

Importing Library Procedures

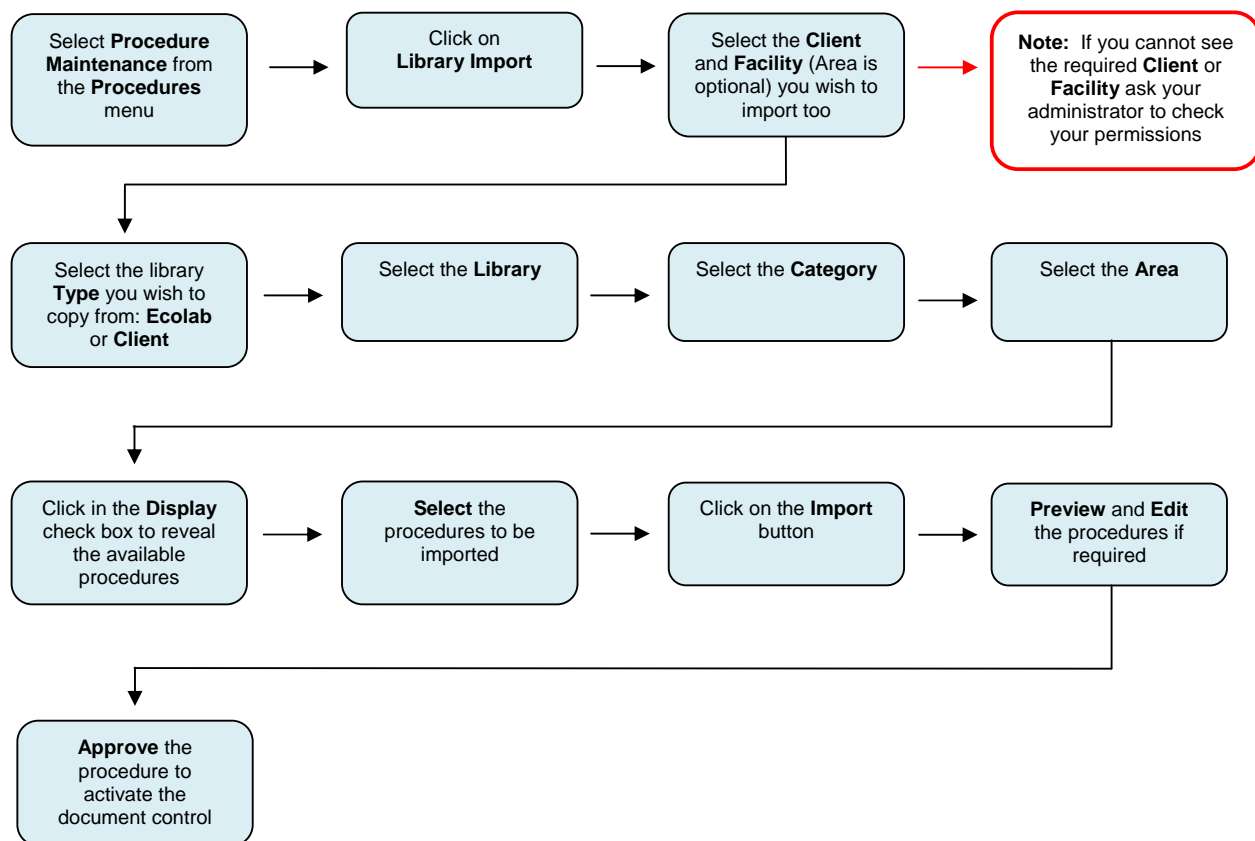
PlanChexx Quick Guide

Before Starting

Procedures copied from a Library do not need to be linked to an Area. A new **Area** will automatically be created if an existing **Area** is not selected as the import location. The name of the new **Area** will be the same as the Library **Area** that the procedures were copied from. To Import procedures into an existing Area, select the Area from the drop down menu.

Plant Items are automatically created during the import process using the name of the Library Item. Plant Item names can be edited after importing in the **Area and Item Setup** screen. Please refer to the Quick Guide on **Managing Areas and Items**.

Importing Library Procedures - Work Flow



Importing Library Procedures

To Import Library procedures, select **Procedures** from the main toolbar and click on **Procedure Maintenance**. From within the Procedure Maintenance screen, click on **Library Import**.

Administration	Procedures	Libraries	Information	User : Wayne Ducker
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 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

From the **Import Library Items** screen use the Client and Facility filters to select the destination of the imported procedures.

Note: Selecting a destination **Area** is optional. If you do not select an Area one will be created during the import process using the **Area** name from the Library.

