

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

## **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

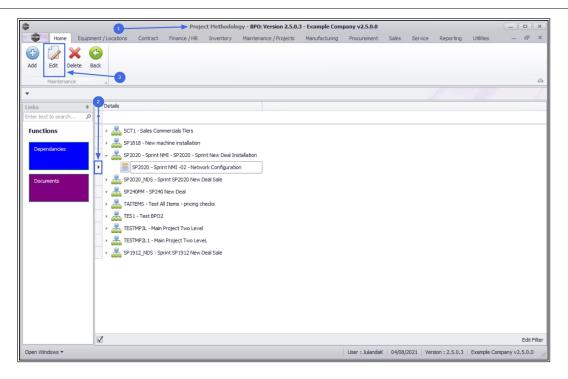


- 1. The **Project Methodology** screen will be displayed.
- 2. Click on the **row** of the **methodology layer** you wish to link an **External Resource** to.
- 3. Click on Edit.



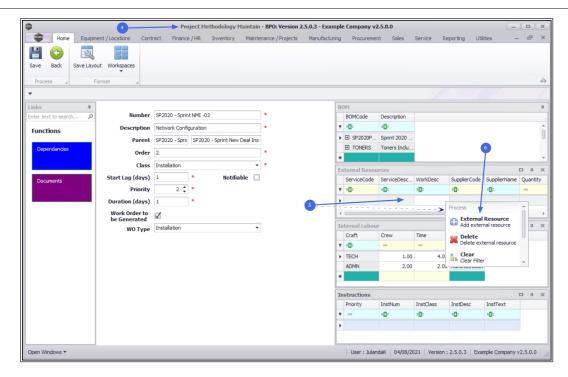
Short cut key: Right click to display the Maintenance menu list. Click on Edit.





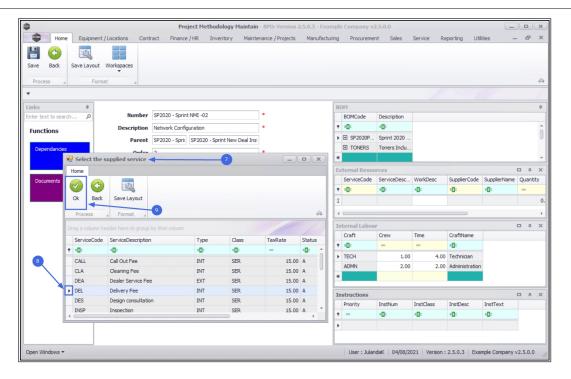
- 4. The Project Methodology Maintain screen will be displayed.
- 5. Right click on the next available row on the External Resources frame, to display the Process menu.
- 6. Click on External Resource Add external resource.





- 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.

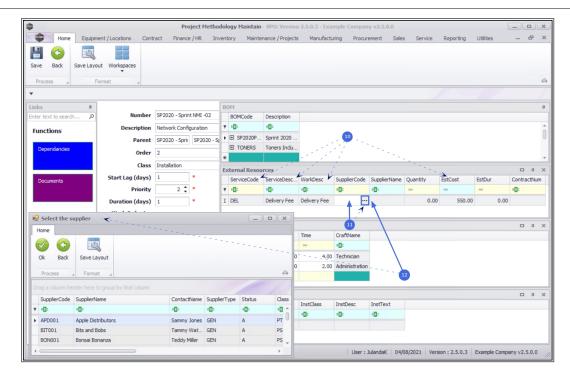




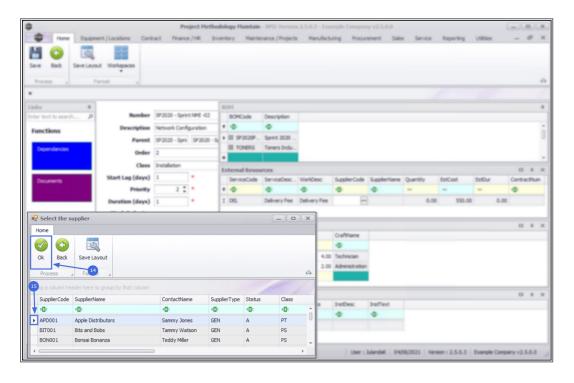
Expand the External Resources frame to display all the fields by click and drag the left side of the frame.

- 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.



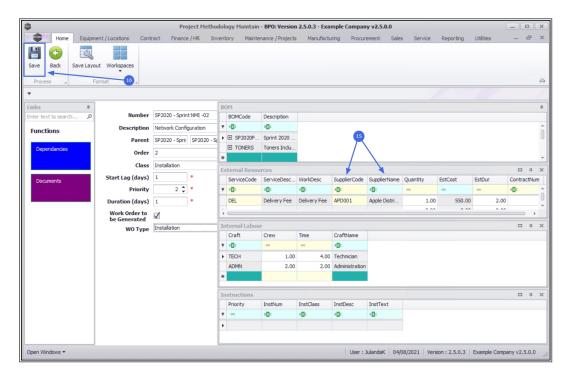


- 13. Click on the **row** of the **supplier** you wish to assign as the **external** resource.
- 14. Click on OK.



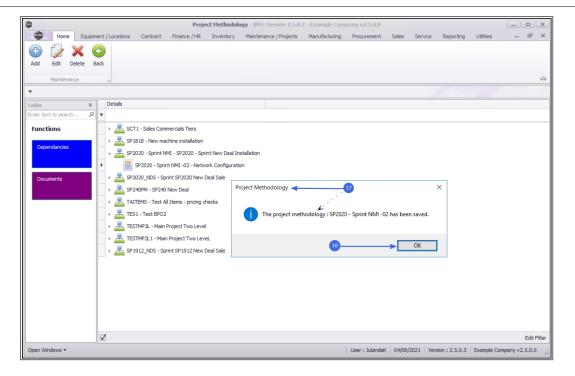


- 15. The **Supplier Code** and **Supplier Name** will populate with the supplier information selected.
  - **Quantity:** Type in or use the directional **arrows** to select the quantity required.
  - **Est Duration:** Type in or use the directional **arrows** to select the estimated time (in days) required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





#### **Related Topics**

• Remove an External Resource

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