Quality / Information Services and Systems

Implementation Planning Application

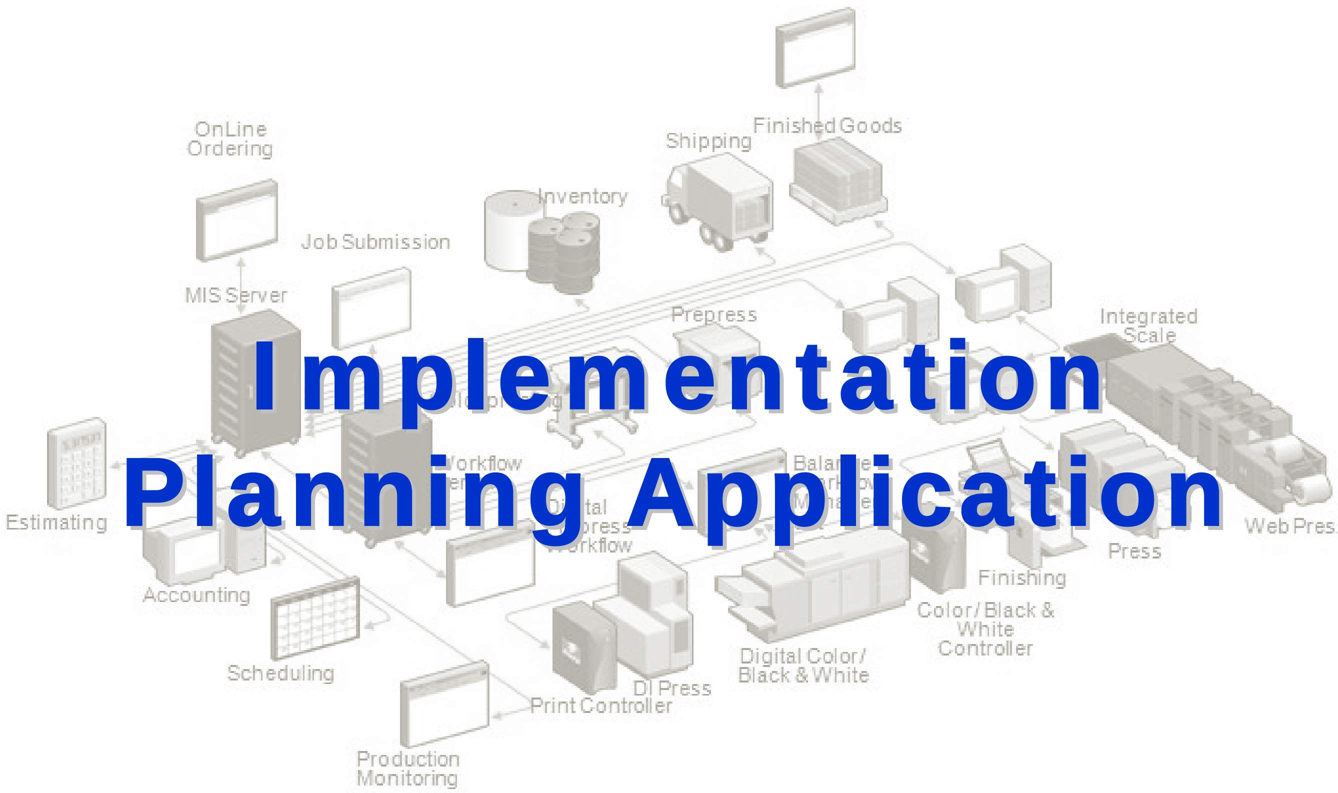


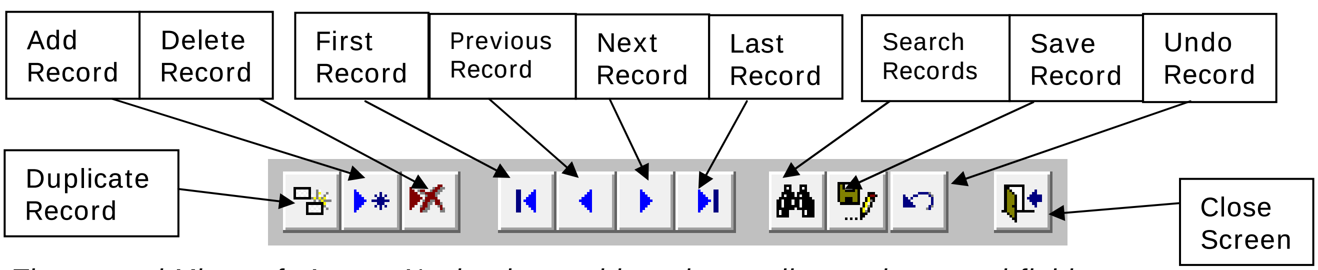
Table of Contents

Introduction

The Implementation Planning Application organizes four major areas of a typical MIS implementation.

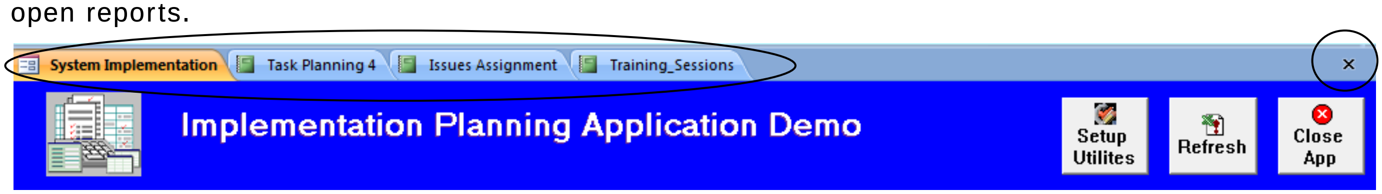
The first is a simplified project planning and reporting tool. This tool utilizes a two level design to identify project milestones and their completion in the project. The second module organizes the system's documentation so that it can be used in training and easy method of categorizing specialty procedures that are creation on site. Third, the application organizes training sessions and creates the documentation necessary to run a training program. Finally, an issues section is used to document, assign and track implementation problems as they occur along with their resolutions.

The program utilizes Microsoft Access 2007 as the base platform for deployment. If the Customized version is utilized, the location will need to purchase Microsoft Access 2007 before implementation. Otherwise, a Runtime version is installed on the systems server. All navigation tools, keyboard shortcuts and search features associated with Microsoft products are available in the program. In addition to these navigation tools, the program contains navigation buttons located at the top of each appropriate screen.



The normal Microsoft Access Navigation tool bar also applies to the record fields

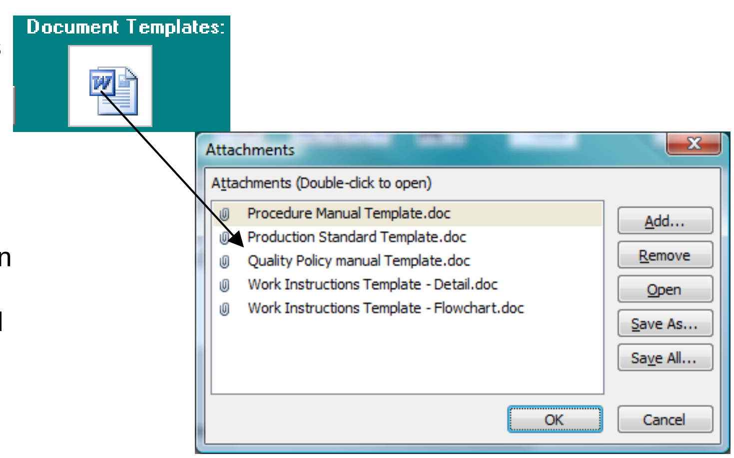
Open screens and reports are displayed as tabs at the top of the program. One can navigate between open tabs by clicking in the desired tab. The tab control at the far right side is used to close open reports.



Run Time deployment is used for ongoing document control and training at the conclusion of the implementation.

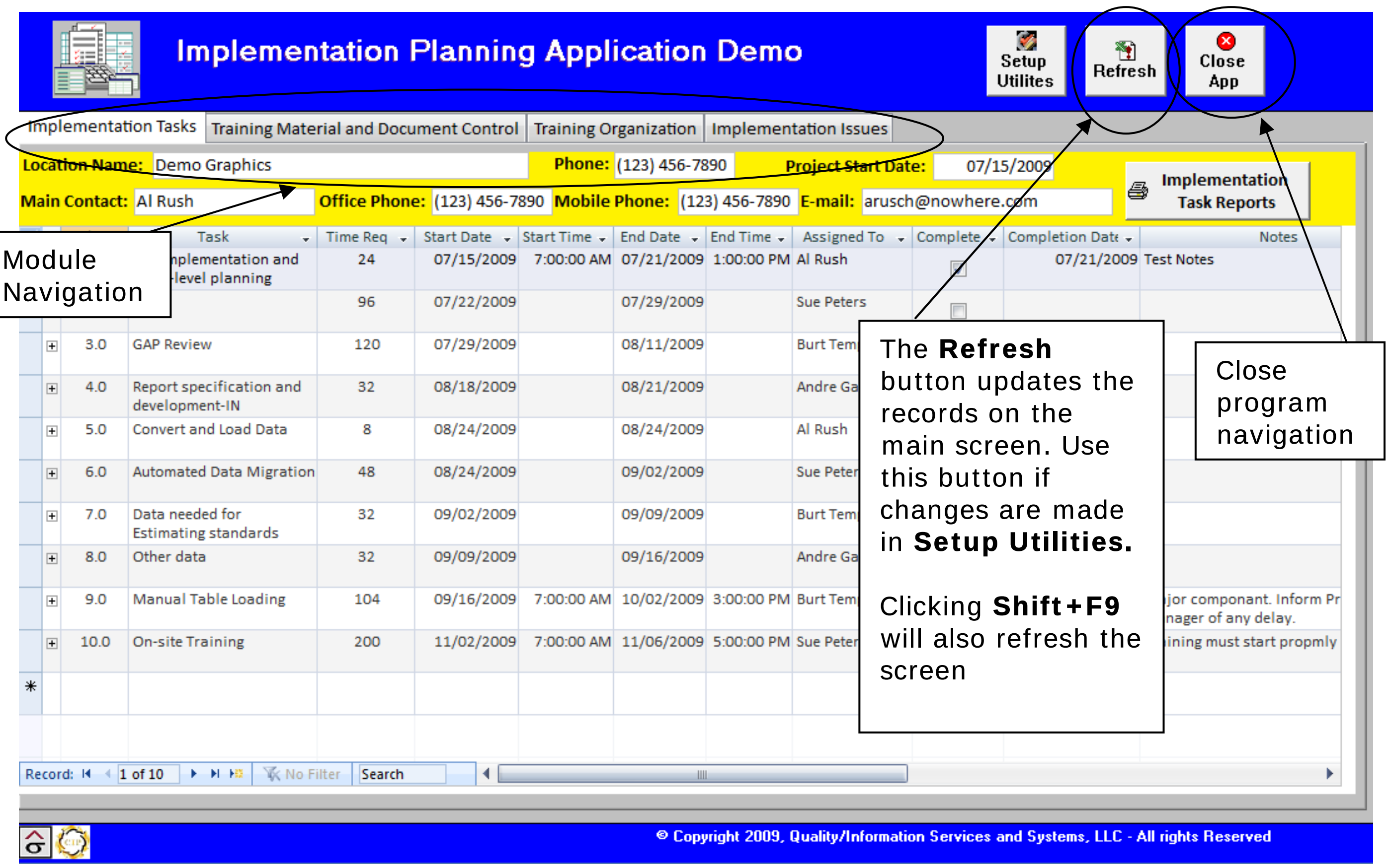
Attachment fields are located in various areas of the program. There areas allow the user to keep multiple files (such as Word documents, Excel spreadsheets, etc) with the records. If there are attachments saved, an icon will be visible in the field.

By double clicking on the field, the user is taken to screen that lists the available attachments where the user can select and open the desired file, add more files or delete obsolete records.



Spell Check- Spell check is available in all text and memo fields by using the **F7** button. Be sure and highlight the area to check of the program will check all records in the table.

The program manages **Implementation Tasks, Training Materials and Document Control, Training Organization** and **Issue Resolution.** A **Setup Utility** section is used to enter the basic implementation and location information along with maintaining common tables and lookup lists. Each module is accusable by clicking on the tabs located below the banner.



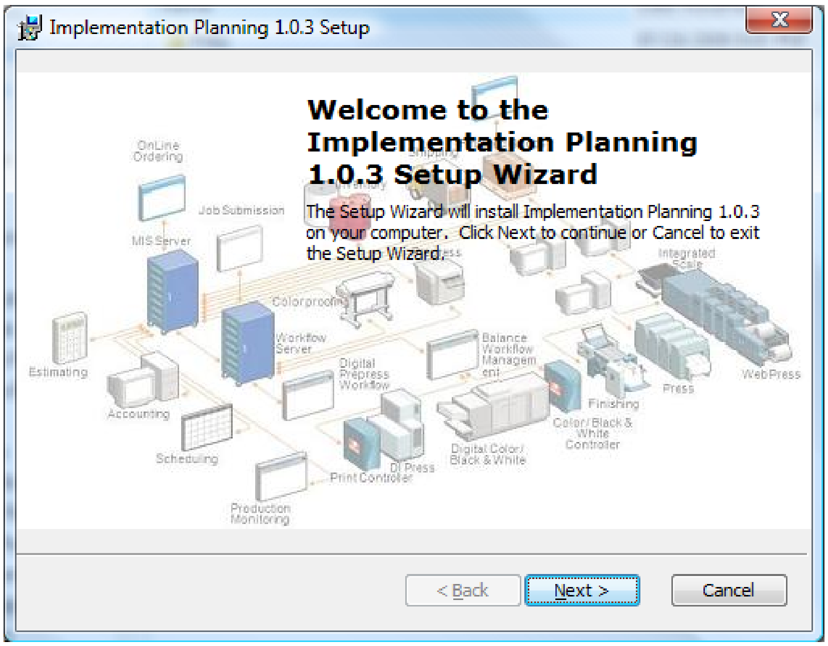
Installation

The program is a standalone application to be installed at a location for use during an implementation and for ongoing support.

1. Obtain the Systems_Implementation_App.zip file. Unzip the file onto a convenent loction on the computer.

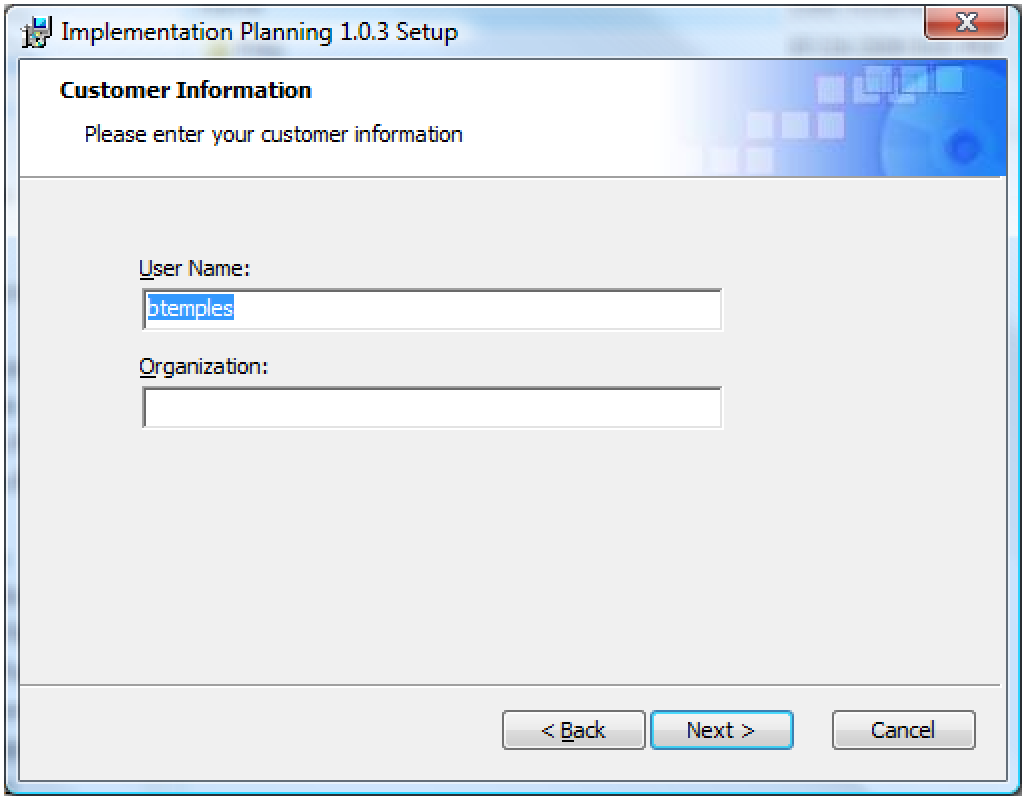
2. Navigate to and click the **Setup.exe** program

3. At the **Welcome** screen, click **Next**.

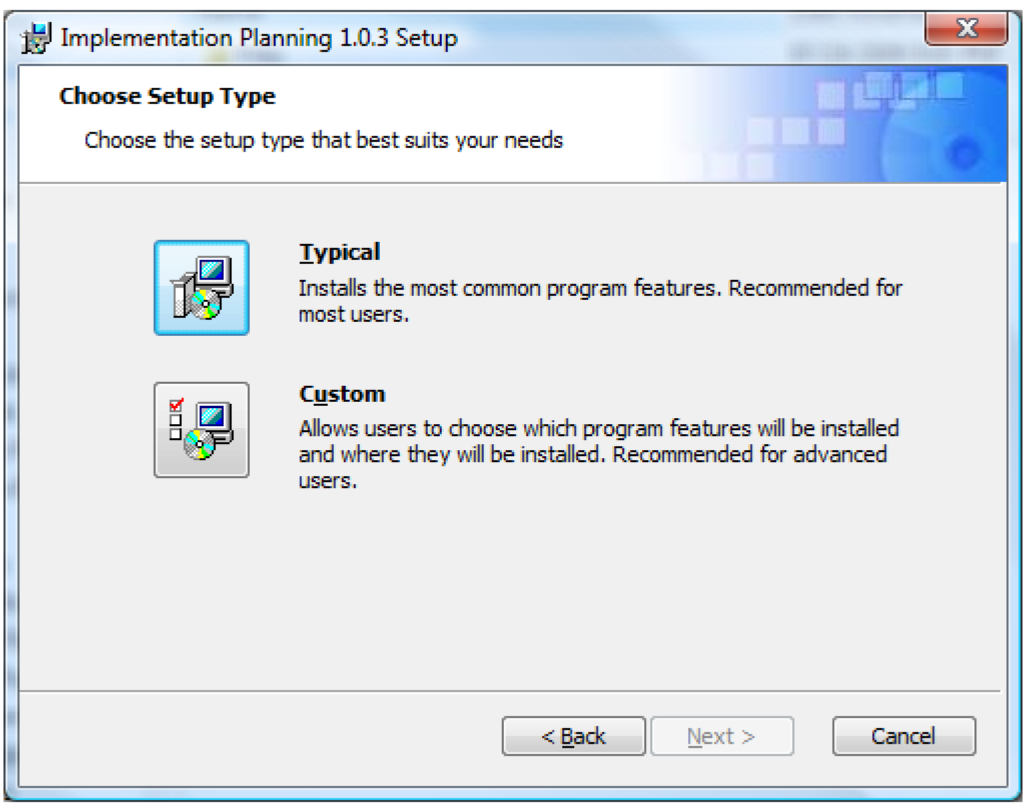


4. Check the acceptance check box of the **End-User License Agreement** and click **Next**.

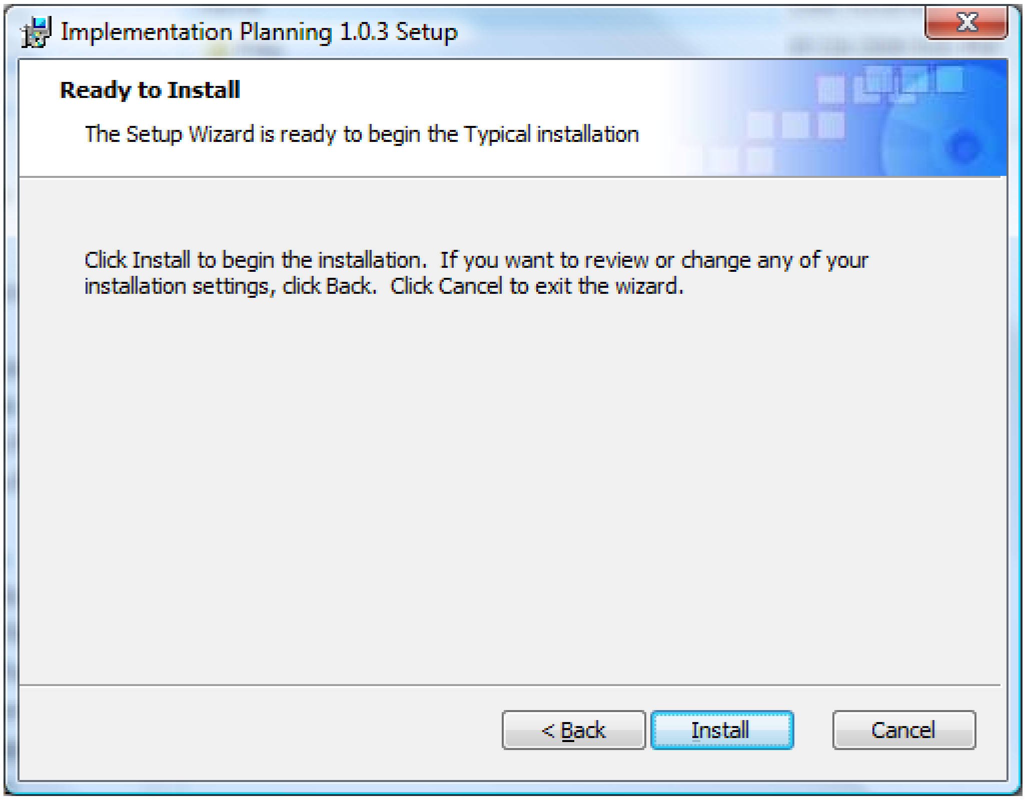
5. Enter **Customer Information** and click **Next**.



