

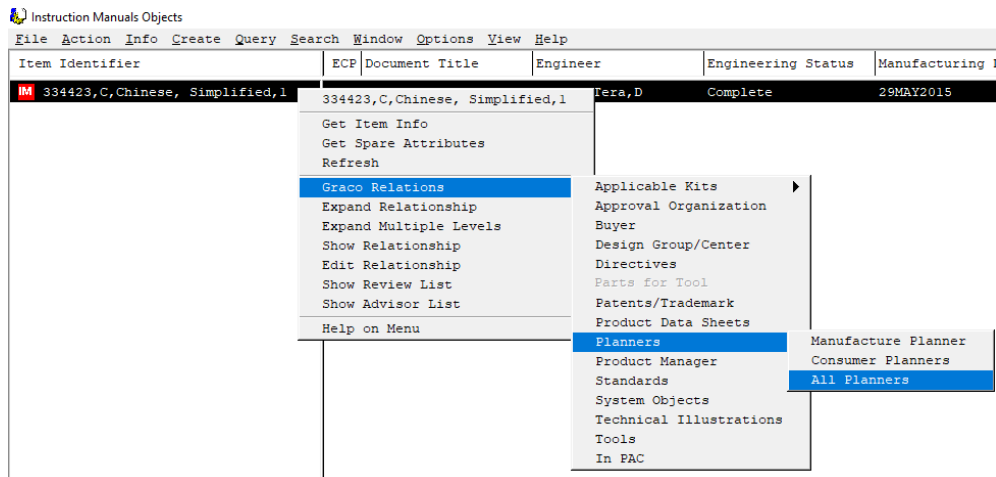
Change Planner Relationship

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.

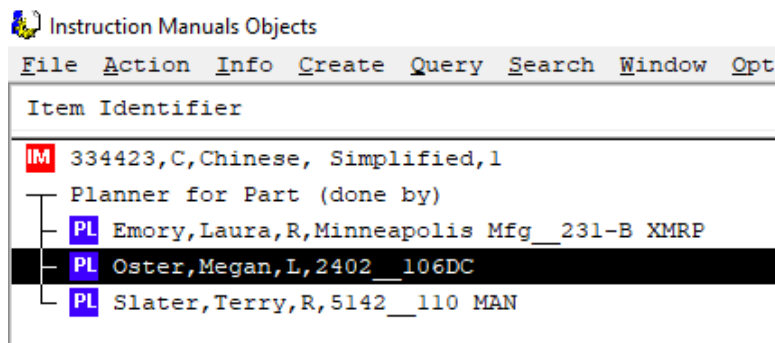
If you are able to create and delete relationships in PDM, you may try to replace the planner on a part in PDM through the relationship of the part as described below in Remove/Replace Planner Relationship. If you are not able to create and delete relationships in PDM, see Change Primary Planner here.

Change Primary Planner

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

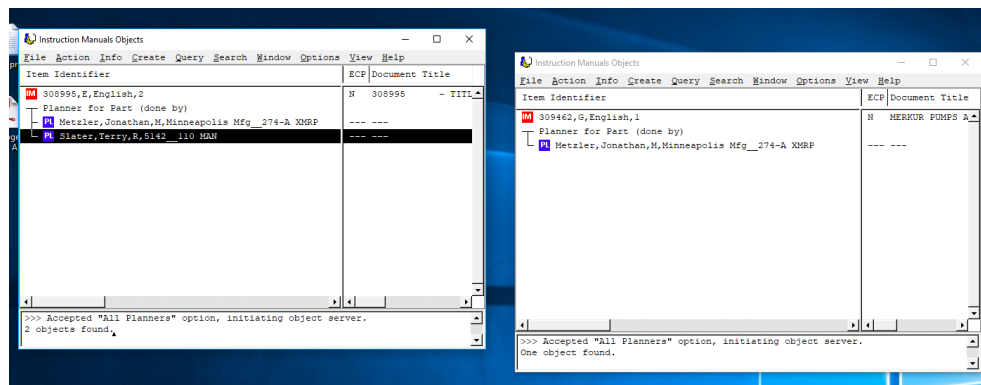


2. Change the primary planner. There may be one, two, or more planners listed.
 - a. If there are two or more planners listed, drag/drop a planner name without XMRP onto the part.

