Change Planner Relationship

When you are revising a manual that has not been updated recently, you may encounter a [Planner Role Error](). Planner role errors sometimes result from an unnecessary "XMRP" designation after the planner's name. To get rid of the planner role error, you will need to change the primary planner role to a planner without XMRP in the name.

If you are able to create and delete relationships in PDM, you may try to replace the planner on a part in PDM through the relationship of the part as described below in Remove/Replace Planner Relationship. If you are not able to create and delete relationships in PDM, see Change Primary Planner here.

Change Primary Planner

1. View planner names. Highlight the part, right click, and select **Graco Relations > Planners >All Planners.**
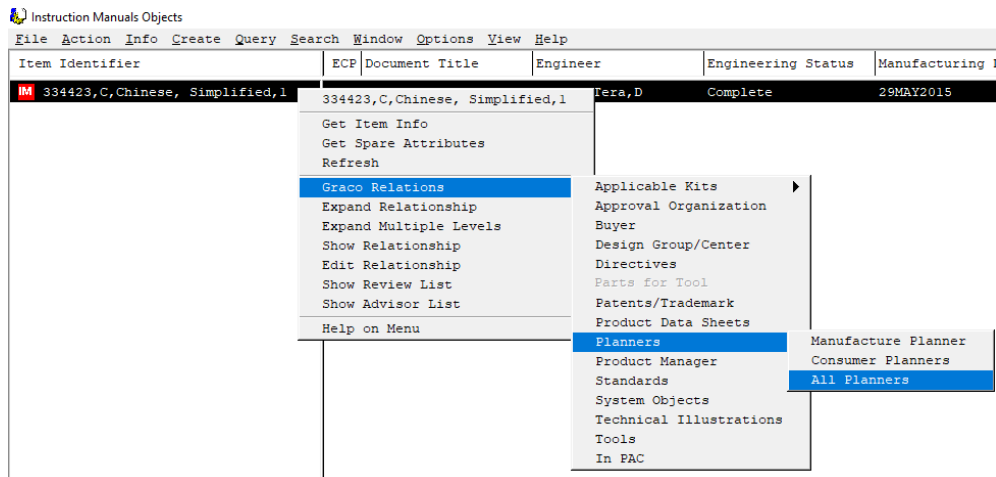

2. Change the primary planner. There may be one, two, or more planners listed.
   a. If there are two or more planners listed, drag/drop a planner name without XMRP onto the part.
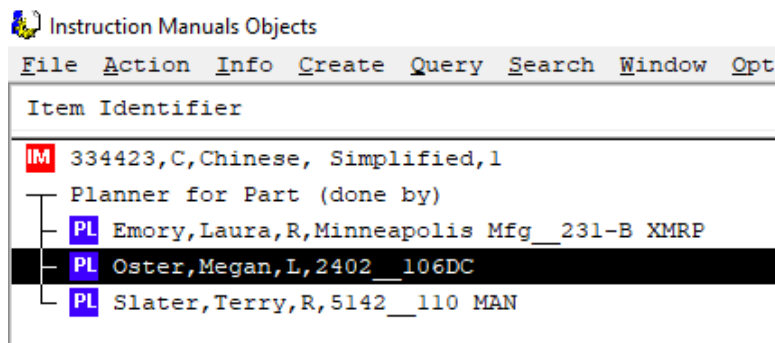
NOTE: You may need to expand the Item Identifier column to see the full planner name. Click and drag the column divider between the Item Identifier and ECP columns to the right to show the full planner name and any XMRP suffix.

