

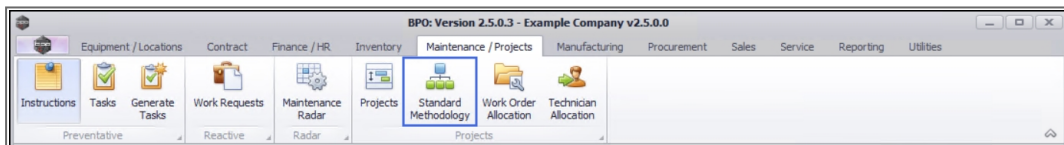
PROJECTS

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.

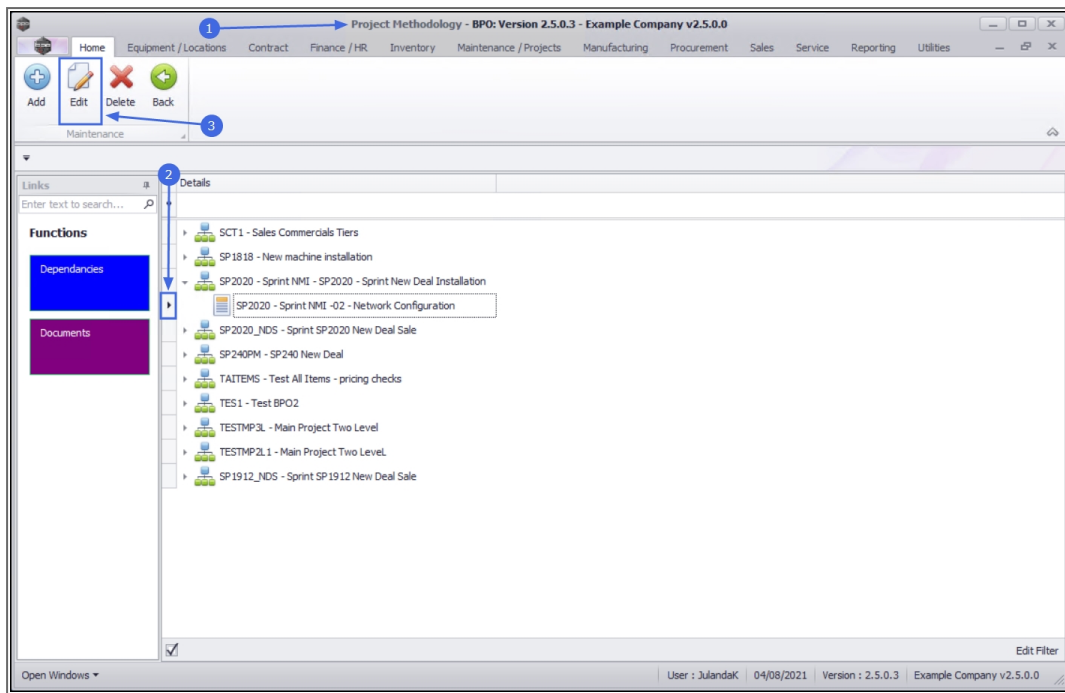
Ribbon Access: *Maintenance / Projects > Standard Methodology*



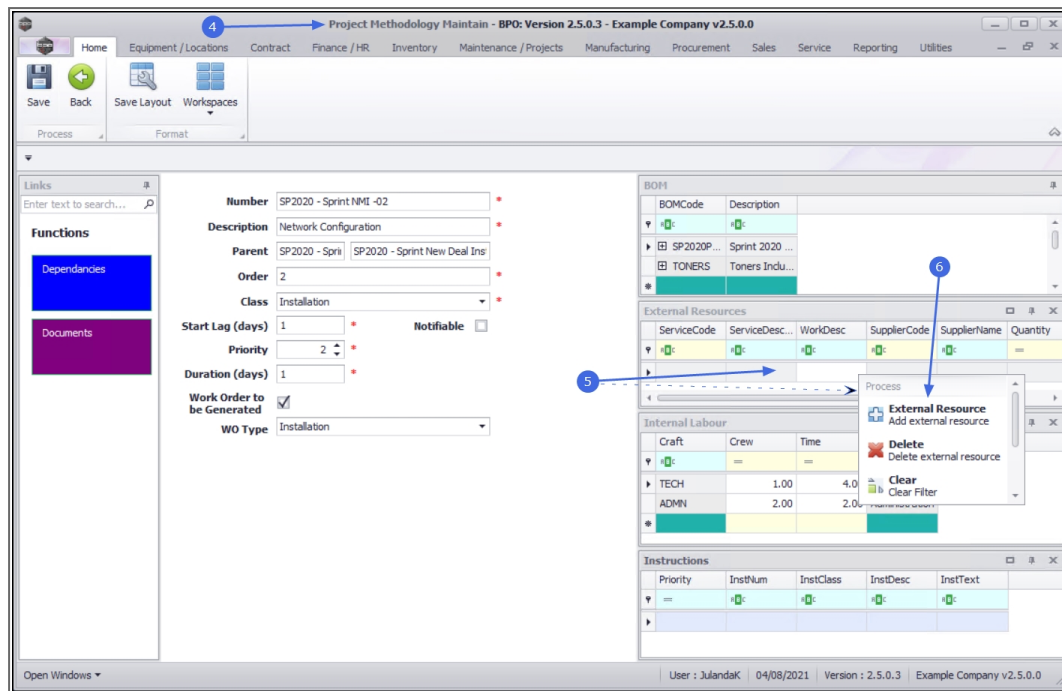
1. The **Project Methodology** screen will be displayed.
2. Click on the **row** of the **methodology layer** you wish to link an **External Resource** to.
3. Click on **Edit**.



