

Managing Areas and Items

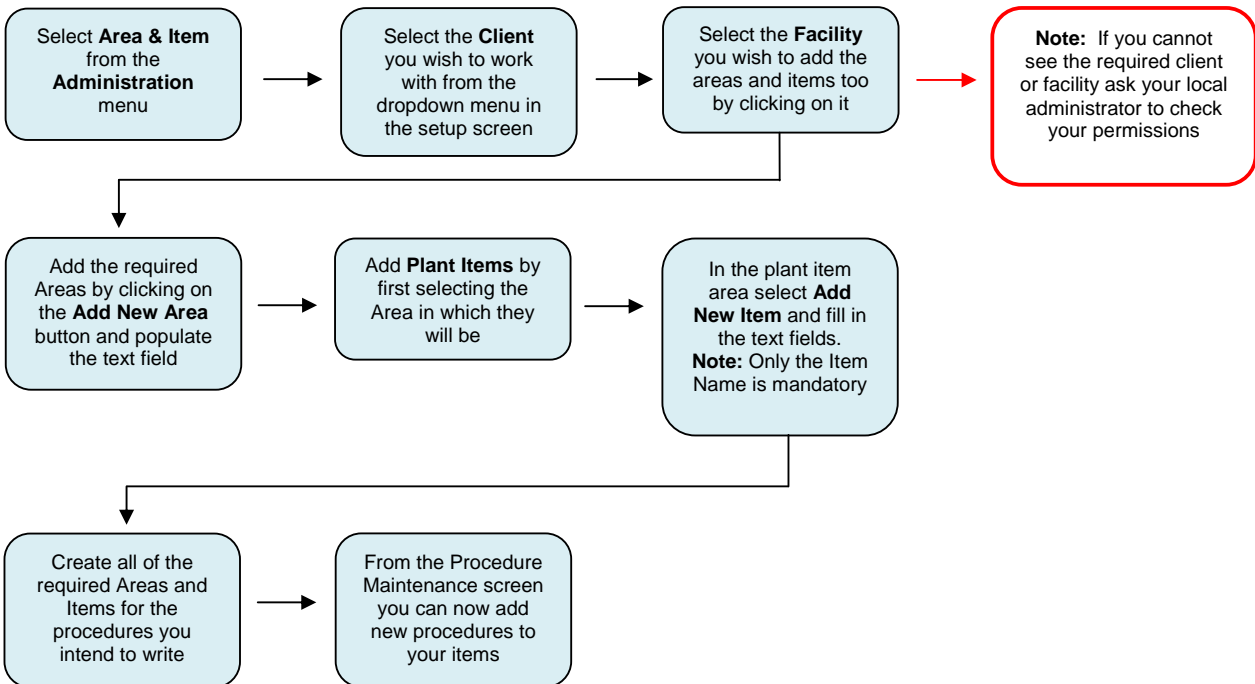
PlanChexx Quick Guide

Areas and Items

Areas and Items allow you to define the structure of your Facility. All procedures must be linked to a plant item; therefore the first step of setting up a new customer is to create the Areas and Items.

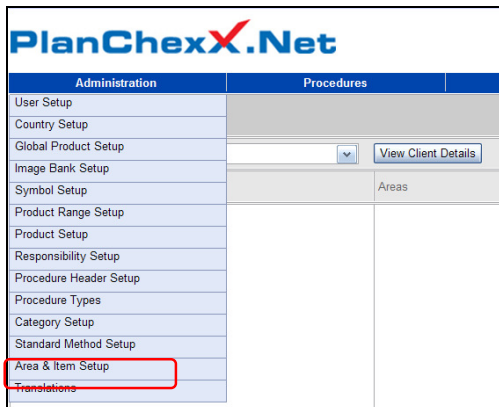
Note: The only exception is when you import procedures from a library as this action will automatically create the Plant Items for you using the original name from the library.

Managing Areas & Items - Work Flow



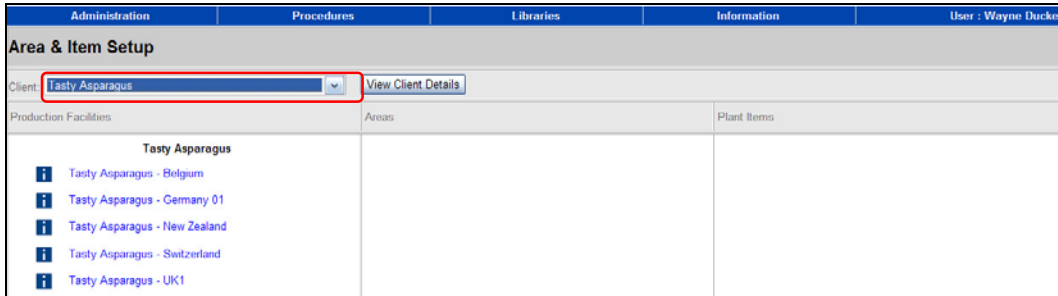
Adding Areas and Items

To add new Areas or Plant Items to your Facility place your mouse over the **Administration** link situated on the navigation bar and select **Area & Item Setup** from the sub menu by clicking on it.