b. If there is only one planner listed, find a manual that has a planner name without XMRP. Open a separate window with that manual in it, then drag/drop the planner name without XMRP onto the part you are revising. In the example below, planner "Slater, Terry" is about to be dragged from the left window to part 309462 in the right window.
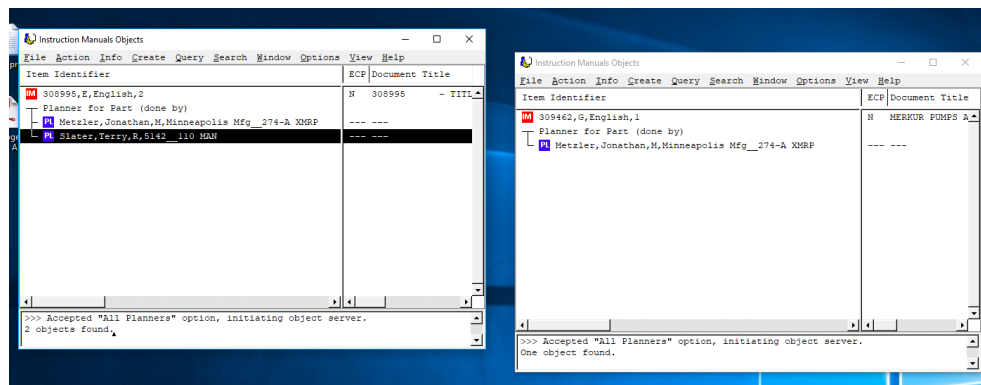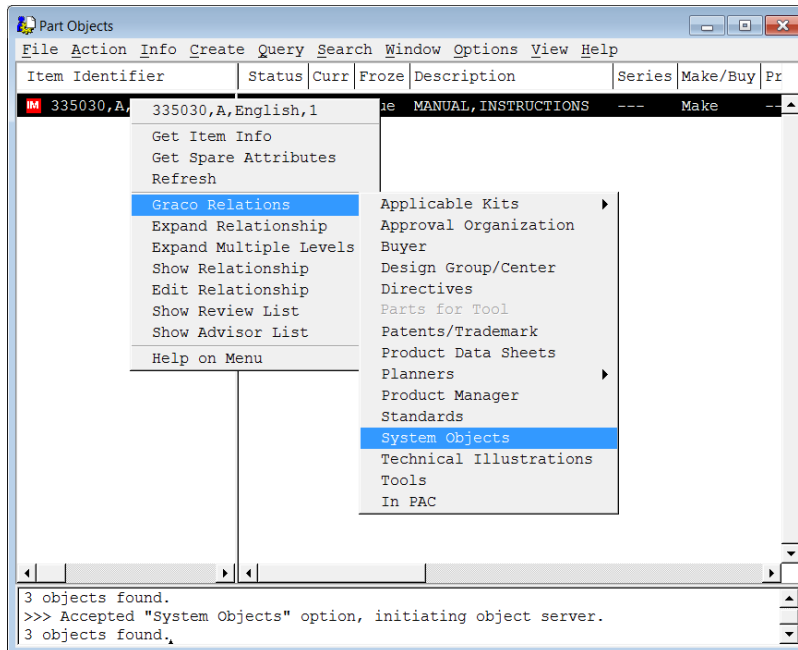

3. Select Manufacture in the **Create Part to Planner** dialogue box. The dialogue box will automatically appear.
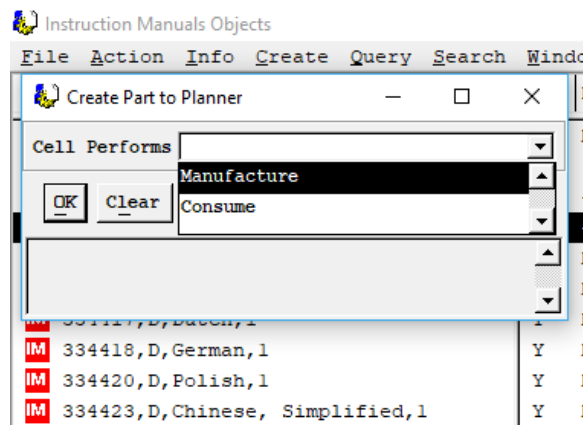
The planner without the XMRP suffix is now the primary planner. Continue to revise and update the manual as usual.
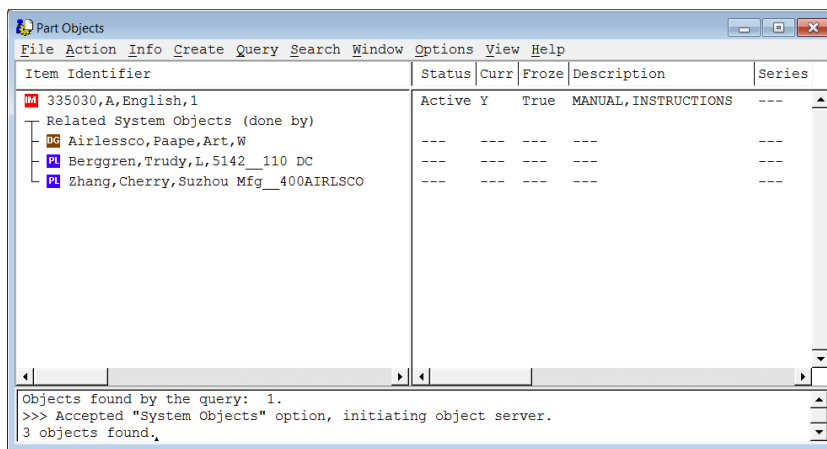
Remove/Replace Planner Relationship

