



Adding Work Plan Details

Work Plan Details enable you to define specific tasks, parts, tools/equipment, and/or certifications for your Work Plan.

1. Navigate to the **Maintenance/Work Plan Detail** menu.
2. Enter (or browse and select) the **Plan Id**.
3. Select the applicable radio button for the details you are adding, updating, or deleting.
4. Select the **Search** button.

Search Criteria

*Plan Id	OC0001	2
Task(s)		3
Part(s)		
Tool(s)/Equip		
Certification(s)		

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Search

Reset



Adding Work Plan Details

Task(s) – This page displays when the **Task(s)** radio button is selected.

1. Enter the description of the task in **Step Desc**.
2. Enter the appropriate result in **Allowable Result**.
3. Select **Save** to add the task to the lower table.
4. Repeat for each task in the plan.

(Task(s) are entered in the order you Save them. To rearrange the order in the table, click, drag, and drop the row to the appropriate position before selecting the **Update** button. Only 50 entries may be added at one time.)

5. Once you have entered all your tasks and rearranged them in the order you want, select the **Update** button.
6. On the **Transaction Status** page, select the **Search Criteria** button to return to the **Search Criteria** page if you wish to select a different detail page.

Select the **Edit** hyperlink to modify a description.

Select the **Delete** hyperlink to remove a description.

Task(s)

Plan Id	OC0001	Plan Type Cd	PREV - Preventive Maintenance
Plan Name	UTIL TRK OIL CHANGE	Plan Desc	OIL CHANGE FOR UTILITY TRUCKS
*Step Desc	<input type="text" value="LOOSEN AND REMOVE OIL FILLER CAP"/>		
Allowable Result	<input type="text" value="CAP REMOVED"/>		

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Save

Edit	Delete	Step Desc	Allowable Result
Edit	Delete	PARK TRUCK IN SERVICE BAY	TRUCK PARKED
Edit	Delete	APPLY PARKING BRAKE	PARKING BRAKE APPLIED
Edit	Delete	TURN ON ENGINE AND WAIT 10 MINUTES	ENGINE WARMED TO SUITABLE TEMPERATURE
Edit	Delete	RAISE TRUCK	TRUCK RAISED
Edit	Delete	TURN ENGINE OFF	ENGINE OFF
Edit	Delete	OPEN TRUCK HOOD	HOOD OPENED

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Update

Reset

Cancel





Adding Work Plan Details

Part(s) – This page displays when the **Part(s)** radio button is selected.

1. Enter the number required for the part that is being added in **Part Qty**.
2. Select the **Required** checkbox if the part is required for the task.
3. Enter the description of the part in **Part Desc**.
4. Enter the **Mfr Name** and/or **Mfr Part Nbr**, if required.
5. Select **Save** to add the part to the lower table.
6. Repeat for every part for this plan. (Part(s) are entered in the order you Save them. To rearrange the order in the table, click, drag, and drop the row to the appropriate position before selecting the **Update** button. Only 50 entries may be added at one time.)
7. Once you have entered all your parts and rearranged them in the order you want, select the **Update** button.
8. On the **Transaction Status** page, select the **Search Criteria** button to return to the **Search Criteria** page if you wish to select a different detail page.

Select the **Edit** hyperlink to modify a description.

Select the **Delete** hyperlink to remove a description.

Part(s)

Plan Id	OC0001	Plan Type Cd	PREV - Preventive Maintenance
Plan Name	UTIL TRK OIL CHANGE	Plan Desc	OIL CHANGE FOR UTILITY TRUCKS
*Part Qty	1	Required	<input checked="" type="checkbox"/>
*Part Desc	OIL FILTER		
Mfr Name		Mfr Part Nbr	
SKU		SKU Desc	

Save

Edit	Delete	Qty	Part Desc	Req	Mfr Name	Mfr Part Nbr	SKU	SKU Desc
Edit	Delete	10	5W30 SYNTHETIC ENGINE OIL	Y				
Edit	Delete	1	DRAIN PLUG WASHER	Y				

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Update

Reset

Cancel



Adding Work Plan Details

Select the **Edit** hyperlink to modify a description.

