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

**5.8.2.1 Manage Projects**

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## Brief Description

**Business Process: 5.8.2.1 WAM.v2.1.Manage Projects**

**Process Type: Sub-Process**

**Parent Process: 5.8.2 WAM.V2.1.Manage Projects**

**Sibling Processes: 5.8.1.2 WAM.v2.1.Manage Work Orders, 5.8.1.3 WAM.v2.1.Manage Approvals, 5.8.1.5 WAM.v2.1.Report Time and Manage Timesheets, 5.8.1.6 WAM.v2.1.Report and Manage Equipment Usage and Other Direct Charges(ODC)**

This process gets initiated when a WAM Authorized user analyses requirements and creates a project in WAM system to manage it. The project after getting created goes through the approval process and if approved, the project gets started and work is performed through respective work orders. A project may be divided and can comprise of sub-projects if felt necessary to manage effectively. Finally when all work is done, the project is completed.

## Business Process Model Page 1



## Business Process Model Page 2



## Business Process Model Page 3



## Detail Business Process Model Description

[**1.0.**](#_Business_Process_Model_2) **Analyze Requirements**

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

**Description:** WAM Authorized User analyses requirements to create project in WAM.

[**1.1**](#_Business_Process_Model_2) **Populate Project Required Data and Project Budget**

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

**Description:** WAM Authorized User [populates required data to create project](#_Add_Project) along with budget information.

|  |
| --- |
| Description of Project |
| Project Category |
| Supervisor |
| Allow Charge |
| Account Segment |
| Budget Amount |
| Cost Center and respective percentages |
| Schedule Start / End Dates |

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

[**1.2**](#_Business_Process_Model_2) **Set Project Do Not Allow Charges**

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

**Description:** WAM Authorized User depending on the nature of project can set value not to allow charge of other projects to this.

|  |
| --- |
| Allow Charge |

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

[**1.3**](#_Business_Process_Model_2) **Set Project Allow Charges**

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

**Description:** WAM Authorized User can set value to allow charge of other project to this.

|  |
| --- |
| Allow Charge |

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

[**1.4**](#_Business_Process_Model_2) **Add Project in “Created” Status**

A**ctor/Role: WAM**

**Description:** WAM adds Project record in ‘Created’ status.

|  |
| --- |
| W1-PRJINFO (Project Information) |
| W1-PRJDELALW (Project Delete Allowed) |
| W1-PRJVAL (Project Validation) |
| W1-CNPJAPRQ (Cancel Project Approval Request) |

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

|  |
| --- |
| [W1-Project](#_W1-Project) |
| W1-ProjectDocuments |
| W1-ProjectNotes |
|  |

**Business Object (Y) Business Object**

[**1.5**](#_Business_Process_Model_2) **Search For Existing Project**

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

**Description:** WAM Authorized User can make [a search for existing project](#_Search_Project).

|  |
| --- |
| Description of Project |
| Status |
| Project Category |
| Parent Project ID |
| Estimate / Actual Start / End Dates |
| Allow charge values |
| Owning organization |

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

[**1.6**](#_Business_Process_Model_2) **Populate Project Required Data**

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

**Description:** WAM Authorized User populates project required data.

|  |
| --- |
| Description of Project |
| Project Category |
| Supervisor |
| Allow Charge |
| Account Segment |
| Budget Amount |
| Cost Center and respective percentages |
| Schedule Start / End Dates |

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

[**1.7**](#_Business_Process_Model_2) **Submit Project For Approval**

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

**Description:** WAM Authorized User submits project for Approval.

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

A**ctor/Role: WAM**

**Description:** WAM updates project status to “Pending Approval’.

|  |
| --- |
| W1-CHPTPRJAP (Check Parent Project Approval) |
| W1-CHKPRJCC (Check Project Cost Centers before Approval) |
| W1-CRPRJAPRQ (Create Project Approval Request) |
| W1-MONPJAPRQ (Monitor Project Approval Request) |

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

|  |
| --- |
| W1-Project |

**Business Object (Y) Business Object**

[**1.9**](#_Business_Process_Model_2) **Manage Approval**

A**ctor/Role: WAM**

**Description:** Approvals of projects has a specific process. Please refer to process 5.8.1.3 WAM.v2.1.Manage Approvals for more details.