1. Highlight the part, right click, and select **Graco Relations > System Objects**.

The items with the blue "PL" icon are the planners and planner codes.

NOTE: If there is more than one planner, you will remove both planners and re-add just the primary manufacturing planner. Remember the full planner code of the primary planner.
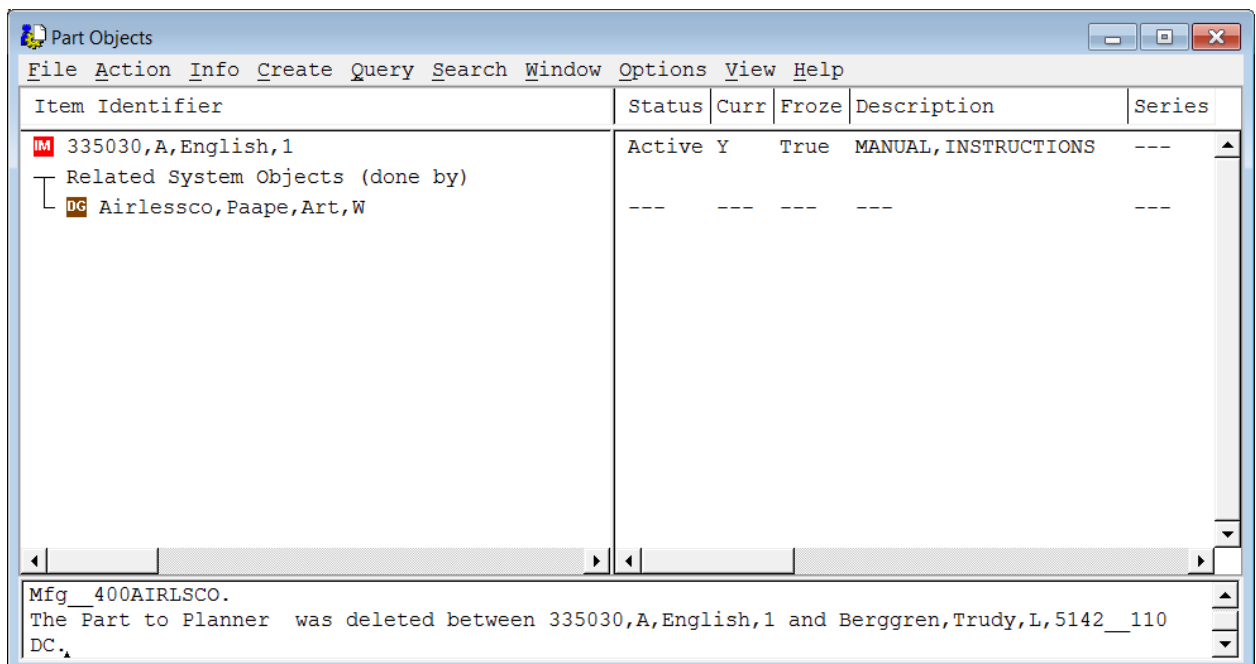
2. Delete the relationship between the planners and the manual item. Highlight the planners and go to **Action > More Actions > Delete Relationship**.

