

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.

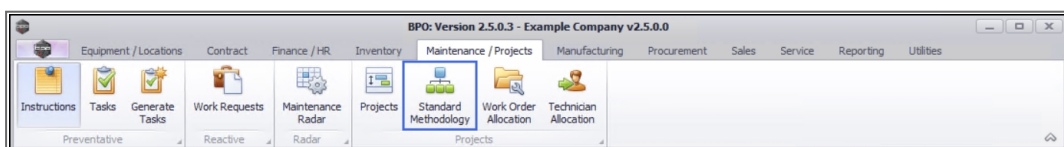
The following needs to be configured:

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



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

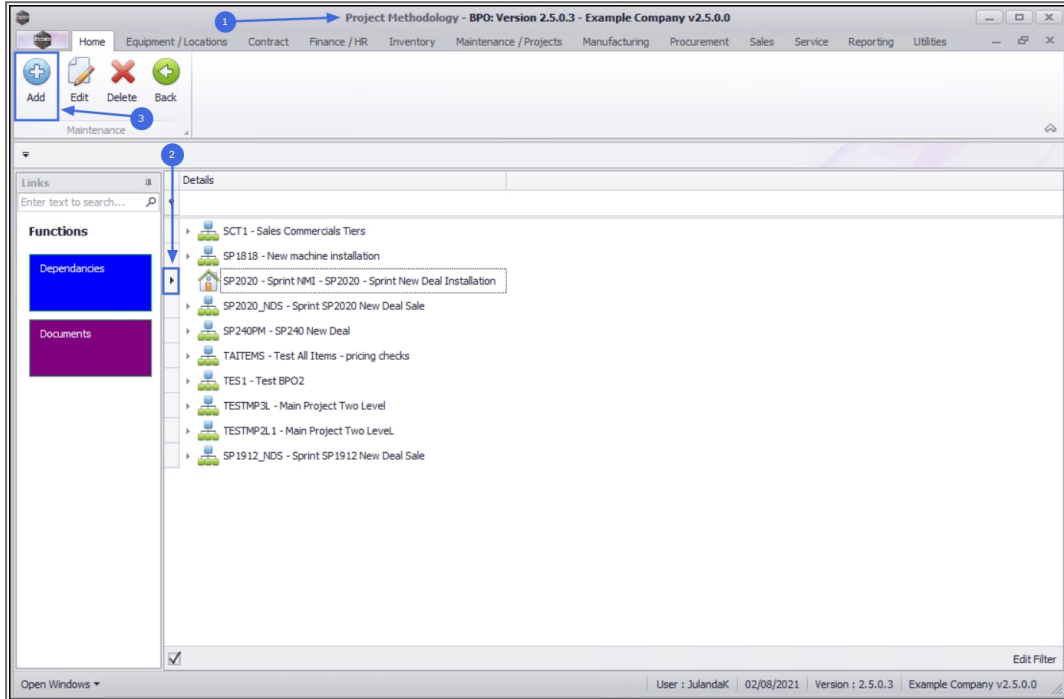
Ribbon Access: Maintenance / Projects > Standard Methodology



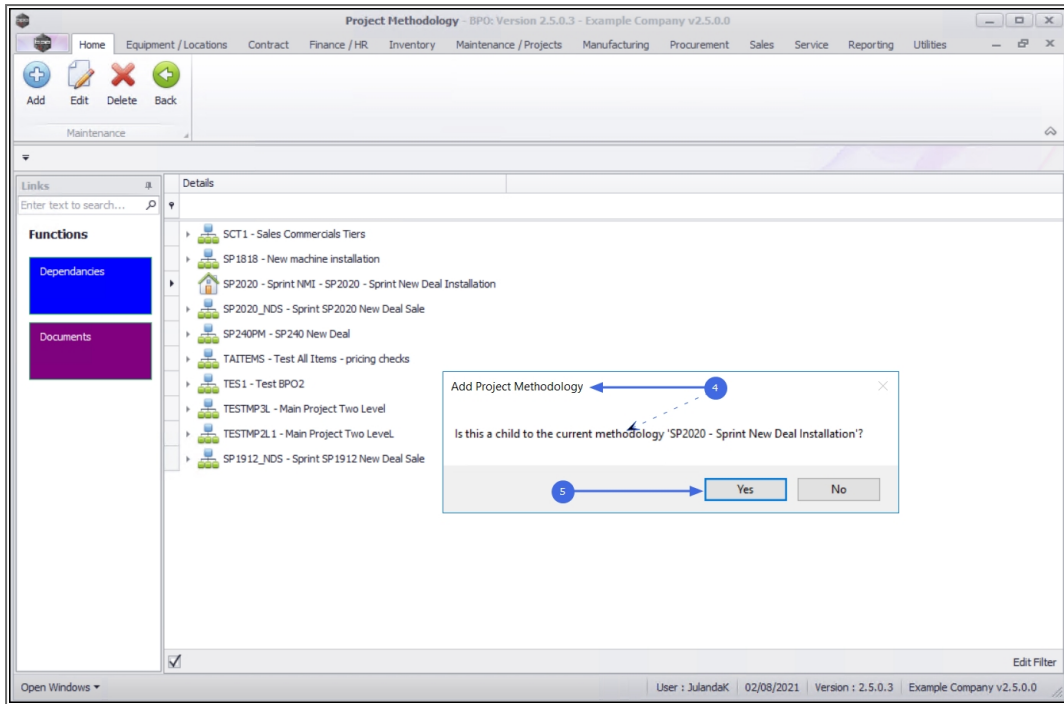
1. The **Project Methodology** screen will be displayed.
2. Click on the **row** of the **main project methodology** that you wish to **add** a sub level to.
3. Click on **Add**.