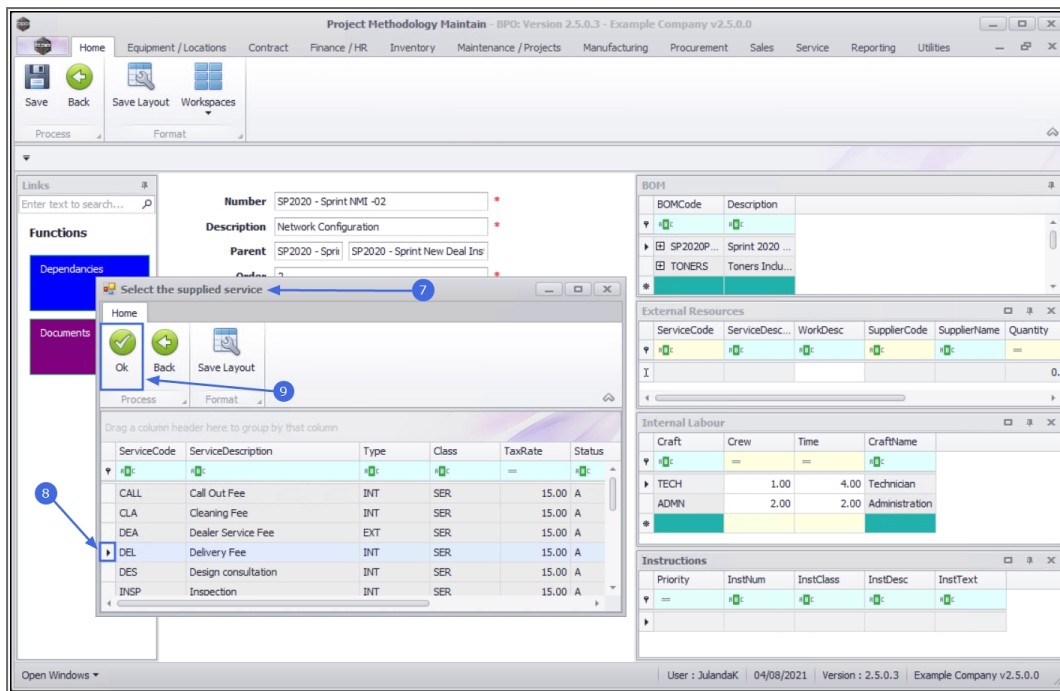
Short cut key: **Right click** to display the **Maintenance** menu list. Click on **Edit**.



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.