Import Library Items.						Import	Cancel	
To Import Library Items.								
<ul style="list-style-type: none"> Step 1: Select the Client / Facility To Import To [Area Is Optional]. 								
Client :	Beech Foods	Facility :	1 - Wayne	Area :	5.0 - UAT 2			
<ul style="list-style-type: none"> Step 2: Using the filters provided, select the Library Items you wish to import. 								
Import From :	Select Import Location	Client :		Facility :				
Area :		Item :		Type :	All			
Author :							Display Records :	<input type="checkbox"/>
<ul style="list-style-type: none"> Step 3: Press the 'Import' button to finish. (Use the 'Preview' button to view a Library Item). 								
<p>Note : A blue row colour indicates that not all Chemicals / Headings may be available for your selected import Facility.</p>								
Select	Procedure Ref	Item	Frequency	Type	Author			
No Results Returned.								

Select the Library you wish to Import from. Depending on your permissions the following options may be available, **Procedure**, **Ecolab** or **Client**.

Note: The **Ecolab** and **Client** Libraries are true Libraries; the **Procedure** option allows the copying of multiple procedures from one Facility to another within the same Client.

Import Library Items.						Import	Cancel	
To Import Library Items.								
<ul style="list-style-type: none"> Step 1: Select the Client / Facility To Import To [Area Is Optional]. 								
Client :	Beech Foods	Facility :	1 - Wayne	Area :	5.0 - UAT 2			
<ul style="list-style-type: none"> Step 2: Using the filters provided, select the Library Items you wish to import. 								
Import From :	Select Import Location	Client :		Facility :				
Area :	Select Import Location	Item :		Type :	All			
Author :	Procedure Library							
	Ecolab Library							
	Client Library							

Select the **Library**, **Category** and **Area** you wish to import from.

Import Library Items.						Import	Cancel	
To Import Library Items.								
<ul style="list-style-type: none"> Step 1: Select the Client / Facility To Import To [Area Is Optional]. 								
Client :	Beech Foods	Facility :	1 - Wayne	Area :	5.0 - UAT 2			
<ul style="list-style-type: none"> Step 2: Using the filters provided, select the Library Items you wish to import. 								
Import From :	Ecolab Library	Library :	United Kingdom	Category :	Food			
Area :	Meat - Processing	Item :	All	Type :	All			
Author :	All							

Click in the **Display Records** check box to review the available procedures.

Import Library Items.

To Import Library Items.

- Step 1:** Select the Client / Facility To Import To [Area Is Optional].
 Client : Beech Foods Facility : 1 - Wayne Area : 5.0 - UAT 2
- Step 2:** Using the filters provided, select the Library Items you wish to import.
 Import From : Ecolab Library Library : United Kingdom Category : Food
 Area : Environment Item : All Type : All
 Author : All
- Step 3:** Press the 'Import' button to finish. (Use the 'Preview' button to view a Library Item). Display Records :

Note : A blue row colour indicates that not all Chemicals / Headings may be available for your selected import Facility.

Select	Procedure Ref	Item	Frequency	Type	Author
<input type="checkbox"/>	Launder Preview	Air Socks	As Required	Food	Howard Charlesworth
<input type="checkbox"/>	Manual Preview	Air Vents	As required	Food	Howard Charlesworth
<input type="checkbox"/>	Foam Preview	Ceiling	As Required	Food	Howard Charlesworth

Use the **Select** check boxes to identify the procedures you wish to Import. Making no selection will allow **All** procedures to be imported. When complete click on the **Import** button.

The Imported procedures will now be visible in the **Procedure Maintenance** screen.



Administration		Procedures		Libraries		Information		User : Wayne Ducker	
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	Beech Foods	Facility	1 - Wayne	Area	5.0 - UAT 3	Item	All		
Author	All	Type	All	Version	All	Display	<input checked="" type="checkbox"/>		
Procedure Ref	Frequency	Plant Item	Version	Latest	Ecolab Approved	Customer Approved	Images	Active	Info
After Use Preview Copy EN	After Use	Ceiling and Air-systems	1	Yes	No	No	No	Yes	i
Ceiling Preview Copy EN	regular	Ceiling and Air-systems	1	Yes	No	No	No	No	i
CIP Preview Copy EN	Weekly	Traywash Descale	1	Yes	No	No	No	Yes	i

Previewing Imported Procedures

To Preview the Imported procedures click on the **Preview** link located below the procedure name.

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 - CIF 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 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.

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PlanChexX.Net
User : Wayne Ducker

Administration
Procedures
Libraries
Information
User : Wayne Ducker

Procedure Maintenance

Add
Library Import
Find & Replace
Print Setup

Client : Beech Foods Facility : 1 - Wayne Area : 5.0 - UAT 2 Item : All

Author : All Type : All Version : All Display :

Procedure Ref	Frequency	Plant Item	Version	Latest	Ecolab Approved	Customer Approved	Images	Active	Info
Laundry Preview Copy EN	As Required	Air Socks	1	Yes	No <input type="checkbox"/>	No <input type="checkbox"/>	No	Yes	
Manual Preview Copy EN	As required	Air Vents	1	Yes	No	No	No	Yes	
Periodic Preview Copy EN	Monthly	Chill Unit	1	Yes	No	No	No	Yes	

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.