[**2.0**](#_Business_Process_Model_2) **Update Project to “Approved”**

A**ctor/Role: WAM**

**Description:** WAM updates the status of project to “Approved” state.

|  |
| --- |
| W1-MONAPRPRJ (Monitor Approved Project) |

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

|  |
| --- |
| W1-Project |

**Business Object (Y) Business Object**

[**2.0.0**](#_Business_Process_Model_2) **Update Project Status to “Rejected”**

A**ctor/Role: WAM**

**Description:** WAM updates project status to “Rejected” status

|  |
| --- |
| W1-Project |

**Business Object (Y) Business Object**

[**2.0.1**](#_Business_Process_Model_2) **Review Rejected Project**

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

**Description:** WAM Authorized User can review the information of the rejected project.

[**2.0.2**](#_Business_Process_Model_2) **Request Cancel Project**

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

**Description:** WAM Authorized User can make a request to cancel project.

[**2.0.3**](#_Business_Process_Model_2) **Validate All Related Objects are Cancelled**

A**ctor/Role: WAM**

**Description:** WAM validates that all related objects are cancelled.

|  |
| --- |
| W1-RSTPRJAPP (Reset Project Approval Profile) |
| W1-NCNPJROBJ (Check for Non Canceled Objs Referencing Project) |
| W1-CNPJAPRQ (Cancel Project Approval Request) |
| W1-PTPJMONIT (Tell Parent Project to Monitor Itself) |

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

|  |
| --- |
| W1-Project |

**Business Object (Y) Business Object**

[**2.0.4**](#_Business_Process_Model_2) **Update Project Status to “Cancelled”**

A**ctor/Role: WAM**

**Description:** WAM updates the status of project to “Cancelled”

|  |
| --- |
| W1-Project |

**Business Object (Y) Business Object**

[**2.0.5**](#_Business_Process_Model_2) **Change Project Details**

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

**Description:** WAM Authorized User makes changes to project information and makes a request to WAM to change project details.

[**2.0.6**](#_Business_Process_Model_2) **Update Project**

A**ctor/Role: WAM**

**Description:** WAM updates changes made to project information.

[**2.0.7**](#_Business_Process_Model_2) **Request Re-Submit Project For Approval**

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

**Description:** WAM Authorized User makes a request to resubmit project for approval.

[**2.0.8**](#_Business_Process_Model_2) **Update Project to “Created” Status**

A**ctor/Role: WAM**

**Description:** WAM updates project to “Created” status.

|  |
| --- |
| W1-Project |

**Business Object (Y) Business Object**

[**2.1**](#_Business_Process_Model_2) **Review Approved Project**

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

**Description:** WAM Authorized user reviews project that is approved.

[**2.2**](#_Business_Process_Model_1) **Request Withdraw Approval**

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

**Description:** WAM Authorized User makes a request to withdraw approval.

[**2.3**](#_Business_Process_Model_4) **Update Project to “Created” Status**

A**ctor/Role: WAM**

**Description:** WAM updates project to “Created” status.

|  |
| --- |
| W1-Project |

**Business Object (Y) Business Object**

[**2.4**](#_Business_Process_Model_4) **Evaluate Work Orders(s)**

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

**Description:** WAM Authorized User evaluates Work Order(s) if any related and existing for the project.

**Note: Sub-project and Project must be approved or started before any references are made to them in Work Order.**

[**2.5**](#_Business_Process_Model_4) **Create Work Order**

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

**Description:** WAM Authorized User creates Work Order. Please refer to 5.8.1.2 WAM.v2.1Manage Work Orders process for more details

[**2.6**](#_Business_Process_Model_4) **Select Work Order Activity in Planned or Approved Status**

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

**Description:** WAM Authorized User selects Work Order activity that is in Planned or Approved status.

[**2.7**](#_Business_Process_Model_4) **Add Project Information to Work Order Activity**

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

**Description:** WAM Authorized User adds project information to Work Order Activity.

[**2.8**](#_Business_Process_Model_4) **Update Activity with Project Information**

A**ctor/Role: WAM**

**Description:** WAM updates Activity with Project information.

[**2.9**](#_Business_Process_Model_4) **Perform Work**

A**ctor/Role: Crew Or Worker**

**Description:** Field Crew or Worker performs actual work in the field.

[**3.0**](#_Business_Process_Model_4) **Review Project Estimates**

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

**Description:** WAM Authorized User reviews project estimates.

[**3.1**](#_Business_Process_Model_4) **Request Start Project**

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

**Description:** WAM Authorized User makes a request to start project.

[**3.2**](#_Business_Process_Model_4) **Validate and Update Status to “Started”**