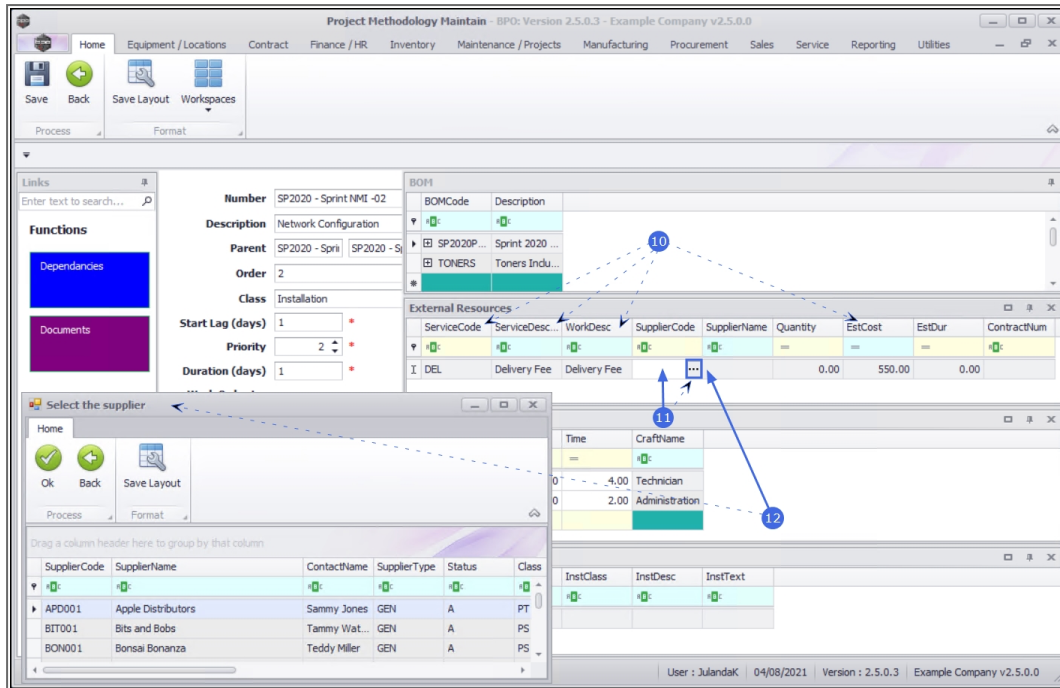


7. The **Select the supplied service** screen will be displayed.
8. Click on the **row** of the **external resource** you wish to **assign** to this **project methodology layer**.
9. Click on **OK**.



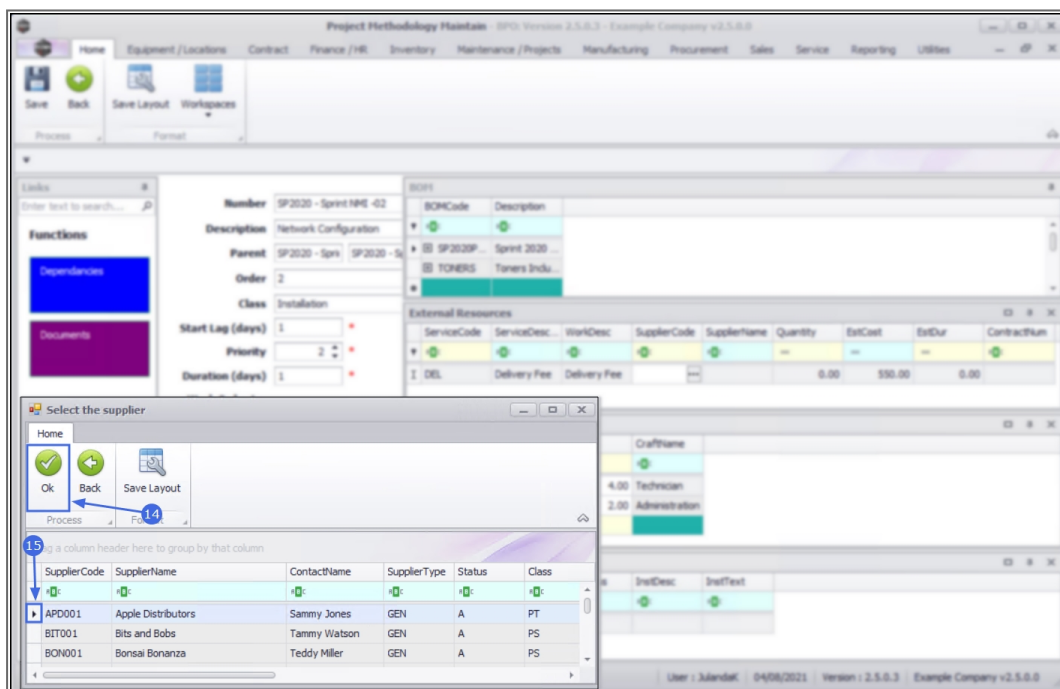

Expand the External Resources frame to display all the fields by click and drag the left side of the frame.

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**.

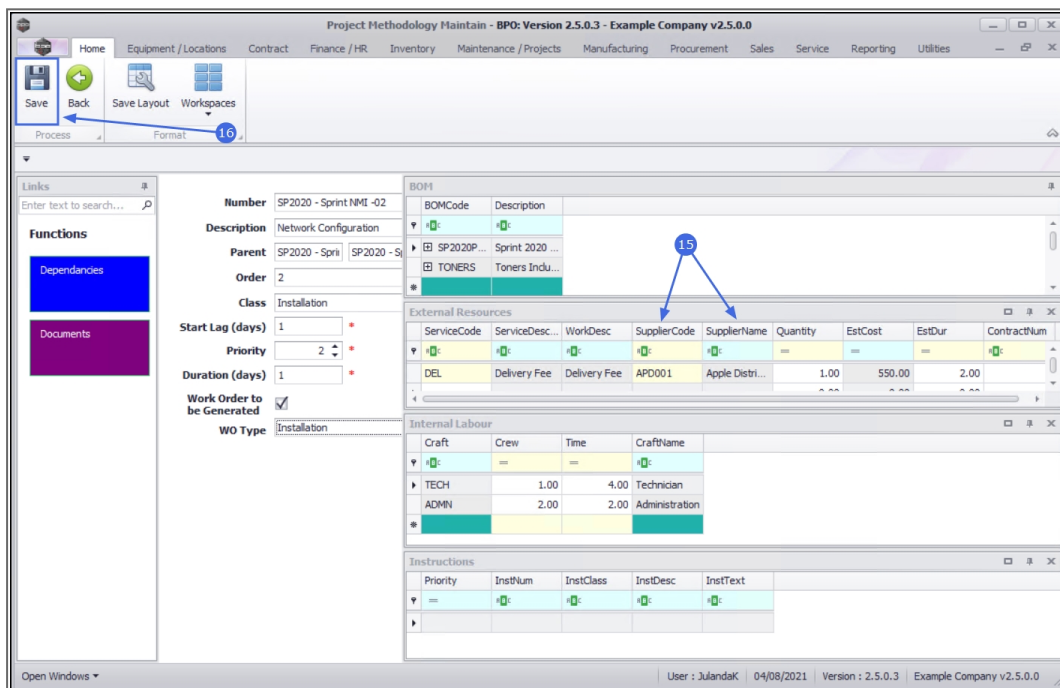
14. Click on **OK**.



