Search for a Work Plan Detail — Criteria

Overview

The Maintenance and Utilization module Work Plan Detail process is to provide the ability to identify the specific Task(s), Part(s) required to perform the work, Tool(s)/Equipment required to perform the task(s), and the required Technician Certification(s) needed to complete the Work Plan.

In order to utilize this process, first establish a Maintenance Work Plan. A Work Plan can be associated with multiple Tasks, Parts, Tool(s)/Equipment, and Certifications. There will be four pages available to identify the details needed to complete the Work Plan.

Navigation

Maintenance > Work Plan Detail > Work Plan Detail Search Criteria

Procedures

Search for a Work Plan Detail

One or more of the Search Criteria fields can be entered to isolate the results. By default, all results are displayed. Selecting [Reset] *at any point of this procedure returns all fields to the default "All" setting.* **Bold** *numbered steps are required.*

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

Search Criteria

*Plan Id	[🔍]	Tool(s)/Equip	○
Task(s)	●	Certification(s)	○
Part(s)	○		

[Reset] [Search]

2. Select [Search]. *The corresponding detail page appears.*

Add a Work Plan Detail — Tool(s)/EQUIP

Navigation

Maintenance > Work Plan Detail > Search Criteria > [Search] > Work Plan Detail Tool (s)/EQUIP page

Procedures

Add a Work Plan Detail — Tool(s)/EQUIP

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

1. Select ◯ Tools(s)/EQUIP. *When selected, the PLAN ID includes tools and/or equipment details.*

2. Select [Search]. *The page **Add a Work Plan Detail — Tool(s)/EQUIP** appears.*

Tool(s)/Equip			
Plan Id	ABCTEST2	***Tool(s)/Equip Desc**	[ ]
Plan Type Cd	ANTE - Analyze/Test	**Required**	☐
Plan Name	TEST	***Tool(s)/Equip Qty**	[ ]
Plan Desc	A TEST		Save

Edit	Delete	Tool(s)/Equip Desc	Req	Qty
Edit	Delete	TEST TEST TEST 3	N	6

Cancel   Update

3. *Verify the correct work plan is displayed in the Tool(s)/EQUIP Grid.*

   A. Enter the TOOL(S)/EQUIP DESC in the field provided. *This is a 255 alphanumeric character field.*

B. Enter the TOOL(S)/EQUIP QTY in the field provided. *This is a 5 numeric character field.*

C. Select [Save] to move the tool(s)/equipment to the Data Stored Table.

> **Note**
>
> Continue to enter tool(s)/equipment as needed. If the tool(s)/equipment are not in the desired order, simply drag and drop them into the proper placement.

4. Select [Update]. *The **View the Work Plan Detail Transaction Status** page appears.*

Edit a Work Plan Detail — Tool(s)/EQUIP

1. Select the **Edit** hyperlink for the tool(s)/equipment. *The **Add a Work Plan Detail — Tool(s)/EQUIP** page appears.*

Tool(s)/Equip

Plan Id	ABCTEST2	*Tool(s)/Equip Desc	TEST 4
Plan Type Cd	ANTE - Analyze/Test	Required	☐
Plan Name	TEST	*Tool(s)/Equip Qty	1
Plan Desc	A TEST		Update Cancel

Edit	Delete	Tool(s)/Equip Desc	Req	Qty
Edit	Delete	TEST 4	N	1

Cancel   **Update**

2. *Verify the correct work plan is displayed in the Tool(s)/EQUIP Grid.*

A. Update the TOOL(S)/EQUIP DESC, entering the revised description in the field provided. *This is a 255 alphanumeric character field.*

B. Update the TOOL(S)/EQUIP QTY, entering the revised quantity in the field provided. *This is a 5 numeric character field.*

Note

Continue to enter tool(s)/equipment as needed. If the tool(s)/equipment are not in the desired order, simply drag and drop them into the proper placement.

3. Select Update . *The **View the Work Plan Detail Transaction Status** page appears.*

Delete a Work Plan Detail — Tool(s)/EQUIP

1. Select the Delete hyperlink for the desired task. *The tool(s)/EQUIP is immediately removed from the list.*

Edit	Delete	Tool(s)/Equip Desc	Req	Qty
Edit	Delete	TEST 4	N	1

Cancel   Update

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

Add a Work Plan Detail — Task(s)

Navigation

Maintenance > Work Plan Detail > Search Criteria > Work Plan Detail Task(s) page

Procedures

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

Add a Work Plan Detail — Task(s)

1. Select ◯ Task(s). *When selected, the PLAN ID includes task(s) details.*

2. Select [Search]. *The page **Add a Work Plan Detail — Task(s)** appears.*

3. *Verify the correct Work Plan displays in the Task(s) Grid.*

    A.   Enter the STEP DESC in the field provided. *This is a 1024 alphanumeric character field.*

4.   Select [Save]. *The detail is moved to the Data Stored Table.*

5.   Select **Update**. *The **View the Work Plan Detail Transaction Status** page appears.*

Update a Work Plan Detail — Task(s)

1.   Select the **Edit** hyperlink.*The **Add a Work Plan Detail — Task(s)** page appears.*

Task(s)				
Plan Id	ABCTEST2		*Step Desc	2 TEST
Plan Type Cd	ANTE - Analyze/Test			
Plan Name	TEST		Allowable Result	
Plan Desc	A TEST 7			
				Update Cancel

Edit	Delete	Step Desc	Allowable Result
Edit	Delete	2 TEST	
Edit	Delete	TESTING 456	
Edit	Delete	ABCDEFG	
Edit	Delete	ANOTHER TEST 8769	

Cancel   **Update**

2.   *Verify the correct Work Plan displays in the Task(s) Grid.*

    A.   Update the STEP DESC, entering the revised description in the field provided. *This is a 1024 alphanumeric character field.*

3.   Select [Update]. *The entry moves to the Data Stored Table*.

> **Note**
>
> If the parts are not in the desired order, simply drag and drop them into the proper placement.

