We are currently updating our site; thank you for your patience.
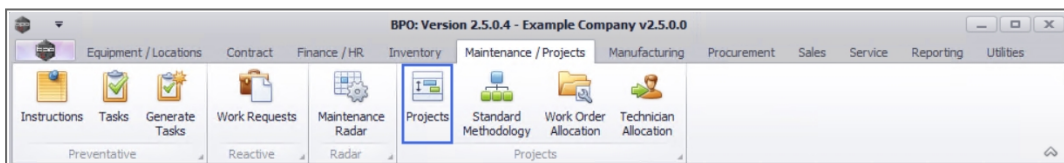
PROJECTS

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.
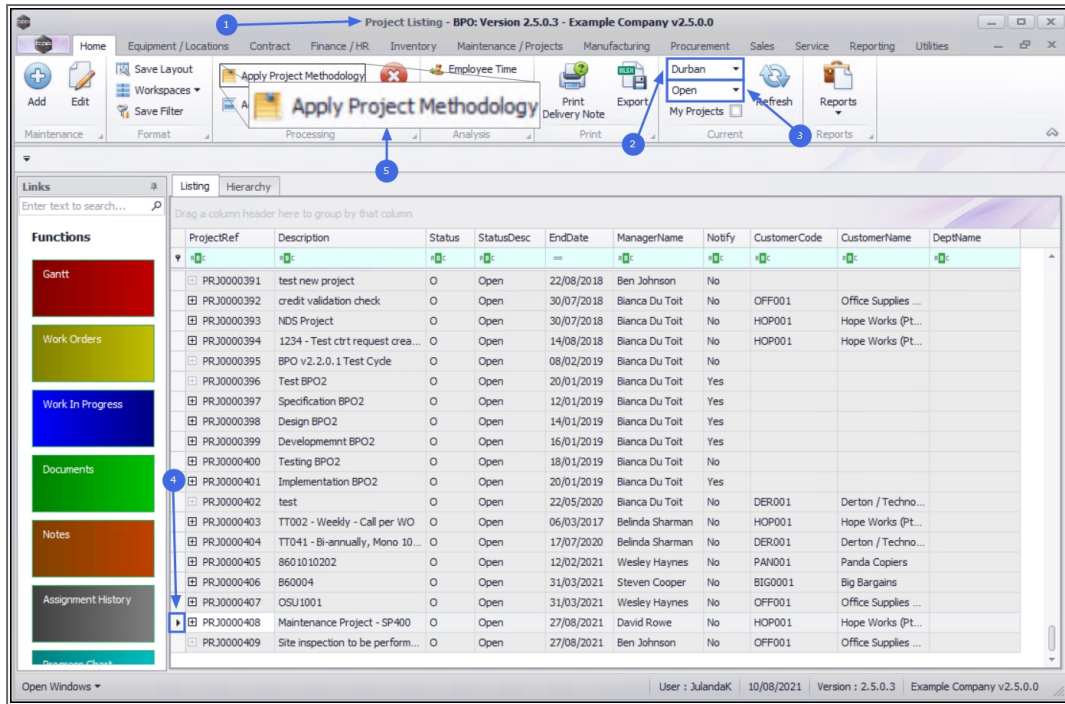

Ribbon Access: Maintenance / Projects > Projects

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.
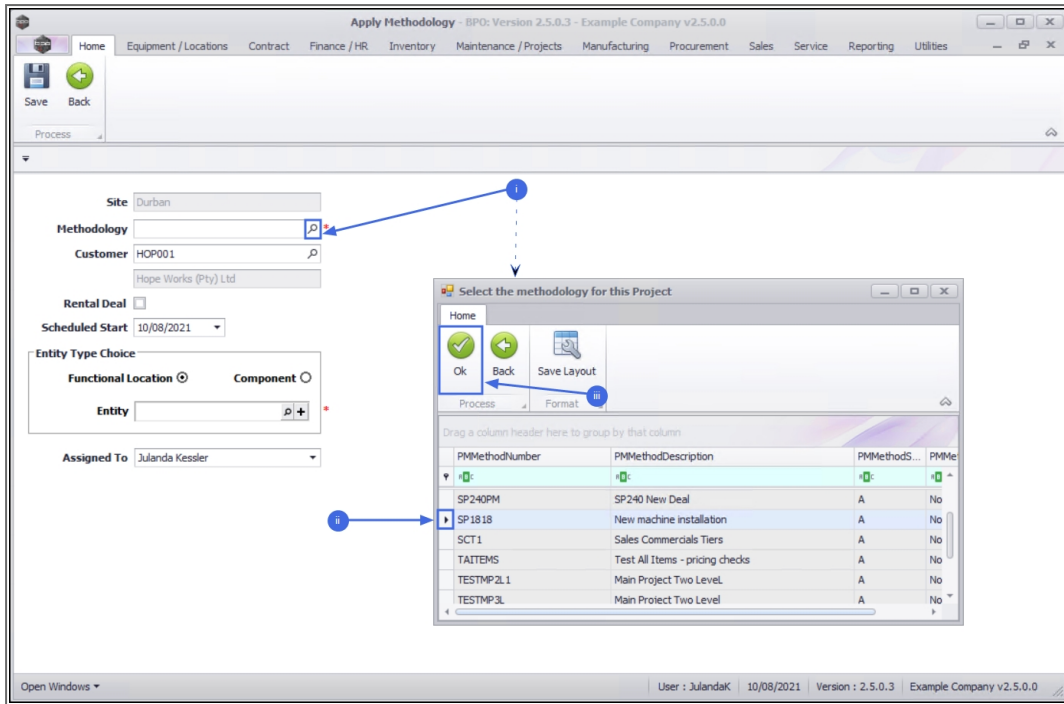5. Click on **Apply Project Methodology**.

