



Process Planning

Overview

The Process Planning screen is part of the Organics Module. It is used to define and manage a series of steps & documents about an organic certification process.

Each plan belongs to an associate and is tied to a year. An associate can have more than one plan per year.

Experimental link to google doc (11/12/20)

Foundation Work Instructions [https://drive.google.com/file/d/1uR4z9Y3NIRmgHebnmbbVCBjWd_cLFBO]

Plan Steps

Each plan has a series of steps. Any step can have any number of sub-steps. Steps can be added to a plan individually, or by adding a predefined Template.

A Template is a special type of plan with all of the steps predefined. When a template is added to an existing plan, all of the steps defined in the Template are copied into the new plan.

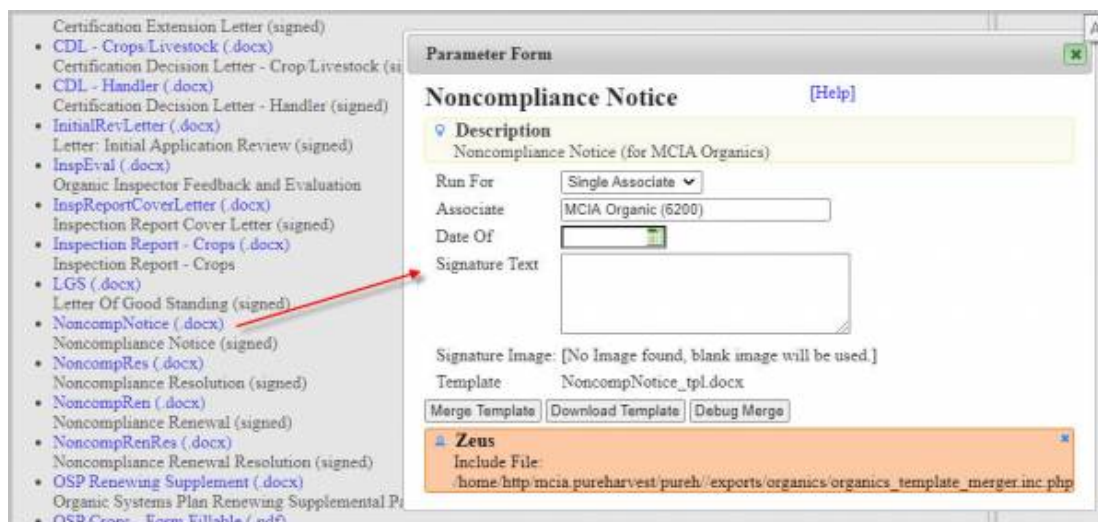
Plan Documents

Each plan is assigned a folder, and documents can be uploaded to the folder using the Upload Document form.

Once a document has been uploaded it can be tied to a step.

Uploaded documents are given a unique name, so as not to overwrite any existing document already in the folder.

Click on a file name, and the param form for that document will open.



Billing the Plan

Charges on the plan can be manually entered, or created by selecting from the predefined fees for Organics.

These charges are created with type "O" and would be invoiced separately from lab fees.

Old PH

These are from old-PH, to be updated for newPH when needed.

Overview

The set of screens and reports will allow you to define a process as a set of steps and documents.

Those steps and documents can be used to manage a particular project in a way that can be documented, controlled and audited.

Plan Management

The “Set Name” is any name you want to give to the set of documents. It can be changed if needed.

The “Set Type” determines which templates and steps will be used when you create the project.

The “Start Date” is the expected start data of the project.

The “Disk Folder” tells where the document set is located on your hard disk. All of the file names must be located in this folder.

The section to the right side is designed for certification of an Organic process.

Duplicate

Press the [Duplicate] button on the main screen to create a copy of a another plan.

Enter the new information and press [Create Copy].

Acres managed

The section to the right side is designed for certification of an Organic process.

Check file status tells PH not to check file dates when this is unchecked. If you are on a computer that doesn't have access to the files, attempting to check the dates will slow the screen way down.

Plan Steps

The lower section allows you to track the process of the plan, and edit and review the particular documents.

The Label field must be unique within the document set. In reports, the label will be used to sort the steps. You should follow a labelling convention that allows the sort to work properly.

For example:

A.01.01 Section A Part 1, step 1
A.01.02 Section A Part 1, step 2
B.01.20 Section B Part 1, step 20

The “File Name” is the name of a document in the project folder. Under the file name, PH will show the last date the file was modified, and the file size. The [?] button next to the file name will bring up your folder browser so you can find the particular document. The [Open] button will open that document.