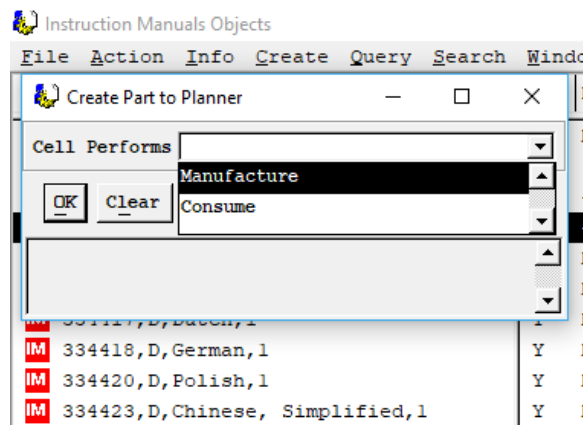


NOTE: You may need to expand the Item Identifier column to see the full planner name. Click and drag the column divider between the Item Identifier and ECP columns to the right to show the full planner name and any XMRP suffix.

- 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.



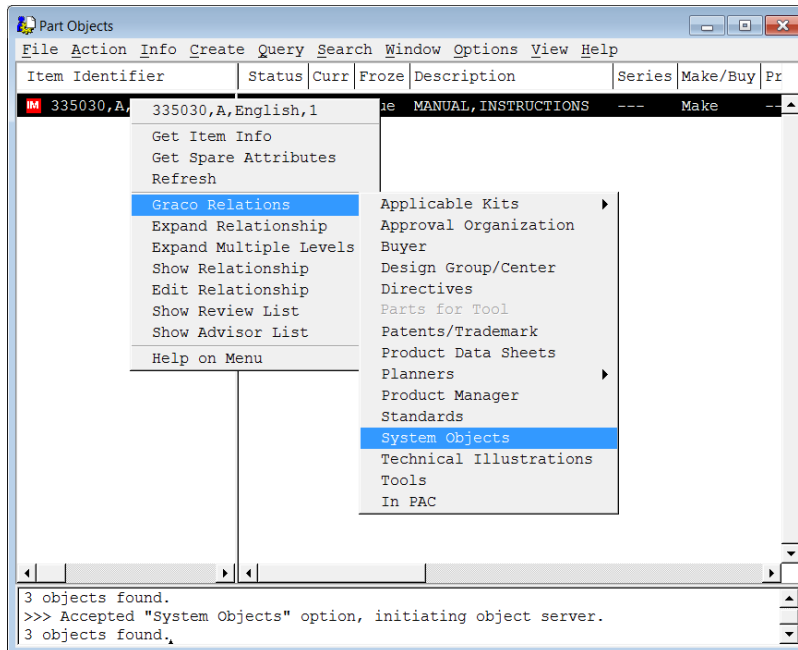
3. Select Manufacture in the **Create Part to Planner** dialogue box. The dialogue box will automatically appear.



The planner without the XMRP suffix is now the primary planner. Continue to revise and update the manual as usual.

