

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

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.

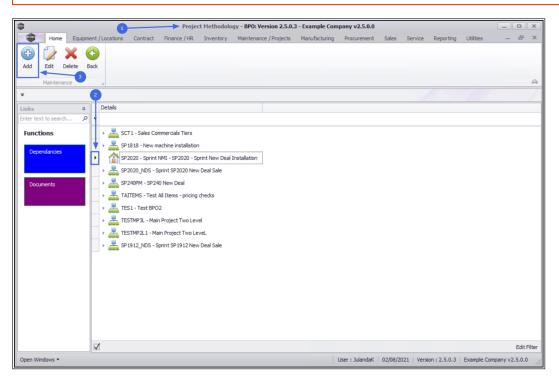
Ribbon Access: Maintenance / Projects > Standard Methodology





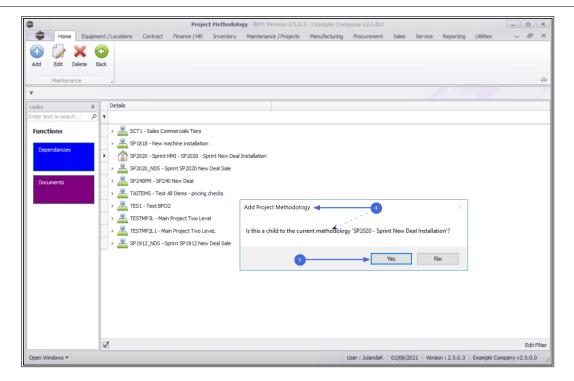
- 1. The **Project Methodology** screen will be displayed.
- 2. Click on the **row** of the **main project methodology** that you wish to **add** a **sub level** to.
- 3. Click on **Add**.

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 <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**.

Help v2024.5.0.7/1.0 - Pg 3 - Printed: 21/08/2024



- **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 days¹ 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 level² 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.

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

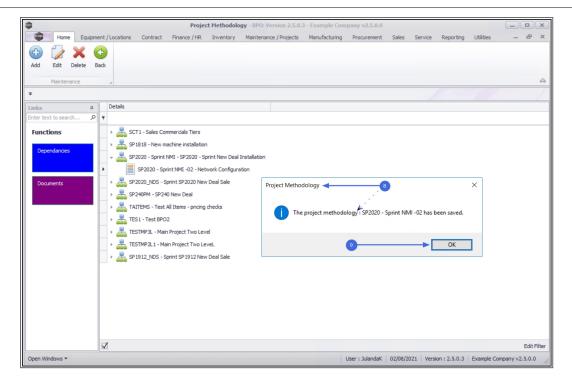
²1 - Very High 2 - High 3 - Moderate 4 - Low 5 - Very Low



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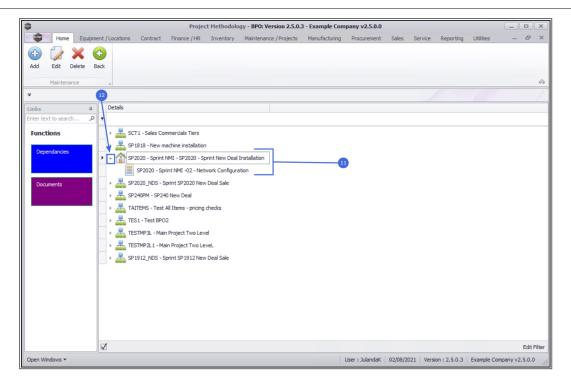
- 8. When you receive the **Project Methodology** message to confirm;
 - The project methodology: [methodology name] has been saved.
- 9. Click on **OK**.





- 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