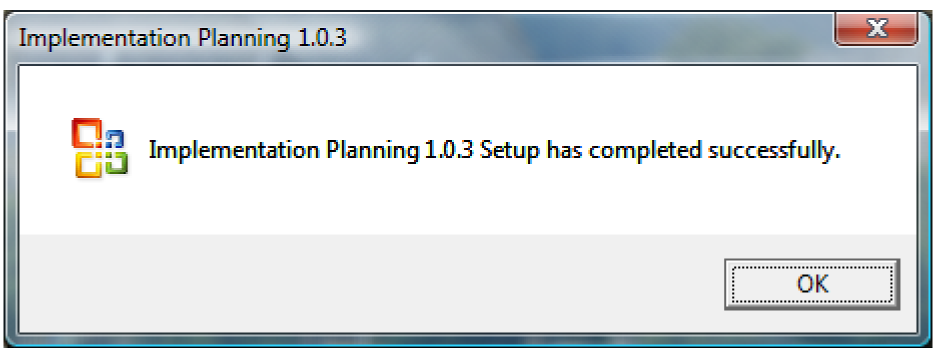
6. Select **Typical** Setup



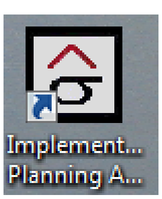
7. At the **Ready to Install** screen, click Next and the program will install.



8. The program will complete the installation with this screen.



9. After installation, the user will be able to access the program by an icon on the desktop or from the program list.



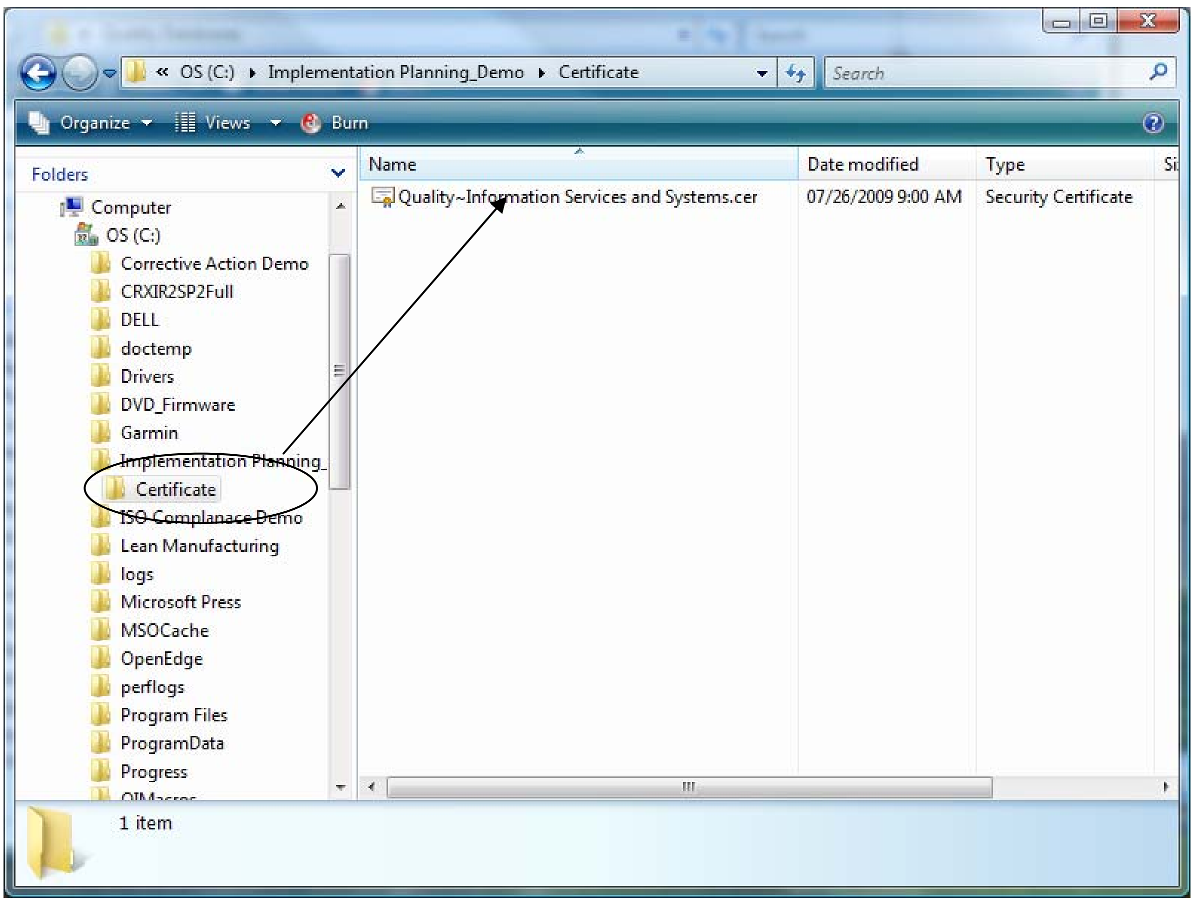
Certificate

A Certificate, or digital signature, is a way to ensure the integrity and origin of data. A digital signature provides strong evidence that the data has not been altered since it was signed and it confirms the identity of the person or entity who signed the data. This enables the important security features of integrity and nonrepudiation, which are essential for secure electronic commerce transactions.

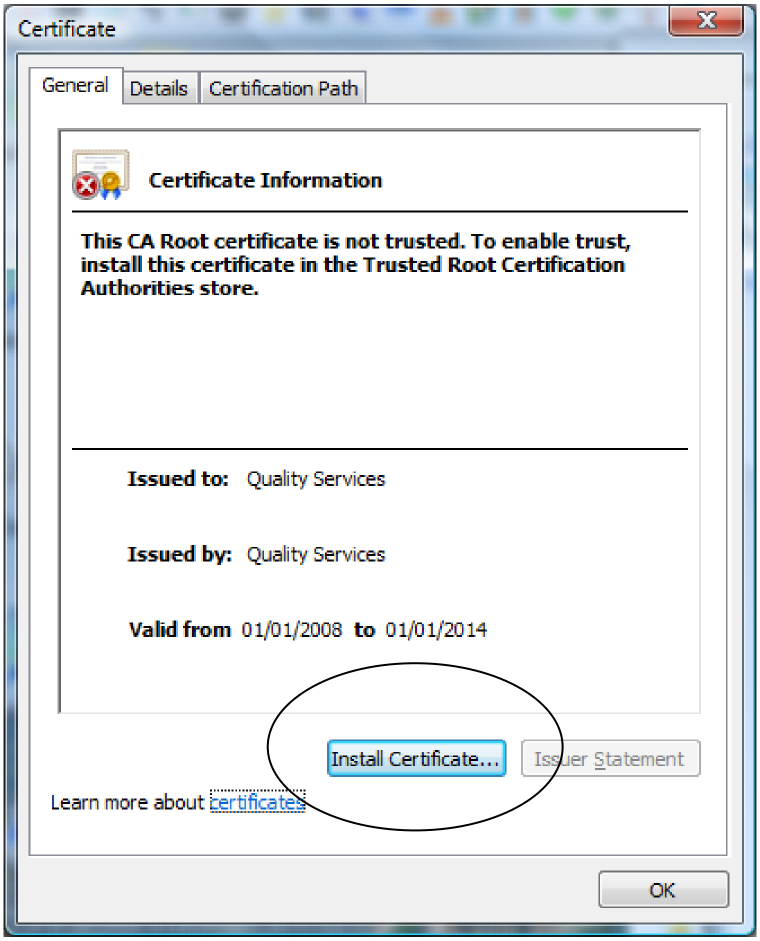
All applications have been thoroughly screened for malicious software. A certificate is provided in the Certificate folder located inside the applications folder. Quality/Information Services and Systems certificates are not commercial validated.

To install the certificate:

1. Navigate to the **Certificate** folder located in the **Implementation Planning** folder located on the C:\ drive. Double click on the certificate



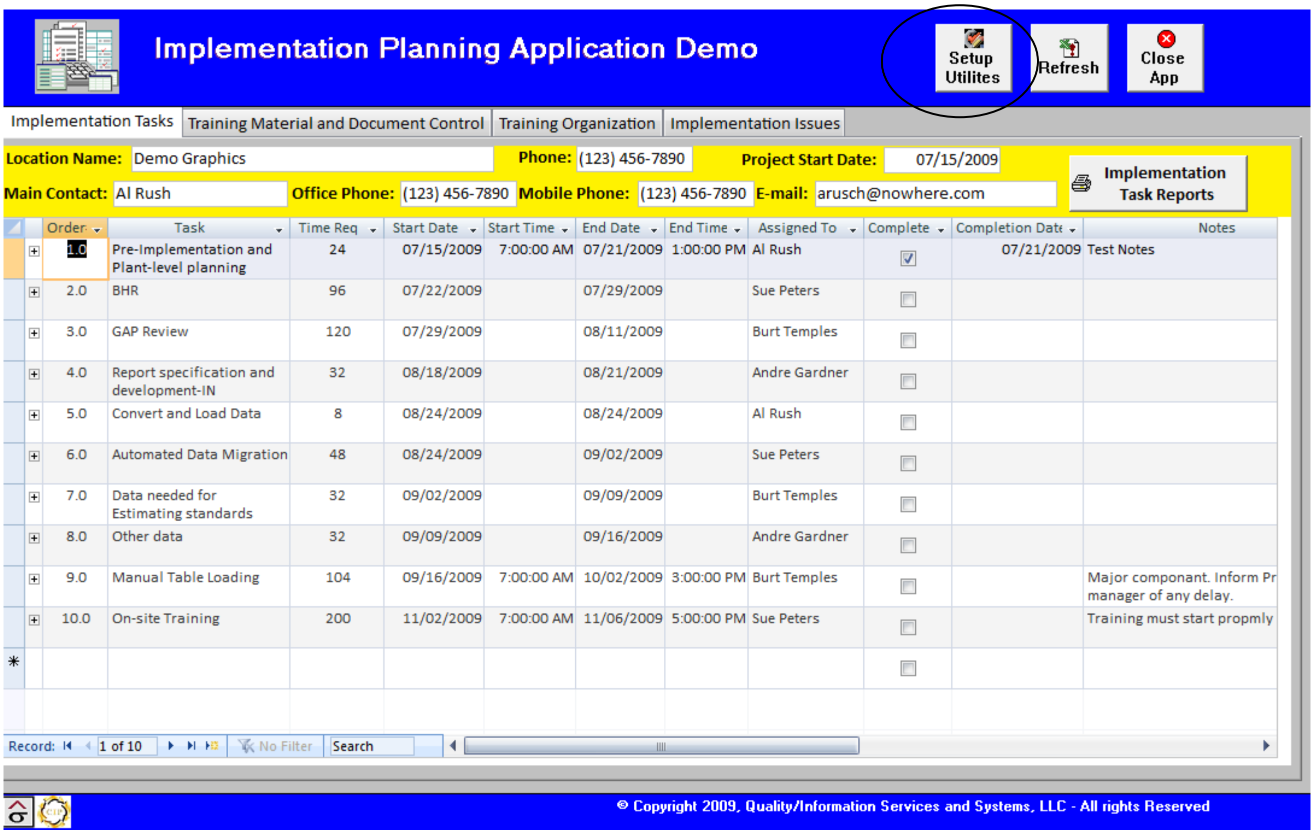
2. Click the Install Certificate button. Follow the import screens that apply to the locations Windows installation.



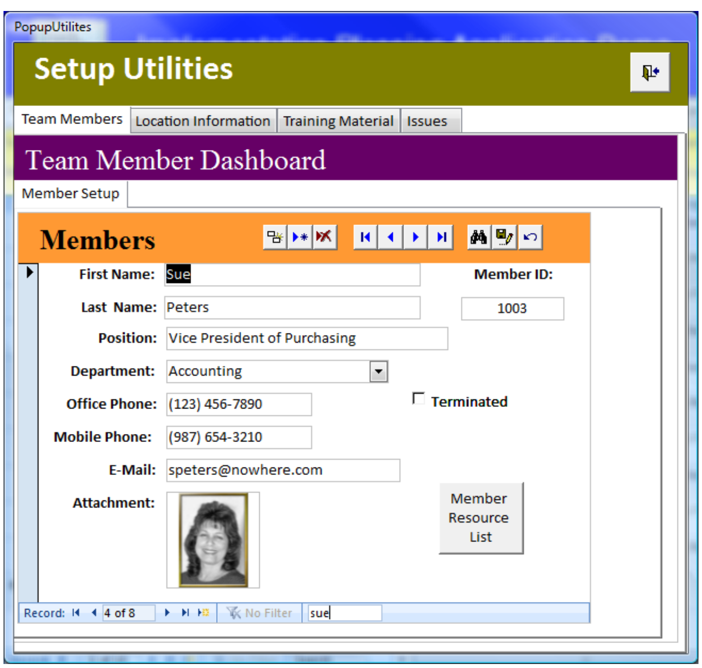
Note: *Certificates install on the local machine and, depending on the users security level, for the logged on user only. Check with the local administrator as to the folder location for the import.*

Setup Utilities

The Setup Utilities popup is used to record the basic information about the location, training materials, and project team members.



1. Click **Setup Utilities** button to activate the utilities popup screen.



Note: *The* ***Members*** *screen is a primary table and must be filled out first.*

2. Click the **Add Records** at the bottom of the tab. The **Member ID** will automatically be assigned.

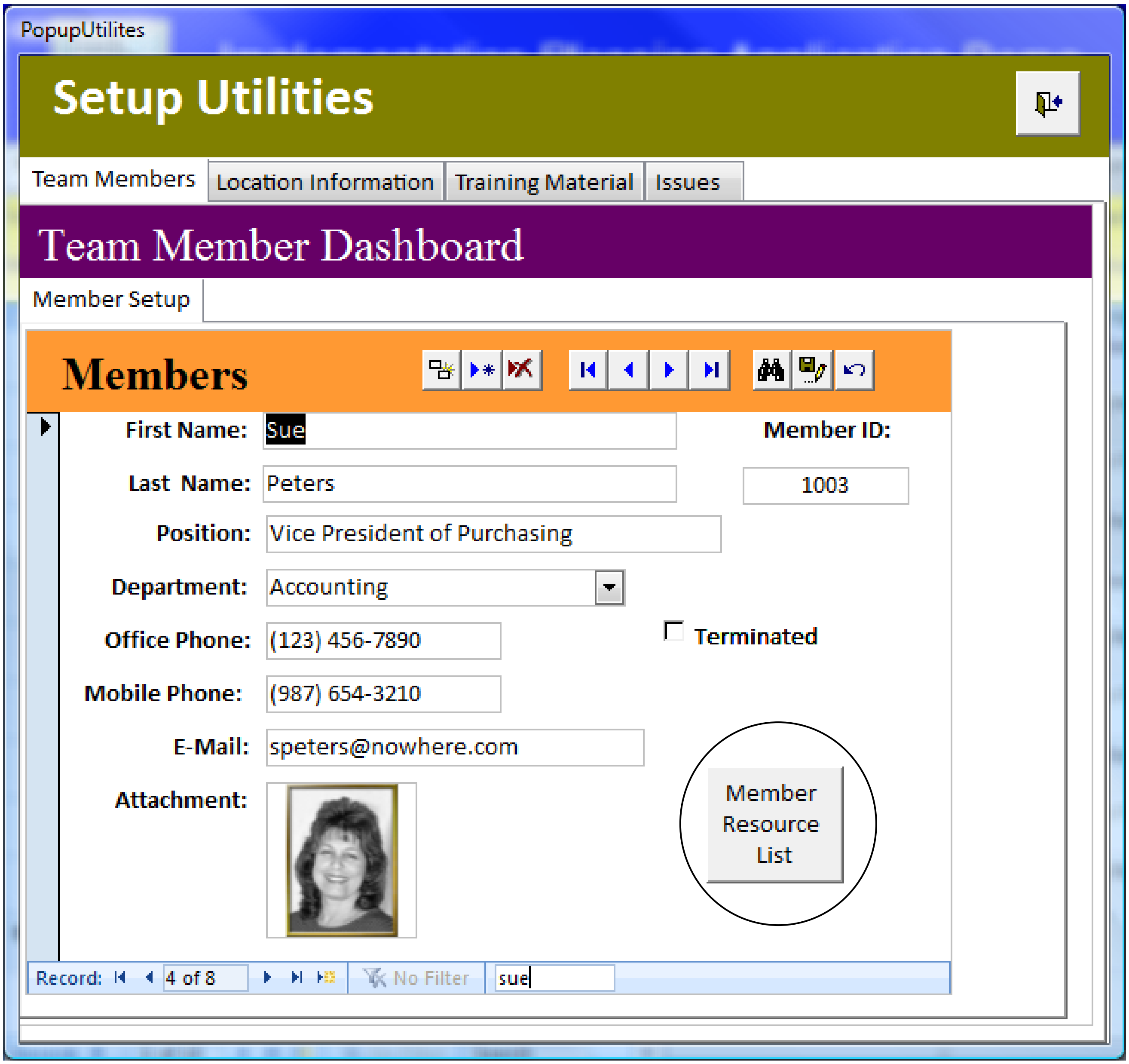
3. Enter the members **First Name, Last Name** and **Position** (title).

4. Select the **Department** he or she works in.

5. Enter **Office Phone #, Mobile Phone #,** and **E-Mail** address.

6. An **Attachment** field is available for images or documents if desired.

7. If the team member is removed from the project, check the **Terminated** check box.



Members Resource List

8. After all of the project members have been entered, click the **Member Resource List** to print out a list of everyone associated with the project and their contact information.

Note: *Running any report in the setup utility will close the utility. It is recommended to complete the setup and then run the reports.*

Member List Report

Print Date: 07/19/2009 9:30:31 PM

Member ID 1002 **Member Name:** Andre Gardner **Attachment:**

Position: Press Supervisor **Department:** Sheetfed Press

Office Phone: (123) 456-7890 **Mobile Phone:** (123) 465-7890 **E-Mail:** agardner@nowhere.com **Terminated** ☐

Member ID 1004 **Member Name:** Charles Hambert **Attachment:**

Position: Pressman **Department:** Web Press

Office Phone: (123) 456-7890 **Mobile Phone:** (987) 654-3210 **E-Mail:** chambert@nowhere.com **Terminated** ☑

Member ID 1006 **Member Name:** Frank Martel **Attachment:**

Position: Director of Estimating **Department:** Estimating

Office Phone: (123) 654-9874 **Mobile Phone:** (123) 564-4789 **E-Mail:** fmartel@nowhere.com **Terminated** ☐

Member ID 1005 **Member Name:** Jerry McNeely **Attachment:**

Position: Vice President of Operations **Department:** Production Management

Office Phone: (123) 987-4562 **Mobile Phone:** (123) 987-4560 **E-Mail:** jmecneely@nowhere.com **Terminated** ☐

Member ID 1003 **Member Name:** Sue Peters **Attachment:**

Position: Vice President of Purchasing **Department:** Accounting

Office Phone: (123) 456-7890 **Mobile Phone:** (987) 654-3210 **E-Mail:** speters@nowhere.com **Terminated** ☐

Member ID 1007 **Member Name:** Marc Rhodes **Attachment:**

Position: Director of Customer Services **Department:** Customer Service

Office Phone: (123) 445-6789 **Mobile Phone:** (123) 659-8742 **E-Mail:** mrhodes@nowhere.com **Terminated** ☐

Member ID 1001 **Member Name:** Al Rush **Attachment:**

Position: Bindery Supervisor **Department:** Bindery

Office Phone: (123) 456-7890 **Mobile Phone:** (123) 456-7890 **E-Mail:** arusch@nowhere.com **Terminated** ☐

Member ID 1000 **Member Name:** Burt Temples **Attachment:**

Position: Implementation Specialist **Department:** Systems Administration

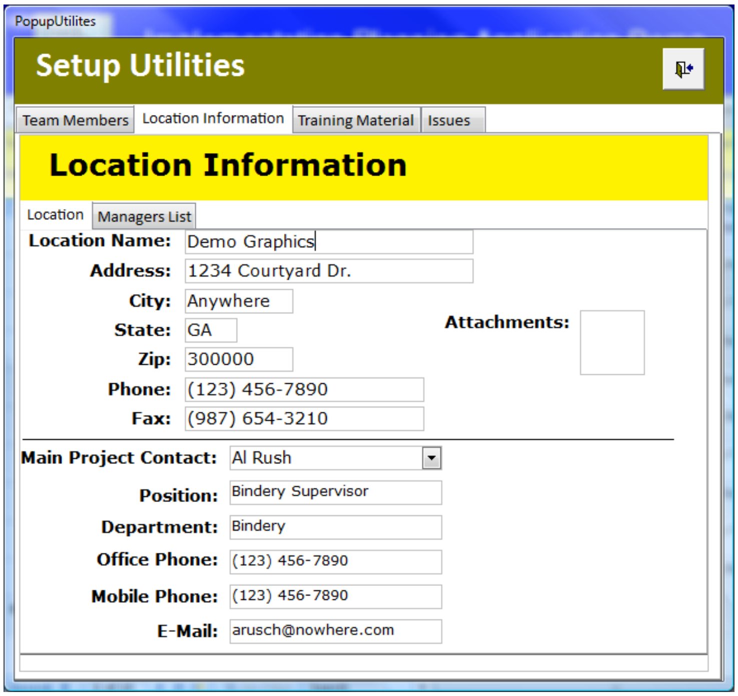
Office Phone: (770) 123-4567 **Mobile Phone:** (678) 521-5168 **E-Mail:** temples5561@comcast.net **Terminated** ☐

Page 1

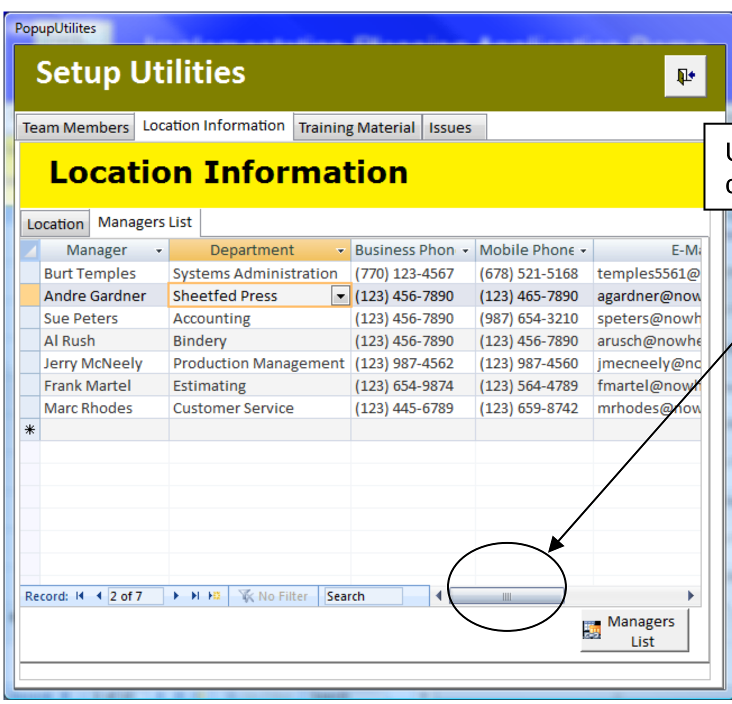
9. Click the **Location Information** tab at the below the banner.