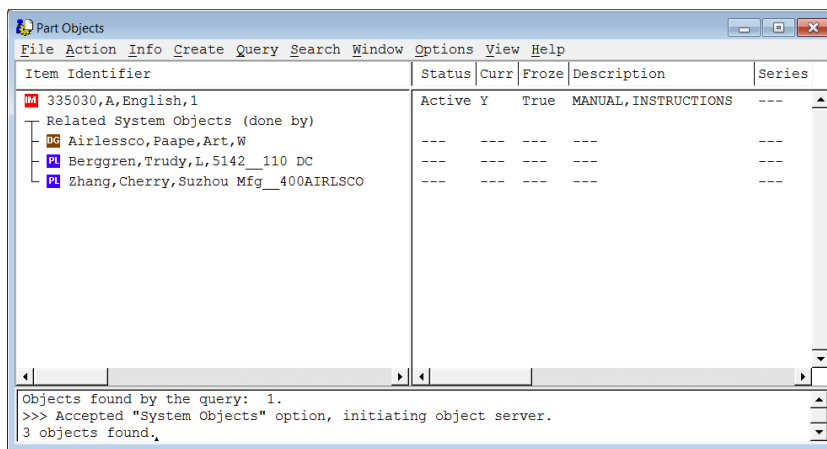
Remove/Replace Planner Relationship

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



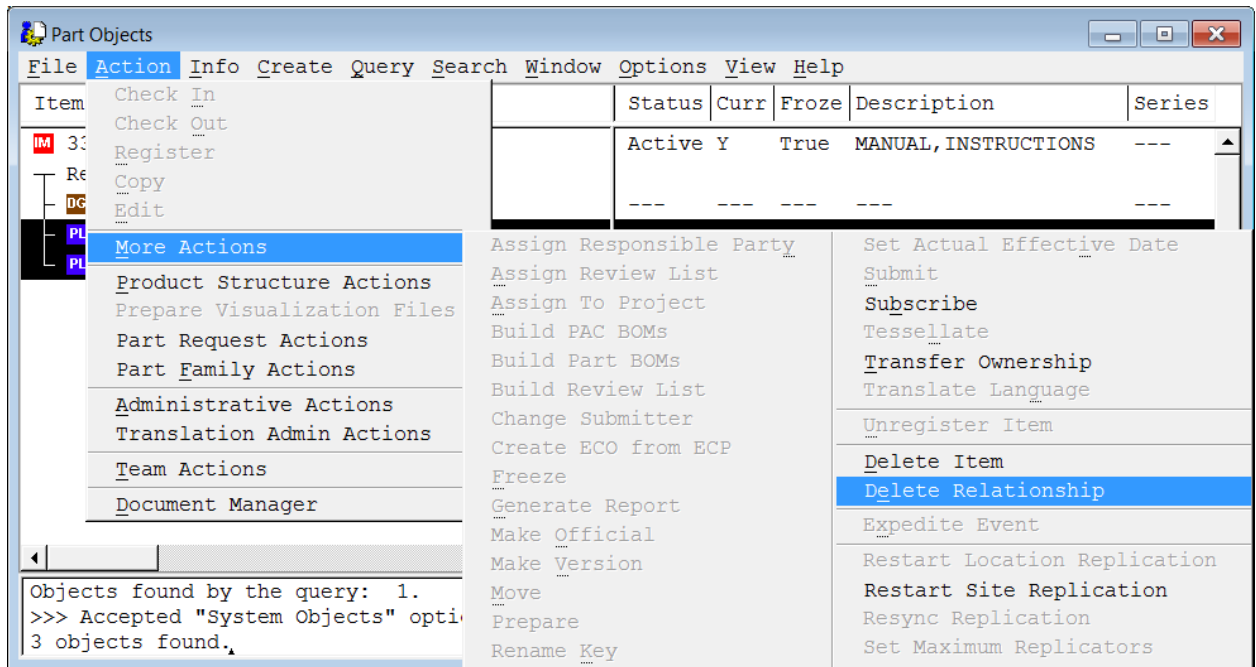
The items with the blue "PL" icon are the planners and planner codes.

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.

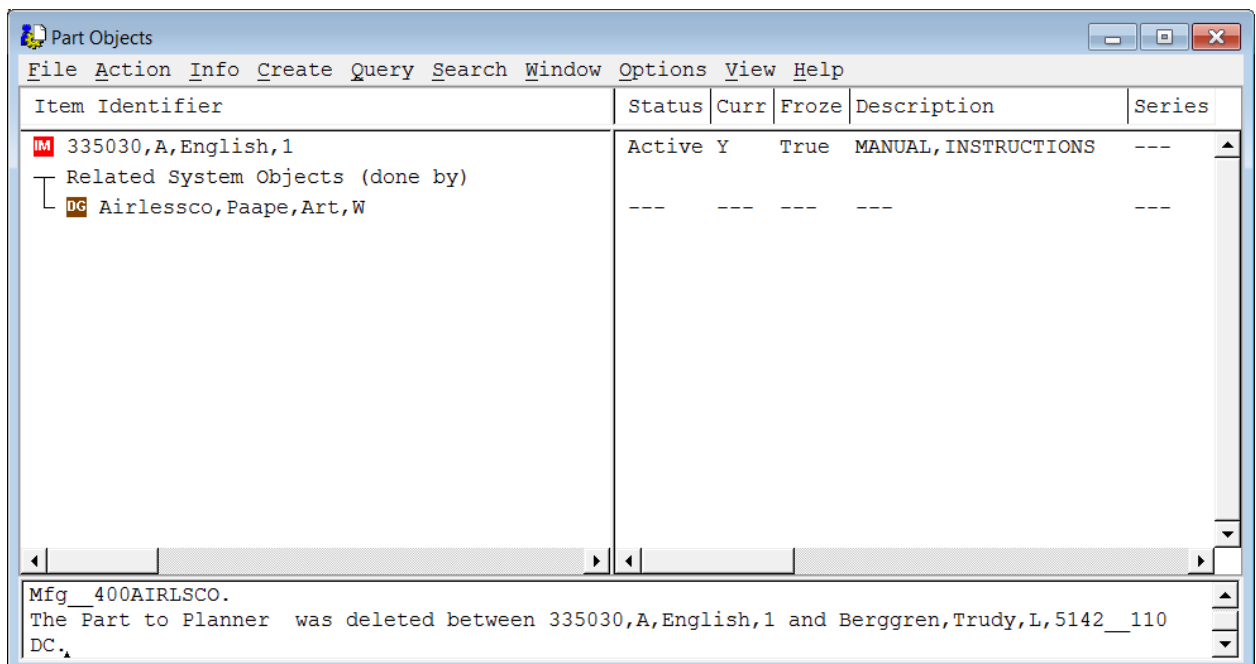


2. Delete the relationship between the planners and the manual item. Highlight the planners and go to **Action > More Actions > Delete Relationship**.

