



Search for a Work Plan – Criteria

Overview

The Maintenance and Utilization module Work Plan process provides the ability to define the high level tasks being performed by the Work Order generated at the asset level to track the progress of the actual work being performed.

Each high level task has the following characteristics:

- Estimated Hours (to complete task)
- Estimated Labor and Non-Labor Costs

Work Plans are created as either Public or Private.

- A Public Work Plan is available to all ELMS Maintenance personnel to use, reducing the time to develop new plans.
- A Private Work Plan is only available to the Maintenance personnel within their Maintenance Activity.

Navigation

Maintenance > Work Plan > Work Plan Search Criteria page

Procedures

Search for a Work Plan

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

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





Help Reference Guide

Search Criteria

*Plan Id	<input type="text"/>	Plan Type Cd	Select an Item
Copy Plan Id	<input type="checkbox"/>	Plan Name	<input type="text"/>

- A. Enter the PLAN ID, or use to browse for the entry. *This is a 50 alphanumeric character field.*
- B. Click to select the Copy PLAN ID. *The fields change.*
 If checked () , enter the Using PLAN ID, or use to browse for a base plan. Proceed to Step 2.

Search Criteria

*Plan Id	<input type="text"/>	Copy Plan Id	<input checked="" type="checkbox"/>
Using Plan Id	<input type="text"/>		

- a. Enter the PLAN ID, or use to browse for the entry. *This is a 25 alphanumeric character field.*
2. Select . The **Search for the Work Plan - Results** page appears. Results display in the Search Results grid.

Search Criteria

Plan Id	Plan Name	Plan Type Cd
ABCTEST2	--	--

Search Results

Update	Delete	Plan Id	Plan Type Cd	Plan Name	Plan Desc
Update	Delete	ABCTEST2	ANTE - Analyze/Test	TEST	A TEST 7





Add a Work Plan

Navigation

Maintenance > Work Plan > Search Criteria >  > Work Plan Add page

Procedures

Add a Work Plan

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

1. Select . The **Add a Work Plan** page appears.

Add	
*Plan Id	<input type="text"/>
Est Non-Labor Cost	<input type="text"/>
*Plan Type Cd	Select an Item <input type="button" value="v"/>
*Plan Desc	<input type="text"/>
*Plan Name	<input type="text"/>
Public	<input type="checkbox"/>
Est Labor Hours	<input type="text"/>
Central Work Plan	<input checked="" type="checkbox"/>
Est Hours to Perform	<input type="text"/>
Remarks	<input type="text"/>
Est Labor Cost	<input type="text"/>
History Remarks	<input type="text"/>

- A. Enter the PLAN ID in the field provided. *This is a 25 alphanumeric character field.*
- B. Enter the PLAN TYPE CD in the field provided. *This is a 4 alphanumeric character field.*
- C. Enter the Plan Name in the field provided. *This is a 50 alphanumeric character field.*
- D. Enter the PLAN DESC in the field provided. *This is a 255 alphanumeric character field.*

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





Copy a Public Work Plan

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

1. Select Work Plan from the Maintenance menu. The **Search for the Work Plan – Criteria** page opens.
2. Enter a new PLAN ID, or use  to browse for an existing plan.
3. Click to select Copy PLAN ID. *The rest of the fields change.*
4. Enter an existing Using PLAN ID, or use  to browse for an existing plan.
5. Select . The **Work Plan Add** page appears.

Add

<p>*Plan Id <input type="text" value="TESTJUN22"/></p> <p>*Plan Type Cd <input style="border: none; border-bottom: 1px solid #ccc; text-decoration: none; color: #444; font-size: 0.9em; padding: 2px 5px; width: 100%;" type="text" value="TEST-Test"/></p> <p>*Plan Name <input type="text" value="REGSTOCT22"/></p> <p>Est Labor Hours <input type="text" value="0.00"/></p> <p>Est Hours to Perform <input type="text" value="0.00"/></p> <p>Est Labor Cost <input type="text" value="0.00"/></p> <p>Est Non-Labor Cost <input type="text" value="0.00"/></p> <p>*Plan Desc <input type="text" value="REGSTOCT22"/></p>	<p>Public <input checked="" type="checkbox"/></p> <p>Central Work Plan <input type="checkbox"/></p> <p>Task(s) <input type="checkbox"/> None</p> <p>Part(s) <input type="checkbox"/> None</p> <p>Tool(s)/Equip <input type="checkbox"/> (1)</p> <p>Certification(s) <input type="checkbox"/> None</p> <p>Remarks <input type="text" value="REGSTOCT22"/></p> <p>History Remarks <input type="text"/></p>
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- A. Enter the PLAN ID in the field provided. *This is a 25 alphanumeric character field.*
- B. Enter the PLAN TYPE CD in the field provided. *This is a 4 alphanumeric character field.*
- C. Enter the Plan Name in the field provided. *This is a 50 alphanumeric character field.*





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- D.** Enter the PLAN DESC in the field provided. *This is a 255 alphanumeric character field.*
6. Select . The **View the Work Plan Transaction Status** page appears.