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**.



Project Methodology Maintain - BPO: Version 2.5.0.3 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Process Format 15

Links
Enter text to search...

Functions
Dependencies
Documents

Number SP2020 - Sprint NMI -02
Description Network Configuration
Parent SP2020 - Spr SP2020 - S
Order 2
Class Installation
Start Lag (days) 1
Priority 2
Duration (days) 1
Work Order to be Generated ☒
WO Type Installation

BOM

BOMCode	Description
SP2020P...	Sprint 2020 ...
TONERS	Toners Indu...

External Resources

ServiceCode	ServiceDesc...	WorkDesc	SupplierCode	SupplierName	Quantity	EstCost	EstDur	ContractNum
DEL	Delivery Fee	Delivery Fee	APD001	Apple Distri...	1.00	550.00	2.00	

Internal Labour

Craft	Crew	Time	CraftName
TECH		1.00	4.00 Technician
ADMIN		2.00	Administration

Instructions

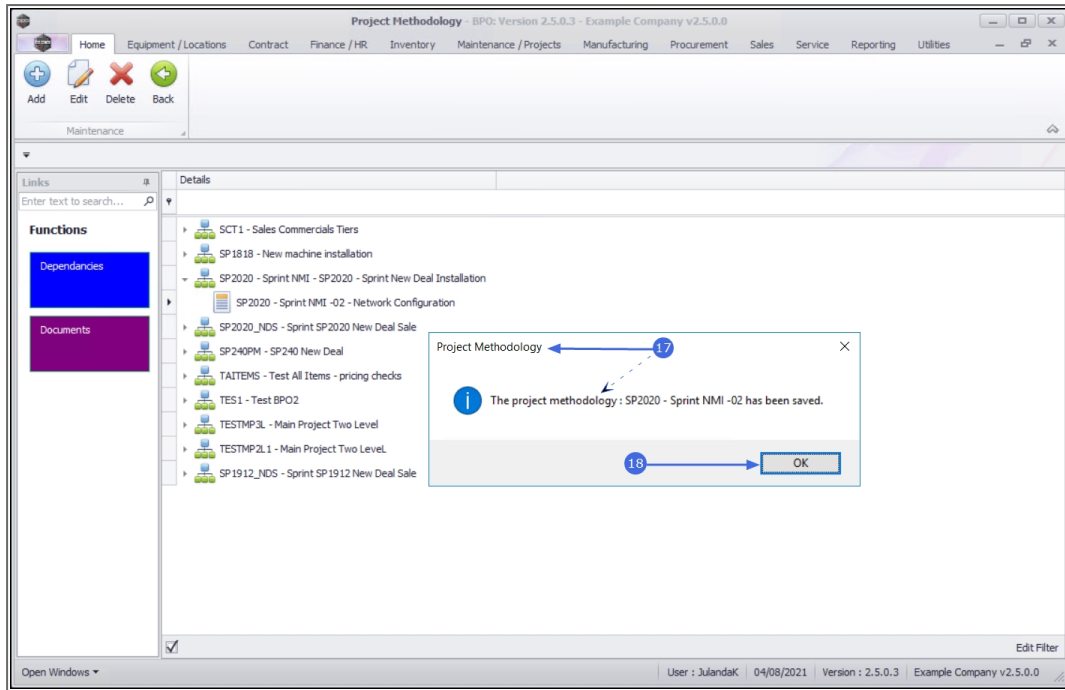
Priority	InstNum	InstClass	InstDesc	InstText

Open Windows User : JulandaK 04/08/2021 Version : 2.5.0.3 Example Company v2.5.0.0

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](#)

MNU.153.006

