



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		Plan Type Cd	Select an Item
Copy Plan Id	☐	Plan Name	

Reset Search Add

- 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		Copy Plan Id	☒
Using Plan Id			

Reset Search Add

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

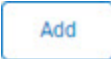
Cancel Add





Add a Work Plan

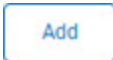
Navigation

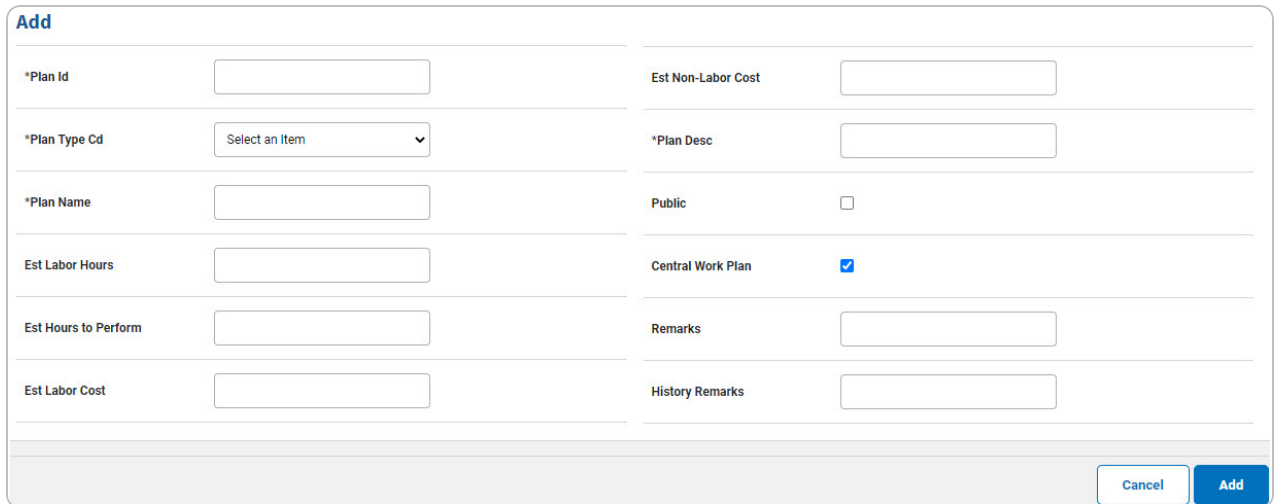
Maintenance > Work Plan > Search Criteria >  > Work Plan Add page

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 **Work Plan Add** page appears.



Add	
*Plan Id	
*Plan Type Cd	Select an Item ▼
*Plan Name	
Est Labor Hours	
Est Hours to Perform	
Est Labor Cost	
Est Non-Labor Cost	
*Plan Desc	
Public	☐
Central Work Plan	☒
Remarks	
History Remarks	

- 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 **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 **Work Plan Search 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

*Plan Id	TESTJUN22	Public	☒
*Plan Type Cd	TEST-Test	Central Work Plan	☐
*Plan Name	REGTSTOCT22	Task(s)	☐ None
Est Labor Hours	0.00	Part(s)	☐ None
Est Hours to Perform	0.00	Tool(s)/Equip	☐ (1)
Est Labor Cost	0.00	Certification(s)	☐ None
Est Non-Labor Cost	0.00	Remarks	REGTSTOCT22
*Plan Desc	REGTSTOCT22	History Remarks	




- 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.





Help Reference Guide

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





Update a Work Plan

Navigation

Maintenance > Work Plan > Search Criteria > [Search](#) > Search Results > Update hyperlink
> Work Plan Update page

Procedures

Update a Work Plan

Selecting [Cancel](#) at any point of this procedure removes all revisions and closes the page.

Bold numbered steps are required.

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

Update

Last Tran Dt	01/22/2020	Est Non-Labor Cost	0.00
Last Updt'd By	BKATELUZOS	*Plan Desc	PERIODIC
*Plan Id	BLK	Public	☐
*Plan Type Cd	CSIS-COSIS	Central Work Plan	☐
*Plan Name	UPDATE TRUCK	Attachment(s)	Add Attachment
Est Labor Hours	0.00	Remarks	
Est Hours to Perform	0.00	History Remarks	
Est Labor Cost	0.00		

[Cancel](#) [Update](#)

- 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.





Help Reference Guide

- 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	Choose File No file chosen		
		Primary	☐

Add

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 **Work Plan Update** page appears.*





Note



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

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





Delete a Work Plan

Navigation

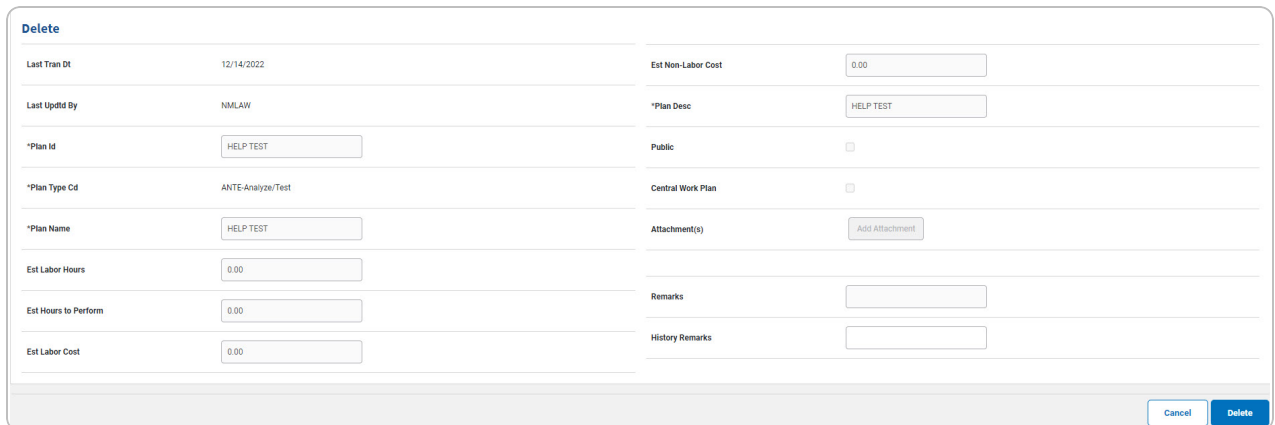
Maintenance > Work Plan > Search Criteria > [Search](#) > Search Results > Delete hyperlink
> Work Plan Delete page

Procedures

Delete a Work Plan

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

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



Delete	
Last Tran Dt	12/14/2022
Last Update By	NMLAW
*Plan Id	HELP TEST
*Plan Type Cd	ANTE-Analyze/Test
*Plan Name	HELP TEST
Est Labor Hours	0.00
Est Hours to Perform	0.00
Est Labor Cost	0.00
Est Non-Labor Cost	0.00
*Plan Desc	HELP TEST
Public	☐
Central Work Plan	☐
Attachment(s)	Add Attachment
Remarks	
History Remarks	

[Cancel](#) [Delete](#)

2. Select [Delete](#). The **Work Plan Transaction Status** page appears.