10. The Locations Information tab has two forms to complete. The first is the location's general information. Complete the Location's Name and Address information. An Attachment field is available for phone lists or direction files that are helpful.

11. Select the Main Project Contact person form the dropdown list. The remainder of the information is pulled from the Members table.



12. Click the **Managers List** tab and select the locations department Managers.



Use the slide bar to view the complete record.

Managers List report

13. After selecting all of the managers, click the Managers List report. The report is a reference report for the locations managers and their contact information.

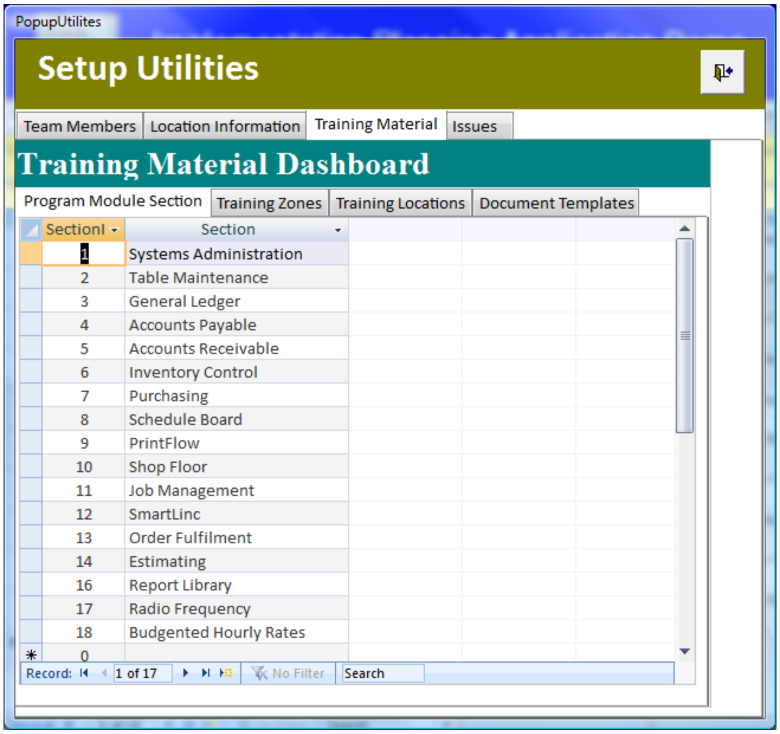
Managers List Report

Print Date: 07/19/2009 9:38:36 PM

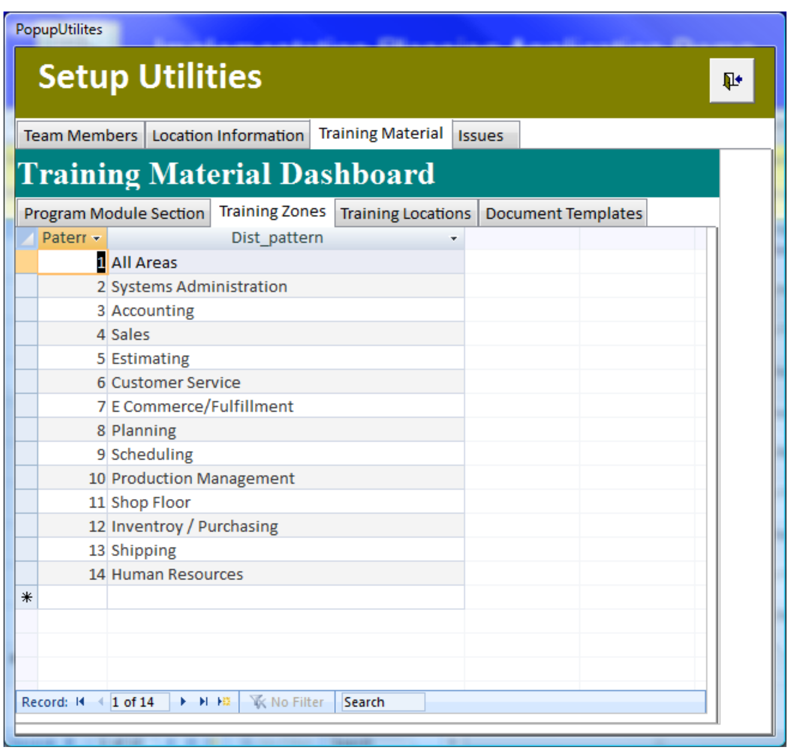
Manager	Department:	Office Phone:	Mobile Phone:	E-Mail:
Burt Temples	Systems Administration	(770) 123-4567	(678) 521-5168	temples5561@comcast.net
Andre Gardner	Sheetfed Press	(123) 456-7890	(123) 465-7890	agardner@nowhere.com
Sue Peters	Accounting	(123) 456-7890	(987) 654-3210	speters@nowhere.com
Al Rush	Bindery	(123) 456-7890	(123) 456-7890	arusch@nowhere.com
Jerry McNeely	Production Management	(123) 987-4562	(123) 987-4560	jmecneely@nowhere.com
Frank Martel	Estimating	(123) 654-9874	(123) 564-4789	fmartel@nowhere.com
Marc Rhodes	Customer Service	(123) 445-6789	(123) 659-8742	mrhodes@nowhere.com

14. Click the **Training Material** tab just below the banner.

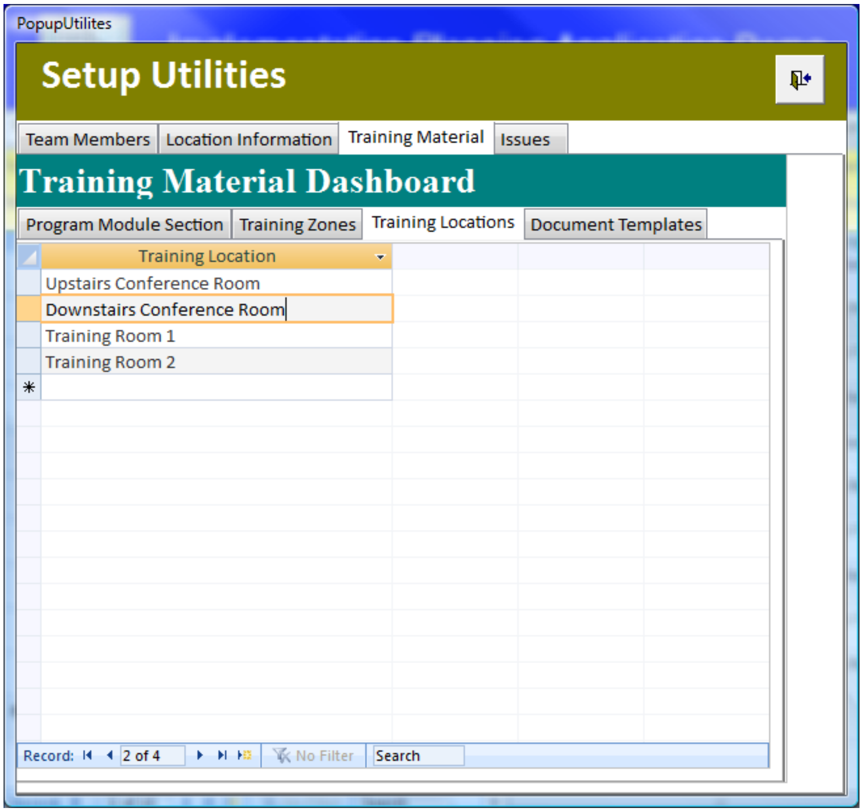
15. The **Training Material** tab contains four screens. The first tab, **Program Module Section**, details the different program modules to be taught.



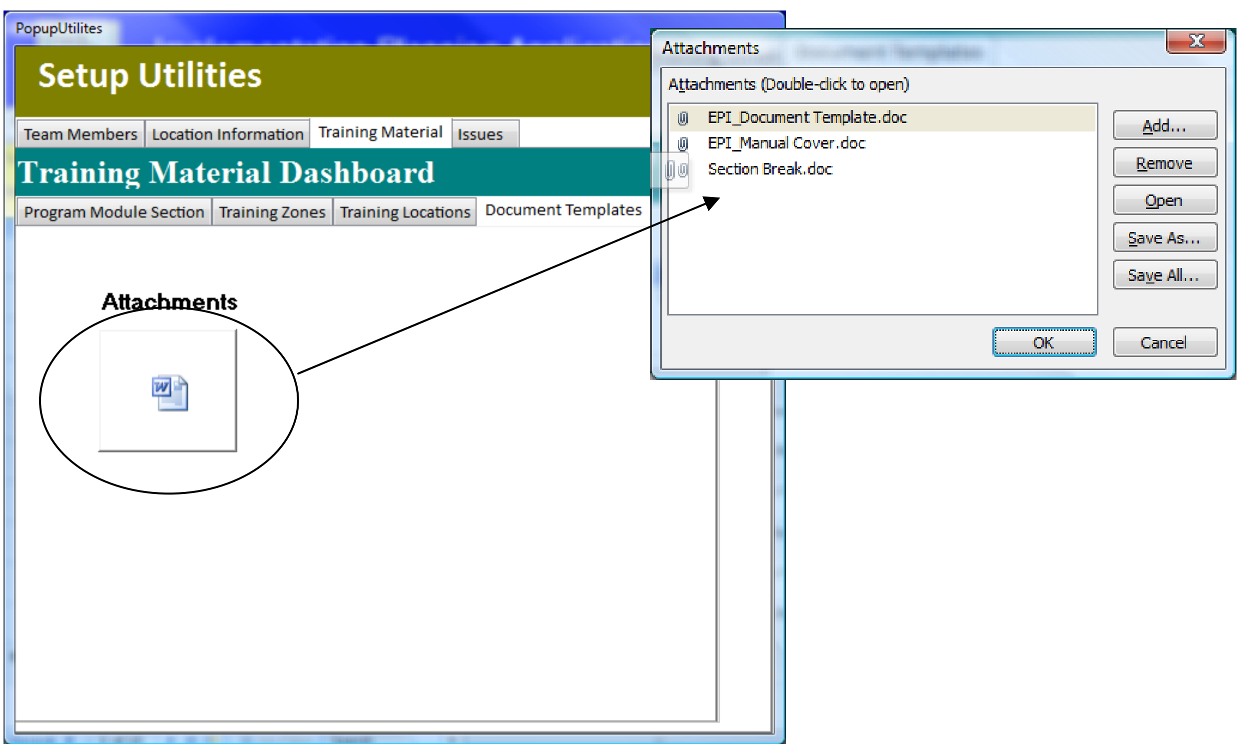
16. The **Training Zones** tab lists the different areas in the location that will receive training. This may be different from the department list.



17. The Training Location tab lists all of the on-site rooms that will be used for training.



18. The final tab, **Document Templates**, contains any preloaded templates the implementation team needs to develop documentation on-site and keep a consistent format.



Issues

The Issues tab contains the priorities that the entries will depend on for sorting. The system is preloaded with

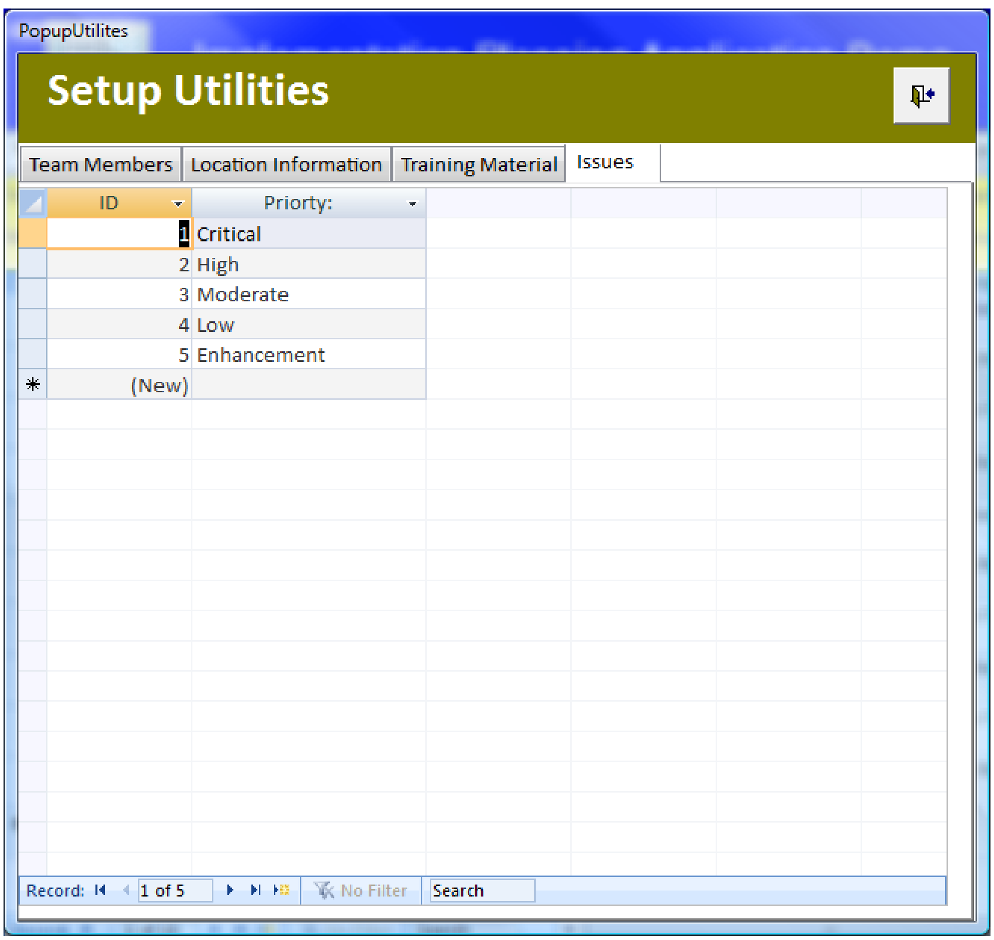
- **Critical** – This priority is the highest. Issues with this are considered system threatening and must be resolved as soon as possible.

- **High** – This issue is very important to the implementation and must be resolved before the implementation can progress.

- **Moderate** – This issue category is used for issues that will not delay go-live but must be resolved at the earile4st possible date.

- **Low** – These are issues that are noted in the software but are not important enough to delay a go-live implementation. These issues may be addressed in a later version.

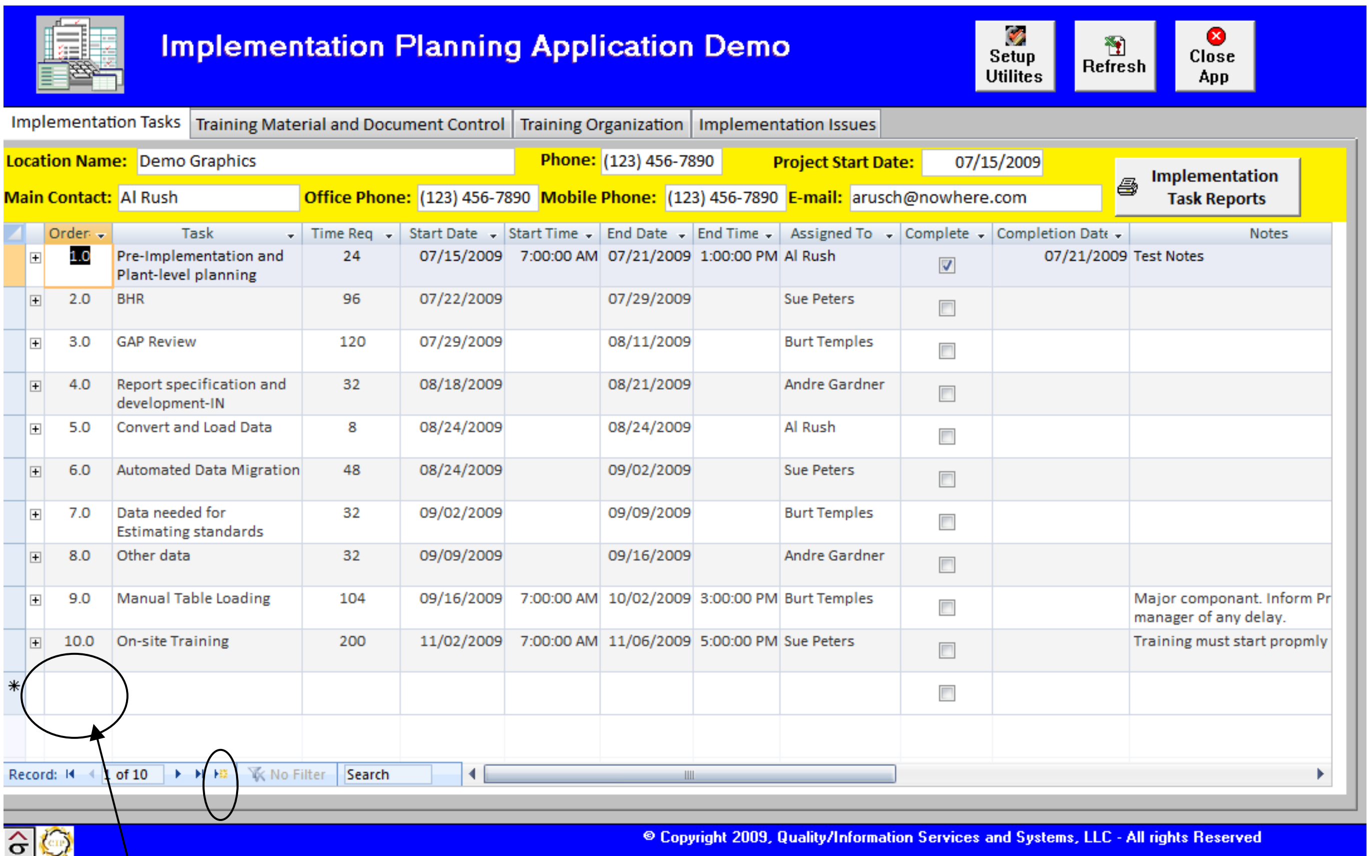
- **Enhancement**- These are items that were noted during the implementation that are not a part of the current program but would enhance it performance. These may take the form of a specialized program or later upgrade suggestions.



Implementation Tasks Module

The Implementation Task tab is used to list all of the major milestones and their subordinate sub tasks. The screen allows the project planned to list the components and to track their progress.

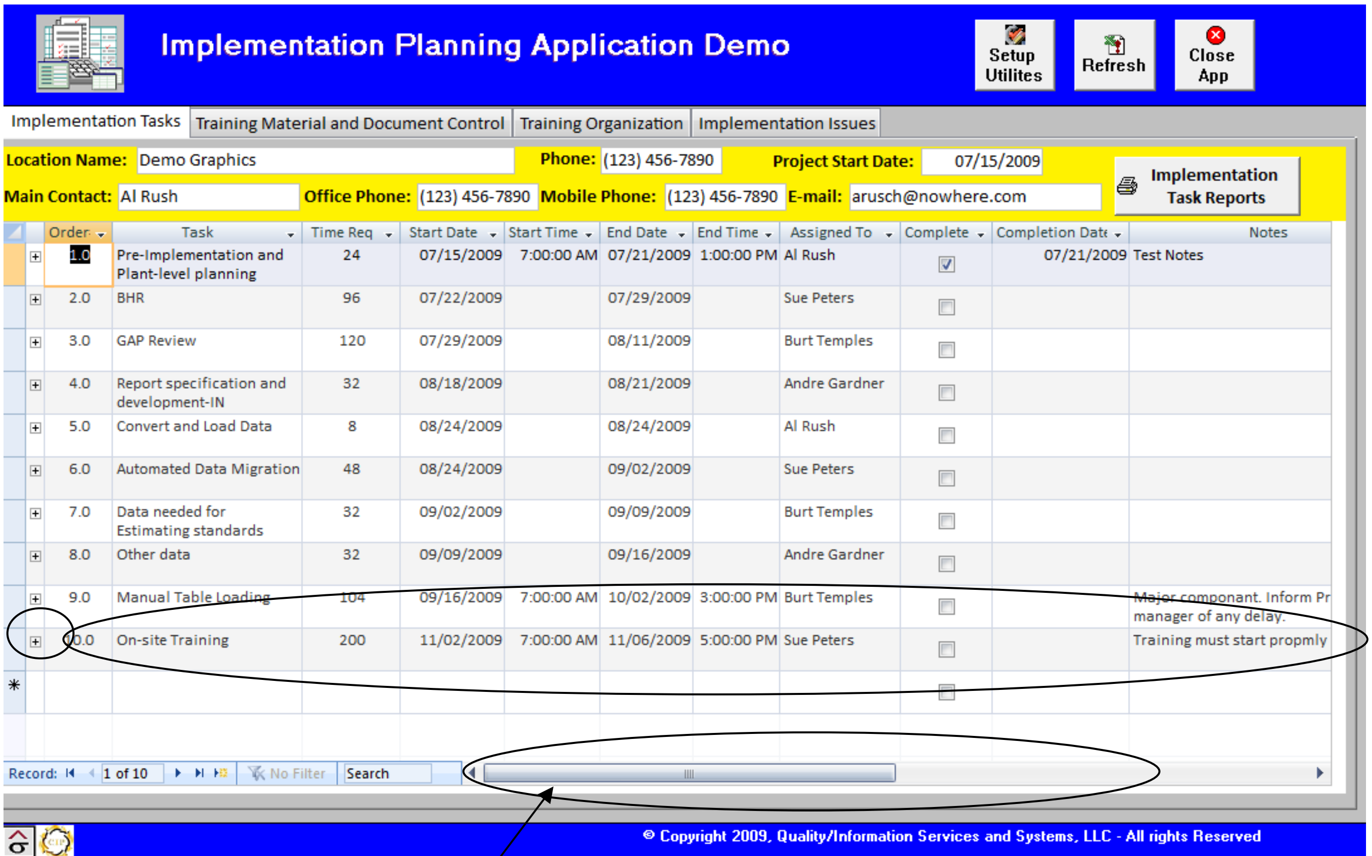
1. Click the **Add Record** button at the bottom of the screen. Enter the number of the major task in the **Order** field. If the project manager needs to rearrange the tasks, this field is changeable.



