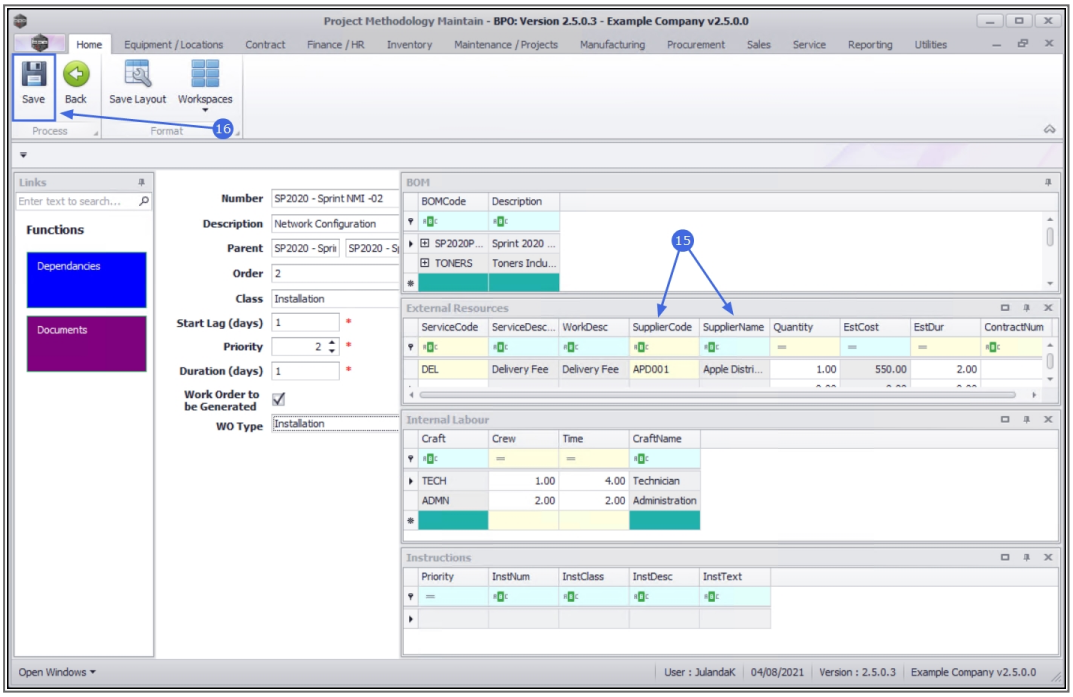
15. The ***Supplier Code*** and ***Supplier Name*** will populate with the supplier information selected.
    - **Quantity:** Type in or use the directional ***arrows*** to select the quantity required.
    - **Est Duration:** Type in or use the directional ***arrows*** to select the estimated time (in 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***.



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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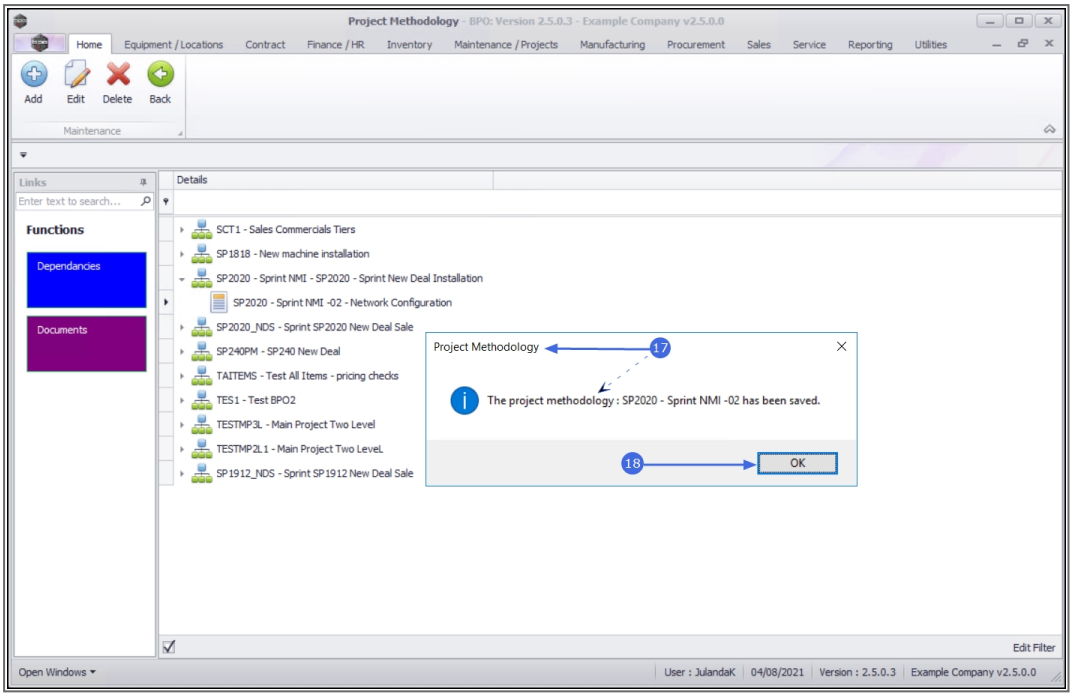

Related Topics

- Remove an External Resource

MNU.153.006

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