> Short cut key: **Right click** to display the **All groups** menu list. Click on **Methodology**.
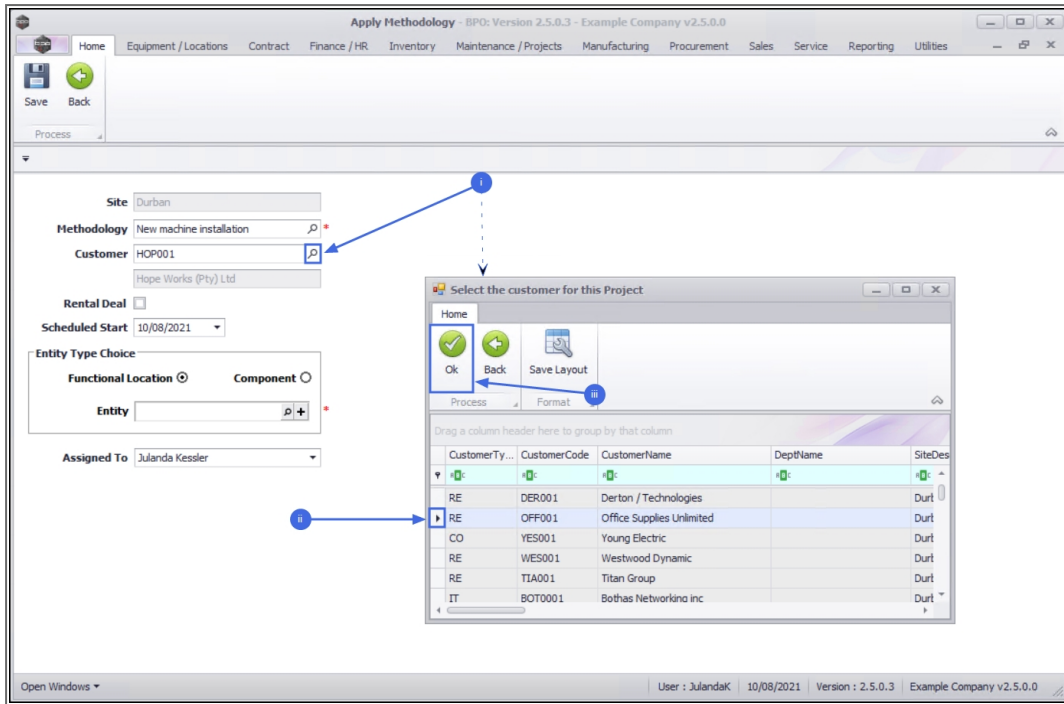
6. The **Apply Methodology** screen will be displayed.