Only numbers will be accepted

2. Enter the **Task Name**, the task **Start Date, Start Time** (optional), **End Date, End Time** (optional), select the person responsible in **the Member Assigned** field and any **Notes** associated with the tasks.

Note: *The End Date is the projected completion date for the task. The true completion date is entered in the* ***Completion Date*** *field for later comparison.*

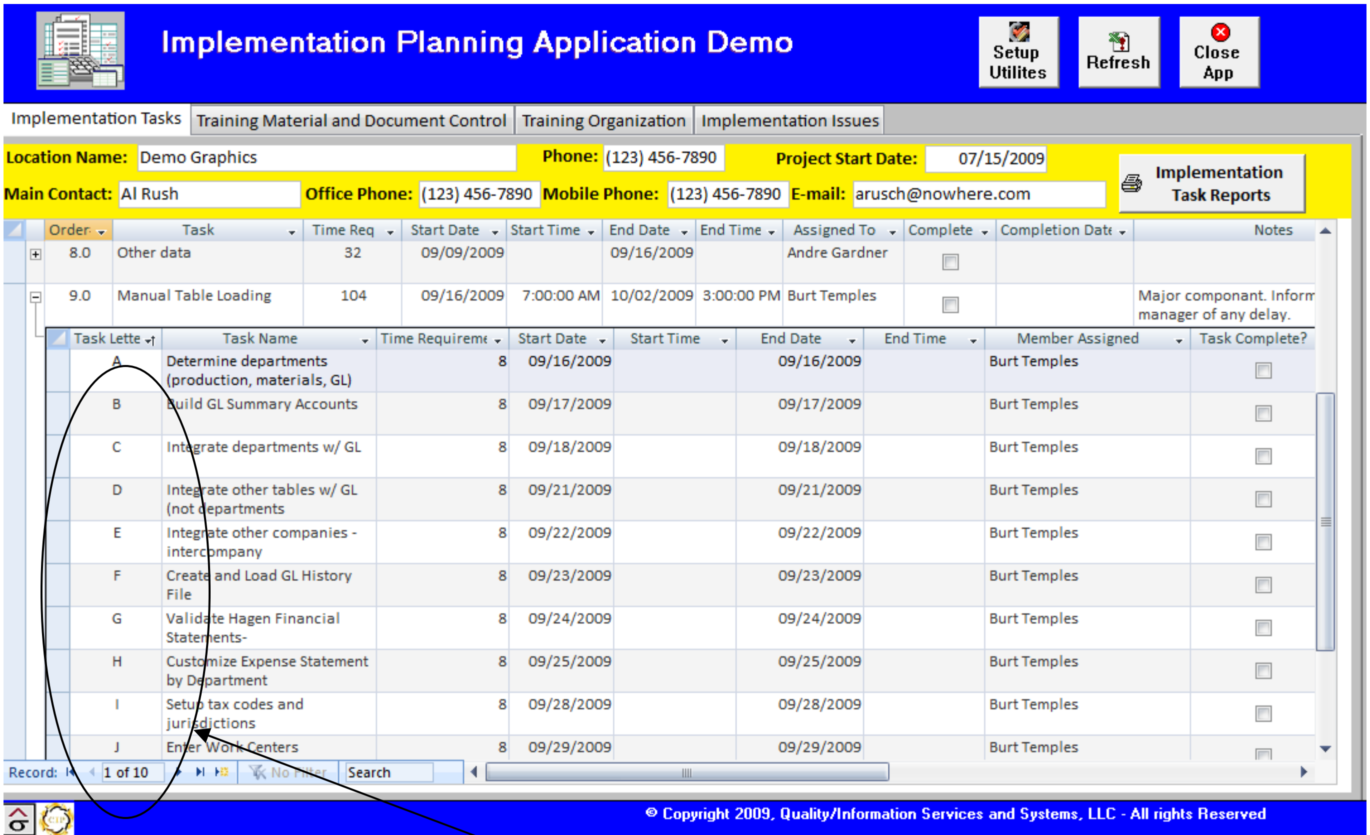


Use the slide bar to view the remaining records

3. Click the plus sign beside the **Order** field to activate the sub section.

4. Enter a **Task Letter**. This field is changeable if the sub-tasks need to be re-ordered.

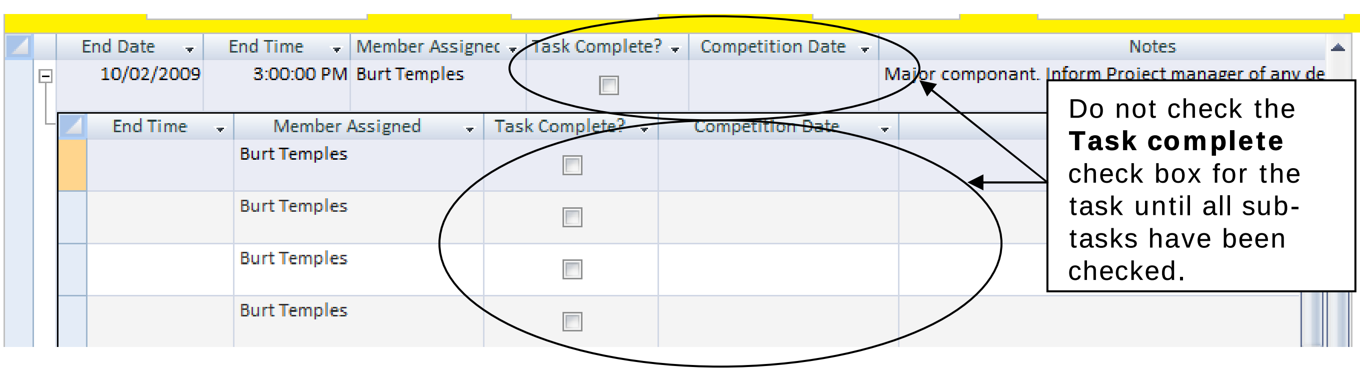
5. The remainder of the sub-task record is that same as the major task record. Complete all of the fields.



Only one letter will be accepted here

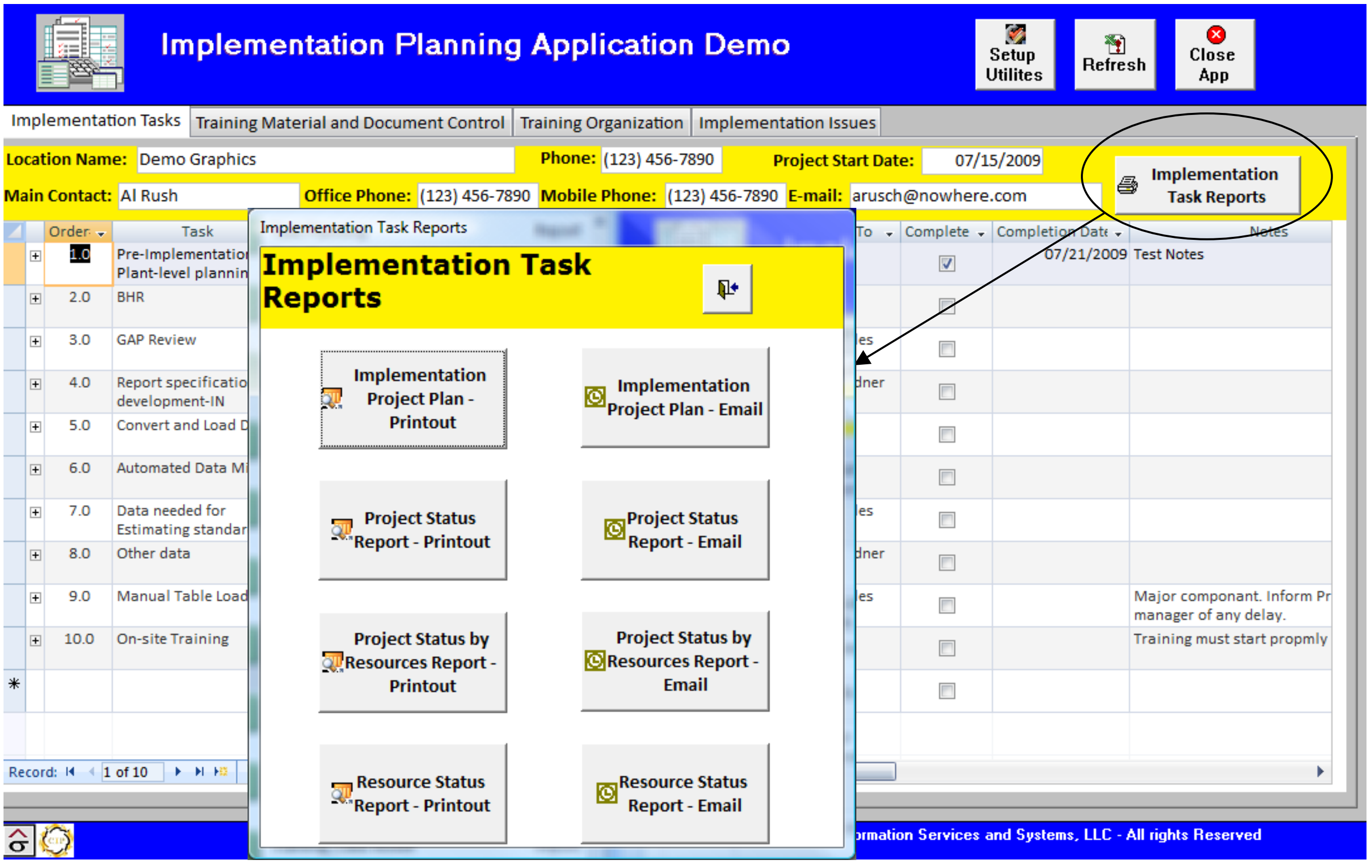
6. Continue entering tasks and sub-tasks until the entire project is outlined.

As tasks and sub-tasks are completed, the project manager designates its status by checking the **Task Complete** checkbox and enters the **Completion Date** in the sub-task or task record.

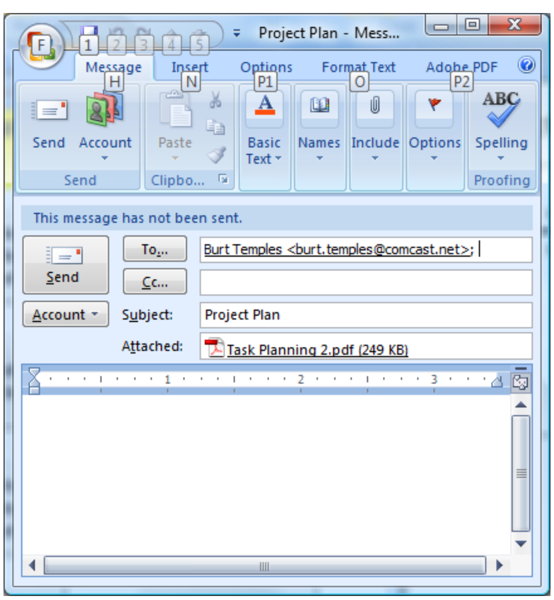


Implementation Tasks Reports

The module contains four reports that detail different aspect of the project. Click the **Implementation Task Reports** button to bring up the menu.

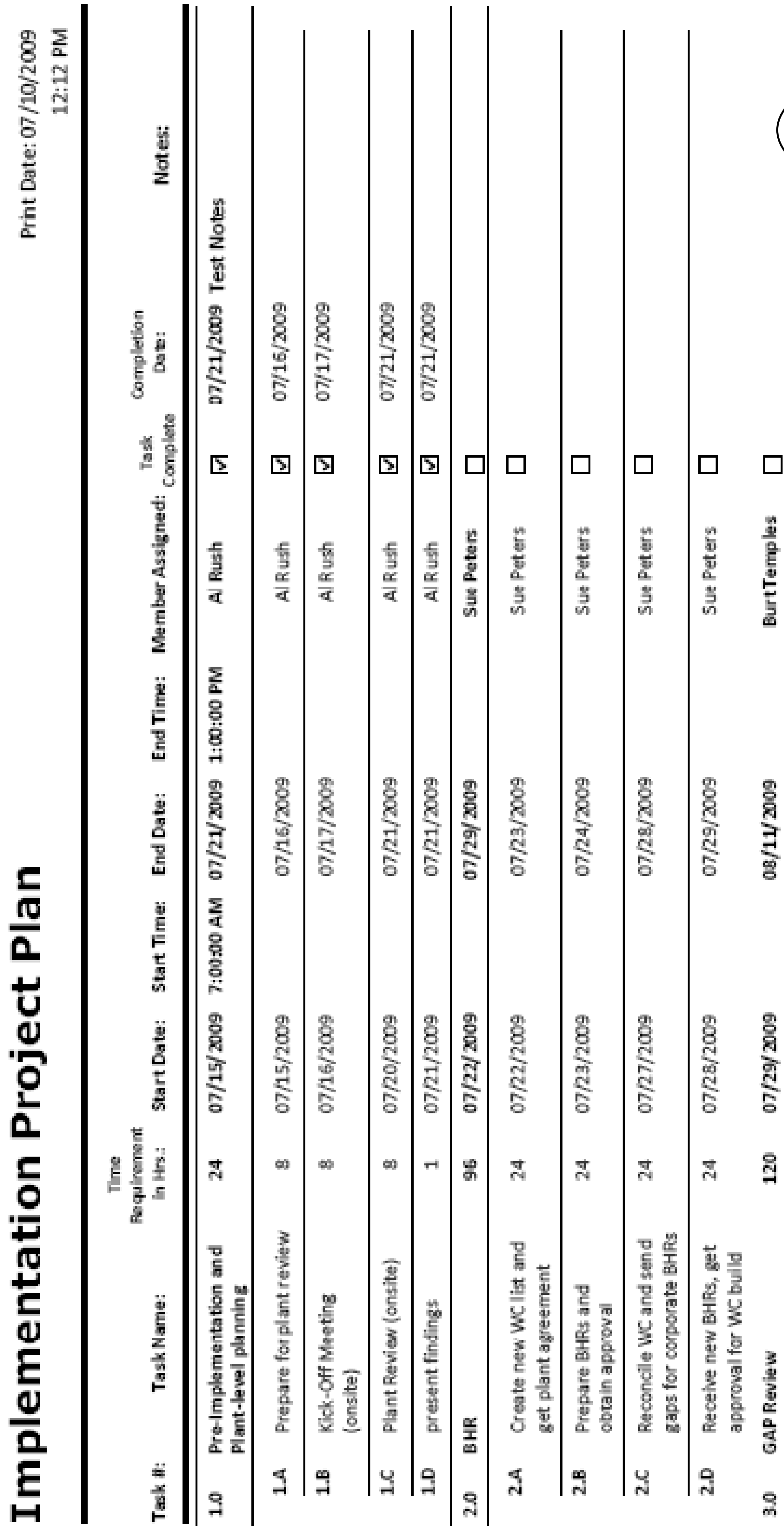


Note: *Each report can be emailed by clicking on the reports email version. The report is output as a .PDF file and place in an email dialog box. Select the recipient and click* ***Send****.*



Implementation Project Plan

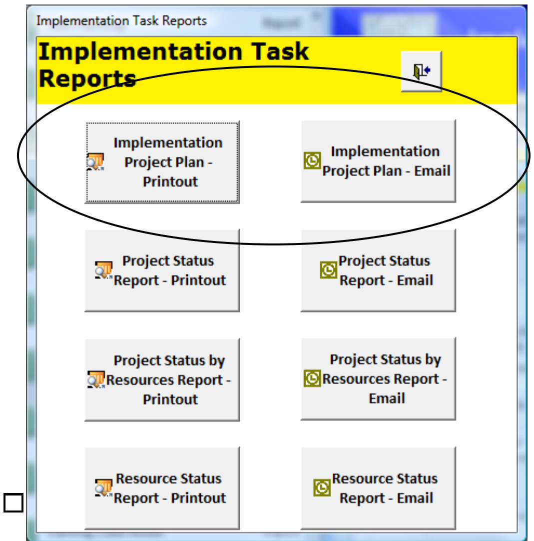
The report displays all the information entered for the entire project.



Implementation Project Plan

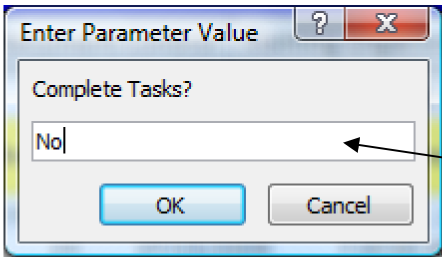
Print Date: 07/10/2009 12:12 PM

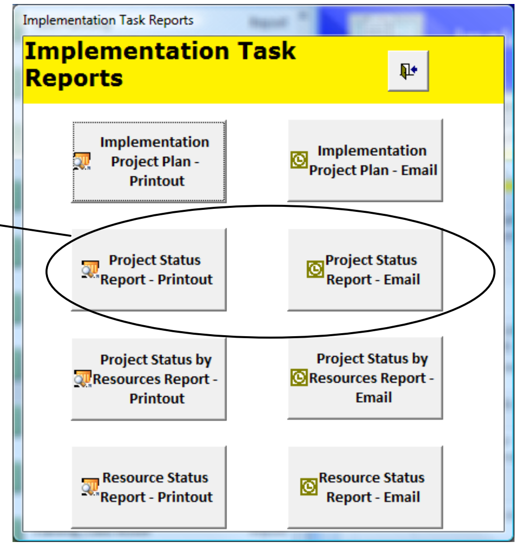
Task #:	Task Name:	Time Requirement In Hrs.:	Start Date:	Start Time:	End Date:	End Time:	Member Assigned:	Task Complete	Completion Date:	Notes:
1.0	Pre-Implementation and Plant-level planning	24	07/15/2009	7:00:00 AM	07/21/2009	1:00:00 PM	Al Rush	☑	07/21/2009	Test Notes
1.A	Prepare for plant review	8	07/15/2009		07/16/2009		Al Rush	☑	07/16/2009	
1.B	Kick-Off Meeting (onsite)	8	07/16/2009		07/17/2009		Al Rush	☑	07/17/2009	
1.C	Plant Review (onsite)	8	07/20/2009		07/21/2009		Al Rush	☑	07/21/2009	
1.D	present findings	1	07/21/2009		07/21/2009		Al Rush	☑	07/21/2009	
2.0	BHR	96	07/22/2009		07/29/2009		Sue Peters	☐		
2.A	Create new WC list and get plant agreement	24	07/22/2009		07/23/2009		Sue Peters	☐		
2.B	Prepare BHRs and obtain approval	24	07/23/2009		07/24/2009		Sue Peters	☐		
2.C	Reconcile WC and send gaps for corporate BHRs	24	07/27/2009		07/28/2009		Sue Peters	☐		
2.D	Receive new BHRs, get approval for WC build	24	07/28/2009		07/29/2009		Sue Peters	☐		
3.0	GAP Review	120	07/29/2009		08/11/2009		Burt Temples	☐		

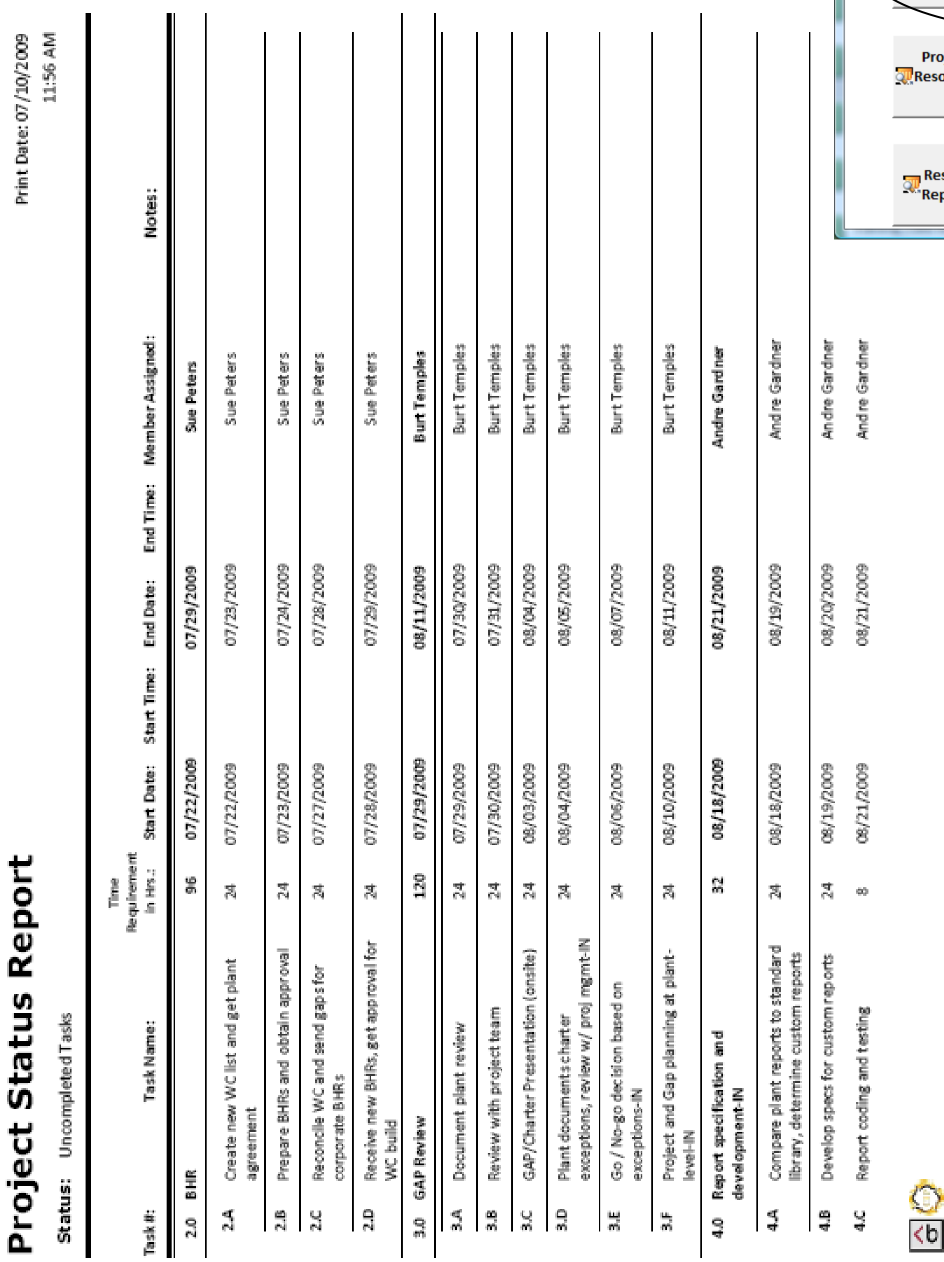


Project Status Report

The Project Status Report reports tasks and sub-tasks by their completion status as designated by the Completion check box. The report will ask the user for the desired status. Enter “Yes” for completed tasks and “No’ for uncompleted tasks and then click **OK**.