A**ctor/Role: WAM**

**Description:** WAM validates and updates status of project to “Started”

|  |
| --- |
| W1-MONAPRPRJ (Monitor Approved Project) |
| W1-CHPTPRJST (Check if Parent Project has Actual Start Date) |
| W1-CHKAPRPRJ (Check Approved Project) |

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

|  |
| --- |
| W1-Project |

**Business Object (Y) Business Object**

[**3.3**](#_Business_Process_Model_4) **Review Project Costs**

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

**Description:** WAM Authorized User reviews costs related to project.

[**3.4**](#_Business_Process_Model_4) **Add Timesheet**

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

**Description:** WAM Authorized User adds timesheets related to the work performed by crew in field. Please refer to process 5.8.1.5 WAM.v2.1.Report Time and Manage Timesheets process for more details.

[**3.5**](#_Business_Process_Model_4) **Add ODC**

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

**Description:** WAM Authorized User adds Other Direct Charges related to the work performed by crew. Please refer to process 5.8.1.6 WAM.v2.1.Report and Manage Equipment Usage and Other Direct Charges(ODC) process for more details

[**3.6**](#_Business_Process_Model_4) **Review Sub-Project Completion**

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

**Description:** WAM Authorized User reviews Sub-Project completion.

[**3.7**](#_Business_Process_Model_1) **Review Project and Sub-Projects**

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

**Description:** WAM Authorized User reviews projects and its sub-projects.

[**3.8**](#_Business_Process_Model_1) **Request Complete Sub-Project**

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

**Description:** WAM Authorized User makes a request to complete Sub-project.

[**3.9**](#_Business_Process_Model_1) **Validate all Related Activities and Other Charges are Complete or Canceled**

A**ctor/Role: WAM**

**Description:** WAM validates that all related activities and other charges are complete or canceled.

|  |
| --- |
| W1-CHKSPJACT (Check Subprojects and Activities States) |
| W1-PTPJMONIT (Tell Parent Project to Monitor Itself) |

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

|  |
| --- |
| W1-Project |

**Business Object (Y) Business Object**

[**4.0**](#_Business_Process_Model_1) **Update Sub-Project Status to Complete**

A**ctor/Role: WAM**

**Description:** WAM updates sub-projects status to complete.

|  |
| --- |
| W1-Project |

**Business Object (Y) Business Object**

[**4.1**](#_Business_Process_Model_1) **Update Project to Complete**

A**ctor/Role: WAM**

**Description:** WAM updated project status to “Complete”

|  |
| --- |
| W1-CHKSPJACT (Check Subprojects and Activities States) |
| W1-PTPJMONIT (Tell Parent Project to Monitor Itself) |

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

|  |
| --- |
| W1-Project |

**Business Object (Y) Business Object**

[**4.2**](#_Business_Process_Model_1) **Review Actual Project Cost**

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

**Description:** WAM Authorized User reviews actual cost of project.

[**4.3**](#_Business_Process_Model_1) **Request Close Sub-Project**

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

**Description:** WAM Authorized User makes a request to close sub-project.

[**4.4**](#_Business_Process_Model_1) **Validate All Related Work Orders, Sub-Projects, Other Charges are Complete or Canceled**

A**ctor/Role: WAM**

**Description:** WAM validates to ensure that all related work orders, sub-projects, other charges are completed or canceled.

|  |
| --- |
| W1-Project |

**Business Object (Y) Business Object**

[**4.5**](#_Business_Process_Model_1) **Update Sub Project to Close**

A**ctor/Role: WAM**

**Description:** WAM updates status of sub-project to “Closed” status

|  |
| --- |
| W1-CHWOSPJAC (Check WO, Subprojects and Activities) |

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

|  |
| --- |
| W1-Project |

**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 |
| --- | --- | --- | --- |
|  |  |  |  |
| 12/9/15 | Barry DeMartini,  Galina Polonsky | 1.0 | Initial Version |
| 09/17/2016 | Srinivas Kanteti | 1.1 | Applied Template, Formatting, minor changes after review |
| 10/19/2016 | Galina Polonsky | 1.1 | Reviewed, Approved |
|  |  |  |  |

## Attachments

### 

### W1-Project



### Add Project



### Search Project