Select the **Delete** hyperlink to remove a description.

Tool(s)/Equip – This page displays when the **Tool(s)/Equip** radio button is selected.

1. Enter the description of the tool (or equipment) in **Tool(s)/Equip Desc.**
2. Select the **Required** checkbox if the tool is required for the task.
3. Enter the quantity needed in **Tool(s)/Equip Qty.**
4. Select **Save** to add the part to the lower table.
5. Repeat for every tool for this plan. (Tool(s)/Equipment are entered in the order you Save them. To rearrange the order in the table, click, drag, and drop the row to the appropriate position before selecting the **Update** button. Only 50 entries may be added at one time.
6. Once you have entered all your tools and rearranged them in the order you want, select the **Update** button.
7. On the **Transaction Status** page, select the **Search Criteria** button to return to the **Search Criteria** page if you wish to select a different detail page.

Tool(s)/Equip			
Plan Id	OC0001	Plan Type Cd	PREV - Preventive Maintenance
Plan Name	UTIL TRK OIL CHANGE	Plan Desc	OIL CHANGE FOR UTILITY TRUCKS
*Tool(s)/Equip Desc	OIL FUNNEL 1		
Required	<input checked="" type="checkbox"/> 2	*Tool(s)/Equip Qty	1 3
			4 Save
Edit>Delete	Tool(s)/Equip Desc		Req Qty
Edit Delete	METRIC SOCKET SET		Y 1
Edit Delete	METRIC OPEN END WRENCH		Y 1
Edit Delete	LARGE GREASE GUN WITH FLEX HOSE		Y 1
Edit Delete	SMALL GREASE GUN		N 1
Edit Delete	TORQUE WRENCH		Y 1
Edit Delete	OIL FILTER WRENCH		Y 1
6 Update Reset Cancel			



Adding Work Plan Details

Select the **Edit** hyperlink to modify a description.

Select the **Delete** hyperlink to remove a description.

Certification(s) – This page displays when the **Certification(s)** radio button is selected.

1. Select the required certification from the **Certification Name** drop-down list. Certifications **MUST** be established prior to creating the details. The certifications and licenses can be built using the **Master Data > Cert/License** menu.
2. Once a **Certification Name** is selected, the **Certification Desc** displays. (**Certification Desc** may be blank if it was not entered in the **Cert/License** process.)
3. Select **Save** to add the certification to the lower table.
4. Repeat for each additional certification for this plan. (Certification(s) are entered in the order you Save them. To rearrange the order in the table, click, drag, and drop the row to the appropriate position before selecting the **Update** button. Only 50 entries may be added at one time.)
5. Once you have selected all the required certifications and rearranged them in the order you want, select the **Update** button.
6. On the **Transaction Status** page, select the **Search Criteria** button to return to the **Search Criteria** page if you wish to select a different detail page.

Certification(s)			
Plan Id	OC0001	Plan Type Cd	PREV - Preventive Maintenance
Plan Name	UTIL TRK OIL CHANGE	Plan Desc	OIL CHANGE FOR UTILITY TRUCKS
*Certification Name	<div> <div>Select an Item</div> <div>1</div> </div>		
Certification Desc	<div> <div>Select an Item</div> <div>ASE-SCHOOL BUS TECH</div> <div>ASE-AUTO TECH</div> <div>ASE-MED-HVY TRUCK TECH</div> <div>ASE-MED-HVY TRK GAS TECH</div> <div>MARINE MECH SPECIALIST</div> <div>AWS CERTIFIED WELDER</div> <div>ASE-MED-HVY TRK DSL TECH</div> </div>		
<div> <div>Edit</div> <div>Delete</div> </div>	<div> <div>Certific</div> <div>ASE-MED-HVY TRUCK TE</div> </div>		
<div> <div>5</div> <div>Update</div> <div>Reset</div> <div>Cancel</div> </div>			