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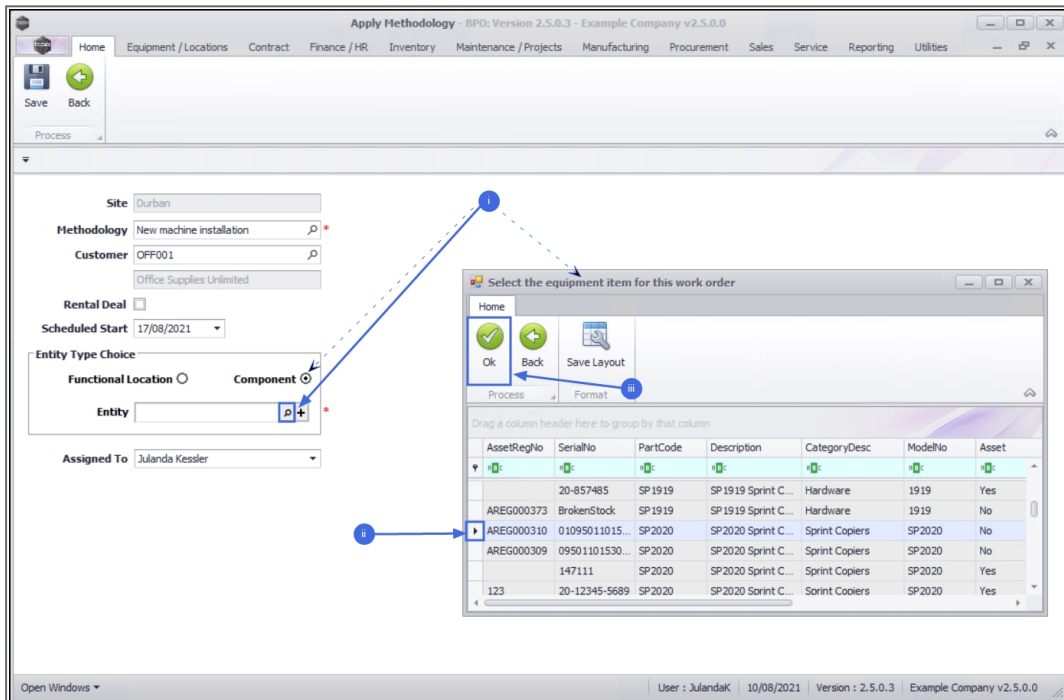
- **Rental Deal:** Select this option <u>only</u> if this is a Cap-italised Deal[1] (the system will request an internal asset).
- **Scheduled Start:** Type in or click the down **arrow** to select the start date for the project using the calendar function.
- **Entity Type Choice:** Click in the relevant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

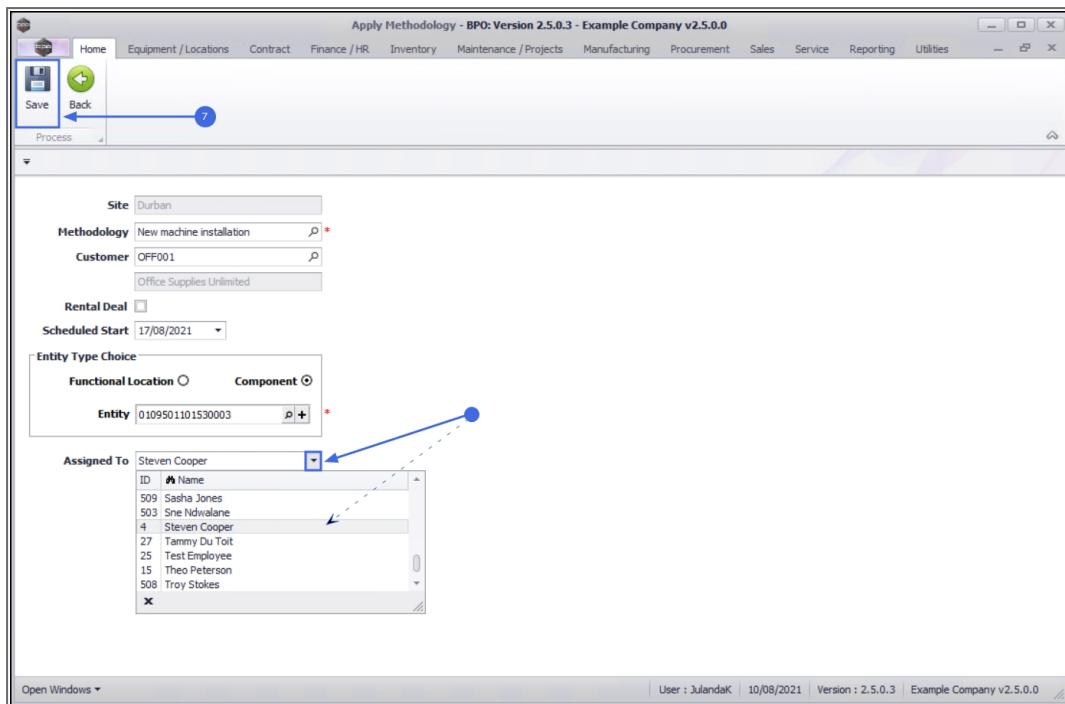> ✎ **Note** that for a New Deal project you will need to link a Functional Location.

