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

**5.8.1.6 Report and Manage Equipment Usage and Other Direct Charges (ODC)**

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## Brief Description

**Business Process: 5.8.1.6 WAM.v2.1.Report and Manage Equipment Usage and Other Direct Charges (ODC)**

**Process Type: Sub-Process**

**Parent Process: 5.8.1 WAM.v2.1.Manage Work and Work Orders**

**Sibling Processes: 5.8.1.3 WAM.v2.1.Manage Approvals, 5.8.1.2 WAM.v2.1.Manage Work Orders**

This process gets initiated when WAM Authorized User reports equipment usage or reports miscellaneous direct charges incurred during course of work. The charges incurred are entered or updated in the WAM system. The information is reviewed and approved before creating any financial transactions the system.

## Business Process Model Page 1



## Business Process Model Page 2



## Detail Business Process Model Description

[**1.0**](#_Business_Process_Model_2) **Review Other Direct Charges**

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

**Description:** Authorized user reviews the request made to consider other direct charges or charges incurred for equipment usage during work

[**1.1**](#_Business_Process_Model_2) **Populate Required Data**

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

**Description:** Authorized user populates required data to create new Other Direct Charges in WAM application

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**1.2**](#_Business_Process_Model_2) **Add ODC in Created Status**

A**ctor/Role:**  WAM

**Description:** WAM creates new ODC in ‘Created’ state for the information entered by authorized user.

|  |
| --- |
| W1-ODCINFO (Other Direct Charges Information) |

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

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**1.3**](#_Business_Process_Model_2) **Add Equipment Line Item(s) and Populate Required Data**

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

**Description:** Authorized user adds equipment line item and [populates required data](#_ODC_Equipment_Details).

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**1.4**](#_Business_Process_Model_2) **Validate Data, Add Equipment Line Item(s) in Created Status, Display Summary**

A**ctor/Role:**  WAM

**Description:** WAM validates data and adds ODC line item in Created state.

|  |
| --- |
| W1-ODCDTLINF (Other Direct Charges Detail Information) |
| W1-ODCVALDTL (Validate ODC Detail Equipment) |
| W1-VALPRJINF (Validate Project Information) |
| W1-ODCPOPDTL (Populate Additional ODC Detail) |
| W1-ODCCOSDTL (Validate ODC Detail Cost Center and Expense Code) |

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

|  |
| --- |
| W1-ODC |
| W1-ODCEquipment |

**Business Object (Y/N) Business Object**

[**1.5**](#_Business_Process_Model_2) **Add Misc Line Item(s) and Populate Required Data**

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

**Description:** Authorized user adds miscellaneous line item and populates required data.

|  |
| --- |
| W1-ODCOther |

**Business Object (Y/N) Business Object**

[**1.6**](#_Business_Process_Model_2) **Validate Data, Add Misc Line Item(s) in Created Status, Display Summary**

A**ctor/Role:**  WAM

**Description:** WAM validates data and adds miscellaneous line item in Created state.

|  |
| --- |
| W1-ODCDTLINF (Other Direct Charges Detail Information) |
| W1-ODCVALDTO (Validate ODC Detail Other) |
| W1-VALPRJINF (Validate Project Information) |
| W1-ODCPOPDTL (Populate Additional ODC Detail) |
| W1-ODCCOSDTL (Validate ODC Detail Cost Center and Expense Code) |

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

|  |
| --- |
| W1-ODC |
| W1-ODCOther |

**Business Object (Y/N) Business Object**

[**1.7**](#_Business_Process_Model_2) **Submit for Approval**

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

**Description:** Authorized user submits the ODC request for approval.

|  |
| --- |
| W1-ODC |
| W1-ODCOther |
| W1-ODCEquipment |

**Business Object (Y/N) Business Object**

[**1.8**](#_Business_Process_Model_2) **Update ODC to “Pending” Approval**

A**ctor/Role:**  WAM

**Description:** System updates ODC to ‘Pending Approval’ state.

|  |
| --- |
| W1-ODCAPRREQ (Monitor ODC Approval Request) |
| W1-ODCRESAPP (Reset ODC Approval Profile) |
| W1-VALODCAPR (Validate ODC Detail for Approval) |
| W1-ODCCRAPRQ (Create ODC Approval Request) |

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

|  |
| --- |
| W1-ODC |
| W1-ODCOther |
| W1-ODCEquipment |

**Business Object (Y/N) Business Object**

[**1.9**](#_Business_Process_Model_2) **Manage Approval 5.8. 1.3 WAM.v2.1.Manage Approvals**

A**ctor/Role:**  WAM

**Description:** Approval of ODC is performed in WAM system. Please refer to process **5.8. 1.3 WAM.v2.1.Manage Approvals** for further details.

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**2.0**](#_Business_Process_Model_2) **Update ODC Status to “Rejected”**

A**ctor/Role:**  WAM

**Description:** ODC is updated to Rejected status

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**2.1**](#_Business_Process_Model_2) **Review Rejected ODC and Details**

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

**Description:** Authorized user reviews rejected ODC and its details. During this, the User can either reopen and resubmit the request for approval or cancel the request.