Update a Work Plan

Navigation

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

Procedures

Update a Work Plan

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

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

Update

Last Tran Dt	01/22/2020	Est Non-Labor Cost	<input type="text" value="0.00"/>
Last Updtd By	BKATELUZOS	*Plan Desc	<input type="text" value="PERIODIC"/>
*Plan Id	<input type="text" value="BLK"/>	Public	<input type="checkbox"/>
*Plan Type Cd	<input type="text" value="CSIS-COSIS"/>	Central Work Plan	<input type="checkbox"/>
*Plan Name	<input type="text" value="UPDATE TRUCK"/>	Attachment(s)	<input type="button" value="Add Attachment"/>
Est Labor Hours	<input type="text" value="0.00"/>	Remarks	<input type="text"/>
Est Hours to Perform	<input type="text" value="0.00"/>	History Remarks	<input type="text"/>
Est Labor Cost	<input type="text" value="0.00"/>		

- A. Update the PLAN ID, entering the revised identifier in the field provided. *This is a 50 alphanumeric character field.*
- B. Update the Plan Type Cd, using to select the desired code.





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- C. Update the Plan Name, entering the revised name in the field provided. *This is a 50 alphanumeric character field.*
- D. Update the PLAN DESC, entering the revised description in the field provided. *This is a 255 alphanumeric character field.*

Upload File

WorkPlan	20PTINSPECTION		*Desc	
*File Path	<input type="button" value="Choose File"/> No file chosen		<input style="width: 90%;" type="text"/>	
			Primary	<input type="checkbox"/>

Temporary Attachments

- a. Select in the File Path field. *The Windows **Choose File To Upload** pop-up window appears.*

Note



Only JPG, JPEG, GIF, and PDF files are supported. No other file types are attachable.

- b. Click . *The **Choose File to Upload** pop-up window closes, and the file name appears in the File Path field.*
- c. Update the DESC, entering the correct information in the field provided. *This is a 250 alphanumeric character field.*
- d. Select . *The file appears below in the Temporary Attachments grid.*

Note



If the file should not be a part of the work plan, select the Remove hyper-link to delete the attachment.

- e. Select . *The **Update the Work Plan** page appears.*





Note



To view the attachment, click the thumbnail. A second window opens, showing the attachment.

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





Delete a Work Plan

Navigation

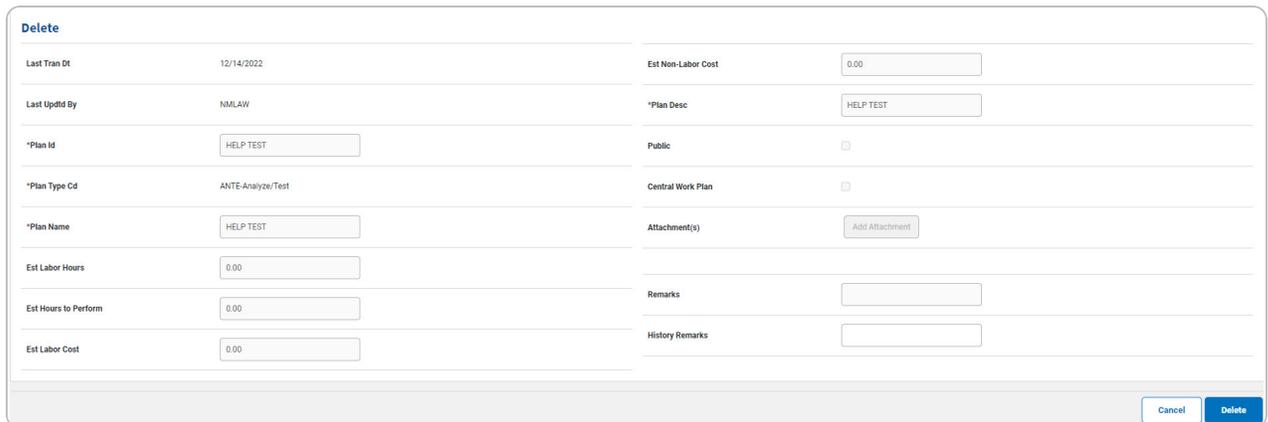
Maintenance > Work Plan > Search Criteria > > Search Results > Delete hyperlink > Work Plan Delete page

Procedures

Delete a Work Plan

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

1. Select the Delete hyperlink. The **Delete a Work Plan** page appears.



The screenshot shows a 'Delete' form with the following fields and values:

Last Tran Dt	12/14/2022	Est Non-Labor Cost	0.00
Last Update By	NMLAW	*Plan Desc	HELP TEST
*Plan Id	HELP TEST	Public	<input type="checkbox"/>
*Plan Type Cd	ANTE-Analyze/Test	Central Work Plan	<input type="checkbox"/>
*Plan Name	HELP TEST	Attachment(s)	<input type="button" value="Add Attachment"/>
Est Labor Hours	0.00	Remarks	<input type="text"/>
Est Hours to Perform	0.00	History Remarks	<input type="text"/>
Est Labor Cost	0.00		

Buttons:

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