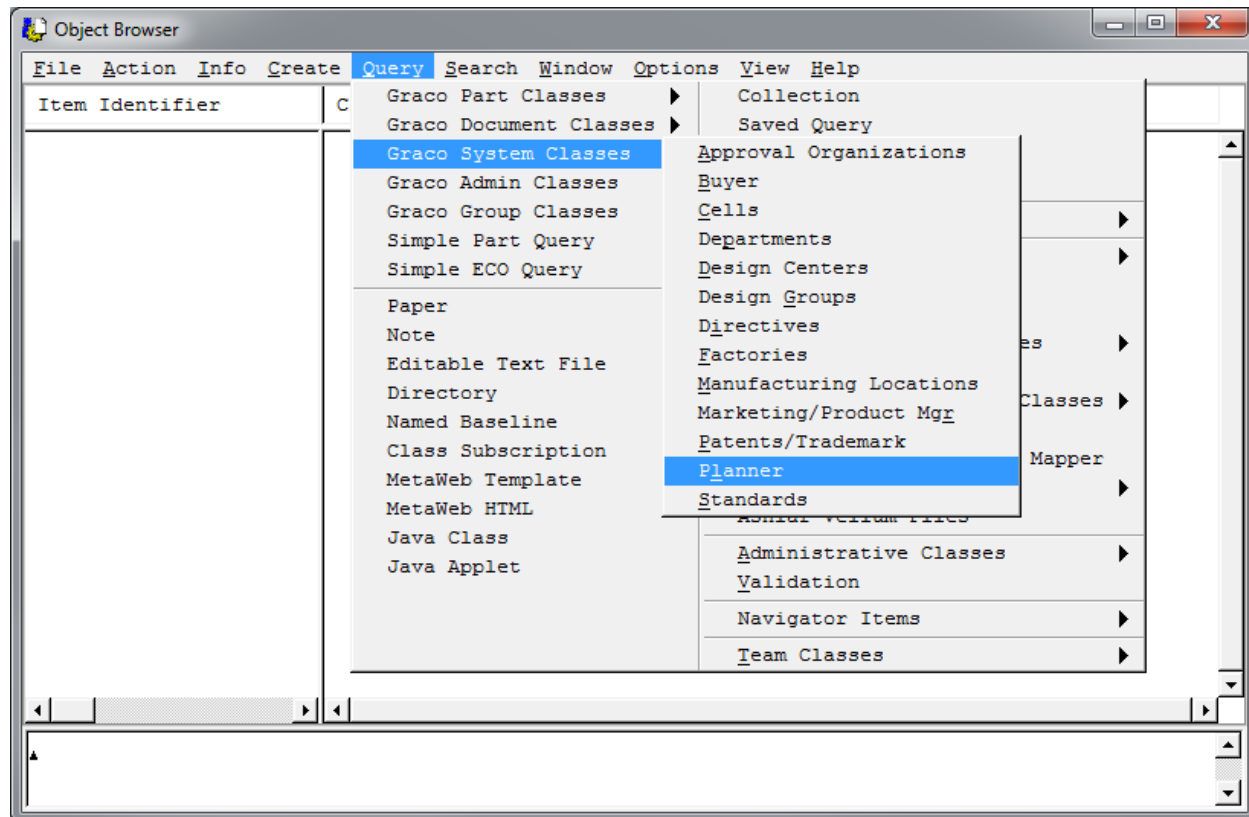
Action > More Actions > Delete Relationship:



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**.