4.   Select **Update**. The ***View the Work Plan Detail Transaction Status*** page appears.

Delete a Work Plan Detail — Task(s)

1. Select the Delete hyperlink for the desired task. *The task(s) is immediately removed from the list.*

Edit	Delete	Step Desc	Allowable Result
Edit	Delete	TESTING 456	
Edit	Delete	ANOTHER 14790	
Edit	Delete	ABCDEFG	
Edit	Delete	TEST AFTER DELETE OPTION	

Cancel   Update

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

Add a Work Plan Detail — Certification(s)

Navigation

Maintenance > Work Plan Detail > Search Criteria > [Search] > Work Plan Detail Certification(s) page

Procedures

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

Add a Work Plan Detail — Certification(s)

1. Select ⚪ Certification(s). *When selected, the PLAN ID includes certification(s) details.*

2. Select [Search]. *The page* **Add a Work Plan Detail — Certification(s)** *appears.*

Certification(s)

Plan Id	ABCTEST2	Plan Desc	A TEST 7
Plan Type Cd	ANTE - Analyze/Test	*Certification Name	Select an Item ▼
Plan Name	TEST	Certification Desc	

[Save]

Edit	Detete	Certification Name	Certification Desc
Edit	Delete	CTB- CERTIFIED THIRD BASE	CTB- CERTIFIED THIRD BASEMAN

[Cancel] [Update]

3. *Verify the correct work plan is displayed in the Work Plan Detail Certification(s) Grid.*

   A. Use ˅ to select the Certification Name.

4. Select [Save]. *The entry moves to the Data Stored Table.*

5. Select [Update]. *The* **View the Work Plan Detail Transaction Status** *page appears.*

Update a Work Plan Detail — Certification(s)

1.   Select the Edit hyperlink for the desired task. *The **Add a Work Plan Detail — Certification(s)** page appears.*

2.   *Verify the correct work plan is displayed in the Work Plan Detail Certification(s) Tab.*

   A.   Update the Certification Name, using ⌄ to select the desired name.

3.   Select [Update] to move the detail to the Data Stored Table.

> **Note**
>
> ![icon] If the parts are not in the desired order, simply drag and drop them into the proper placement.

4.   Select [Update]. *The **View the Work Plan Detail Transaction Status** page appears.*

Delete a Work Plan Detail — Certification(s)

1.   Select the Delete hyperlink for the desired task. *The certification(s) is immediately removed from the list.*

> **Note**
>
> The tool(s)/equipment is immediately removed from the list.

2. Select [Update]. The ***View the Work Plan Detail Transaction Status*** page appears.

Add a Work Plan Detail — Part(s)

Navigation

Procedures

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

Selecting [Reset] at any point of this procedure returns all fields to the default setting.

Add a Work Plan Detail — Part(s)

1. Select ◯ Part(s). *When selected, the PLAN ID includes part(s) details.*

2. Select [Search]. *The* **Add a Work Plan Detail — Part(s)** *page appears.*

3.   *Verify the correct Work Plan displays in the Part(s) Grid.*

   A.   Enter the PARTS REQUIRED QTY in the field provided. *This is a 3 numeric character field.*

   B.   Enter the PART DESC in the field provided. *This is a 255 alphanumeric character field.*

4.   Select [Add]. *The entry moves the part to the Data Stored Table.*

> **Note**
>
> ![?]   If the parts are not in the desired order, simply drag and drop them into the proper placement.

5.   Select [Update]. *The* **Search for a Work Plan Detail — Criteria** *page appears.*

Update a Work Plan Detail — Part(s)

1. Select the **Edit** hyperlink. *The **Add a Work Plan Detail — Part(s)** page appears.*

Part(s)

Plan Id	ABCTEST2
Plan Type Cd	ANTE - Analyze/Test
Plan Name	TEST
Plan Desc	A TEST
Required	☐
*Parts Required Qty	2

Stock Nbr	[🔍]
Priority Level	02
Req Delivery Dt (RDD)	[ ]
*Part Desc	another test
Mfr Name	[ ]
Mfr Part Nbr	[ ]

[Save] [Cancel]

				Req	Qty Req	Cancelled Qty	Stock Nbr	Part Desc	Mfr Name	Mfr Part Nbr
↳	Edit	CC	Delete	NO	2			another test		
↳	Edit	CC	Delete	NO	3			Testing 5		

[Cancel] [Update]

2. *Verify the correct Work Plan displays in the Part(s) Grid.*

    A. Update the PARTS REQUIRED QTY, entering the revised quantity in the field provided. *This is a 3 numeric character field.*

3. Select [Save]. *The entry moves the part to the Data Stored Table.*

> **Note**
>
> ❓ If the parts are not in the desired order, simply drag and drop them into the proper placement.

4. Select [Update]. *The **View the Work Plan Detail Transaction Status** page appears.*

Delete a Work Plan Detail — Part(s)

1. Select the Delete hyperlink for the desired part. *The part(s) is immediately removed from the list.*

				Req	Qty Req	Cancelled Qty	Stock Nbr	Part Desc	Mfr Name	Mfr Part Nbr	
↳	Edit	CC	Delete	NO	2			another test			
↳	Edit	CC	Delete	NO	3			Testing 5			

Cancel   Update

2. Select [Update]. *The **View the Work Plan Detail Transaction Status** page appears.*