

Editing a Procedure

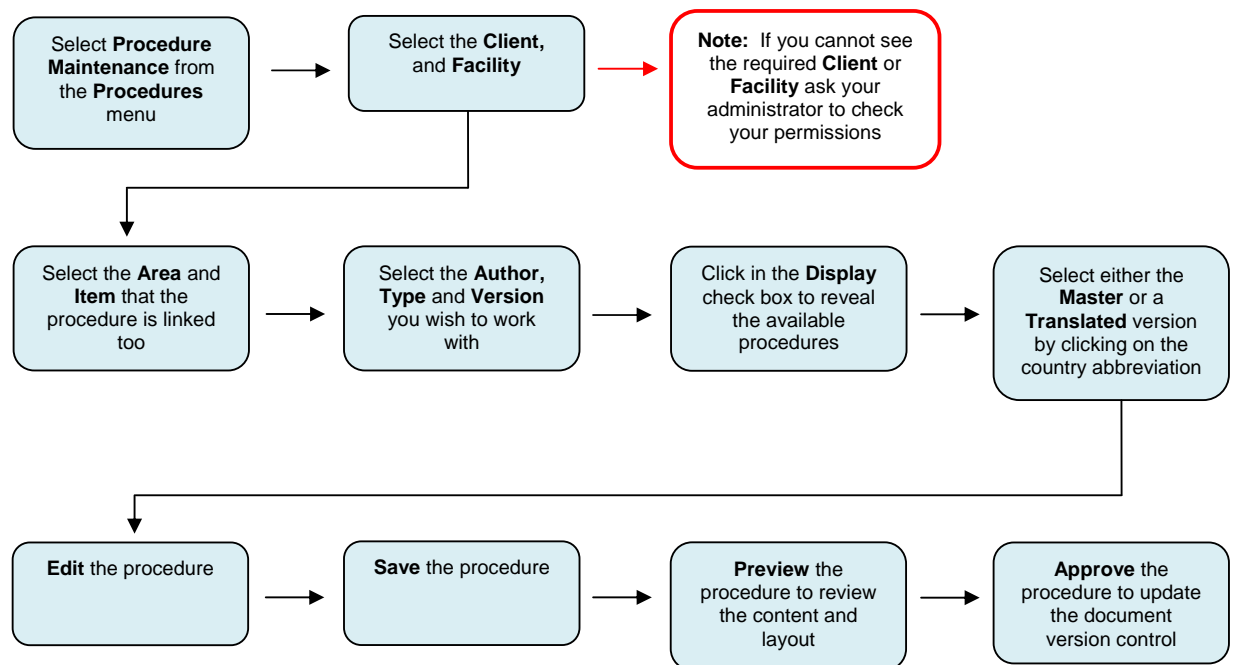
PlanChexx Quick Guide

Before Starting

Editing an approved procedure creates a **Draft** version that will not supersede the currently approved procedure until it has been approved. When approved, a draft procedure becomes the new **Approved Procedure**; the previously approved procedure automatically adopts the status of archived.

Note: Translated versions of a procedure are only accessible when the master is approved. When editing a translated version only the free text fields can be edited, all other areas will be automatically translated.

Editing a Procedure - Work Flow



Editing a Procedure

To edit a procedure, select **Procedures** from the main toolbar and click on **Procedure Maintenance**. Select the **Client**, **Facility**, **Area** and **Item** using the filters situated at the top of the screen.

Administration	Procedures	Libraries	Information	User : Beatrix Biren					
Procedure Maintenance									
<input type="button" value="Add"/> <input type="button" value="Library Import"/> <input type="button" value="Find & Replace"/> <input type="button" value="Print Setup"/>									
Client	Facility	Area	Item						
Beech Foods	1 - Wayne	Test 1	Traywash Descale						
Author	Type	Version	Display						
All	All	Approved Procedure	<input checked="" type="checkbox"/>						
Procedure Ref	Frequency	Plant Item	Version	Latest	Ecolab Approved	Customer Approved	Images	Active	Info
CIP	Weekly	Traywash Descale	1	Yes	Yes	No	No	Yes	
Allocate Language Preview Copy EN DE ES									

The **Author**, **Type** and **Version** filters can also be used to further refine your selection. Click in the **Display** check box to reveal the available procedures.

The available procedures will be displayed in the **Procedure Maintenance** table. Select the one you wish to edit by clicking on the country abbreviation.

Administration	Procedures	Libraries	Information	User : Beatrix Biren					
Procedure Maintenance									
<input type="button" value="Add"/> <input type="button" value="Library Import"/> <input type="button" value="Find & Replace"/> <input type="button" value="Print Setup"/>									
Client	Facility	Area	Item						
Beech Foods	1 - Wayne	Test 1	Traywash Descale						
Author	Type	Version	Display						
All	All	Approved Procedure	<input checked="" type="checkbox"/>						
Procedure Ref	Frequency	Plant Item	Version	Latest	Ecolab Approved	Customer Approved	Images	Active	Info
CIP	Weekly	Traywash Descale	1	Yes	Yes	No	No	Yes	
Allocate Language Preview Copy EN DE ES									

Note: The country abbreviations for **Approved** procedures are displayed in **Green** and **Draft** procedures are displayed in **Red**. Click on the language that you want to edit.




