

## Creating a Procedure

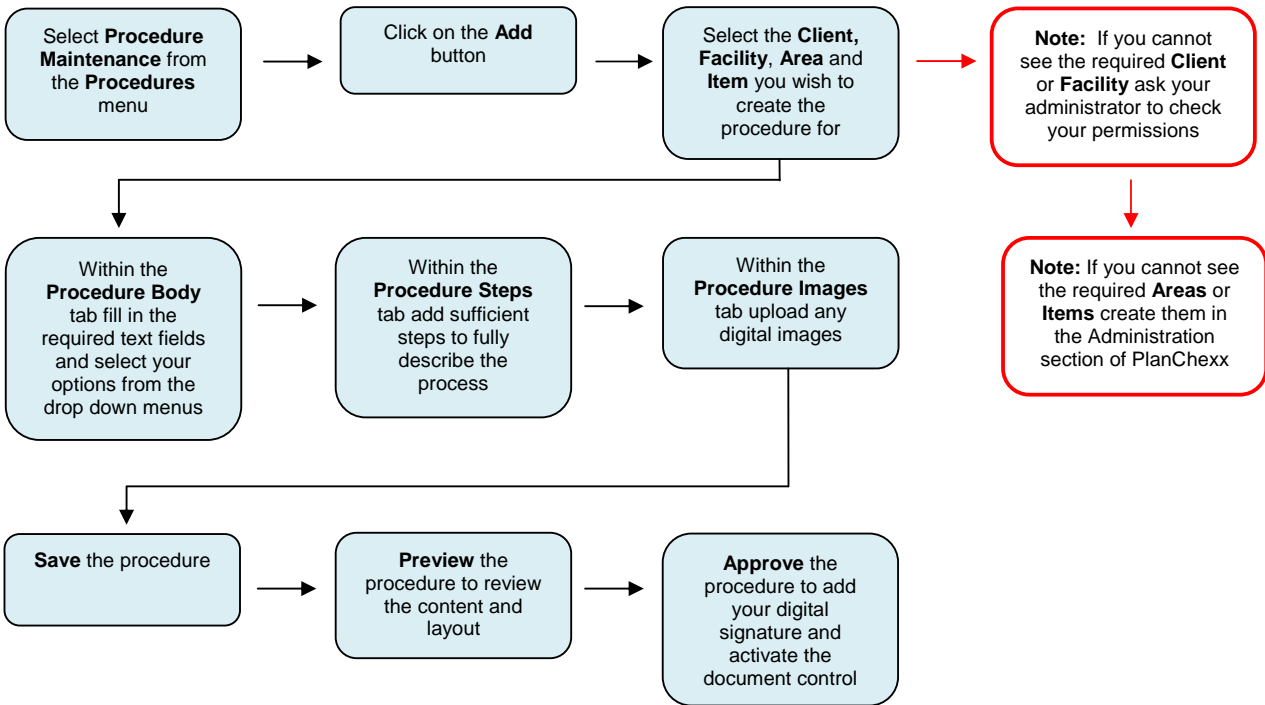
### PlanChexx Quick Guide

#### Before Starting

All procedures must be linked to a plant item. If you have not created the Areas and Items for your facility, please refer to the quick guide on **Managing Areas and Items** before proceeding.

**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 procedure name.

#### Creating a Procedure - Work Flow



#### Creating a New Procedure

To create a new procedure, select **Procedures** from the main toolbar and click on **Procedure Maintenance**. Select the **Add** button from within the screen.

Administration	Procedures	Libraries	Information	User : Wayne Ducker					
<b>Procedure Maintenance</b>				<input type="button" value="Add"/> <input type="button" value="Library Import"/> <input type="button" value="Find &amp; Replace"/> <input type="button" value="Print Setup"/>					
Client Select A Client	Facility No Results Returned	Area No Results Returned	Item No Results Returned						
Author No Results Returned	Type All	Version Approved Procedure	Display <input type="checkbox"/>						
Procedure Ref	Frequency	Plant Item	Version	Latest	Ecolab Approved	Customer Approved	Images	Active	Info

There are three tabs within the **Add New Procedure** screen; each tab should be completed in order starting with **Procedure Body**. Fields marked with an Asterisk \* are mandatory and must be completed before proceeding.

Select the **Client**, **Facility**, **Area** and **Item** that you wish to create the procedure for, using the filters situated at the top of the screen. This aligns your new procedure with the correct plant Item.