Project Status Report

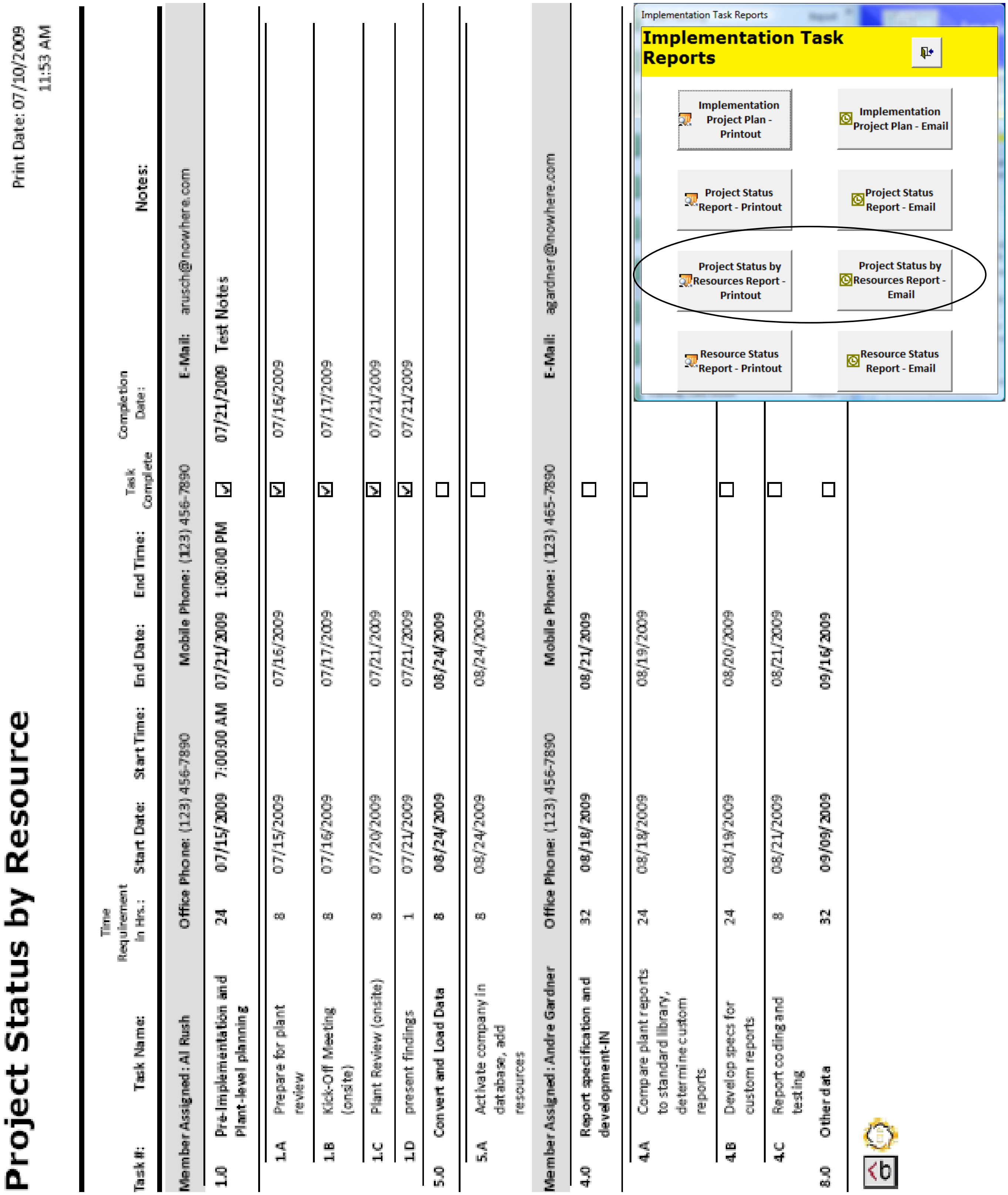
Print Date: 07/10/2009 11:56 AM

Status: Uncompleted Tasks

Task #:	Task Name:	Time Requirement in Hrs.:	Start Date:	Start Time:	End Date:	End Time:	Member Assigned:	Notes:
2.0	**BHR**	**96**	**07/22/2009**		**07/29/2009**		**Sue Peters**	
2.A	Create new WC list and get plant agreement	24	07/22/2009		07/23/2009		Sue Peters	
2.B	Prepare BHRs and obtain approval	24	07/23/2009		07/24/2009		Sue Peters	
2.C	Reconcile WC and send gaps for corporate BHRs	24	07/27/2009		07/28/2009		Sue Peters	
2.D	Receive new BHRs, get approval for WC build	24	07/28/2009		07/29/2009		Sue Peters	
3.0	**GAP Review**	**120**	**07/29/2009**		**08/11/2009**		**Burt Temples**	
3.A	Document plant review	24	07/29/2009		07/30/2009		Burt Temples	
3.B	Review with project team	24	07/30/2009		07/31/2009		Burt Temples	
3.C	GAP/Charter Presentation (onsite)	24	08/03/2009		08/04/2009		Burt Temples	
3.D	Plant documents charter exceptions, review w/ proj mgmt-IN	24	08/04/2009		08/05/2009		Burt Temples	
3.E	Go / No-go decision based on exceptions-IN	24	08/06/2009		08/07/2009		Burt Temples	
3.F	Project and Gap planning at plant-level-IN	24	08/10/2009		08/11/2009		Burt Temples	
4.0	**Report specification and development-IN**	**32**	**08/18/2009**		**08/21/2009**		**Andre Gardner**	
4.A	Compare plant reports to standard library, determine custom reports	24	08/18/2009		08/19/2009		Andre Gardner	
4.B	Develop specs for custom reports	24	08/19/2009		08/20/2009		Andre Gardner	
4.C	Report coding and testing	8	08/21/2009		08/21/2009		Andre Gardner	

Project Status by Resource

The Project Status by Resource Report displays all tasks sorted by the assigned team member.



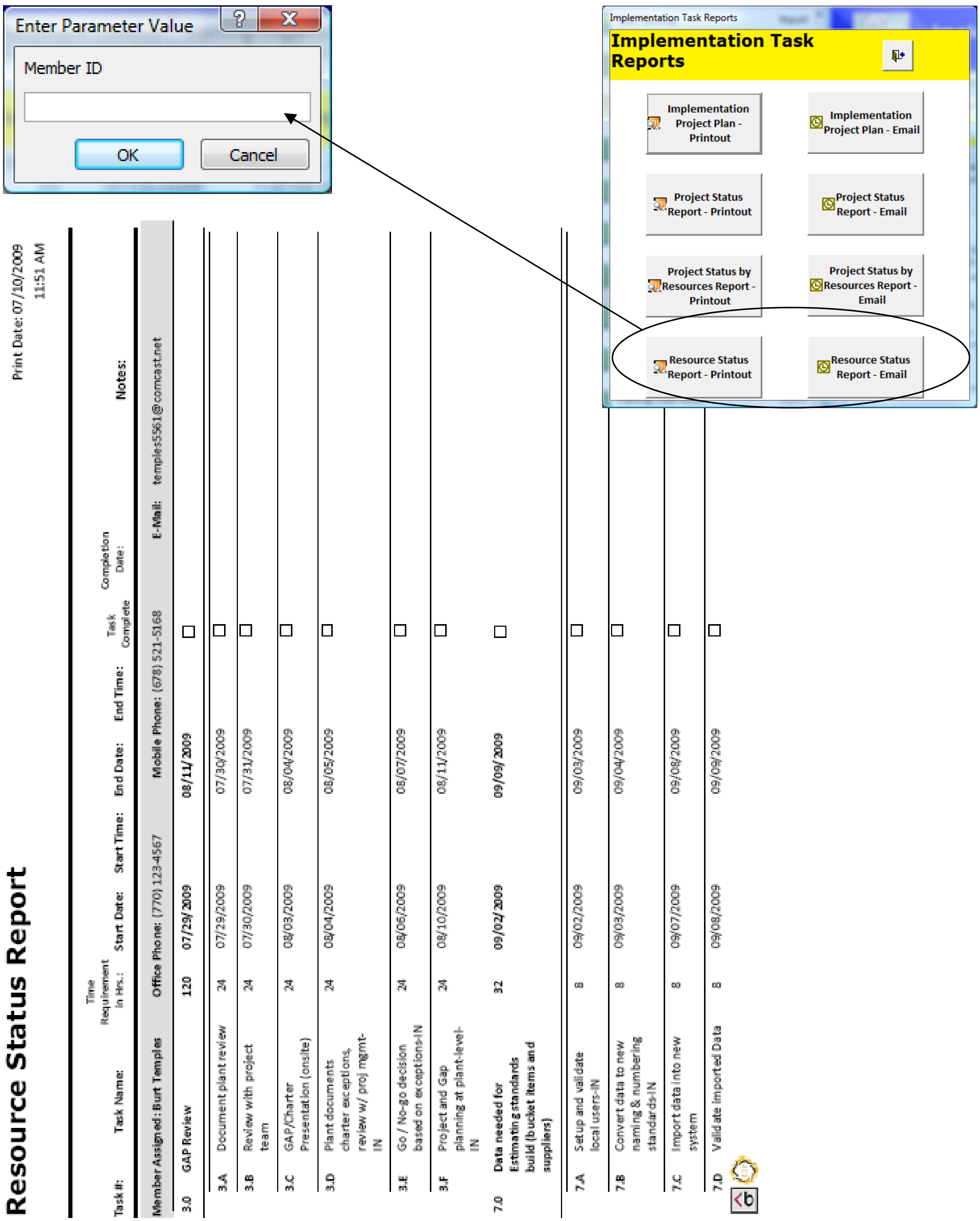
Project Status by Resource

Print Date: 07/10/2009 11:53 AM

Task #:	Task Name:	Time Requirement in Hrs.:	Start Date:	Start Time:	End Date:	End Time:	Task Complete	Completion Date:	Notes:
Member Assigned: Al Rush		Office Phone: (123) 456-7890			Mobile Phone: (123) 456-7890			E-Mail:	arusch@nowhere.com
1.0	Pre-Implementation and Plant-level planning	24	07/15/2009	7:00:00 AM	07/21/2009	1:00:00 PM	☑	07/21/2009	Test Notes
1.A	Prepare for plant review	8	07/15/2009		07/16/2009		☑	07/16/2009	
1.B	Kick-Off Meeting (onsite)	8	07/16/2009		07/17/2009		☑	07/17/2009	
1.C	Plant Review (onsite)	8	07/20/2009		07/21/2009		☑	07/21/2009	
1.D	present findings	1	07/21/2009		07/21/2009		☑	07/21/2009	
5.0	Convert and Load Data	8	08/24/2009		08/24/2009		☐		
5.A	Activate company in database, add resources	8	08/24/2009		08/24/2009		☐		
Member Assigned: Andre Gardner		Office Phone: (123) 456-7890			Mobile Phone: (123) 465-7890			E-Mail:	agardner@nowhere.com
4.0	Report specification and development-IN	32	08/18/2009		08/21/2009		☐		
4.A	Compare plant reports to standard library, determine custom reports	24	08/18/2009		08/19/2009		☐		
4.B	Develop specs for custom reports	24	08/19/2009		08/20/2009		☐		
4.C	Report coding and testing	8	08/21/2009		08/21/2009		☐		
8.0	Other data	32	09/09/2009		09/16/2009		☐		

Resource Status Report

The Resource Status Report displays project assignments and their status by team member. The report will request the team member ID and then display the information for that member.



Resource Status Report

Print Date: 07/10/2009 11:51 AM

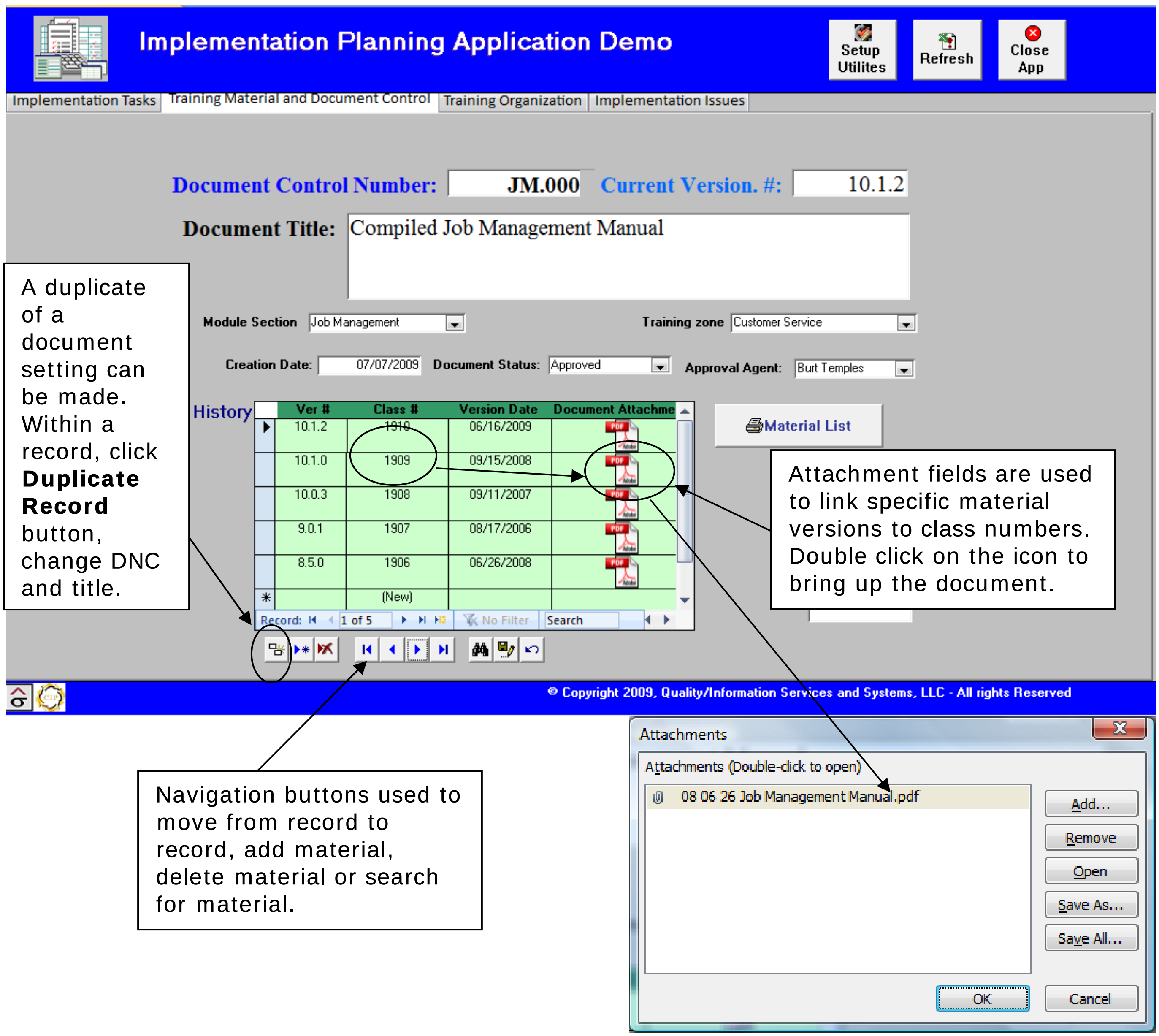
Member Assigned: Burt Temples — Office Phone: (770) 123-4567 — Mobile Phone: (678) 521-5168 — E-Mail: temples5561@comcast.net

Task #:	Task Name:	Time Requirement in Hrs.:	Start Date:	Start Time:	End Date:	End Time:	Task Complete	Completion Date:	Notes:
3.0	GAP Review	120	07/29/2009		08/11/2009		☐		
3.A	Document plant review	24	07/29/2009		07/30/2009		☐		
3.B	Review with project team	24	07/30/2009		07/31/2009		☐		
3.C	GAP/Charter Presentation (onsite)	24	08/03/2009		08/04/2009		☐		
3.D	Plant documents charter exceptions, review w/ proj mgmt-IN	24	08/04/2009		08/05/2009		☐		
3.E	Go / No-go decision based on exceptions-IN	24	08/06/2009		08/07/2009		☐		
3.F	Project and Gap planning at plant-level-IN	24	08/10/2009		08/11/2009		☐		
7.0	Data needed for Estimating standards build (bucket items and suppliers)	32	09/02/2009		09/09/2009		☐		
7.A	Setup and validate local users-IN	8	09/02/2009		09/03/2009		☐		
7.B	Convert data to new naming & numbering standards-IN	8	09/03/2009		09/04/2009		☐		
7.C	Import data into new system	8	09/07/2009		09/08/2009		☐		
7.D	Validate imported Data	8	09/08/2009		09/09/2009		☐		

Training Materials and Document Control Module

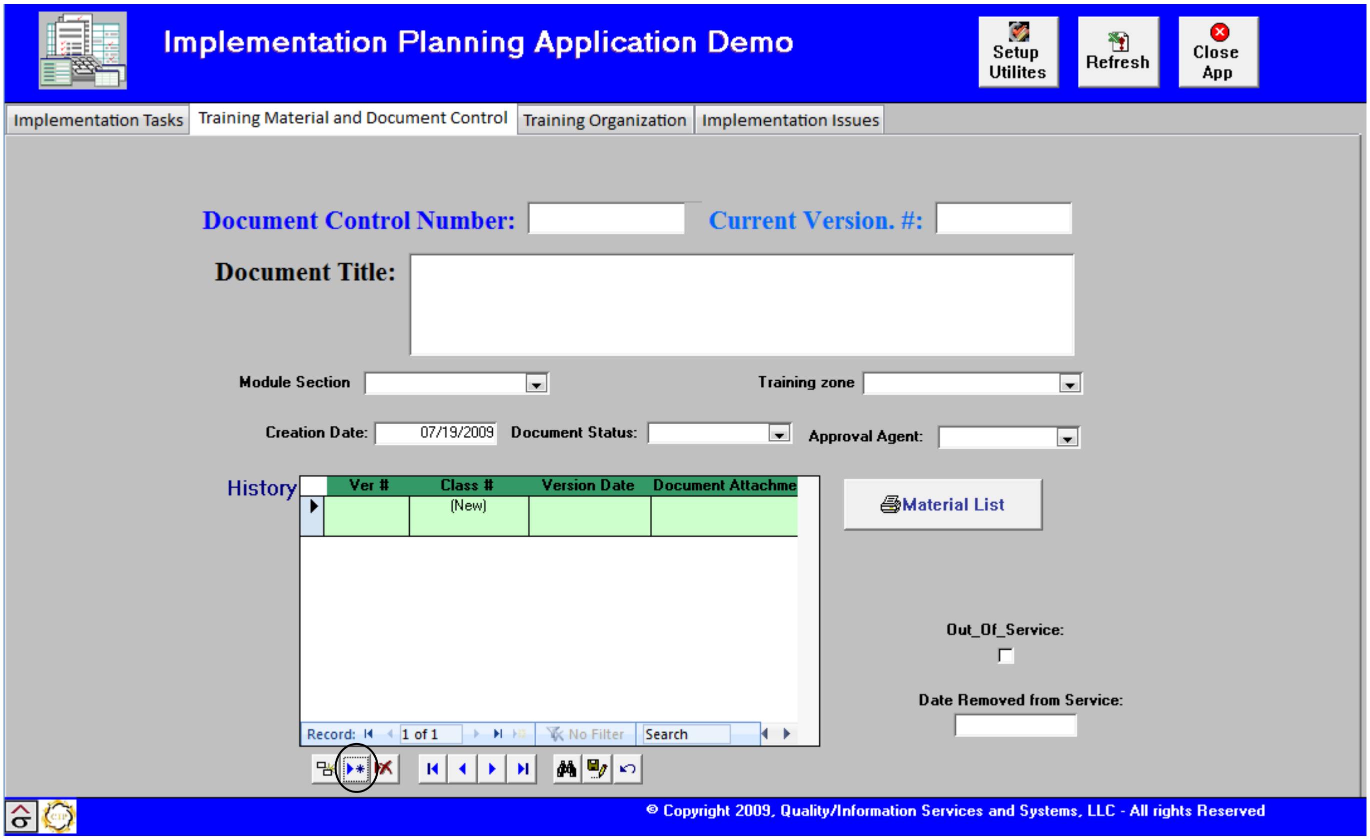
The Training Materials and Document Control module is designed to organize the manuals and individual procedures that are used to teach a program. The application can keep up with material version. Further, the program links the files to specific training classes. Material can be preloaded before the project starts or written “on the fly” as needs arise. Procedure and training material templates can be preloaded or stored in the attachment field located in **Setup Utilities | Training Materials | Document Templates | Attachments**.

Note: *After the project has been completed, this module can continue to serve as a material library and as a document control tool for future procedures and training.*



Creating a new document.

1. Click the **Add Record** button.



2. Enter the **Document Control Number** (DCN). The convention is two letters that represent the Programs module (JM=Job Management, SA= Systems Administration, SH=Shipping, ES= Estimating, etc.) and four numbers that are next in the sequence. The numbers are all zeros for section manuals.