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.



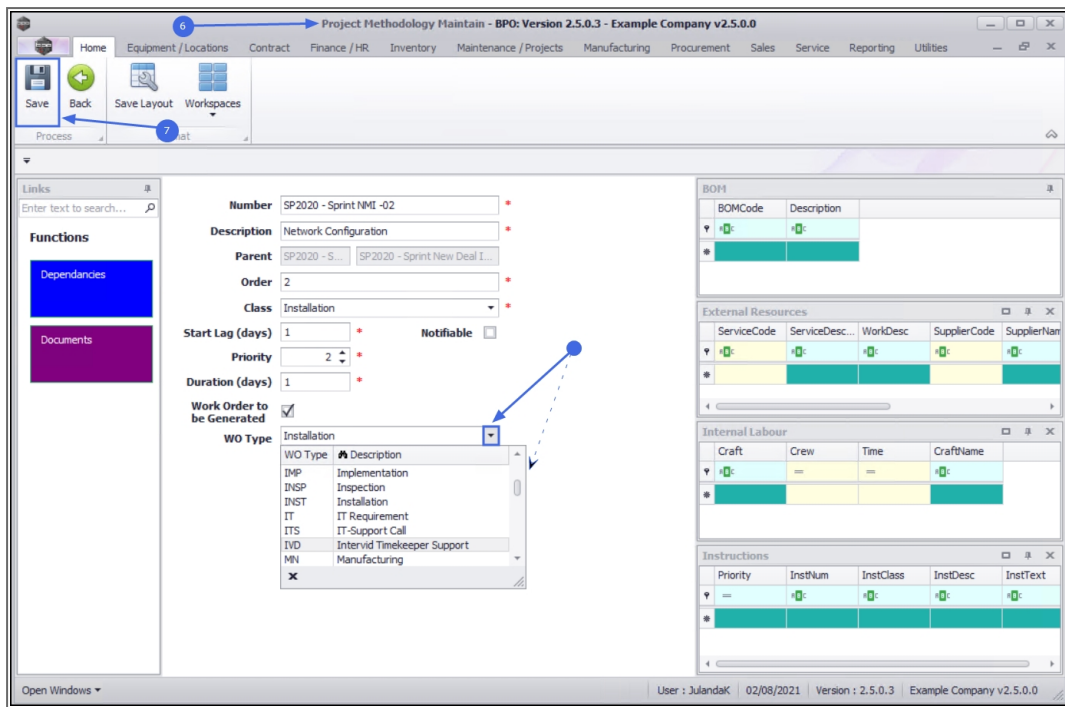
Note that this option is not used by the system. For notifications, assign the project work order(s) to a technician. If the company configuration is set up correctly, the technician will receive an email regarding the assignment.

- **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.