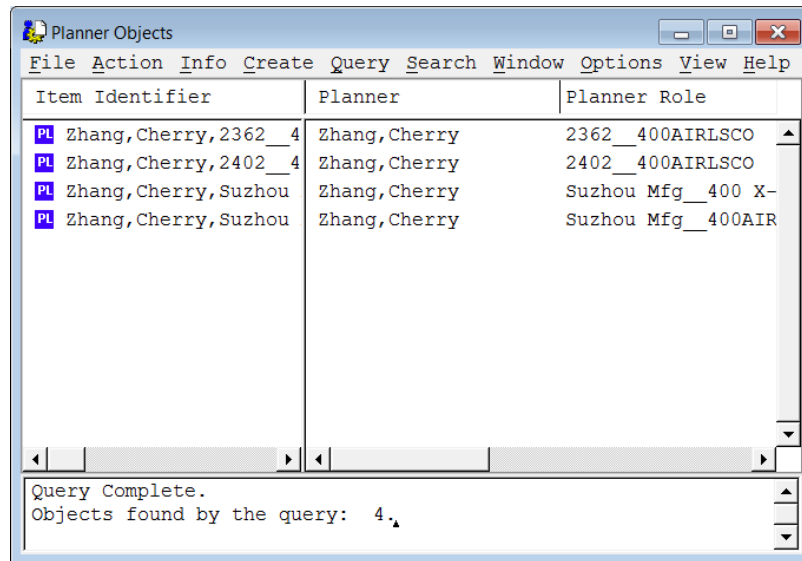


2. In the **Planner Role** field, enter the last name of the planner with an asterisk (such as Zhang*). This query will return a list of all of the planner codes for the planner with that last name.

The 'Query for Planner' dialog box contains the following fields and controls:

- Tims Value: [Text Field]
- Planner Role: [Text Field]
- Planner: [Text Field] (Value: Zhang*)
- Tims System: [Text Field]
- Category Code: [Text Field]
- Mfg Org Planner?: [Dropdown Menu] (Value: Y)
- Initial Org: [Text Field]
- Owner: [Text Field]
- Last Modified By: [Text Field]
- Creation Date (from): [Text Field]
- Creation Date (to): [Text Field]
- Modification Date (from): [Text Field]
- Modification Date (to): [Text Field]
- Maximum to Retrieve: [Text Field] (Value: 50)
- Buttons: OK, Save..., Recall, Set Scope..., Clear, Cancel, Help

All planner codes for Cherry Zhang:

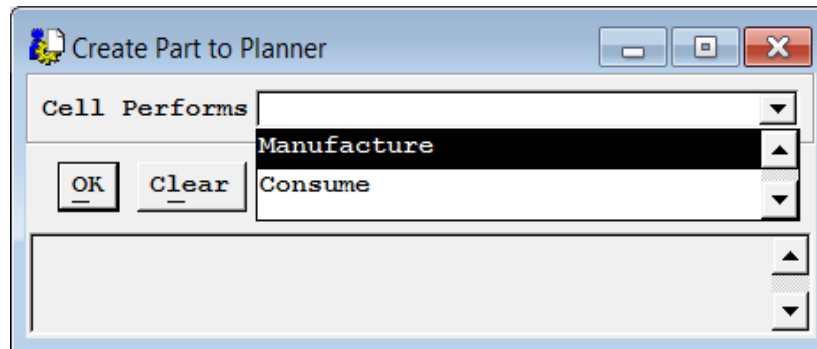


The image shows a window titled "Planner Objects" with a menu bar (File, Action, Info, Create, Query, Search, Window, Options, View, Help) and a table with three columns: Item Identifier, Planner, and Planner Role. The table contains four rows of data, all for the planner "Zhang, Cherry". The first two rows have item identifiers "2362_400AIRLSCO" and "2402_400AIRLSCO". The last two rows have item identifiers "Suzhou Mfg_400 X-" and "Suzhou Mfg_400AIR". At the bottom of the window, a status bar indicates "Query Complete. Objects found by the query: 4."

Item Identifier	Planner	Planner Role
PL Zhang, Cherry, 2362_4	Zhang, Cherry	2362_400AIRLSCO
PL Zhang, Cherry, 2402_4	Zhang, Cherry	2402_400AIRLSCO
PL Zhang, Cherry, Suzhou	Zhang, Cherry	Suzhou Mfg_400 X-
PL Zhang, Cherry, Suzhou	Zhang, Cherry	Suzhou Mfg_400AIR

Query Complete.
Objects found by the query: 4.

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.



The image shows a dialog box titled "Create Part to Planner". It has a "Cell Performs" label and a dropdown menu. The dropdown menu is open, showing two options: "Manufacture" (which is highlighted) and "Consume". There are "OK" and "Clear" buttons to the left of the dropdown menu.




Cell Performs: **Manufacture**

OK Clear

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

Part Objects

FileActionInfoCreateQuerySearchWindowOptionsViewHelp

Item Identifier	Status	Curr	Froze	Description	Series
 335030,A,English,1	Active	Y	True	MANUAL, INSTRUCTIONS	---
Related System Objects (done by)					
 Airlessco, Paape, Art, W	---	---	---	---	---
 Zhang, Cherry, Suzhou Mfg__400AIRLSO	---	---	---	---	---

2 objects found.

Updated items in an expansion.

Added items to an expansion.