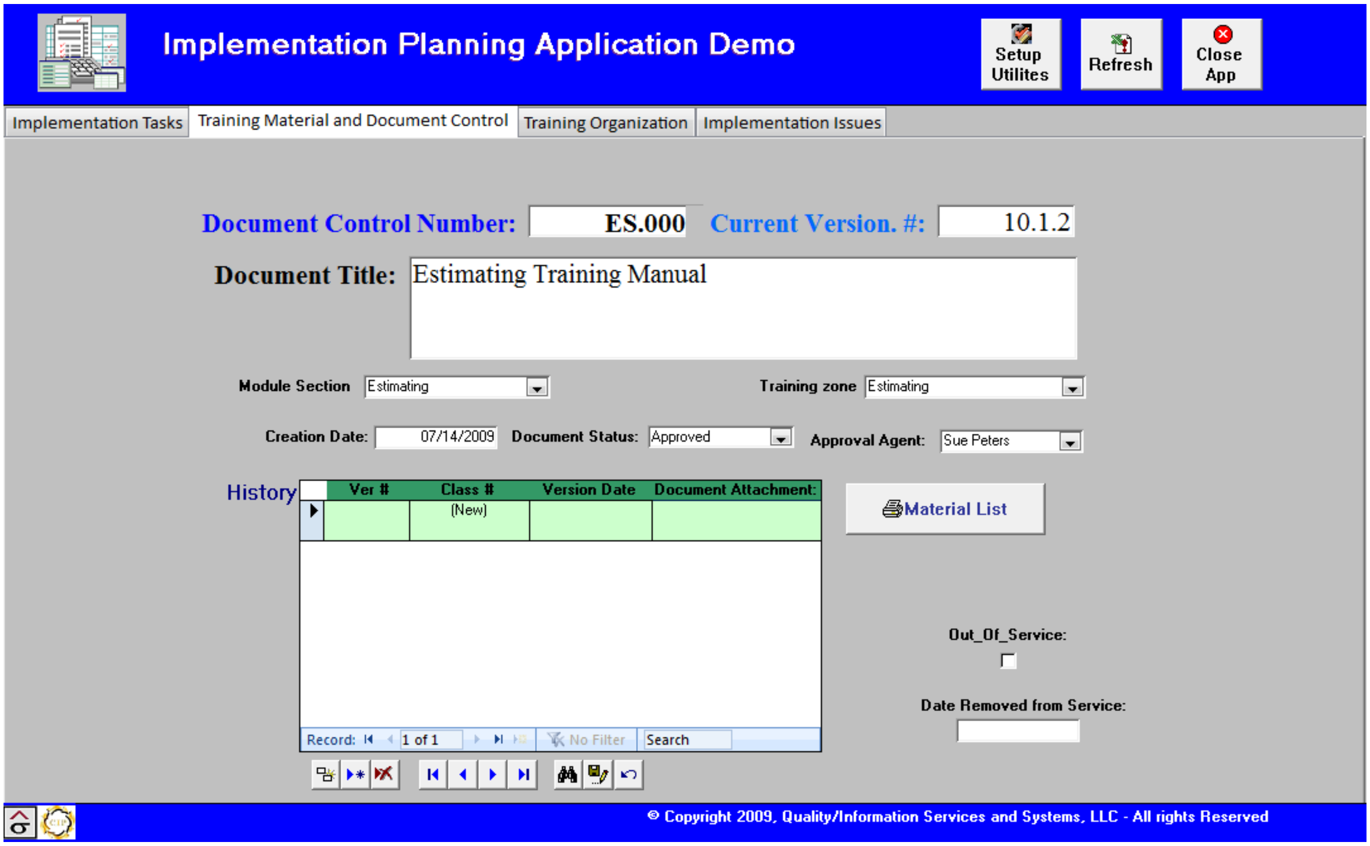
Note: *The application will not accept duplicate DCN. If* ***Duplicate Record*** *button is used, the DNC and title must be changed before the record can be saved.*

3. Enter the program's version number in the **Current Version** # field.

4. Enter the name of the document in **Document Title**.

5. From the dropdown lists, select the **Module Section** that the document applies to and the main training audience in the **Training Zone** field.

6. If the document is written on-site, select a **Document Status** (Approved or Processing) and the **Approval Agent.**

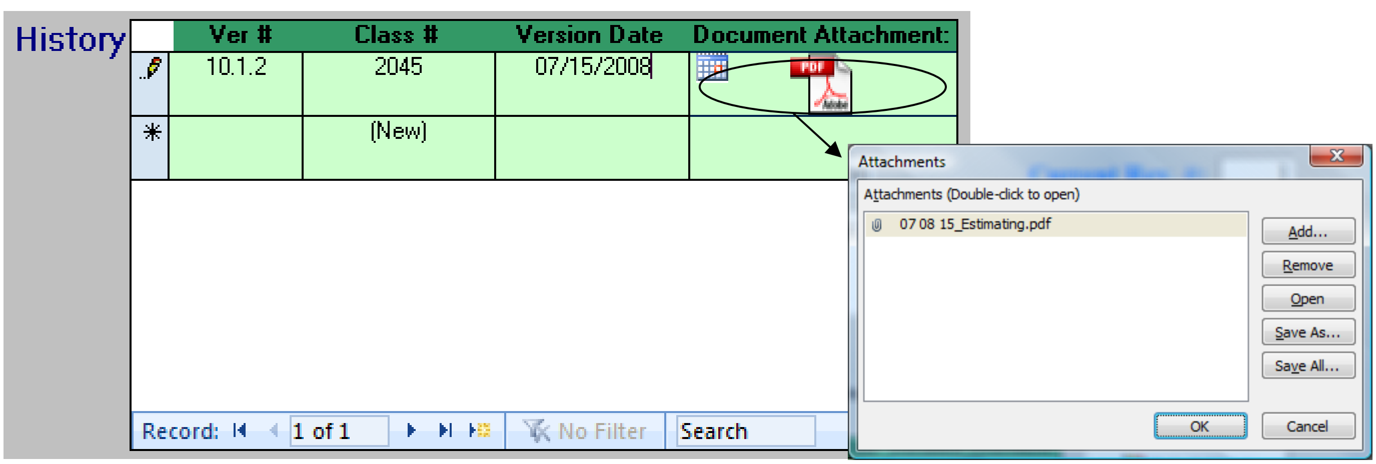


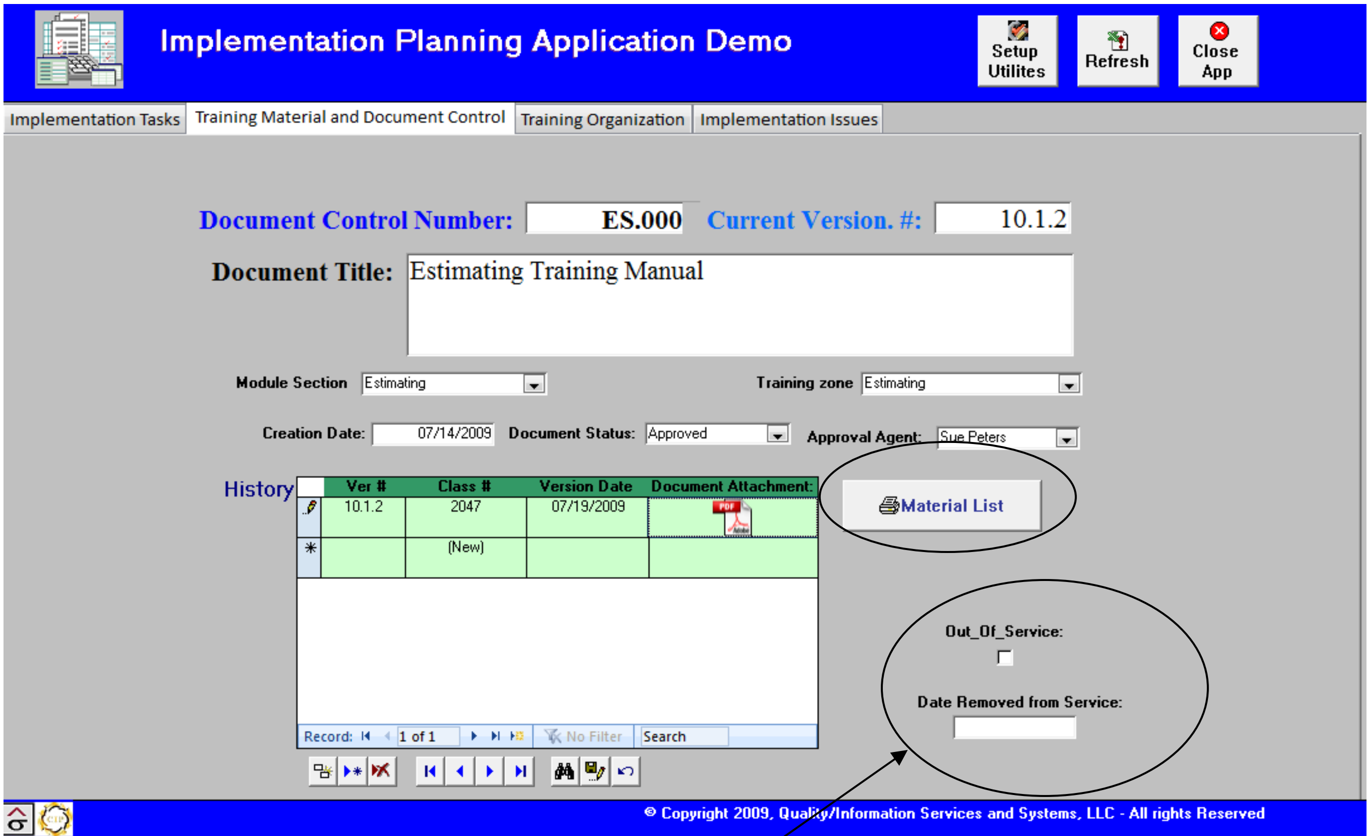
7. Tab to the **History** section

8. Enter the **Revision #. The Class #** and **Revision Date** will automatically be populated.

Note: *The Class number will be used later to build a training class.*

9. Double click in the **Document Attachment Field** and link the document to the record.





If a manual or procedure is removed from service, a record of it being used is kept in the application. Navigate to the document and check the **Out of Service** checkbox and record the date

A Materials List report detailing all of the items available for use in the project is accessible by clicking the **Material List** button.

Materials List Report

The Materials List Report details all of the training material under document control by program section. A total count of material items is provided at the end.

Materials List

Wednesday, July 15, 2009

DCN	Document Name	Current Version
Section: Estimating		
ES.0000	Estimating Training Manual	10.1.2
	Total Documents in Section:	**1**
Section: Job Management		
JM.0000	Compiled Job Management Manual	10.1.2
JM.0001	Entering a Job Manually	10.1.2
JM.0002	Merging an Estimate into a Job	10.1.2
JM.0003	Estimate Merging Terms	10.1.2
JM.0005	Copying a Job	10.1.2
JM.0006	Entering Purchase Order/Requisitions	10.1.2
JM.0007	Adding a Purchase Order/Requistion	10.1.2
JM.0008	Reviewing the Pricing Data Page	10.1.2
JM.0009	Entering Ship To Information	10.1.2
JM.0010	Updating Ship To Information	10.0.0
JM.0011	Completing Jobs Free Fields	10.1.2
JM.0014	Reviewing and Changing the Job Specifications	9.0.0
JM.0015	Entering General Job Notes	10.1.2
JM.0016	Using Sub Jobs	8.5.0
JM.0017	Entering a Spoilage or Customer Sub Job	10.1.2
JM.0018	Production Ticket	9.5.1
JM.0019	Entering Inventory Reserves	10.1.2
JM.0020	Creating a Customer Alteration	8.0.5
JM.0022	Entering Location Changes, Returns, and Run Locations Due Report	10.1.2
JM.0023	Reviewing Schedule Information	10.1.2
JM.0024	Schedule Board and Workbench	10.1.2
JM.0025	Returning a Proof	10.1.2
JM.0026	Jobs Scheduled in PrintFlow	9.5.0
JM.0029	Tracking and Reviewing Job Information	9.5.0
JM.0030	Running the Job Status Report	9.0.5
JM.0031	Active Jobs Report	10.1.2
JM.0032	Conversion Jobs Report	10.1.2
JM.0035	Jobs Report	10.1.2
JM.0040	Merging a Template Estimate	10.1.2
JM.0041	Order Entry Process Tip Sheet	10.1.2
JM.0042	Order Entry for Copying a Job that is an Exact Reprint Tip Sheet	10.1.2

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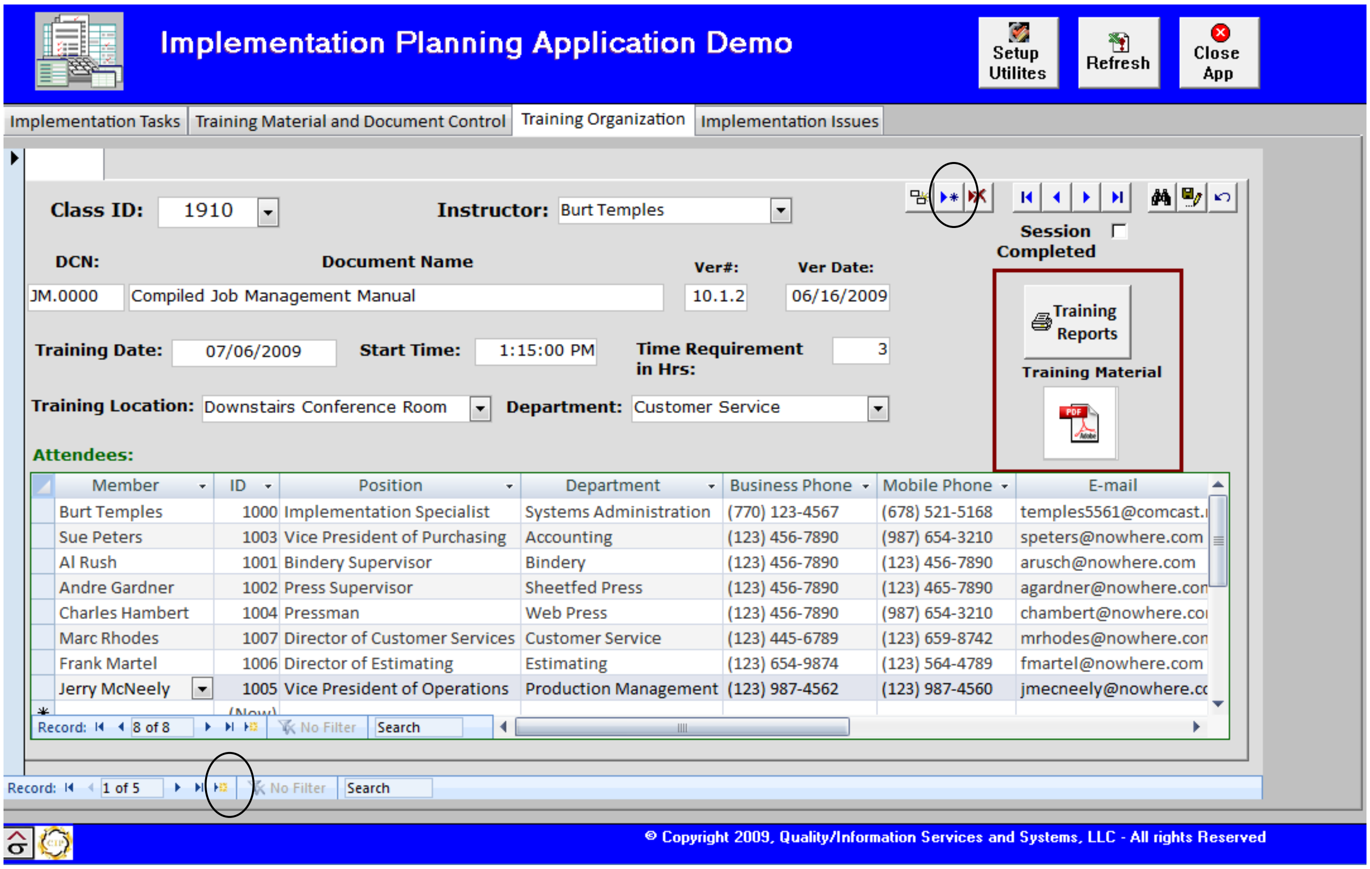
Training Organization Module

The training organization module allows the project manager to build training classes around the desired module and training material. The program assigns individuals to classes and produces the forms necessary for a class.

The program can schedule multiple sessions for the same material.



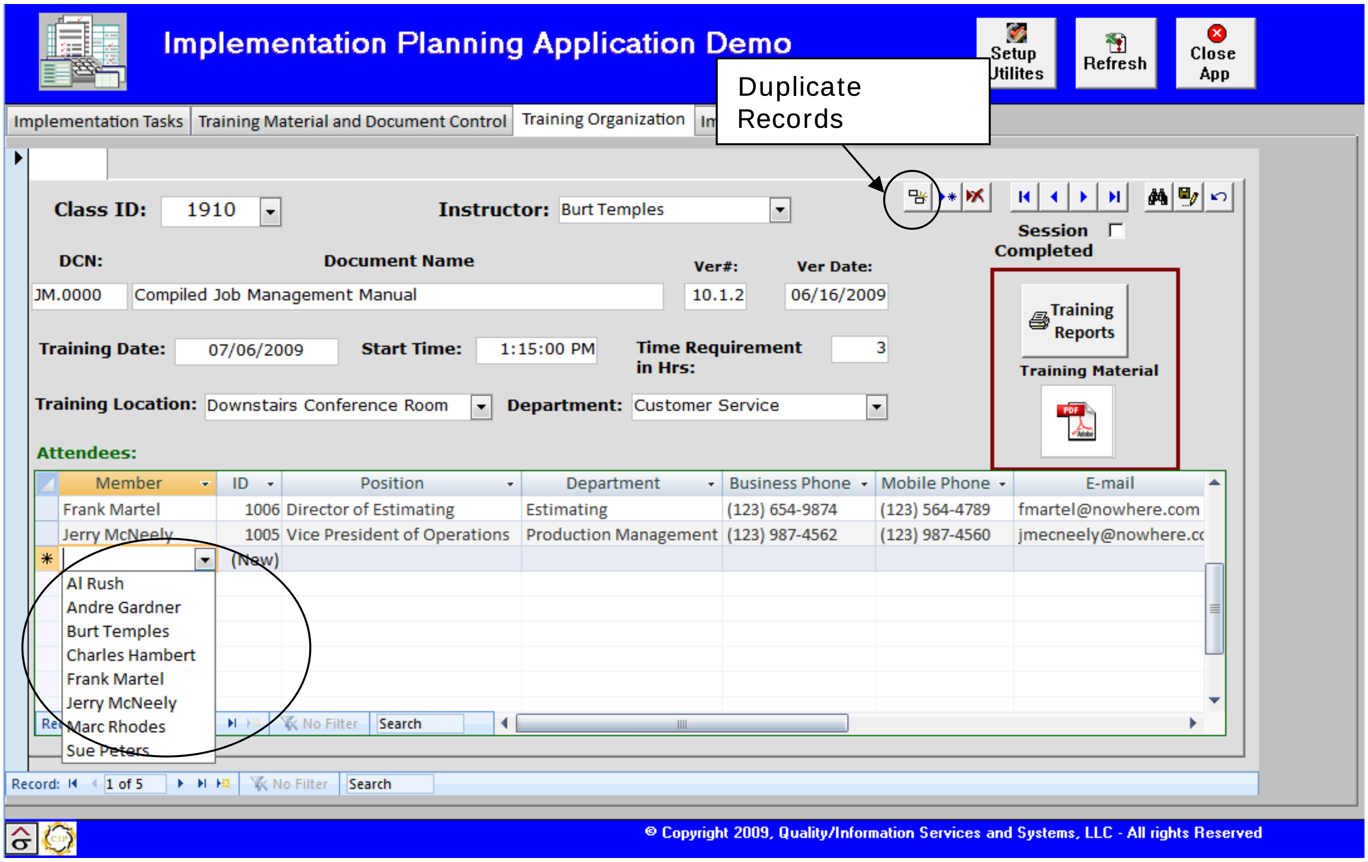
1. Click the **Add Record** button.

2. Select or enter the desired class number from the Training Materials tab in the **Class ID** field.

3. Select the class **Instructor** from the dropdown list.

4. Select or enter the **Training Date, Start Time, Time Requirements, Training Location** and **Department**.

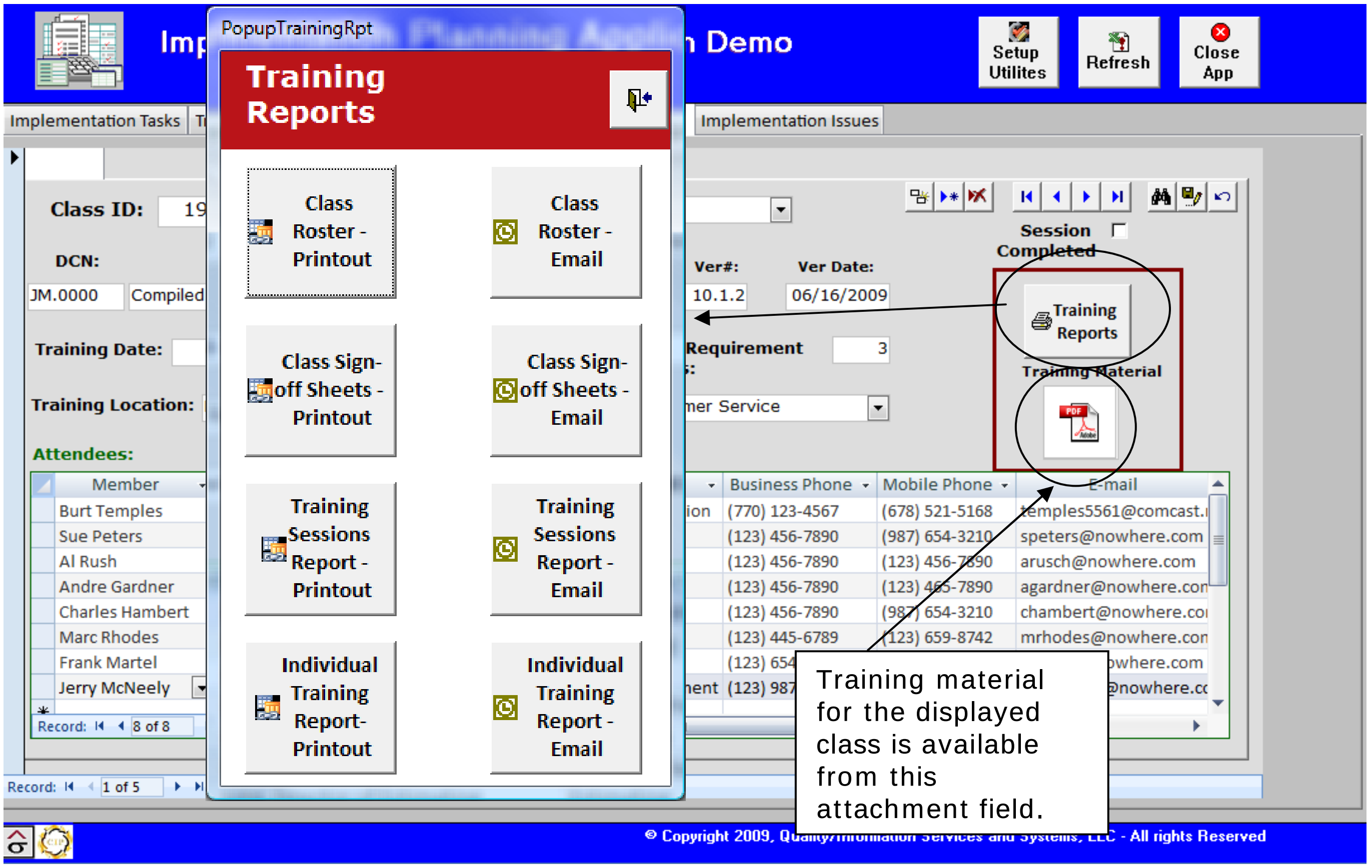
5. Tab to the **Attendees** section and select the members who will attend the session from the **Members** dropdown list.