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[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.
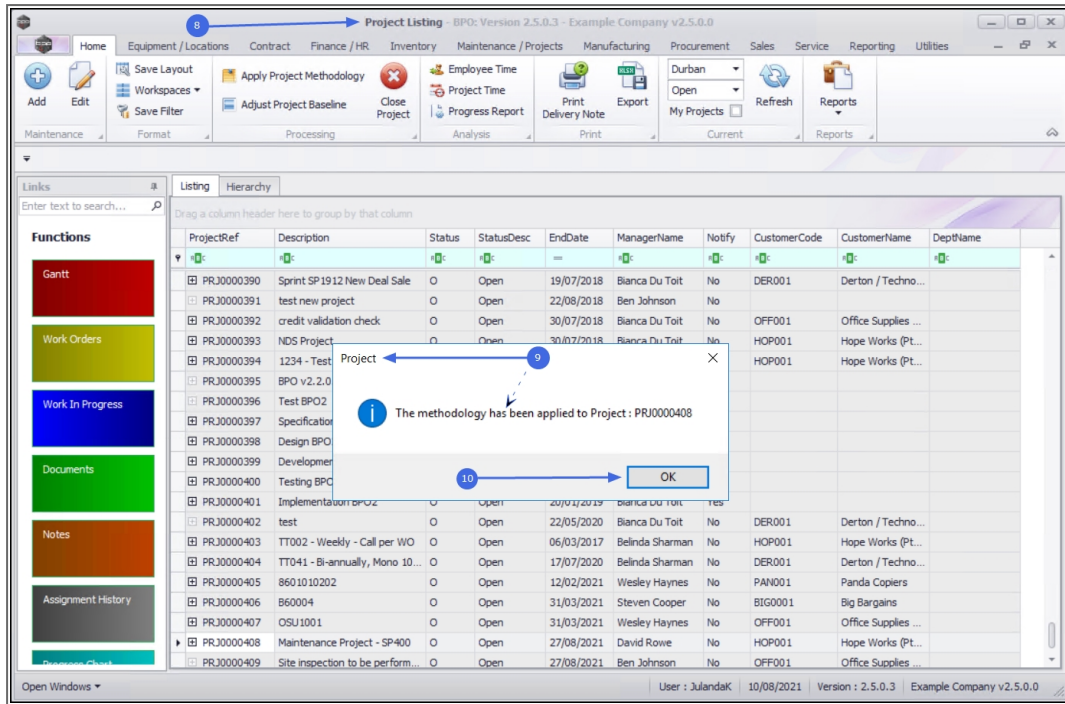   iii. Click on **OK**.

- **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**.
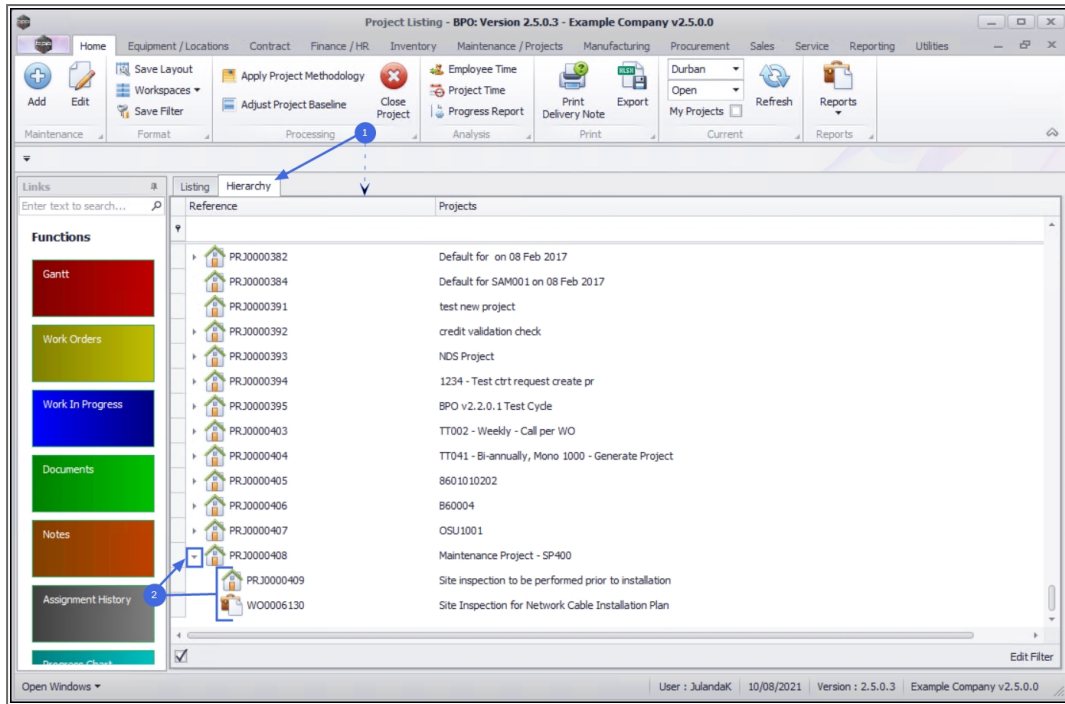
8. You will return to the **Project Listing** screen.

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