**Work and Asset Management, V2.1.1**

**5.8.1.4 Manage Assign and Schedule Work**

Creation Date: November 23, 2015

Last Updated:

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## Brief Description

**Business Process: 5.8.1.4 WAM.v2.1.Manage Assign and Schedule Work**

**Process Type: Sub-Process**

**Parent Process: 5.8.1 WAM.V2.1.Manage Work and Work Orders**

**Sibling Processes: 5.8.1.2 WAM.v2.1.Manage Work Orders**

This process gets initiated when WAM Authorized User analyses shift and plans to assign activities to a shift and schedule it. If there is no existing shift, User creates a new shift by using either a template or without a template.

## Business Process Model Page 1



## Business Process Model Page 2



## Detail Business Process Model Description

[**1.0.**](#_Business_Process_Model_2) **Analyze Shift to Plan**

A**ctor/Role: WAM Authorized User**

**Description:** WAM Authorized User analyses Shift to plan activities and schedule.

[**1.1**](#_Business_Process_Model_2) **Request to Cancel Shift**

A**ctor/Role: WAM Authorized User**

**Description:** WAM Authorized User makes a request to cancel shift.

[**1.2**](#_Business_Process_Model_2) **Transition Crew Shift Status to “Canceled”**

A**ctor/Role: WAM**

**Description:** WAM transitions and updates Crew Shift status to ‘Canceled’ state

|  |
| --- |
| W1-CANSHFVAL (Canceled Schedule Plan Validation) |

**Process Plug-in enabled (Y)**  **Available Algorithm(s):**

|  |
| --- |
| W1-DailySchedule |
| W1-SchedulePlan |

**Business Object (Y) Business Object**

[**1.3**](#_Business_Process_Model_2) **Request to Create Shift With Template**

A**ctor/Role: WAM Authorized User**

**Description:** WAM Authorized User makes a request to create Shift using Shift Template.

|  |
| --- |
| Shift Template |

**Configuration required (Y/N) Entities to Configure:**

[**1.4**](#_Business_Process_Model_2) **Create Shift In “Planning “ Status**

A**ctor/Role: WAM**

**Description:** WAM creates Shift in Planning State

|  |
| --- |
| W1-DFCRSOWAG (Default Crew Shift Owning Access Group) |
| W1-DCRSHFINF (Daily Schedule Information) |
| W1-CRSHDELAL (Crew Shift Delete Allowed) |
| W1-DCRSHFVAL (Daily Crew Shift Validation) |
| W1-VALACTVCS (Validate Active Crew Shift) |
| W1-CRSHAUDRL (Activate Shift) |
| W1-WCRSHFINF (Schedule Plan Information) |
| W1-DFCRSOWAG (Default Crew Shift Owning Access Group) |
| W1-WCRSHFVAL (Schedule Plan Validation) |

**Process Plug-in enabled (Y)**  **Available Algorithm(s):**

|  |
| --- |
| W1-DailySchedule |
| W1-SchedulePlan |

**Business Object (Y) Business Object**

[**1.5**](#_Business_Process_Model_2) **Request to Create New Shift**

A**ctor/Role: WAM Authorized User**

**Description:** WAM Authorized User makes a request to create New Shift without using shift template.

|  |
| --- |
| Crew Shift |
| Schedule Plan |

**Configuration required (Y/N) Entities to Configure:**

[**1.6**](#_Business_Process_Model_1) **Prepare to Schedule Work**

A**ctor/Role: WAM Authorized User**

**Description:** WAM Authorized User prepares to schedule work for shift.

[**1.7**](#_Business_Process_Model_1) **Select Schedule Plan for Crew**

A**ctor/Role: WAM Authorized User**

**Description:** WAM Authorized User selects Schedule Plan from available plans for Crew

|  |
| --- |
| Schedule Plan |

**Configuration required (Y/N) Entities to Configure:**

[**1.8**](#_Business_Process_Model_1) **Select Crew Shift**

A**ctor/Role: WAM Authorized User**

**Description:** WAM Authorized User selects Crew Shift to assign and schedule work.

|  |
| --- |
| Crew Shift |

**Configuration required (Y/N) Entities to Configure:**

[**1.9**](#_Business_Process_Model_1) **Evaluate Hours of Availability**

A**ctor/Role: WAM Authorized User**

**Description:** WAM Authorized User evaluates available work hours for shift

|  |
| --- |
| Crew Shift |

**Configuration required (Y/N) Entities to Configure:**

[**2.0**](#_Business_Process_Model_1) **Identify Activities to Add to Crew’s Schedule**