The screenshot shows the 'Add new Procedure' form with the following fields highlighted by red boxes:

- \* Client:** Beech Foods
- \* Facility:** 1 - Wayne
- \* Area:** Test 1
- \* Item:** Traywash Descaler
- \* Procedure Ref:** 193
- \* Responsibility:** Hygiene Operative

The **Reference** field is free text and is used to uniquely identify the procedure or link it to an external system. This is a mandatory field.

The **Responsibility** dropdown box allows you to select who is likely to be responsible for completing the activity. This is a mandatory field.

The **Frequency** field allows you to describe the frequency that the procedure is normally completed, for example "Once Daily", "Three times per week" etc. This field is mandatory.

The **Type** option is used to classify the type of procedure that is about to be written. This is an optional field.

The screenshot shows the 'Add new Procedure' form with the following fields highlighted by red boxes:

- \* Frequency:** Weekly
- \* Type:** Food
- Check Sheets:** Daily, Weekly, Monthly
- Extra PPE:** Apron, Body Suit, Boots, Breathing Apparatus Required, Chemical Gloves, Chemical Resistant Jacket

Additional fields visible in the screenshot include:

- Additional Information 1:** COSHH, box 741
- Additional Information 2:** (empty)
- Date of Issue:** 01.11.2011

For each Procedure a maximum of two items of **Additional Information** can be selected. These are used to refer to additional documents or information that may have relevance to the procedure. Select your header from the list and then add the additional information in the free text field. This is an optional field.

The **Check Sheets** menu offers three options, Daily, Weekly or Monthly. If printable hygiene check sheets are required to record the completion of cleaning tasks at least one option must be selected.

The **Extra PPE** (Personal Protective Equipment) dropdown box allows you to select single or multiple items. To select more than one item hold down the <Ctrl> key while highlighting the required items with the left mouse button.

**Note:** When selecting chemicals within a procedure step the system will automatically recommend the required PPE. The **Extra PPE** selection box is used only when additional or alternative PPE is thought to be necessary.

The **Equipment** field is used to list the items that are required to complete the hygiene procedure, for example Brush, Bucket etc. This is an optional free text field.

The **Residues** field is used to describe the types of soiling that may be present on the item or surfaces. This is an optional free text field

The screenshot displays a vertical stack of four text input fields, each with a red box highlighting its title. The fields are: 'Equipment Required:' containing 'Spray Applicator'; 'Typical Residues:' containing 'Protein and fat'; 'Special Instructions:' containing 'Before starting work ensure all electrical items have been isolated'; and 'Inspection Points:' containing 'Corners and skirts'. Each field has a scroll bar on the right side.

The **Special Instructions** field is used to describe any dangers or issues that you wish to be considered before starting the procedure. This text will always appear in **Red** on the screen and in the printed document.

The **Inspection Points** are displayed at the end of the finished procedure and will be colour coded **Green**. Inspection Points can be used to identify expected standards or critical areas within the procedure.

## Procedure Steps


Steps are used to describe the hygiene process and the order that they should be completed. There is no limit to the amount of steps. To add a step click on the **Procedure Steps** tab.





**Add new Procedure** Save Procedure Cancel

Procedure Body **Procedure Steps** Procedure Images

No	Cleaning Procedure	Chemicals	%	Temp	Time	Instructions

**Step Details** Cancel Save Step

Step   Library Information  New Picto

 Ref  %  Temp  Time   
 And  Or    Ref  %  Temp  Time   
 And  Or    Ref  %  Temp  Time   
 And  Or    Ref  %  Temp  Time

\* Step Instructions:

To create a new step you first need to select a pictogram. Pictograms are used to provide a visual guide to the nature of the steps activity. There are two methods available to select a pictogram

The pictogram **Library** contains a list of pictograms with predefined descriptions. The **New Picto** option provides more flexibility allowing you to browse an image library and define your own description.

To use the Picto **Library** click on the description that best describes the steps activity, the screen will refresh and the pictogram and description will be displayed.

