Remote Employee - What does the process look like here in Putney?

All Project Manager work, up to the point of printing and submitting the work order, will remain unchanged.

When the work order is ready to be released to production:

1. Dawn will have created pdf’s of the WO contents and saved them to the L drive into a folder named: WORK ORDER. The file naming convention of the ‘released’ work order will be ‘XXXXX RELEASED’ where XXXXX is the work order #.
2. Dawn will also created the following folders   
   Lists

Merge

PM Working Files

Work Order

And others as needed

1. Dawn will email the ‘Person in Putney’ (PIP), the ‘RELEASE’ pdf with direction that the work order is ready to be released.

The PIP will

1. print and assemble the work order contents
2. review the materials needed and create all samples.
3. Confirm that the WO Check Sheet has been completed.

Two ‘working hours’ should be allowed to print and prepare the work order for release. When needed, Dawn can contact PIP and advise of ‘rush’ situations.

**Variable Proofs:**

Data Processor emails and/or scans proofs to Dawn.

Work Order remains with the DP person until third party proofing is needed.

Dawn does 1st party proofing and emails all PM’s with 3rd Party Proof forms attached and id’s the DP person.

Project Managers decide who is able to do 3rd Party Proofing. The 3rd Party Proofer PM ‘reply’s to all’ so that everyone knows 3rd Party Proofing is covered.

If Dawn does not receive a response from PM’s in 2 hours, she is to follow-up with PM’s. If needed, a huddle is called to determine who can do 3rd party proofing.

3rd Party Proofer brings changes, if needed, directly to DP and advises Dawn.

DP finalizes proofs or makes changes as needed.

When proofs are ready to go the client, Data Processor emails and/or scans proofs to Dawn.

DP retains the Work Order until additional changes are requested or final approval is received.

Approval should always be done via email so there is a written record. Ideally, the client email should be forwarded to DP.

DP is responsible for printing final approval email and putting with proofs.

**Inkjet Proofs:**

Michele will prepare the proofs as usual

Michele will scan the proofs to Dawns scan folder and will text Dawn that proofs have been saved to the scan folder.

Text should include

1. work order number
2. Proof #
3. Proofs and wo should be given to the PIP after scanned to Dawn

Dawn will save the inkjet proofs to the L drive.

When proofs are approved or changes are needed,

* 1. Dawn emails PIP with changes or approval.
  2. PIP prints changes and/or approval, fastens to proofs, and forwards approval and wo to Michele

**Static Proofs**

Person producing the static proofs emails and/or scans proofs to Dawn. Work Order stays with person producing the proofs (ie: Parker)

Dawn emails sender of static proofs changes/approval.

Person handling static proofs, prints out approval and/or changes and creates the ‘proof packet’ for the work order.

Printing moves forward.

**Return of Work Order for Billing**

After the project has been mailed, the Warehouse Manager will bring the work order job bag to the PIP.

The PIP puts the contents of the work order into order and scans them as a pdf to Dawns Scan folder.

Colored ‘Work Order Dept Dividers’ are used when putting the work order into order and scanning. This provides consistency no matter who is performing the PIP duties and makes is easier to locate specific documents rather than searching through the entire pdf.

After scanning, PIP goes into Dawns scan folder and re-names the scanned file ‘XXXXX COMPLETE’

PIP emails Dawn and advises that the wo is ready for billing.

Print proofs, static or variable, or inkjet proofs are not scanned since they are accessible on the L drive.

**Marked Up Work Order returned for Invoicing**

Dawn reviews the ‘COMPLETE’ pdf to be sure all documents are present and contacts the necessary dept if any documents are missing. For example, the post office receipt, Bill of Lading, Signed 8125’s, etc.

Dawn reviews, marks up and saves only the ‘consolidated’ Work Order using the naming convention XXXXX BILLING, to the L drive. Then emails the marked up wo to the PIP.

In summary, at job completion, there all three versions will have been saved into the folder named WORK ORDER within the job folder on L drive.

1. XXXXX RELEASED (this is everything needed for processing)
2. XXXXX COMPLETE (this is the scanned copy for billing)
3. XXXXX BILLING (this is only the consolidated work order)

**Process details, Issue’s that have come up and resolutions:**

1. Please save any ‘marked up’ print files that you create to clarify wo direction to PM Working Files folder. Move ‘Dakin Summer 16 Slips, 6-28-16. qxp - MARKED UP.pdf’ to PM Working Files folder.
2. Don’t create a folder called LETTERS…just save them to the work order.
3. My recommendation would be that if you as the PM discover an issue with the data, its best to define the issue to DP and let the Data Processor review the list to identify the records to fix.
4. Here’s my understanding of the process:
5. PM does 1st party proof
6. PM gets someone to 3rd party proof
7. All changes go to DP after 3rd party proofing is complete.
8. Here’s why I think it’s important to include the section breaks in the ‘completed’ scan:
   1. There’s a clear ‘order’ of things within the scan.  No matter who scans it or looks at it.  It’s clear and repeatable.
   2. This will help eliminate things being overlooked within the scan.
   3. It will also help when the ‘newbie’ takes over the pip responsibilities.
9. When pre-printed shells arrive and are anything other than a chop cut, the PM should provide direction to DP & Print Depts regarding gutters. PM should also request a ‘rule up’ from the printer but that was not discussed.
10. I find that DP generally does a good job identifying bad or questionable salutations.  So, I’m fine with your direction if you feel Project Bread will be ok with DP’s decisions.

If I know the client is persnickety about things like this and I feel it’s likely that I’d have to get input from them on an ‘questionable’ salutations, I’d provide the direction to forward any questionable or bad salutations to the PM and I’d follow-up with the client.

If there’s enough lead time, emailing would work too.

In the case of the Dakin example that your remembering…DP didn’t generate the list, I did because I saw them during file review. The list wasn’t meant to reflect actual problems, only to demonstrate that the list did contain salutations that were questionable and that you should include direction to DP regarding what to do in advance.

1. Remote PM will include PIP on emails to the warehouse. Bruce just brought me over an email that you sent to him requesting that he send some materials to Emily Abbott at Project Bread. He’s brought the UPS shipping charges up.

Should I forward this to Ginny for billing now?

Let me know.

When you email the warehouse with this type of request, it might be a good process to cc the PIP and include billing direction too.

I can absolutely do that in the future.

1. All files get saved to the L drive. No files get saved locally.
2. Scan folder is for temporary use only. No files ‘live’ there. All get moved to the L drive.
3. Per phone con on 7/19/16 - we agree that responsibility for incoming material rests with the Remote PM.

Remote PM will review Mail Shop receipts everyday but first thing in the am after vacation or time away from the office. If PIP see’s receipts ‘sitting’ for a few days…PIP should email to be sure PM is aware the material is there.

1. Notes to yourself on work orders are fine. They should be on their own service code line followed by (Notes for PM use only)…or something like that.
2. please don’t send the fulfillment person to the ‘client supplied document’.  Fulfillment should always refer to two things…the sample and the wo.  If they have questions, they should ALWAYS ask the PM about it.
3. Color Match - PIP either approves color or advises Dawn the color does not match. Dawn resolves the issue.