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**2.2**](#_Business_Process_Model_2) **Request Cancel ODC**

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

**Description:** Authorized user makes a request to cancel ODC

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**2.3**](#_Business_Process_Model_2) **Update ODC Status to “Canceled”**

A**ctor/Role:**  WAM

**Description:** WAM updates ODC status to ‘Canceled’ state

|  |
| --- |
| W1-ODCCANRQ (Cancel ODC Approval Request) |
| W1-ODCCANDTL (Cancel ODC Details) |

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

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**2.4**](#_Business_Process_Model_2) **Update ODC Detail(s) Status to “Canceled”**

A**ctor/Role:**  WAM

**Description:** WAM updates ODC details to ‘Canceled’ state. It reverses the financial transaction if exists.

|  |
| --- |
| W1-ODRVFTDTL (Reverse ODC financial transaction) |

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

|  |
| --- |
| W1-ODCOther |
| W1-ODCEquipment |

**Business Object (Y/N) Business Object**

[**2.5**](#_Business_Process_Model_2) **Request Reopen ODC**

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

**Description:** Authorized user makes a request to reopen the ODC.

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**2.6**](#_Business_Process_Model_2) **Update ODC to Created Status**

A**ctor/Role:**  WAM

**Description:** WAM updates ODC to ‘Created’ state.

|  |
| --- |
| W1-ODCCANRQ (Cancel ODC Approval Request) |

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

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**2.8**](#_Business_Process_Model_2) **Update Line Item(s)**

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

**Description:** Authorized user updates line item(s)

|  |
| --- |
| W1-ODC |
| W1-ODCOther |
| W1-ODCEquipment |

**Business Object (Y/N) Business Object**

[**2.9**](#_Business_Process_Model_2) **Update ODC Details**

A**ctor/Role:**  WAM

**Description:** WAM updates ODC details in system.

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**3.0**](#_Business_Process_Model_2) **Search for ODC**

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

**Description:** Authorized user makes a search for ODC in system.

[**3.1**](#_Business_Process_Model_2) **Update ODC to “Approved”**

A**ctor/Role:**  WAM

**Description:** WAM updates ODC to ‘Approved’ status.

|  |
| --- |
| W1-ODCAPRREQ (Monitor ODC Approval Request) |
| W1-ODCRESAPP (Reset ODC Approval Profile) |

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

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**3.2**](#_Business_Process_Model_2) **Review Approved ODC Details**

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

**Description:** Authorized user reviews details of ODC that are approved.

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**3.3**](#_Business_Process_Model_2) **Request Withdraw Approval**

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

**Description:** Authorized user makes a request to withdraw approval.

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**3.4**](#_Business_Process_Model_2) **Update ODC to Created Status**

A**ctor/Role:**  WAM

**Description:** WAM updates ODC to ‘Created’ state.

|  |
| --- |
| W1-ODCCANRQ (Cancel ODC Approval Request) |

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

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**3.5**](#_Business_Process_Model_2) **Update Line Item(s)**

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

**Description:** Authorized user updates line item(s)

|  |
| --- |
| W1-ODCOther |
| W1-ODCEquipment |

**Business Object (Y/N) Business Object**

[**3.6**](#_Business_Process_Model_2) **Update ODC Details**

A**ctor/Role:**  WAM

**Description:** WAM updates ODC details in system.

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**3.7**](#_Business_Process_Model_1) **Identify and Validate Approved ODC Details**

A**ctor/Role:**  WAM

**Description:** WAM identifies approved ODC and validates them for further processing.

|  |
| --- |
| F1-AT-RQJ (Transition to Default Next Status (Java)) |

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

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

|  |
| --- |
| ODC MO Periodic Monitor Process |

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

[**3.8**](#_Business_Process_Model_1) **Create Financial Transaction(s)**

A**ctor/Role:**  WAM

**Description:** WAM creates financial transactions for the ODC(s).

|  |
| --- |
| W1-ODCRFTDTL (Create ODC financial transaction) |

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

|  |
| --- |
| W1-ODCOther |
| W1-ODCEquipment |

**Business Object (Y/N) Business Object**

[**3.9**](#_Business_Process_Model_1) **Update ODC Details(s) Status to “Posted”**

A**ctor/Role:**  WAM

**Description:** WAM updates ODC Detail(s) to ‘Posted’ state.

|  |
| --- |
| W1-ODCRFTDTL (Create ODC financial transaction) |

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

|  |
| --- |
| W1-ODCOther |
| W1-ODCEquipment |

**Business Object (Y/N) Business Object**

[**4.0**](#_Business_Process_Model_1) **Update ODC Status to “Posted”**

A**ctor/Role:**  WAM

**Description:** WAM updates ODC to ‘Posted’ state.

|  |
| --- |
| W1-ODCMOVEDT (Transition ODC and ODC Detail to Posted) |

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

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**4.1**](#_Business_Process_Model_1) **Review Posted ODC Details**

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

**Description:** Authorized user reviews ODC that are in ‘posted’ state.

[**4.2**](#_Business_Process_Model_1) **Request Reopen ODC**

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

**Description:** Authorized user makes a request to reopen the ODC.

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) Business Object**

[**4.3**](#_Business_Process_Model_1) **Update ODC to Created Status**

A**ctor/Role:**  WAM

**Description:** WAM updates ODC to ‘Created’ state.

|  |
| --- |
| W1-ODCCANRQ (Cancel ODC Approval Request) |

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

|  |
| --- |
| W1-ODC |

**Business Object (Y/N) 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 |
| --- | --- | --- | --- |
|  |  |  |  |
| 10/9/15 | Barry DeMartini,  Galina Polonsky | 1.0 | Initial Version |
| 06/07/2016 | Huan Vu | 1.0 | Reviewed |
| 07/07/2016 | Srinivas Kanteti | 1.1 | Applied Template, Formatting, minor changes after review |
| 09/10/2016 | Galina Polonsky | 1.1 | Reviewed, Approved |

## Attachments

### W1-ODC



### W1-ODCOther



### W1-ODCEquipment



### ODC Equipment Details Sample