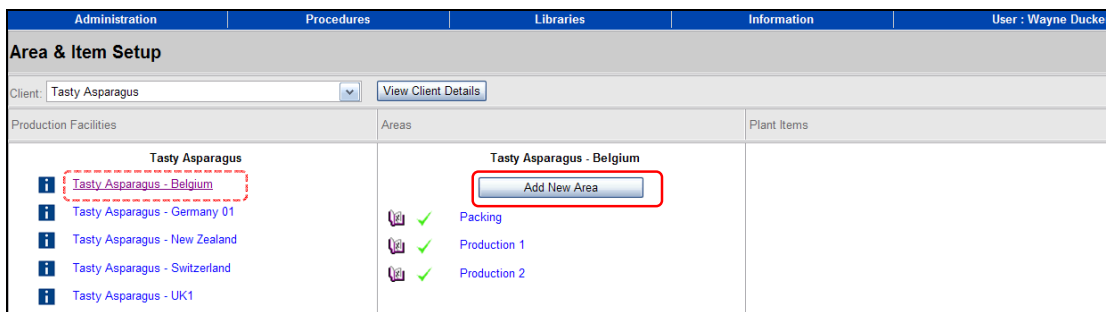


Choose the **Client** you wish to work with by selecting it from the dropdown menu. This will populate the **Facility** column and display the facilities you have access to.

Note: If you cannot see the Client or Facility you are looking for, your permissions may need adjusting. Please contact your local administrator for support.



By selecting the **Facility** you will activate the **Areas** column which will display any existing Areas and allow you to create new ones.



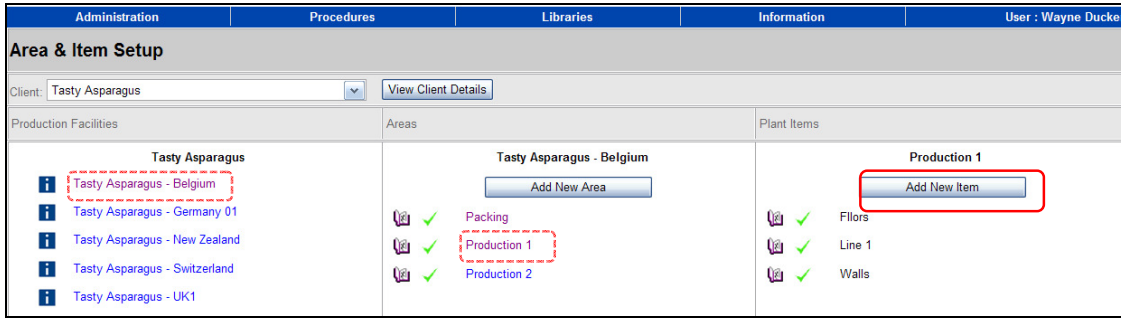
To add a new Area click on the **Add New Area** button and in the text box that appears type the name and click on the **Save** button. The new Area will now be displayed in the list.



Areas can be edited by clicking on the **Book** symbol situated on the left hand side of each entry. This provides the ability to **Edit** the name.



To add a new **Plant Item** select the Area that you wish the Item to be within and click on the **Add New Item** button.



Within the **Add New Item** screen enter the name of the new Item in the **Item Name** field. All other fields within this screen are optional.

The **Description** field allows a more detailed explanation of an item to be made which will appear within the header of the printed procedure. This could be of use if the **Plant Item** name describes a collection of items that need to be cleaned as part of one process. For example **Line 1** might be the name given to the plant item but its component parts could be listed in the description field. The **Description** is displayed on the **Preview** and final **PDF** versions of the procedure.

Add New Item

Item Name :

Item Type :

Item Location :

Manufacturer :

Manufacturer Contact :

Asset Number :

Cost Center :

Description :

Click on **Save** and your new Plant Item will appear in the list.

Note: An unlimited amount of Areas and Plant Items can be added to a facility.