

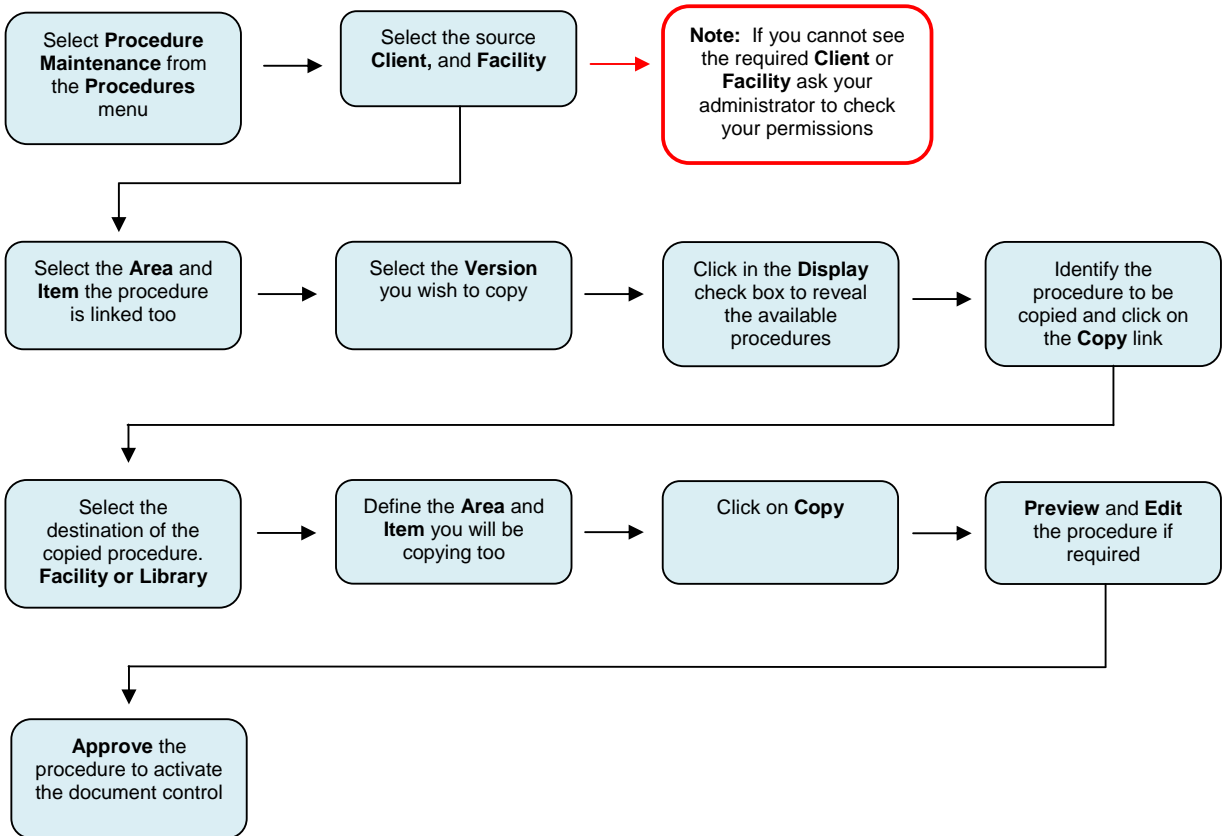
## Copying a Procedure

### PlanChexx Quick Guide

#### Before Starting

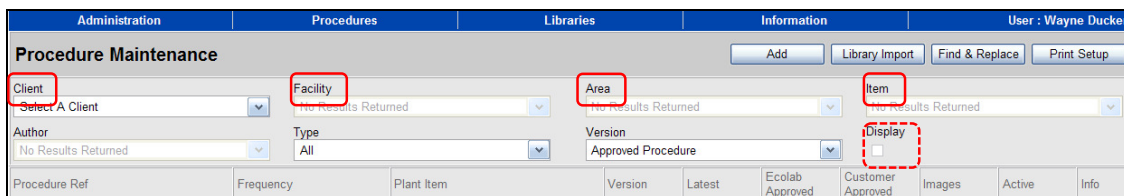
All procedures copied to a facility must be linked to a plant item in the destination area. If you have not created the areas and items for the procedures you intend to copy, please refer to the Quick Guide on **Managing Areas** and **Items** before proceeding.

#### Copying a Procedure - Work Flow



#### Copying a Procedure

To copy 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 to locate the procedure to be copied.



Use the **Version** filter 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 copy by clicking on the **Copy** link.

**Note:** Only master procedures can be copied. If a master procedure has translated versions these will also be copied to the target destination.

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	Beech Foods	Facility	1 - Wayne	Area	5.0 - UAT 2	Item	All		
Author	All	Type	All	Version	All	Display	<input checked="" type="checkbox"/>		
Procedure Ref	Frequency	Plant Item	Version	Latest	Ecobab Approved	Customer Approved	Images	Active	Info
CIP	Weekly	Traywash Descale	1	Yes	Yes	No	No	Yes	
<a href="#">Allocate Language Preview</a> <a href="#">Copy</a>									
EN									
Deep Clean	Yearly	Holding Chill Store	1	Yes	No	No	No	Yes	
<a href="#">Preview Copy</a>									
EN									

In the Copy a Procedure screen select the destination of the procedure you wish to copy. This can either be a **Facility** or one of the **Libraries**.

**To Copy A Procedure.**

- Select where you wish to Copy the procedure to.

Copy To :

On selecting the **Copy To** destination, additional fields will appear allowing you to select the area and item that the copied procedure will be aligned too. Use the dropdown menus to populate the fields and click on **Copy**.

**To Copy A Procedure.**

- Select where you wish to Copy the procedure to.

Copy To :

- Select the Client, Facility, Area, and Item. Type is optional.
- Click the 'Copy Procedure' button.

Client :

Facility :

Area :

Item :

Type :

The new procedure will automatically be created and displayed in the Procedure Maintenance table.

## 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	
<b>Procedure Maintenance</b>									
Client Beech Foods		Facility 1 - Wayne		Area 5.0 - UAT 3		Item Traywash Descale			
Author All		Type Food		Version All		Display <input checked="" type="checkbox"/>			
Procedure Ref	Frequency	Plant Item	Version	Latest	Ecolab Approved	Customer Approved	Images	Active	Info
CIP	Weekly	Traywash Descale	1	Yes	No	No	No	Yes	
<a href="#">Preview Copy</a> <a href="#">EN</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						
<b>Product</b>	<b>Hazard Symbols</b>	<b>Chemical Symbol</b>	<b>Personal Protective Equipment</b>			
Library - CIP Detergent						
<b>Frequency</b>	<b>Equipment</b>					
Weekly	Spray Applicator, Rinse Hose.					
<b>Responsibility</b>	<b>Ref. No</b>					
Hygiene Operative						
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 the Procedure

To approve the 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.