**Step Details** Cancel Save Step

Step  Library  New Picto

And  Or    
 And  Or    
 And  Or

- Select a product from
- Apply Detergent
- Apron Cleaning
- ATP Test
- Check Temperature
- Checklist
- CIP
- Cleaning Small Parts
- Conductivity Check
- Disinfection
- Disinfection (Wipes)
- Dismantling
- Dry Cleaning (Vacuum)

\* Step Instructions:

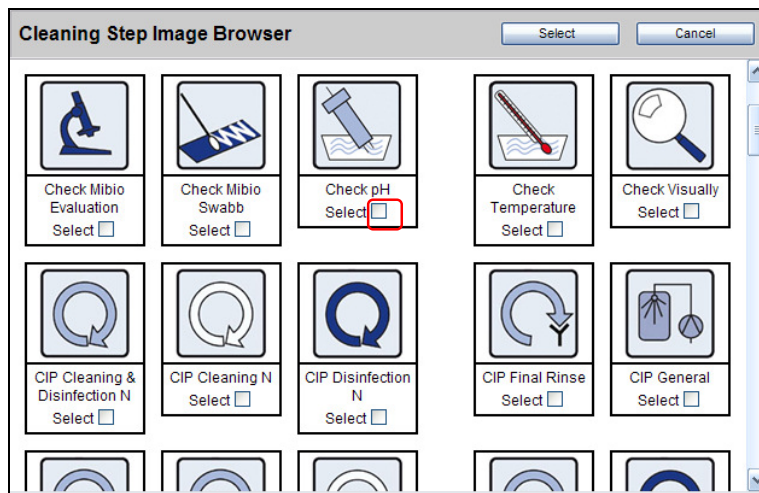
Ref  %  Temp  Time   
 Ref  %  Temp  Time   
 Ref  %  Temp  Time   
 Ref  %  Temp  Time

To use the **New Picto** option, click on the **New Picto** button and then click on Select. The “Picto Image Browser” will be displayed.

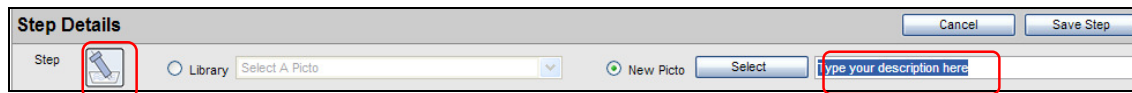
**Step Details** Cancel Save Step

Step  Library   New Picto

Select the required image by clicking within the images selection box and click "Select".



The screen will refresh and the pictogram and description will be displayed. You are now able to add your description.



## Selecting the Required Chemicals

A predefined list of chemicals is provided to enable you to make your selection. For each step you can select up to four chemicals. After choosing the required chemicals the system will automatically import the correct hazard, classification and PPE symbols which will be displayed in the final document.

**Note:** Selecting a chemical for each step is not mandatory. If chemicals are not required in the step proceed to the Step Instructions.


To add a chemical to a step click on the **Product Range** filter and select the appropriate range.





**Add new Procedure** Save Procedure Cancel

Procedure Body Procedure Steps Procedure Images

No	Cleaning Procedure	Chemicals	%	Temp	Time	Instructions

**Step Details** Cancel Save Step


Step  Library Foam Cleaning New Picto Select





<input type="radio"/> And <input type="radio"/> Or	Select a product range	No Results Returned		Ref	%	Temp	Time
<input type="radio"/> And <input type="radio"/> Or	Select a product range	No Results Returned		Ref	%	Temp	Time
<input type="radio"/> And <input type="radio"/> Or	Select a product range	No Results Returned		Ref	%	Temp	Time
<input type="radio"/> And <input type="radio"/> Or	Select a product range	No Results Returned		Ref	%	Temp	Time

\* Step Instructions:

Having selected the product range the **Select a Product** field will be activated. Select the product you require by clicking on its name.

**Step Details** Cancel Save Step


Step  Library Foam Cleaning New Picto Select





<input type="radio"/> And <input type="radio"/> Or	F&B - UK	Select a Product		Ref	%	Temp	Time
<input type="radio"/> And <input type="radio"/> Or	Select a product range	No Results Returned		Ref	%	Temp	Time
<input type="radio"/> And <input type="radio"/> Or	Select a product range	No Results Returned		Ref	%	Temp	Time
<input type="radio"/> And <input type="radio"/> Or	Select a product range	No Results Returned		Ref	%	Temp	Time

\* Step Instructions:

Your selection will be displayed and a reference will also be displayed beside this product.

**Step Details** Cancel Save Step

Step  Library Foam Cleaning New Picto Select

<input type="radio"/> And <input type="radio"/> Or	F&B - UK	Topax 66		Ref Chem_1021	%	Temp	Time
<input type="radio"/> And <input type="radio"/> Or	Select a product range	No Results Returned		Ref	%	Temp	Time
<input type="radio"/> And <input type="radio"/> Or	Select a product range	No Results Returned		Ref	%	Temp	Time
<input type="radio"/> And <input type="radio"/> Or	Select a product range	No Results Returned		Ref	%	Temp	Time

\* Step Instructions:

Each product will be assigned a unique **Ref** (Reference). The **Reference** in this example (chem\_1021) is used in the Step Instructions instead of the chemical name when describing which product to use.