Action > More Actions > Delete Relationship:
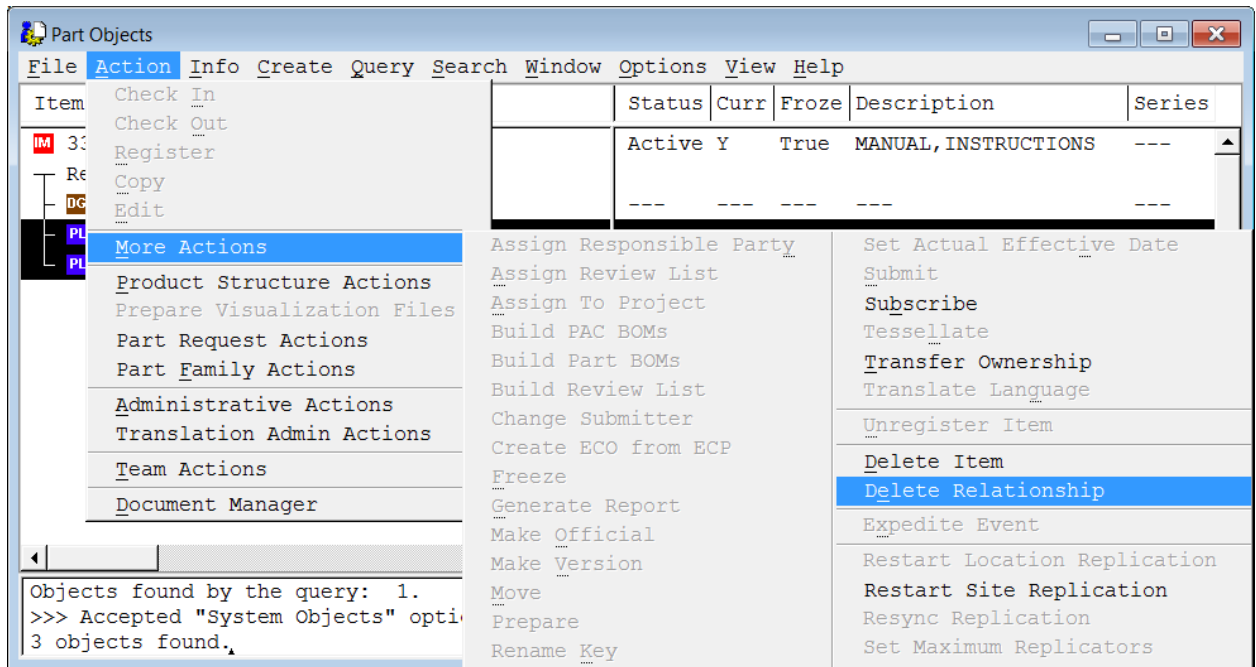
When relationship has been deleted:

3. Re-add the primary manufacturing planner to the item.
    1. Open a new window (**Window > Object Browser**). Query for the planner through **Query > Graco System Classes > Planner**.
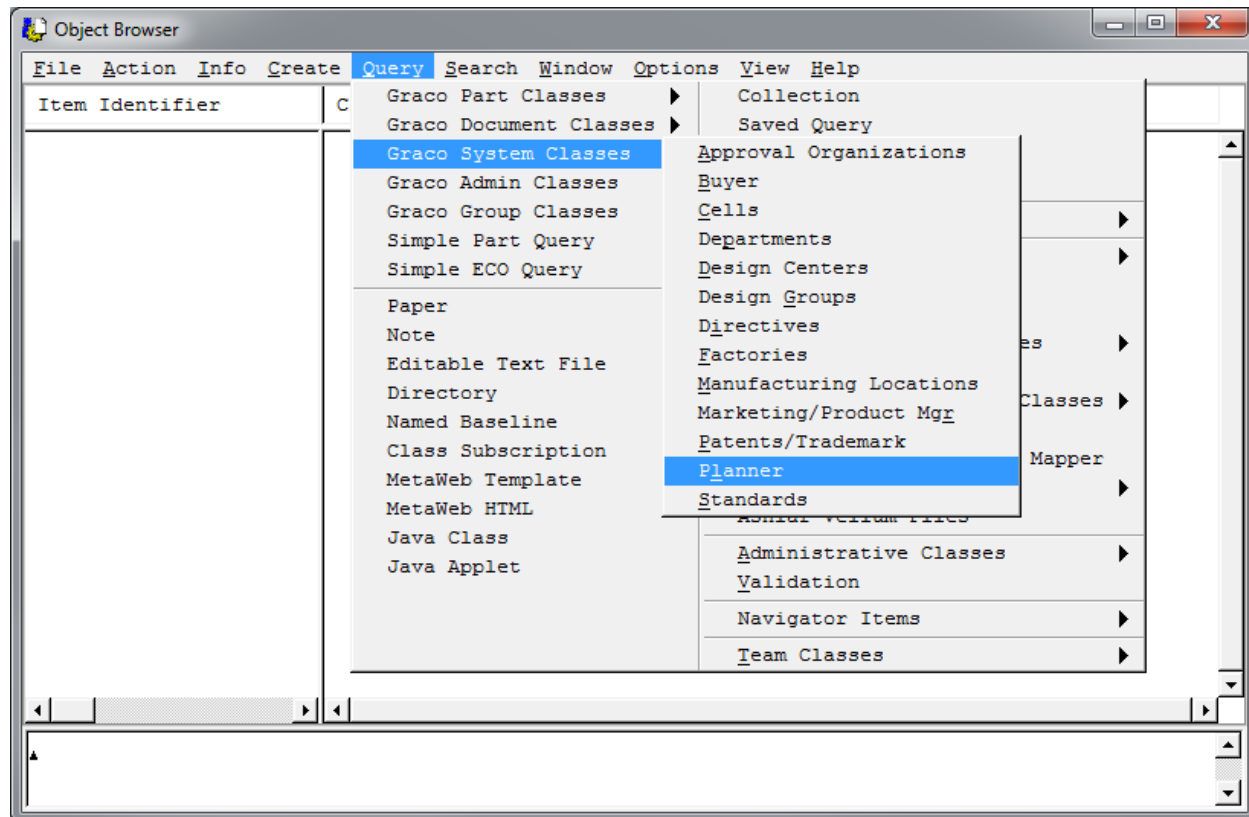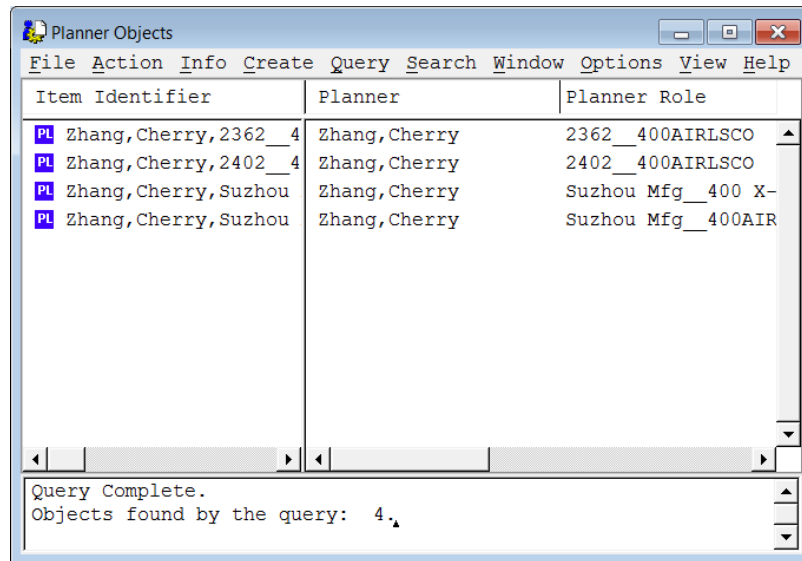

    2. In the **Planner Role** field, enter the last name of the planner with an asterisk (such as Zhang*). This query will return a list of all of the planner codes for the planner with that last name.

All planner codes for Cherry Zhang:

3. Select the same planner code of the primary manufacturing engineer (the same planner code seen in step 1). Drag and drop the planner name onto the manual part number.

4. In the **Create Part to Planner** dialogue box, select Manufacture.

5. Verify that the planner is attached to the part. Right click and select **Graco Relations > System Objects**.

Part Objects

Item Identifier	Status	Curr	Froze	Description	Series
IM 335030,A,English,1	Active	Y	True	MANUAL,INSTRUCTIONS	---
Related System Objects (done by)					
DG Airlessco,Paape,Art,W	---	---	---	---	---
PL Zhang,Cherry,Suzhou Mfg__400AIRLSCO	---	---	---	---	---

2 objects found.
Updated items in an expansion.
Added items to an expansion.