The screenshot shows the 'Edit Procedure (English)' interface. At the top right, there are buttons for 'Preview', 'Save Procedure', and 'Cancel'. Below these are four tabs: 'Procedure Body', 'Procedure Steps', 'Procedure Images', and 'History'. The 'Procedure Body' tab is active. The form contains several sections: metadata fields for Client, Facility, Area, Item, Procedure Ref, Responsibility, Frequency, Type, and Extra PPE; two 'Additional Information' sections with dropdowns and text boxes; an 'Equipment Required' section with a list box; and three empty sections for 'Typical Residues', 'Special Instructions', and 'Inspection Points'.

In the **Edit Procedure** screen navigate using the tabs to make the required changes. When complete save by clicking on the **Save Procedure** button.


This screenshot shows the same 'Edit Procedure (English)' interface, but with the 'Save Procedure' button highlighted with a red box. The form fields are populated with different data: Client is 'Beech Foods2', Facility is '1 - Wayne', Area is '5.0 - UAT 1', Item is 'Plant UAT 1', Procedure Ref is 'As required', Responsibility is 'Hygiene Manager', Frequency is 'HC 100', Type is 'Food', and Extra PPE includes 'Apron', 'Body Suit', 'Boots', 'Breathing Apparatus Required', 'Chemical Gloves', and 'Chemical Resistant Jacket'. The 'Equipment Required' section now contains the text 'This is a test'.





Edit Procedure (English) Preview Save Procedure Cancel

Procedure Body **Procedure Steps** Procedure Images History

No	Cleaning Procedure	Chemicals	%	Temp	Time	Instructions
1	 Isolate Power Edit Delete Insert Move Up Move Down					Switch off machine and heater.
2	 Step Instruction Edit Delete Insert Move Up Move Down					Open side door of traywash and unscrew black knobs to remove side plate. Fig 2 and Fig 3.
3	 Remove Gross Debris Edit Delete Insert Move Up Move Down					Manually hose interior to remove gross debris.

Step Details Cancel Save Step


Step  Library Information New Picto

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

* Step Instructions:

Edit Procedure (English) Preview Save Procedure Cancel

Procedure Body Procedure Steps Procedure Images **History**

No	Image	Image Description
1	 Edit Delete Move Up Move Down <input checked="" type="checkbox"/>	Descale

Saving the Procedure

On completing the save you will be returned to the Procedure Maintenance screen which will display the latest version of your procedure.

Administration		Procedures		Libraries		Information		User : Wayne Ducker	
Procedure Maintenance									
<div style="text-align: right;"> <input type="button" value="Add"/> <input type="button" value="Library Import"/> <input type="button" value="Find & Replace"/> <input type="button" value="Print Setup"/> </div>									
Client Beech Foods		Facility 1 - Wayne		Area 5.0 - UAT 1		Item Plant UAT 1			
Author All		Type All		Version Latest Version		Display <input checked="" type="checkbox"/>			
Procedure Ref	Frequency	Plant Item	Version	Latest	Ecolab Approved	Customer Approved	Images	Active	Info
12345 Allocate Language Preview Copy EN	Daily	Plant UAT 1	2	Yes	Yes	No	Yes	Yes	?
As required Preview Copy EN	HC 100	Plant UAT 1	4	Yes	No	No	Yes	Yes	?



Previewing a Procedure

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




Administration		Procedures		Libraries		Information		User : Wayne Ducker	
Procedure Maintenance									
<div style="text-align: right;"> <input type="button" value="Add"/> <input type="button" value="Library Import"/> <input type="button" value="Find & Replace"/> <input type="button" value="Print Setup"/> </div>									
Client Beech Foods		Facility 1 - Wayne		Area 5.0 - UAT 1		Item Plant UAT 1			
Author All		Type All		Version Latest Version		Display <input checked="" type="checkbox"/>			
Procedure Ref	Frequency	Plant Item	Version	Latest	Ecolab Approved	Customer Approved	Images	Active	Info
12345 Allocate Language Preview Copy EN	Daily	Plant UAT 1	2	Yes	Yes	No	Yes	Yes	?
As required Preview Copy EN	HC 100	Plant UAT 1	4	Yes	No	No	Yes	Yes	?

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
Library - 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.

Approving a Procedure

To approve a procedure, click on the **NO** link situated in either the **Ecolab** or **Customer Approved** column of the Procedure Maintenance table. Your access to either the Ecolab or Customer approval option will be dependent on your user profile.

Note: A draft procedure approved by either Ecolab or a Customer becomes the new **Approved Procedure** and displays the latest version number. The old approved procedure automatically adopts the status of **Archived** and displays the previous version number.