



## **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.

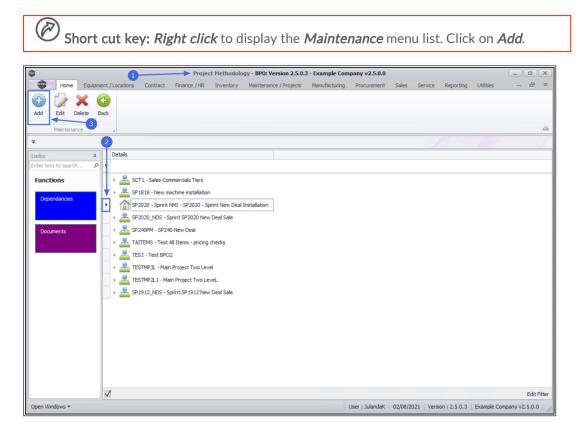
Note that the *Auto Apply Task Configuration to WO* <u>Company Configuration</u> flag must be set to *No*. Both these functionalities, cannot be used simultaneously.

Ribbon Access: Maintenance / Projects > Standard Methodology



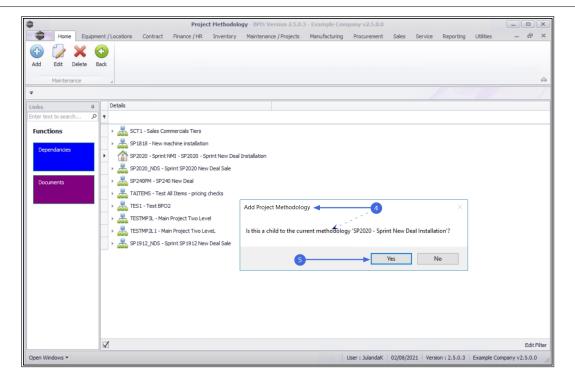


- 1. The *Project Methodology* screen will be displayed.
- Click on the *row* of the *main project methodology* that you wish to *add* a *sub level* to.
- 3. Click on *Add*.



- 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 <u>cannot</u> 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 <u>meth-odology class</u> from the menu.
- **Start Lag (days):** Specify the number of lag days<sup>1</sup> 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**<sup>2</sup> 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.
- When you have finished entering the sub-layer details to the *Project Methodology Maintain* screen, click on *Save*.

<sup>2</sup>1 - Very High 2 - High 3 - Moderate 4 - Low 5 - Very Low

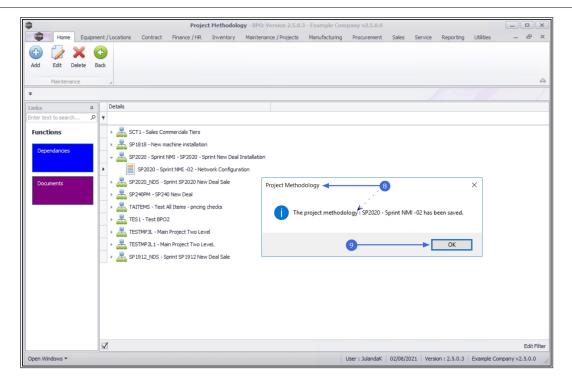
<sup>&</sup>lt;sup>1</sup>Lag days refer to the number of days that needs to be waited out before this layer of the project methodology is due.



| \$                     | 6                             | Project Methodology Maintain - E                       | 3PO: Version 2.5.0.3 - Example 0 | Company v2.5.0.0        |              |              | _             |              |
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| Open Windows 🕶         |                               |                                                        | U                                | Iser : JulandaK 02/08/2 | 021 Version  | : 2.5.0.3 Ex | ample Company | v2.5.0.0     |

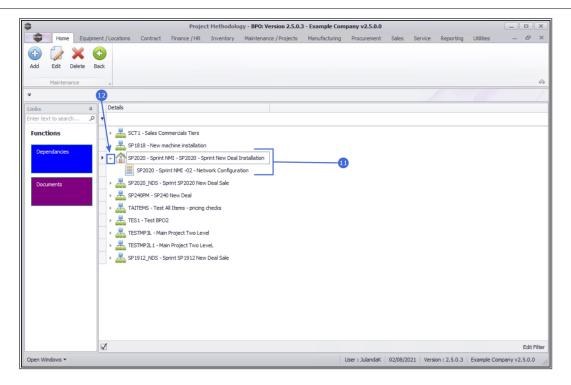
- 8. When you receive the *Project Methodology* message to confirm;
  - The project methodology: [methodology name] has been saved.
- 9. Click on *OK*.





- 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 lay- |
|--------------------------------------------------------------------------|
| ers.                                                                     |

## **Related Topics**

- Link a Bill of Materials
- Link External Resources
- Link Internal Labour
- Assign an Instruction

MNU.153.002