<input type="radio"/> And	<input type="radio"/> Or	F&B - UK	Topax 66		Ref Chem_1021	%	Temp	Time
<input type="radio"/> And	<input type="radio"/> Or	Select a product range	No Results Returned		Ref	%	Temp	Time
<input type="radio"/> And	<input type="radio"/> Or	Select a product range	No Results Returned		Ref	%	Temp	Time
<input type="radio"/> And	<input type="radio"/> Or	Select a product range	No Results Returned		Ref	%	Temp	Time

\* Step Instructions:



For example when writing a step you refer to the chemical in the following manner. “Apply chem\_1021 to all surfaces”

**Note:** The benefit of using the reference (chem\_1021) is that it will automatically insert and colour code (in accordance with its classification) the correct chemical name.

To view the automatically inserted symbols (hazard, classification, colour coding and PPE) associated with this chemical click on the **Information** symbol.



This will display the appropriate information. Only the PPE (personal protective equipment) can be edited. If any of the recommended PPE is not required click the “Tick” immediately below its symbol and it will not appear in the final document.

The screenshot shows a web browser window titled "Product Details - Microsoft Internet Explorer provided by Ecolab". The address bar shows the URL: [https://pcxstage01.planchexx.net/planchexx52/Procedures/display\\_chem](https://pcxstage01.planchexx.net/planchexx52/Procedures/display_chem). The main content area displays "Topax 66" and a table of information:

PPE :			
Hazard Symbols :			
Chemical Symbol :			
Colour Code :			

The browser status bar at the bottom shows "Do", "Internet", and "100%" zoom level.



**Note:** If additional PPE is required select the items required using the **Extra PPE** facility situated within the **Procedure Body** tab.

The percentage (%) field is used to indicate the strength of the in use solution of the chemical

The temperature (**Temp**) field is used to indicate the temperature of the solution

The time (**Time**) field is used to indicate the contact or cycle time

<input type="radio"/> And	<input type="radio"/> Or	F&B - UK	Topax 66	Ref Chem_1021	% 2-3	Temp 40c	Time 20 mins
<input type="radio"/> And	<input type="radio"/> Or	F&B - UK	Topactive 200	Ref Chem_1010	%	Temp	Time
<input type="radio"/> And	<input type="radio"/> Or	Select a product range	No Results Returned	Ref	%	Temp	Time
<input type="radio"/> And	<input type="radio"/> Or	Select a product range	No Results Returned	Ref	%	Temp	Time

Additional chemicals can be inserted into a step by using the **And/Or** facility.

**Step Details** Cancel Save Step

Step Library Foam Cleaning  New Picto

<input checked="" type="radio"/> And	<input type="radio"/> Or	F&B - UK	Topax 66	Ref Chem_1021	%	Temp	Time
<input type="radio"/> And	<input checked="" type="radio"/> Or	F&B - UK	Topactive 200	Ref Chem_1010	%	Temp	Time
<input type="radio"/> And	<input type="radio"/> Or	Select a product range	No Results Returned	Ref	%	Temp	Time
<input type="radio"/> And	<input type="radio"/> Or	Select a product range	No Results Returned	Ref	%	Temp	Time

\* Step Instructions:

The **And** facility is used where more than one chemical product is used in a single step. The **Or** facility is used where you need to suggest an alternative product.

## Step Instructions

The step instruction field is free text, mandatory and will scroll to allow an unlimited entry. There are no limits to the number of steps that can be created allowing instructions to be written in a logical order.

**Step Details** Cancel Save Step

Step 1 Library Isolate Power  New Picto

<input type="radio"/> And	<input type="radio"/> Or	Select a product range	No Results Returned	Ref	%	Temp	Time
<input type="radio"/> And	<input type="radio"/> Or	Select a product range	No Results Returned	Ref	%	Temp	Time
<input type="radio"/> And	<input type="radio"/> Or	Select a product range	No Results Returned	Ref	%	Temp	Time
<input type="radio"/> And	<input type="radio"/> Or	Select a product range	No Results Returned	Ref	%	Temp	Time

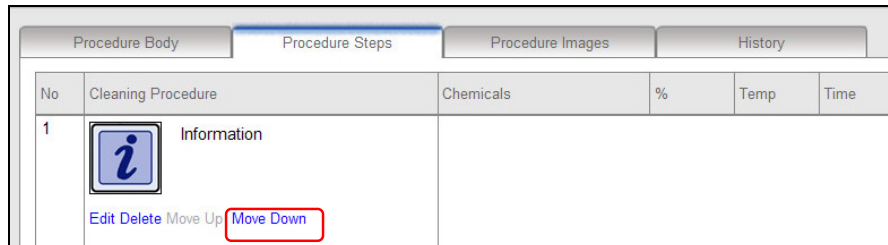
\* Step Instructions: Ensure all items of equipment in the immediate area are isolated from the power supply.