6. If several sessions are going to be held for the same material, copy the class by clicking the **Duplicate Records** button and change the relevant data.

7. Once the class has successfully been held, the **Session Complete** check box is checked.

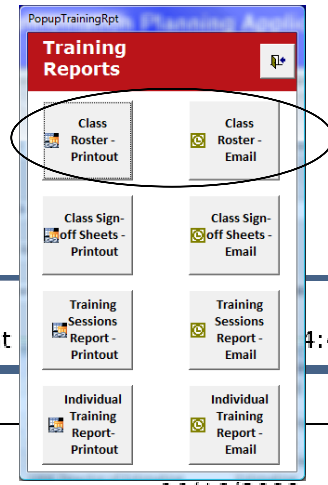
8. After building the class, click the **Training Reports** button to bring up the reports menu. From here the user can select the desired reports.



Note: *Each report can be emailed by clicking on the reports email version. The report is output as a .PDF file and place in an email dialog box. Select the recipient and click* ***Send****.*

Class Roster

The **Class Roster** is a report showing all of the training details can be handed to the instructor. This report can then be used by the instructor to make sure of who is suppose to be in their sessions and if they attended.



Training Session Roster

Print 4:44 PM

Class ID: 1910 **Instructor:** Burt Temples

Document Title

JM.0000 Compiled Job Management Manual Ver. 10.1.2 06/16/2009

Training Date: 07/06/2009 **Department Trained:** Customer Service

Start Time: 1:15:00 PM **Location:** Downstairs Conference Room **Time Requirement in Hrs** 3 .

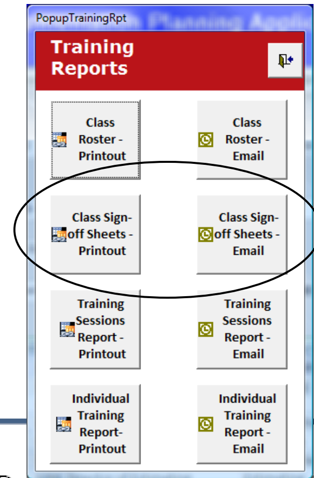
Member:	Department:	Position:	Business Phone:	Mobile Phone:	E-mail:
☐ Jerry McNeely	Production Management	Vice President of Operations	(123) 987-4562	(123) 987-4560	jmecneely@nowhere.co m
☐ Frank Martel	Estimating	Director of Estimating	(123) 654-9874	(123) 564-4789	fmartel@nowhere.com
☐ Marc Rhodes	Customer Service	Director of Customer Services	(123) 445-6789	(123) 659-8742	mrhodes@nowhere.com
☐ Charles Hambert	Web Press	Pressman	(123) 456-7890	(987) 654-3210	chambert@nowhere.com
☐ Andre Gardner	Sheetfed Press	Press Supervisor	(123) 456-7890	(123) 465-7890	agardner@nowhere.com
☐ Al Rush	Bindery	Bindery Supervisor	(123) 456-7890	(123) 456-7890	arusch@nowhere.com
☐ Sue Peters	Accounting	Vice President of Purchasing	(123) 456-7890	(987) 654-3210	speters@nowhere.com
☐ Burt Temples	Systems Administration	Implementation Specialist	(770) 123-4567	(678) 521-5168	temples5561@comcast. net

Checkboxes to signify that the person attended the session

Contact information for each person assigned to the class

Training Sign-off Sheets

The program also produces a course sign-off sheet for each participant. The purpose of the sheet is to verify in writing that the person attended the session and understood the material Presented. Click **Sign-off Sheets** button in Reports prior to the session.



Systems Training

Print Date: 07/19/2009 10:42:39 PM

Member: Jerry McNeely **Department:** Production Management **Position:** Vice President of Operations

Class ID: 1910

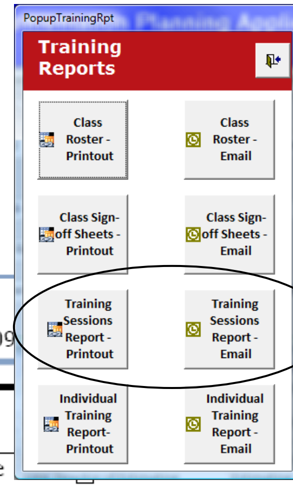
I have reviewed the material and received training for **JM.0000 Compiled Job Management Manual Ver. 10.1.2.**

The Trainer and my supervisor have completed the lessions. I understand the document, procedures and requirements contained in the documentation. I had a chance to ask questions and understand all of the components.

Member Signature **Date**

Sessions Report

The Sessions report displays all of the classes that were scheduled by date and time and the members that are scheduled to attend. It also reports if the class has been completed.



Training Sessions Report

Print Date: 07/19/2009

Session ID:	Training Date:	Start Time:	Name	Location
1910	07/06/2009	1:15:00 PM	Compiled Job Management Manual Ve	Downstairs Conference

Sue Peters	Accounting	Vice President of Purchasing
Al Rush	Bindery	Bindery Supervisor
Andre Gardner	Sheetfed Press	Press Supervisor
Charles Hambert	Web Press	Pressman
Marc Rhodes	Customer Service	Director of Customer Services
Frank Martel	Estimating	Director of Estimating
Jerry McNeely	Production Management	Vice President of Operations
Burt Temples	Systems Administration	Implementation Specialist

Number of Attendies: 8

Session ID:	Training Date:	Start Time:	Name	Location	Completed
2023	07/17/2009	10:00:00 AM	Shipping Manual Ver. 1	Downstairs Conference	☑

Sue Peters	Accounting	Vice President of Purchasing
Andre Gardner	Sheetfed Press	Press Supervisor
Charles Hambert	Web Press	Pressman
Al Rush	Bindery	Bindery Supervisor

Number of Attendies: 4

Session ID:	Training Date:	Start Time:	Name	Location	Completed
1906	07/25/2009	11:00:00 AM	Compiled Job Management Manual Ve	Downstairs Conference	☐

Al Rush	Bindery	Bindery Supervisor
Burt Temples	Systems Administration	Implementation Specialist
Charles Hambert	Web Press	Pressman
Sue Peters	Accounting	Vice President of Purchasing

Number of Attendies: 4

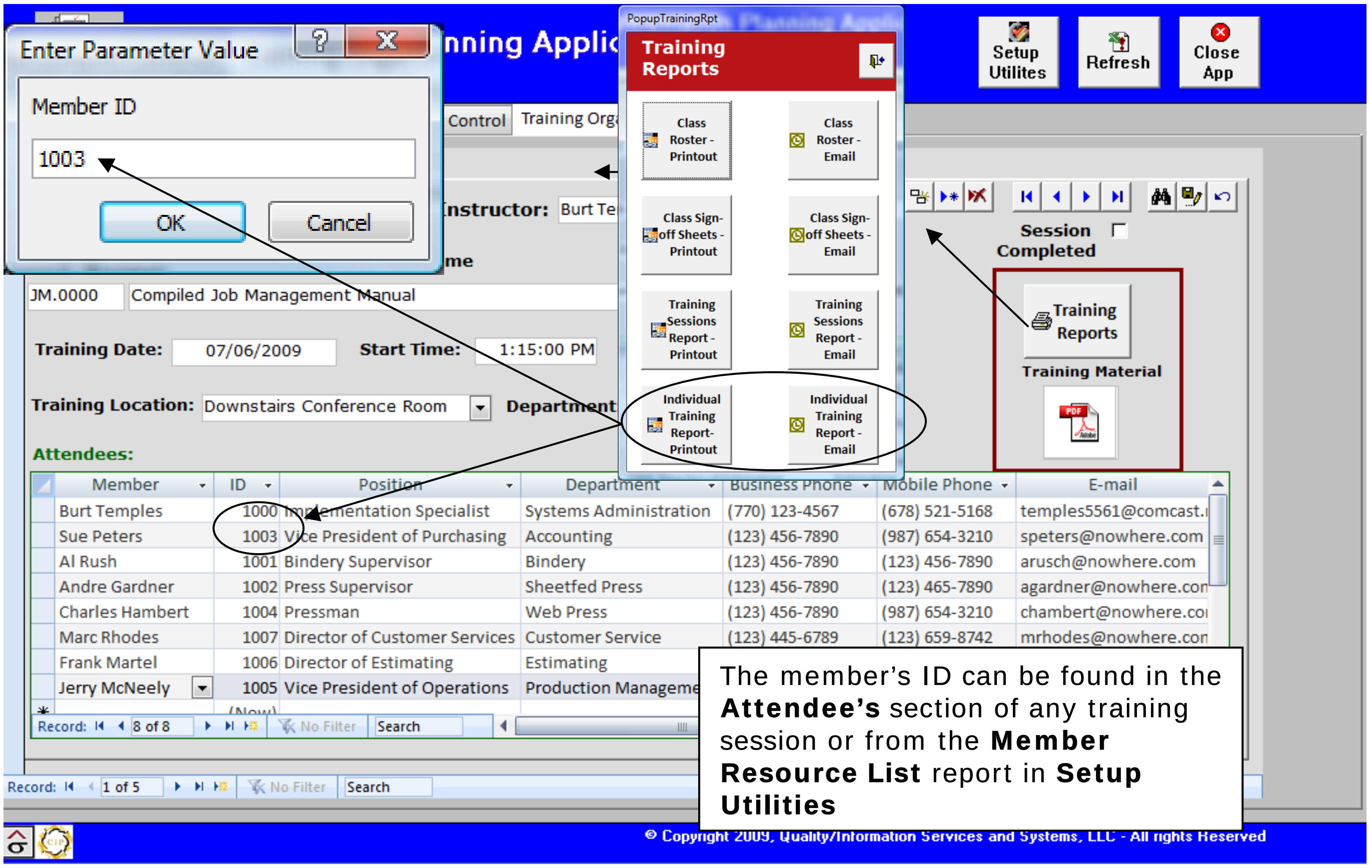
Session ID:	Training Date:	Start Time:	Name	Location	Completed
2021	07/28/2009	1:00:00 PM	UPS Returns in SmartLinc Ver. 1	Upstairs Conference Roo	☐

Charles Hambert	Web Press	Pressman
Al Rush	Bindery	Bindery Supervisor

Page 1

Individual's Training Report

The Individual's Training Report details all of the sessions that an individual has been scheduled to attend or has attended. The report pulls information by the member's ID.



Individual Training Report

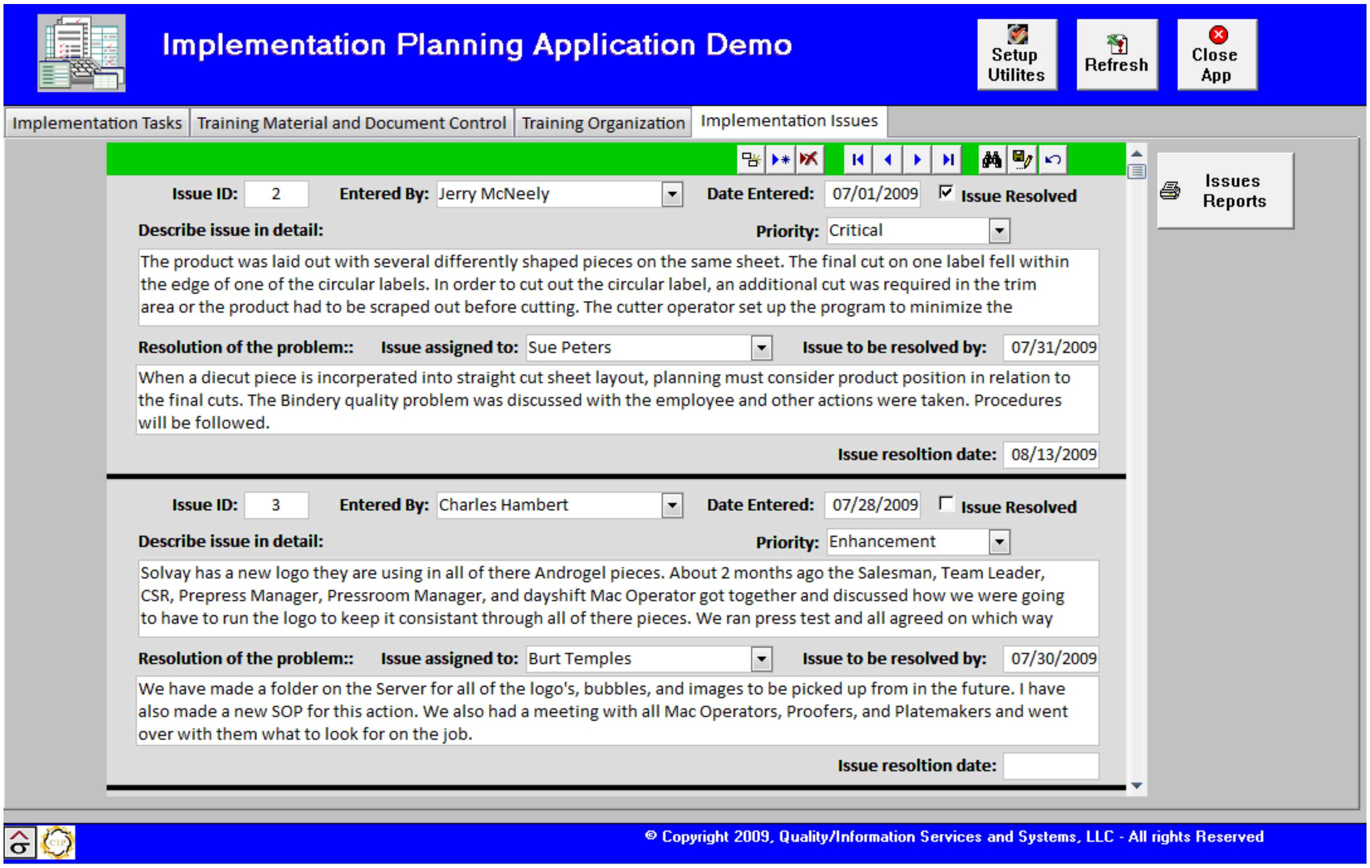
Print Date: 07/26/2009 11:29:11 AM

Member:	Department:	Position:
Sue Peters	Accounting	Vice President of Purchasing

Class ID:	DCN:	Document Title:	Ver.#:	Ver. Date:	Training Date:
2021	SM.0012	UPS Returns in SmartLinc	1	07/07/2009	07/28/2009
1906	JM.0000	Compiled Job Management Manual	8.5.0	06/26/2008	07/25/2009
2023	SH.0000	Shipping Manual	1	07/10/2009	07/17/2009
1910	JM.0000	Compiled Job Management Manual	10.1.2	06/16/2009	07/06/2009

Implementation Issues Module

During a deployment, problems may arise that have to be resolved before the implementation can progress or be completed to everyone's satisfaction. The Implementation Issues module is used to record the issue's details, assign a priority and the solution arrived at to correct the problem.



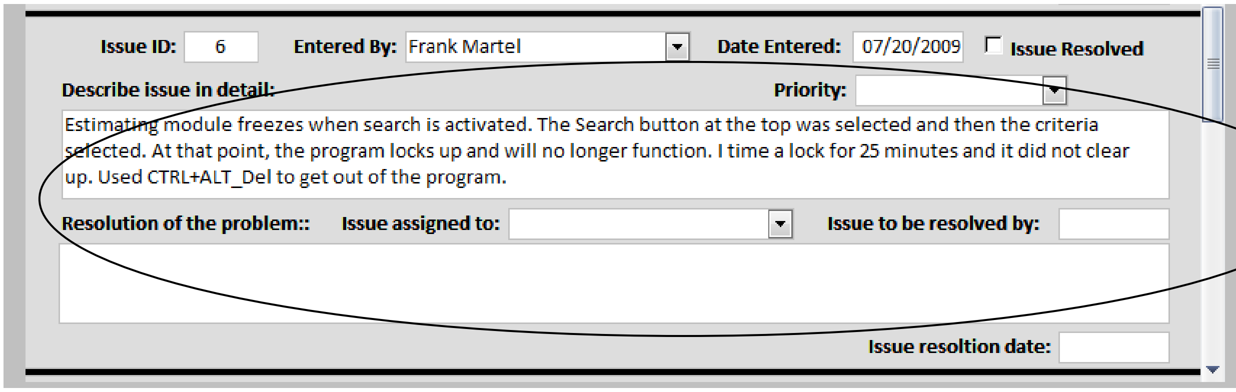
Note: *For privacy reasons, the example issues listed are for verbiage only and do not represent implementation issues.*

1. Click **Add Record**.
2. An **Issue ID** is automatically entered. Select the person initiated the issue in the **Entered By** field.

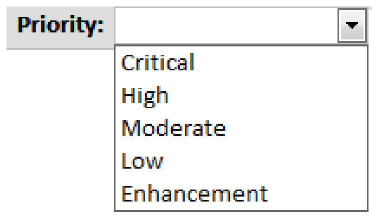
Note: *The Date Entered will default to today. Change the date if necessary.*

3. Enter a description of the issue in the Describe issue in detail field. Include all relevant information about the module, nature of the problem; any reports are affected by the problem.

Note: *Include as much detail as possible about the steps taken prior to the problem being discovered. The issue will have to be duplicated before it can be fixed.*

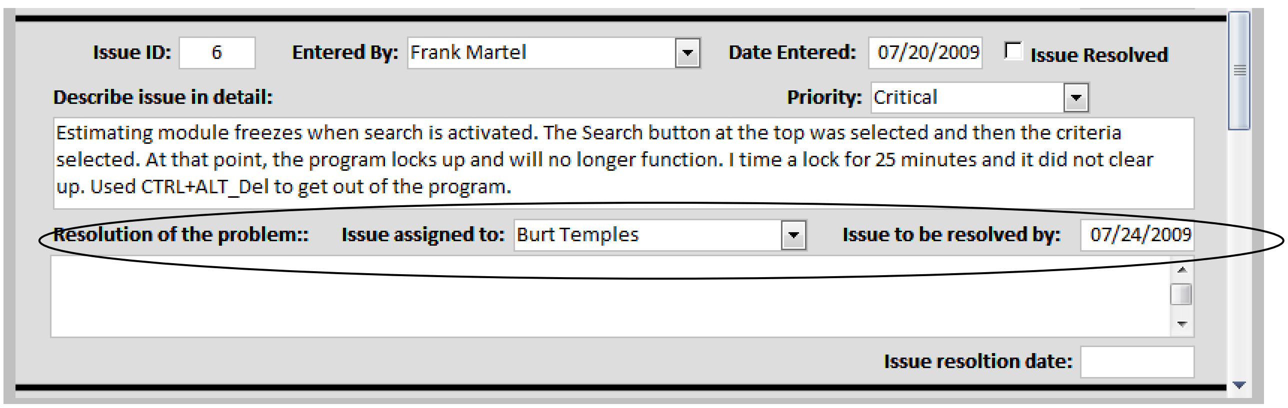


4. Select a **Priority** for the issue.

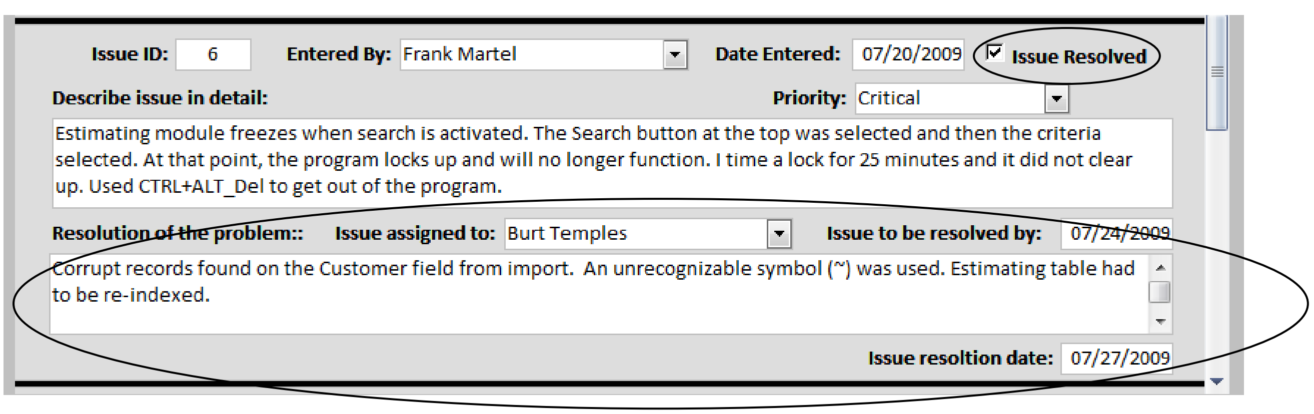


Note: *Prior to the project beginning, the team will need to determine the definition of the priories for this implementation. The priorities are used as a sorting tool by all of the reports. See **Setup Utilities** for the pre-loaded definitions.*

5. Assign the issue to a team member and select a date the problem is to be resolved by.

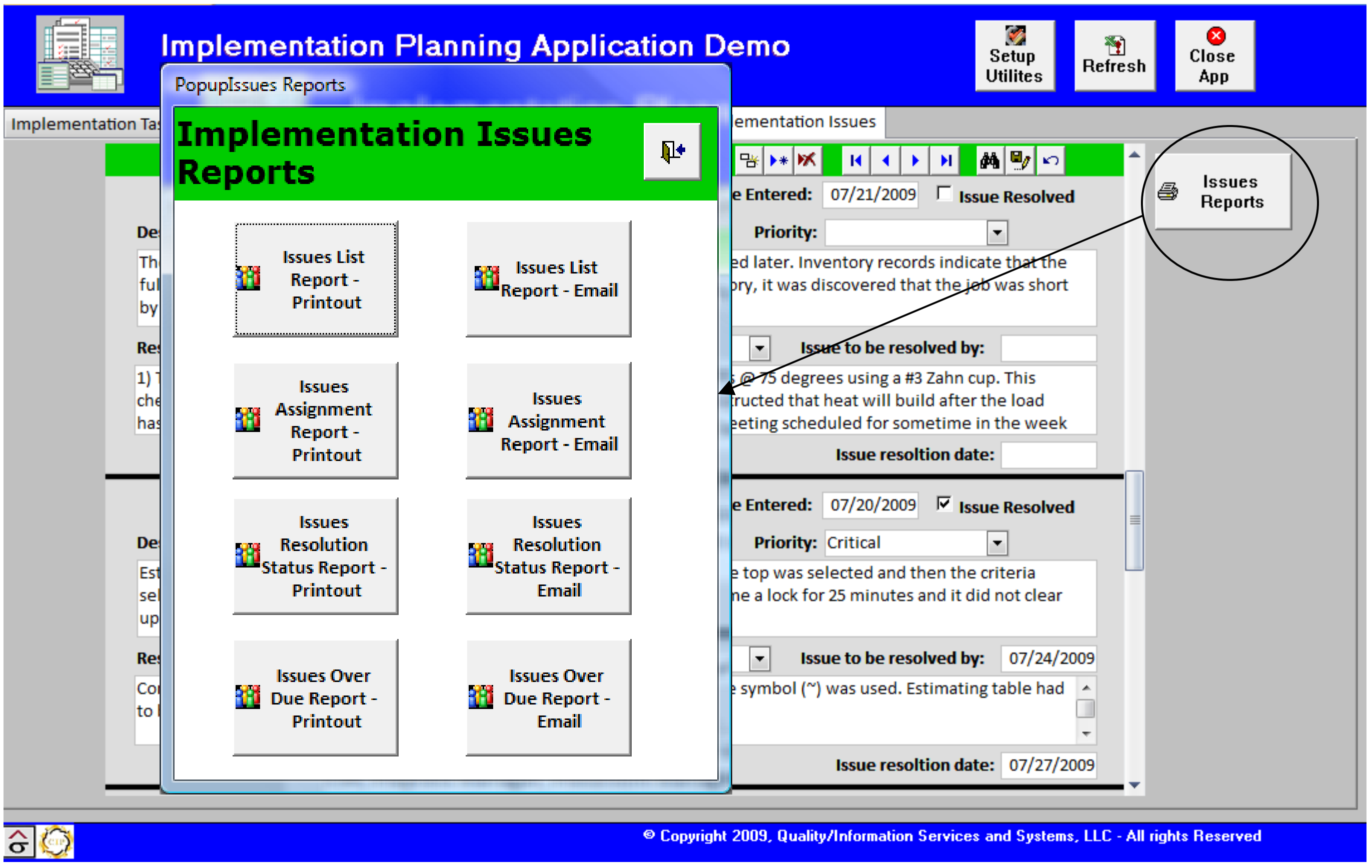


6. When the problem is resolved, a detailed description of the solution is entered along with the date the solution was completed in the appropriate fields. The Issue Resolved checkbox is checked.