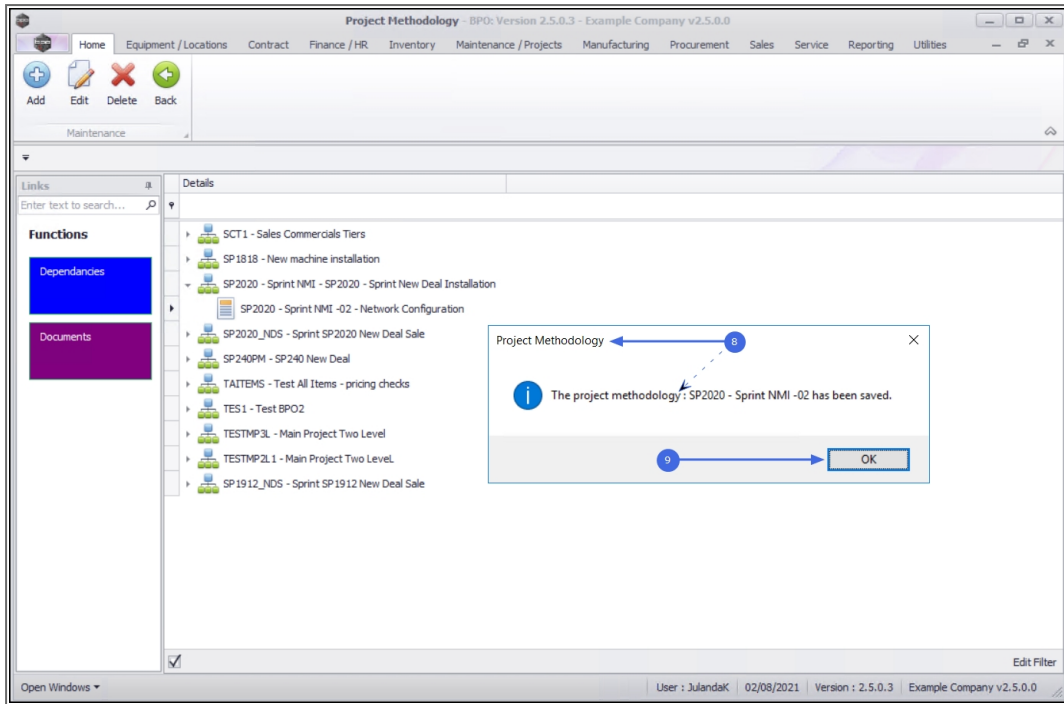
7. When you have finished entering the sub-layer details to the **Project Methodology Maintain** screen, click on **Save**.

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

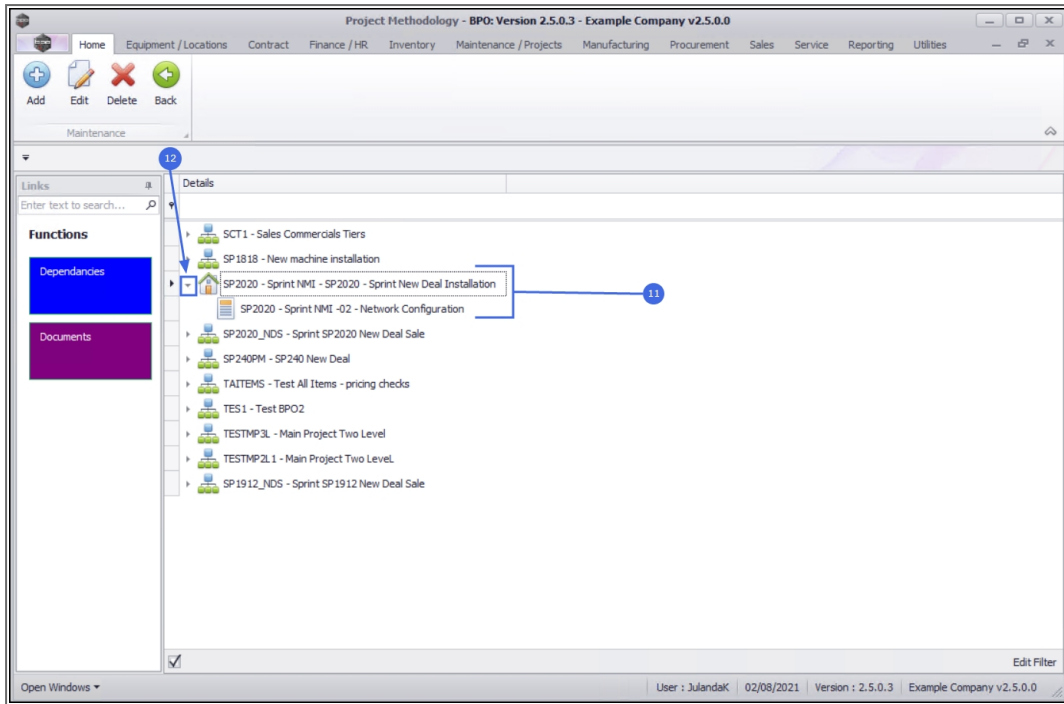
²1 - Very High 2 - High 3 - Moderate 4 - Low 5 - Very Low



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](#)

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