Search for a Work Plan Association — Criteria

Overview

The Maintenance and Utilization module Work Plan Association process provides the ability to create and maintain associations between Work Plans characterized in the M&U module and associated information stored in the Warehouse module. The following Warehouse specifications are mapped to M&U during a Work Order request:

Warehouse Specifications:
- stock number
- item condition
- preservation level
- shipment preparation
- storage type

The work order is generated based on the associated work plan information:

Work Plan Information:
- tasks
- parts
- tools/equipment
- certifications

Navigation

Maintenance > Work Plan Assoc > Work Plan Assoc Search Criteria page

Procedures

Search for a Work Plan Assoc

*One or more of the Search Criteria fields can be entered to isolate the results. By default, all results are displayed. **Bold** numbered steps are required.*

1. In the Search Criteria box, narrow the results by entering one of the following optional fields.

Search Criteria

Plan Id	[🔍]	Preservation Lvl Cd	Select an Item ▾
Warehouse Stock Nbr	[🔍]	Storage Type Cd	Select an Item ▾
Cond Cd	Select an Item ▾	Prep for Shipment Cd	Select an Item ▾

Search   Add

A. Enter the PLAN ID, or use 🔍 to browse for the entry. *This is a 25 alphanumeric character field.*

2. Select Search . *The* **Search for a Work Plan Association — Results** *page appears.*

Search Criteria

Plan Id ABCTEST2	Preservation Lvl Cd --	Storage Type Cd --
Warehouse Stock Nbr --	Cond Cd --	Prep for Shipment Cd --

Search Results

Assoc	Update	Plan Id	Plan Nm
↳	Update	ABCTEST2	TEST

Cancel

Search for a Work Plan Association — Results

Navigation

Maintenance > Work Plan Assoc > Search Criteria > [Search] > Work Plan Assoc Search Results page

Procedures

View the Work Plan Assoc

Selecting [Cancel] *at any point of this procedure removes all revisions and closes the page.* ***Bold*** *numbered steps are required.*

Click ↳ to view the Assoc details. *The **Assoc Grid** appears.*

> **Note**
>
> If there is no Work Plan Assoc, the following message will appear: "No Work Plan Associations match Search Criteria for selected work plan."

Search Results

Assoc	Update	Plan Id				Plan Nm
↳	Update	ABCTEST2				TEST

	Stock Nbr	Preservation Lvl Cd	Cond Cd	Prep for Shipment Cd	Storage Type Cd
	8440002210852	NR-Not Required	D-Svcbl(Test/Mod)		

Add a Work Plan Association

Navigation

Maintenance > Work Plan Assoc > Search Criteria > [Add] > Work Plan Assoc Add page

Procedures

Add a Work Plan Association

Selecting [Cancel] *at any point of this procedure removes all revisions and closes the page, whereas selecting* [Reset] *returns all fields to the default "All" setting.* **Bold** *numbered steps are required.*

1. Select [Add]. *The* **Work Plan Assoc Add** *page appears.*

   Work Plan

*Plan Id	ABCTEST2	Plan Desc	A TEST 7
Plan Nm	TEST		

   Associations

*Warehouse Stock Nbr(s)	[🔍]	Storage Type Cd	Select an Item ▾
*Cond Cd	Select an Item ▾	Prep for Shipment Cd	Select an Item ▾
Preservation Lvl Cd	Select an Item ▾		[Reset] [Save]

   There are no associations made with the selected work plan.

   [Cancel] [Add]

   A. *The* Plan Id *automatically populates and is not editable.*

   B. *Complete the Associations Panel.*

   a. Enter the Warehouse Stock Nbr, or use 🔍 to browse for the entry. *This is a 15 alphanumeric character field.*

b. Use ⌄ to select the Cond Cd.

c. Select [Save]. *The entry moves to the Assoc Save Grid.*

2. Select [Add]. *The* **View the Work Plan Assoc Transaction Status** *page appears.*

Delete a Work Plan Association

1. Select Delete hyperlink. *The entry is immediately removed from the Assoc Save Grid.*

Associations

*Warehouse Stock Nbr(s)	[ ] 🔍		Storage Type Cd	Select an Item ⌄
*Cond Cd	Select an Item ⌄		Prep for Shipment Cd	Select an Item ⌄
Preservation Lvl Cd	Select an Item ⌄			[Reset] [Save]

Delete All	Warehouse Stock Nbr	Cond Cd	Preservation Lvl Cd	Storage Type Cd	Prep for Shipment Cd
Delete	8340015455869	D-Svcbl(Test/Mod)			
Delete	8340015455869	D-Svcbl(Test/Mod)	NR-Not Required		
Delete	8440002210852	D-Svcbl(Test/Mod)	NR-Not Required		

[Cancel] [Add]

2. Select [Add]. *The* **View the Work Plan Assoc Transaction Status** *page appears.*

Update a Work Plan Association

Navigation

Maintenance > Work Plan Assoc > Search Criteria > Search Results > Update hyperlink > Work Plan Assoc Update page

Procedures

Update a Work Plan Association

1. Select the Update hyperlink. *The **Update the Work Plan Assoc** page appears.*

    A. *Verify the PLAN ID.*

    B. *Complete the Associations panel.*

        a. Update the Warehouse STOCK NBR, using 🔍 to browse for the revised entry. *This is a 15 alphanumeric character field.*

        b. Update the Cond Cd, using ⌄ to select the desired code.

c. Select **Save**. *The entry moves to the ASSOC Save Grid.*

2. Select **Update**. *The* **View the Work Plan Assoc Transaction Status** *page appears.*

Delete a Work Plan Association

1. Select Delete hyperlink. *The entry is immediately removed from the ASSOC Save Grid.*

Associations

*Warehouse Stock Nbr(s)	[🔍]		Storage Type Cd	Select an Item ▾
*Cond Cd	Select an Item ▾		Prep for Shipment Cd	Select an Item ▾
Preservation Lvl Cd	Select an Item ▾			Reset Save

Delete All	Warehouse Stock Nbr	Cond Cd	Preservation Lvl Cd	Storage Type Cd	Prep for Shipment Cd
Delete	8340015455869	D-Svcbl(Test/Mod)			
Delete	8340015455869	D-Svcbl(Test/Mod)	NR-Not Required		
Delete	8440002210852	D-Svcbl(Test/Mod)	NR-Not Required		

Cancel   Update

2. Select **Update**. *The* **View the Work Plan Assoc Transaction Status** *page appears.*