After you have saved the first step it will appear in the table above the step details and be allocated the number "1" indicating it is the first in the sequence. Additional steps can be added by repeating the process.

To **Edit** a step, locate the step in the table and click on the “Edit” link below the pictogram. This will allow you to change the saved information.

The **Delete** link allows you to delete a step. If you delete a step then all subsequent steps will be renumbered to maintain the numeric sequence.

To change the Order of the steps use the **Move Up** or **Move Down** links situated below the pictograms.



No	Cleaning Procedure	Chemicals	%	Temp	Time
1	 Information				

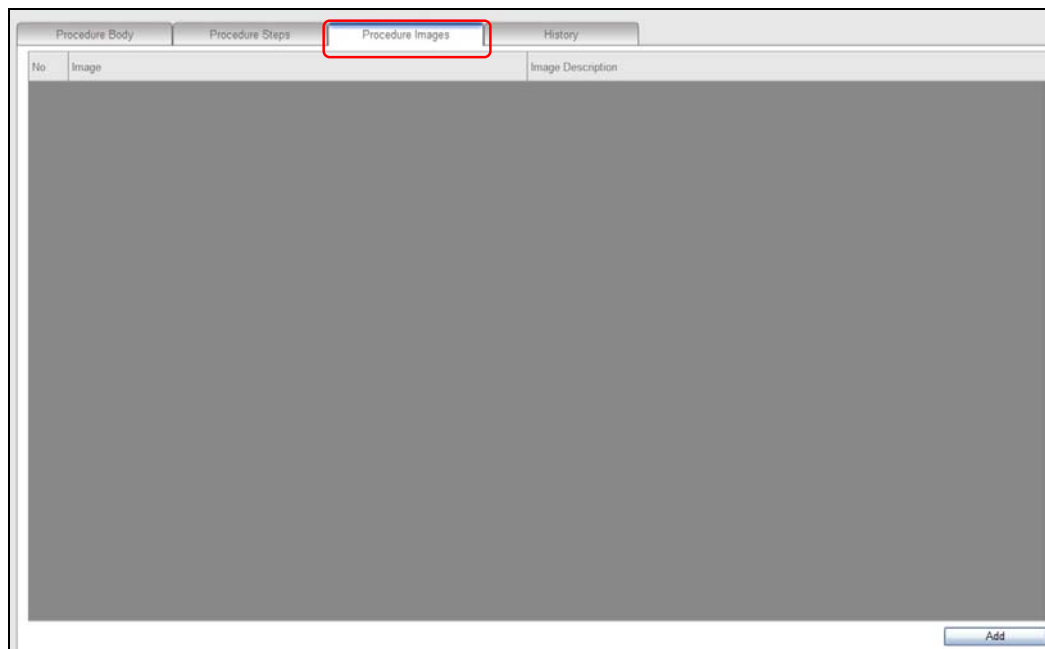
Edit Delete Move Up Move Down

## Adding Digital Images

Unlimited digital images can be added to a procedure to provide visual detail. Images are displayed within the document after the final step. A written description can accompany each image and will be displayed immediately below it. Images will automatically be resized to fit the available space and multiple images are displayed in rows of three.

**Note:** Digital images must be in either \*.jpg or \*.gif format and not exceed 500 KB.

Click on the **Add** button to open the **New Procedure Image** window.



No	Image	Image Description
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Add

The **Image Description** field supports unlimited text and is used to provide a description or additional information. Use the **Browse** button to locate the image on your local drive. Click on the **Upload**

button to add your image. Depending on the size of the file or the speed of your internet connection this may take a few seconds.

### Add a new Procedure Image

Save Cancel

Image Description

Write your description here...

Image

To upload an image you must perform the following actions:

- Please enter a description.
- Browse your local drives for the image file.
- Make sure it has a .Gif Or .Jpg File Extension.
- Click the 'Save' button.
- Be patient as uploading files may take a few minutes.