A**ctor/Role: WAM Authorized User**

**Description:** WAM Authorized User identifies activities to add to Crew shift schedule

[**2.1**](#_Business_Process_Model_1) **Apply Selected Activities to Schedule**

A**ctor/Role: WAM Authorized User**

**Description:** WAM Authorized User selects activities and applies them to the Crew Shift schedule

[**2.2**](#_Business_Process_Model_1) **Add Activity to Schedule**

A**ctor/Role: WAM**

**Description:** WAM adds activities selected by Authorized User to the Schedule

|  |
| --- |
| W1-DailySchedule |
| W1-SchedulePlan |

**Business Object (Y) Business Object**

|  |
| --- |
| Activities |

**Configuration required (Y/N) Entities to Configure:**

[**2.3**](#_Business_Process_Model_1) **Evaluate Activation Crew Shift Criteria**

A**ctor/Role: WAM**

**Description:** WAM evaluates criteria to activate Crew Shift

|  |
| --- |
| W1-ACTCRSHF (Activate Shift) |
| W1-ACTSCHDPL (Activate Schedule Plan) |
| W1-CCWCRSHF (Cancel Schedule Plan) |

**Process Plug-in enabled (Y)**  **Available Algorithm(s):**

|  |
| --- |
| W1-DailySchedule |
| W1-SchedulePlan |

**Business Object (Y) Business Object**

|  |
| --- |
| Crew Shift Periodic Monitor |

**Customizable process (Y/N) Process Name**

[**2.4**](#_Business_Process_Model_1) **Request Activate Crew Shift**

A**ctor/Role: WAM Authorized User**

**Description:** WAM Authorized User makes a request to activate Crew Shift

[**2.5**](#_Business_Process_Model_1) **Transition Crew Shift Status to “Active”**

A**ctor/Role: WAM**

**Description:** WAM transitions and updates Crew Shift state to Active

|  |
| --- |
| W1-DailySchedule |
| W1-SchedulePlan |

**Business Object (Y) Business Object**

[**2.6**](#_Business_Process_Model_1) **Request Re-Plan Crew Shift**

A**ctor/Role: WAM Authorized User**

**Description:** WAM Authorized User makes a request to re-plan shift.

[**2.7**](#_Business_Process_Model_1) **Transition Crew Shift Status to “Planned”**

A**ctor/Role: WAM**

**Description:** WAM transitions crew shift status to ‘Planned’

|  |
| --- |
| W1-CLSCRSHF (Close Shift) |
| W1-CMPSCHDPL (Complete Schedule Plan) |

**Process Plug-in enabled (Y)**  **Available Algorithm(s):**

|  |
| --- |
| W1-DailySchedule |
| W1-SchedulePlan |

**Business Object (Y) Business Object**

[**2.8**](#_Business_Process_Model_1) **Evaluate Criteria to Close Crew Shift**

A**ctor/Role: WAM**

**Description:** WAM evaluates criteria to close crew shift.

|  |
| --- |
| W1-CLSCRSHF (Close Shift) |
| W1-CMPSCHDPL (Complete Schedule Plan) |
|  |

**Process Plug-in enabled (Y)**  **Available Algorithm(s):**

|  |
| --- |
| W1-DailySchedule |
| W1-SchedulePlan |
|  |

**Business Object (Y) Business Object**

|  |
| --- |
| Crew Shift Periodic Monitor |

**Customizable process (Y/N) Process Name**

[**2.9**](#_Business_Process_Model_1) **Transition Crew Shift Status to “Complete”**

A**ctor/Role: WAM**

**Description:** WAM transitions and updates crew shift status to ‘Complete’

|  |
| --- |
| W1-CMPSHFVAL (Close Schedule Plan Validation) |
| W1-CHKDALSCH (Check Daily Schedules**)** |

**Process Plug-in enabled (Y)**  **Available Algorithm(s):**

|  |
| --- |
| W1-DailySchedule |
| W1-SchedulePlan |
|  |

**Business Object (Y) Business Object**

## Test Documentation related to the Current Process

| ID | Document Name | Test Type |
| --- | --- | --- |
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## Document Control

**Change Record**

| Date | Author | Version | Change Reference |
| --- | --- | --- | --- |
|  |  |  |  |
| 12/09/2015 | Barry DeMartini,  Galina Polonsky | 1.0 | Initial Version |
| 09/10/2016 | Srinivas Kanteti | 1.1 | Apply template and formatting |
| 10/21/2016 | Galina Polonsky | 1.1 | Reviewed, Approved |
|  |  |  |  |

## Attachments

### 

### Daily Schedule