Issues Reports

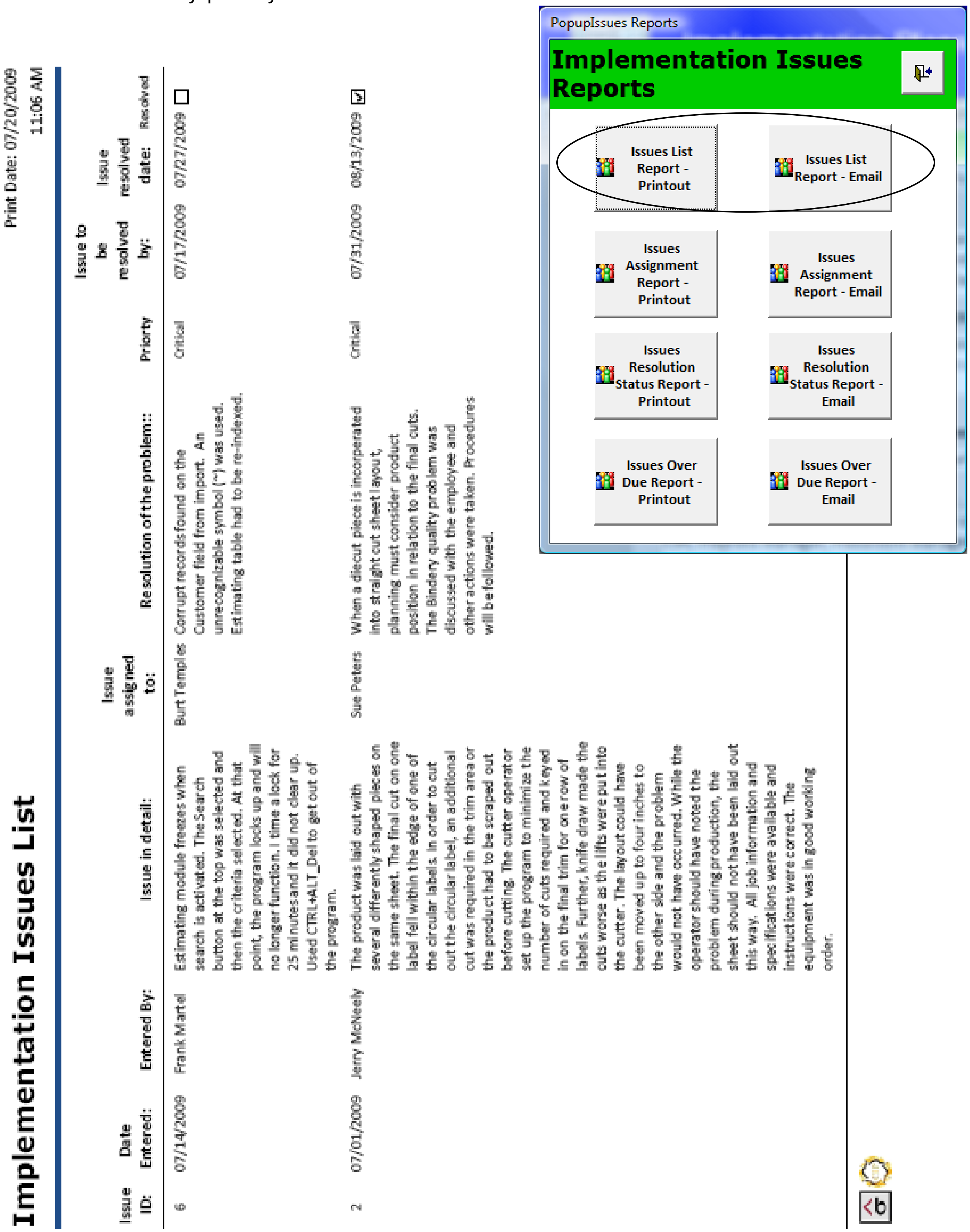
Four reports are available to track issues within the program. Click the **Issues Reports** button to access the menu.



Note: *Each report can be emailed by clicking on the reports email version. The report is output as a .PDF file and place in an email dialog box. Select the recipient and click **Send**.*

Issues List Report

The Issues list returns all issues entered into the system and is used as an overview of the problems. The data is sorted by priority.



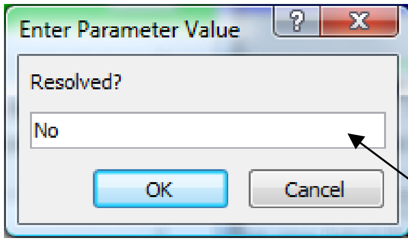
Implementation Issues List

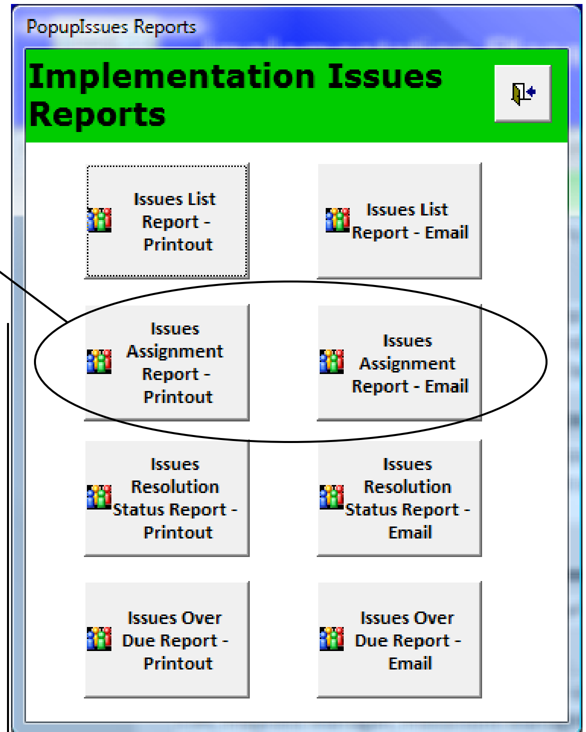
Print Date: 07/20/2009
11:06 AM

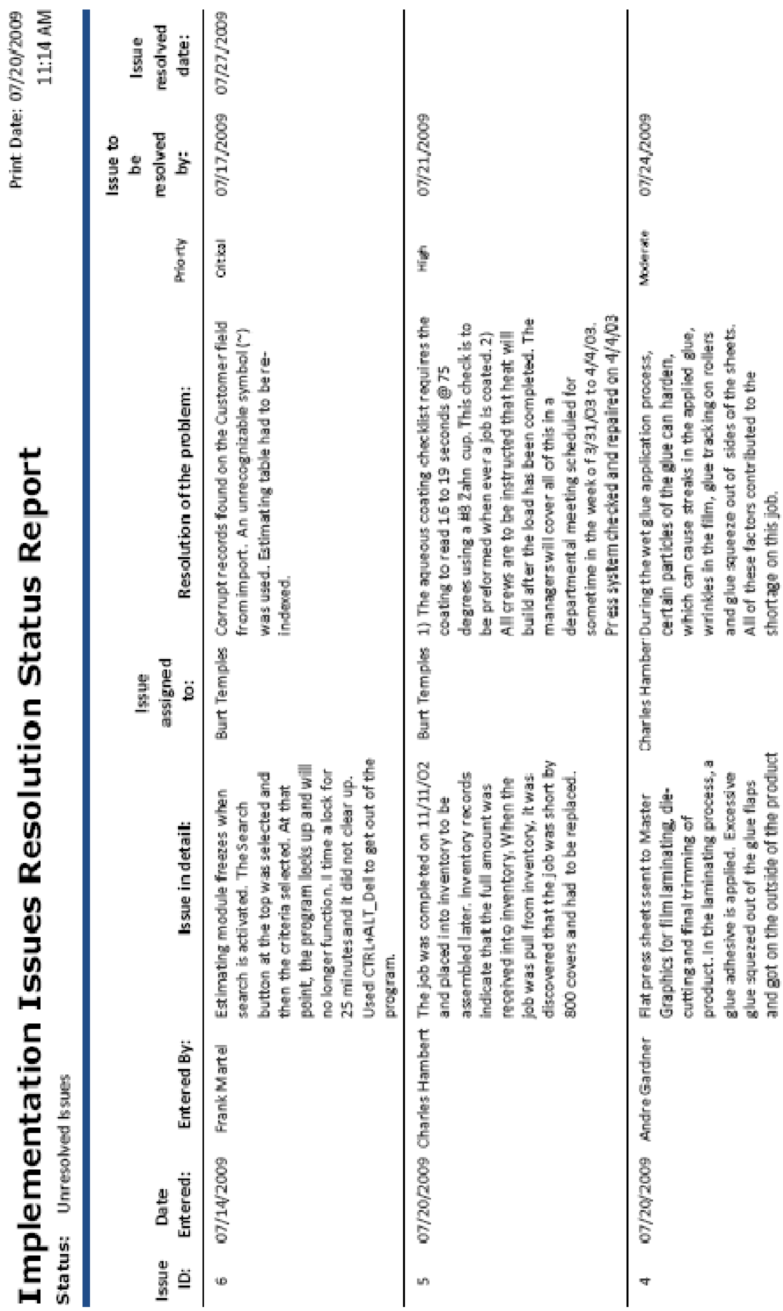
Issue ID:	Date Entered:	Entered By:	Issue in detail:	Issue assigned to:	Resolution of the problem::	Priorty	Issue to be resolved by:	Issue resolved date:	Resolved
6	07/14/2009	Frank Martel	Estimating module freezes when search is activated. The Search button at the top was selected and then the criteria selected. At that point, the program locks up and will no longer function. I time a lock for 25 minutes and it did not clear up. Used CTRL+ALT_Del to get out of the program.	Burt Temples	Corrupt records found on the Customer field from import. An unrecognizable symbol (~) was used. Estimating table had to be re-indexed.	Critical	07/17/2009	07/27/2009	☐
2	07/01/2009	Jerry McNeely	The product was laid out with several differently shaped pieces on the same sheet. The final cut on one label fell within the edge of one of the circular labels. In order to cut out the circular label, an additional cut was required in the trim area or the product had to be scraped out before cutting. The cutter operator set up the program to minimize the number of cuts required and keyed in on the final trim for one row of labels. Further, knife draw made the cuts worse as the lifts were put into the cutter. The layout could have been moved up to four inches to the other side and the problem would not have occurred. While the operator should have noted the problem during production, the sheet should not have been laid out this way. All job information and specifications were available and instructions were correct. The equipment was in good working order.	Sue Peters	When a diecut piece is incorporated into straight cut sheet layout, planning must consider product position in relation to the final cuts. The Bindery quality problem was discussed with the employee and other actions were taken. Procedures will be followed.	Critical	07/31/2009	08/13/2009	☑

Issues Resolution Status Report

The Implementation Issues Resolution Status Report returns issues by their resolution status and asks a Yes/No question. The data is sorted by priority.







Implementation Issues Resolution Status Report

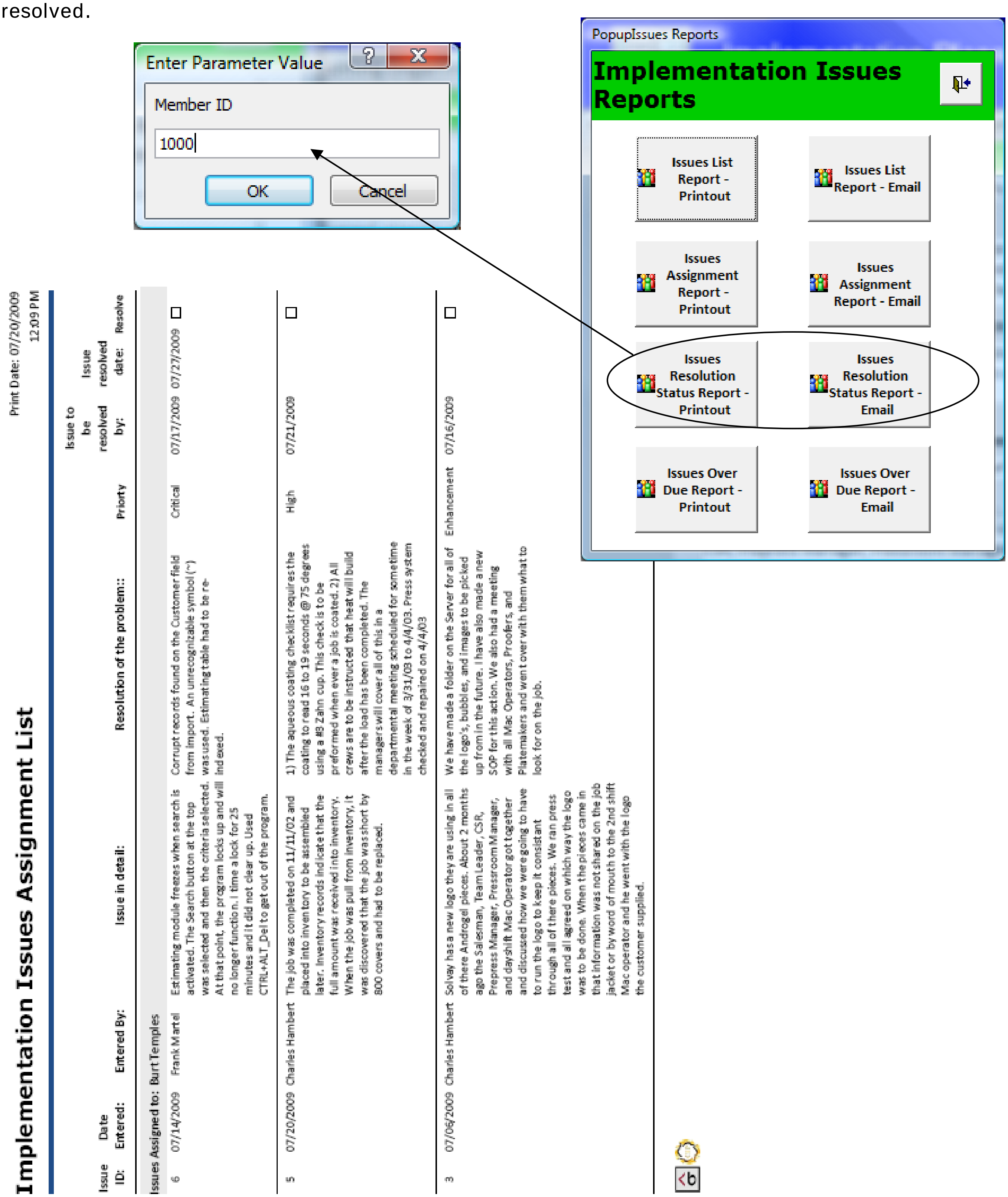
Print Date: 07/20/2009 11:14 AM

Status: Unresolved Issues

Issue ID:	Date Entered:	Entered By:	Issue in detail:	Issue assigned to:	Resolution of the problem:	Priority	Issue to be resolved by:	Issue resolved date:
6	07/14/2009	Frank Martel	Estimating module freezes when search is activated. The Search button at the top was selected and then the criteria selected. At that point, the program locks up and will no longer function. I time a lock for 25 minutes and it did not clear up. Used CTRL+ALT_Del to get out of the program.	Burt Temples	Corrupt records found on the Customer field from import. An unrecognizable symbol (~) was used. Estimating table had to be re-indexed.	Critical	07/17/2009	07/27/2009
5	07/20/2009	Charles Hambert	The job was completed on 11/11/02 and placed into inventory to be assembled later. Inventory records indicate that the full amount was received into inventory. When the job was pull from inventory, it was discovered that the job was short by 800 covers and had to be replaced.	Burt Temples	1) The aqueous coating checklist requires the coating to read 16 to 19 seconds @ 75 degrees using a #3 Zahn cup. This check is to be preformed when ever a job is coated. 2) All crews are to be instructed that heat will build after the load has been completed. The managers will cover all of this in a departmental meeting scheduled for sometime in the week of 3/31/03 to 4/4/03. Press system checked and repaired on 4/4/03	High	07/21/2009	
4	07/20/2009	Andre Gardner	Flat press sheets sent to Master Graphics for film laminating, die-cutting and final trimming of product. In the laminating process, a glue adhesive is applied. Excessive glue squeezed out of the glue flaps and got on the outside of the product	Charles Hamber	During the wet glue application process, certain particles of the glue can harden, which can cause streaks in the applied glue, wrinkles in the film, glue tracking on rollers and glue squeeze out of sides of the sheets. All of these factors contributed to the shortage on this job.	Moderate	07/24/2009	

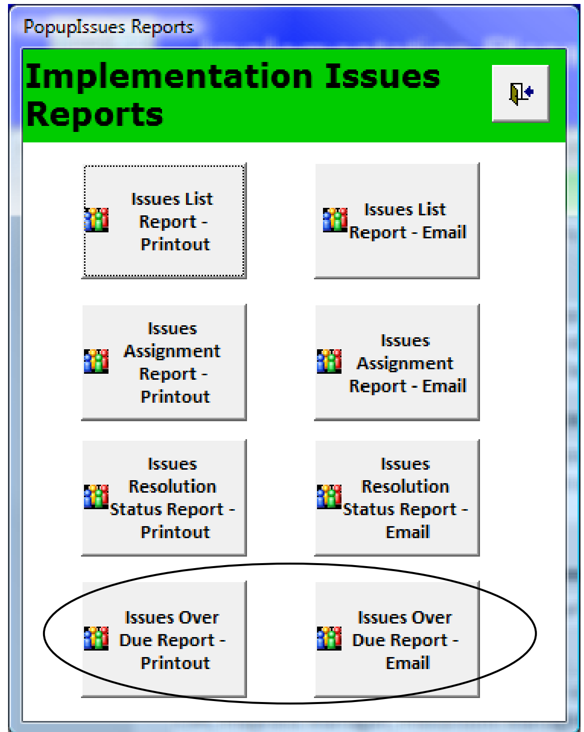
Issues Assignment Report

The Implementation Issues Assignment Report displays the issues assigned to team members. When clicked, the report asks for the assigned members ID. The report then returns all issues assigned to the member. The report is further sorted by priority and date the problem was suppose to be resolved.



Issues Over Due Report

The Implementation Issues Over Due report returns the issues that have passed their **Issue to be resolved by** date. The report is further sorted by priority and date the problem was suppose to be resolved.



Implementation Issues Over Due Report

Print Date: 07/20/2009
12:14 PM

Issue ID:	Date Entered:	Entered By:	Issue in detail:	Issue assigned to:	Resolution of the problem::	Issue to be resolved by:	Priorty
6	07/14/2009	Frank Martel	Estimating module freezes when search is activated. The Search button at the top was selected and then the criteria selected. At that point, the program locks up and will no longer function. I time a lock for 25 minutes and it did not clear up. Used CTRL+ALT_Del to get out of the program.	Burt Temples	Corrupt records found on the Customer field from import. An unrecognizable symbol (~) was used. Estimating table had to be re-indexed.	07/17/2009	Critical
3	07/06/2009	Charles Hambert	Solvay has a new logo they are using in all of there Androgel pieces. About 2 months ago the Salesman, Team Leader, CSR, Prepress Manager, Pressroom Manager, and dayshift Mac Operator got together and discussed how we were going to have to run the logo to keep it consistant through all of there pieces. We ran press test and all agreed on which way the logo was to be done. When the pieces came in that information was not shared on the job jacket or by word of mouth to the 2nd shift Mac operator and he went with the logo the customer supplied.	Burt Temples	We have made a folder on the Server for all of the logo's, bubbles, and images to be picked up from in the future. I have also made a new SOP for this action. We also had a meeting with all Mac Operators, Proofers, and Platemakers and went over with them what to look for on the job.	07/16/2009	Enhancement