Browse

**Note:** Images are displayed in order of upload. It is possible to edit, deactivate and delete images and descriptions as well as changing the order in which they appear.

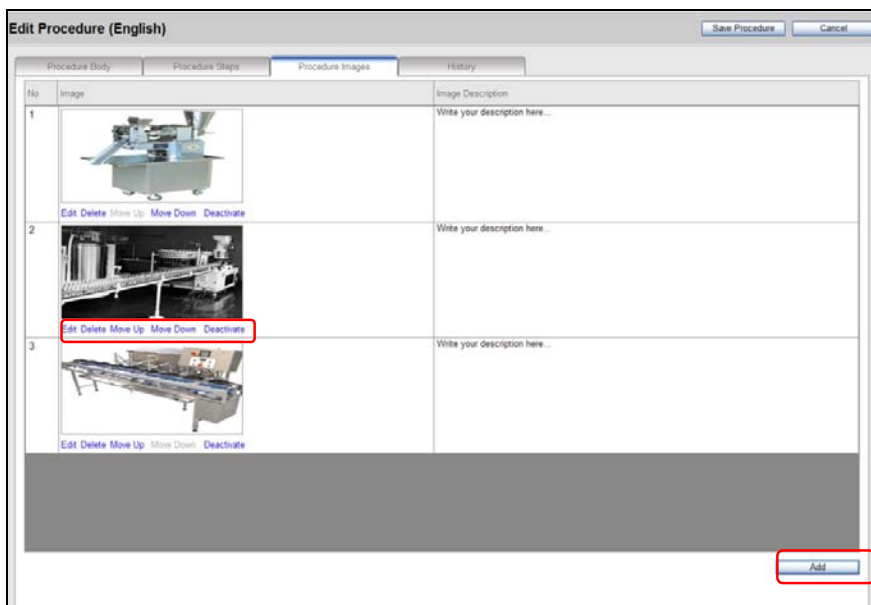
### Add new Procedure

Save Procedure Cancel

Procedure Body Procedure Steps Procedure Images

No	Image	Image Description
1	 <a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Move Up</a> <a href="#">Move Down</a> ✓	Crate cleaning

Add



To edit the description of an image, click on the **Edit** link under the image.

To change the order of images use the **Move Up** and **Move Down** links to achieve desired position.

To deactivate an image click on the **Deactivate** link situated under the image. **Note:** An image that has been deactivated will remain within the list but will not be displayed in the final procedure.

## Saving a Procedure

When the procedure is complete, save it using the **Save** button located at the top right hand corner of the **Procedure** screen. After clicking on the save button you will be returned to the Procedure Maintenance screen and the procedure will be displayed in the table.



## Previewing a Procedure

To review the completed procedure click on the **Preview** link located below the procedure name.




Administration		Procedures		Libraries		Information		User : Beatrix Biren		
<b>Procedure Maintenance</b>										
Client		Facility		Area		Item				
Beech Foods		Beech Foods - Saltash		High Care		Bowl Chopper				
Author		Type		Version		Display				
All		All		Latest Version		<input checked="" type="checkbox"/>				
Procedure Ref	Frequency	Plant Item	Version	Latest	Ecolab Approved	Customer Approved	Images	Active	Info	
193	Weekly	Bowl Chopper	1	Yes	No	No	No	Yes	<a href="#">i</a>	
<a href="#">Preview Copy</a>										

The preview link generates a partially formatted version of the procedure providing an opportunity to review the content. This is not an exact copy of the final document and should only be used for verifying the data.

**Note:** The fully formatted and printable version of the procedure can be accessed from within the Print Maintenance area. To locate this, click on the Procedure menu and select **Print Maintenance**.

**1 - WAYNE / TEST 1 / TRAYWASH DESCALE**






Product	Hazard Symbols	Chemical Symbol	Personal Protective Equipment
Libary - CIP Detergent			

**Frequency**  
Weekly

**Responsibility**  
Hygiene Operative

**Equipment**  
Spray Applicator, Rinse Hose.

**Ref. No**

No	Cleaning Procedure	Chemicals	%	Temp	Time	Instructions
1	 Isolate Power					Switch off machine and heater.
2	 Step Instruction					Open side door of traywash and unscrew black knobs to remove side plate. Fig 2 and Fig 3.
3	 Remove Gross Debris					Manually hose interior to remove gross debris.
4	 Step Instruction					Open drain valve and empty wash tank.
5	 Rinse					Rinse wash tank.