



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 > > Work Plan Detail Tool (s)/EQUIP page

Procedures

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

Selecting 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 . The page **Work Plan Detail — Tool(s)/EQUIP Add** 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

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.





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- B. Enter the TOOL(S)/EQUIP QTY in the field provided. *This is a 5 numeric character field.*
- C. Select  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 . 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 **Work Plan Detail — Tool(s)/EQUIP Update** page appears.

Tool(s)/Equip

Plan Id

ABCTEST2

Plan Type Cd

ANTE - Analyze/Test

Plan Name

TEST

Plan Desc

A TEST

*Tool(s)/Equip Desc

TEST 4

Required

☐

*Tool(s)/Equip Qty

1

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 . 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



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

Task(s)

Plan Id	ABCTEST2	*Step Desc	
Plan Type Cd	ANTE - Analyze/Test	Allowable Result	
Plan Name	TEST		
Plan Desc	A TEST 7		

Save

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

Cancel Update

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





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- A.** Enter the STEP DESC in the field provided. *This is a 1024 alphanumeric character field.*
4. Select . *The detail is moved to the Data Stored Table.*
5. Select . *The **Work Plan Detail Transaction Status** page appears.*

Update a Work Plan Detail — Task(s)

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

Task(s)

Plan Id	ABCTEST2	*Step Desc	2 TEST
Plan Type Cd	ANTE - Analyze/Test	Allowable Result	
Plan Name	TEST		
Plan Desc	A TEST 7		




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




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 . *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 . 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	ABCDEFGH	
Edit	Delete	TEST AFTER DELETE OPTION	
			 

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





Add a Work Plan Detail — Certification(s)

Navigation

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

Procedures

Selecting 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 . The page **Work Plan Detail — Certification(s) Add** 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	

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

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 . The entry moves to the Data Stored Table.





5. Select [Update](#). 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 **Work Plan Detail — Certification(s) Update** page appears.

Certification(s)

Plan Id	ABCTEST2	Plan Desc	A TEST 7
Plan Type Cd	ANTE - Analyze/Test	*Certification Name	CTB- CERTIFIED THIRD BASE
Plan Name	TEST	Certification Desc	

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

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

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

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



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

4. Select [Update](#). 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.



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

Cancel

Update

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





Add a Work Plan Detail — Part(s)

Navigation

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

Procedures

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

Selecting 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 . The **Work Plan Detail — Part(s) Add** page appears.





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Part(s)

Plan Id	ABCTEST2	Stock Nbr	
Plan Type Cd	ANTE - Analyze/Test	Priority Level	02
Plan Name	TEST	Req Delivery Dt (RDD)	
Plan Desc	A TEST 7	*Part Desc	
Required	☐	Mfr Name	
*Parts Required Qty		Mfr Part Nbr	

	Req	Qty Req	Cancelled Qty	Stock Nbr	Part Desc	Mfr Name	Mfr Part Nbr
 	NO	2			another test to test		
 	NO	3			Testing 5		
 	NO	5			test22		

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 . *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 . *The **Work Plan Detail Search Criteria** page appears.*





Update a Work Plan Detail — Part(s)

- Select the **Edit** hyperlink. The **Work Plan Detail — Part(s) Update** page appears.

Part(s)

Plan Id	ABCTEST2	Stock Nbr	
Plan Type Cd	ANTE - Analyze/Test	Priority Level	02
Plan Name	TEST	Req Delivery Dt (RDD)	
Plan Desc	A TEST	*Part Desc	another test
Required	☐	Mfr Name	
*Parts Required Qty	2	Mfr Part Nbr	

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

- Verify the correct Work Plan displays in the Part(s) Grid.
 - Update the PARTS REQUIRED QTY, entering the revised quantity in the field provided. This is a 3 numeric character field.

- Select . 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.

- Select . 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 **Work Plan Detail Transaction Status** page appears.

