Printshop Workflow Automation System
P.W.A.S.

PWAS User Guide

Presented by:

Dulcardo Arteaga | Naveen Gowda | Larissa Guerrero
Erik Kessler | Lenny Markus | Javier Mesa | Rolando Vicaria

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INTRODUCTION

Information technology and business are becoming inextricably interwoven.
I don't think anybody can talk meaningfully about one without the talking about the other. ~Bill Gates

On behalf of all the development team, welcome to the Printshop Workflow Automation System (PWAS!). This system will enable XYZ Printing Co. to speed up production and minimize error through the use of a simple to understand web application. This document will show you how to properly set up the system and how to successfully integrate it into the daily workflow.

The USERS section will explain how to register new users into the system, as well as doing maintenance operations like updating their contact information, deleting, etc. Customer Service Representatives should read this section, as it's very relevant to their work.

The ORDERS section describes how new orders are entered, and how they can be modified or deleted when necessary. Again, Customer service Representatives should be familiar with these procedures.

Finally, the PRINT RUNS section should be read by all plant workers directly involved with production. This section shows how print runs should be created, populated and released into the work stream. The system is very straightforward to use, however, being familiar with this documentation will allow for a much smaller learning curve during the first few days that somebody is learning the new system.

Should any problems arise during use of the PWAS software, please refer to the troubleshooting section at the end of the document.

We sincerely hope that you find this software intuitive, and that you'll use it to its full extent, as this will make XYZ Printing Co. reach the next level.

INSTALLATION

RAM disk is not an installation procedure. ~Author Unknown

<u>System Requirements:</u>

PWAS only requires a Windows Server installation with IIS 6.0+ and SQLServer2005+

<u>Deployment:</u>

PWAS has been designed with simplicity in mind, to install the system just insert the provided CD into the servers CD-ROM Drive and double click on the Setup Icon.

<u>Running for the first time</u>

Initially there will only be one user registered with the system. This user will serve the role of System Administrator. The username will be Admin, and the initial password will be "Admin123". It is strongly suggested that this default password be changed immediately to prevent any potential security issues.

The following section will explain the different types of users (roles), how to create them and how to manage them.

USERS

From a programmer's point of view, the user is a peripheral that types when you issue a read request.
~Peter Williams

PWAS is intended to be used by people with different clearance levels. The role of a user will limit the type of activity that said user could perform within the system. A default PWAS installation allows for four different roles: Administrator, Worker, Customer Service Rep and Customer.

About User Roles

Roles have been created with the intent of preserving security, and assigning specific responsibilities to users of the systems. The existing roles are:

- Administrator: Enjoys full access to all features of the system. The Administrator is responsible for assigning roles to new users, as well as removing users from the system (Note: Any new user is assigned a Customer role by default). The Admin has full access to all areas, except Print Runs, as this responsibility falls solely on the workers.
- Worker: Plant workers are responsible for creating printing runs, and updating their status. They are also responsible for assigning orders to specific runs. As a run passes through each step in production, the workers at each station must update the status of the print run, and the system will take care of updating the orders associated with that print run.
- Customer Service Representative: CSR's are meant to act as proxies for any Customers that are unable to access the system, yet need to access the system. CSR's have the same access privileges that a Customer does, with the distinction that they can access the information for ANY Customer.
- Customer: These are the clients of XYZ Printing Co. They can only place orders, track the status of their own orders, and update their contact information.

User Registration

In order for a user to register in the system, they should click on the "Register" Icon from the main PWAS Website on the top right corner. Once the user is on the main registration page, the user must fill out the complete information form, and click the submit button. All users of the system must register the same way. Once registered, the Administrator will assign the appropriate role. (The password selected must be between 6 and 8 characters, with only letters/numbers combinations).

Registration

Login Information

Email Address:	[_____] ✱
Password:	[_____] ✱
Confirm Password:	[_____] ✱

Contact Information

First Name:	[_____] ✱
Last Name:	[_____] ✱
Company Name:	[_____]
Phone #:	[_____] ✱

Billing Address

Address Line 1:	[_____] ✱
Address Line 2:	[_____]
City:	[_____] ✱
State:	[_____] ✱
Zip Code:	[_____] ✱

[Register]

Modifying a User's Profile

From the Manage User Accounts page, you click on the Edit icon (the one with the pencil) for any user you want to edit. Modifying a users profile uses the same form that's filled at registration time. Any detail that needs to be changed is updated on this form and submitted to the server, where the changes will be validated and stored.

Manage User Accounts

		Username	Full Name	Email	Role	Update
🖉	✗	rolyv19	Roly Vicaria	rolyv19@gmail.com	Customer ▾	[Update]
🖉	✗	lari	Larissa Guerrero	lari@gmail.com	Administrator ▾	[Update]
🖉	✗	javiermesa85	Javier Mesa	javiermesa85@gmail.com	Administrator ▾	[Update]
🖉	✗	nhc001	Naveen Gowda	nhc001@fiu.edu	Customer ▾	[Update]

Deleting a User

From the Manage User Accounts page, you click on the Delete icon (the one with the red X) for any user you want to delete. Only an Administrator can delete Users. It must be noted that this operation is irreversible; all information associated to this user (Order history, work in progress, profile, etc) will be permanently removed from the system.

ORDERS
Work expands so as to fill the time available for its completion. ~C. Northcote Parkinson

About Orders

The main purpose of the PWAS software is to streamline the way that customers place orders, and to improve the way that these are handled once they enter into the company's workflow. The format in which the orders arrive will be standardized; all incoming orders will have exactly the same format. As orders come in (meaning, Orders are paid for), they are automatically added to the work pool. Workers can then select the specific orders that should be printed. (This will be explained in more detail from the Print Run Section). An order will contain all the specifications of the job to be printed, such as size, quantity, stock, and more.

Creating a New Order

Click on the Create Order link on the Menu. The New Order form will be shown, which allows users to easily choose the specs for a new Order to be printed. All the user has to do is select the appropriate options from the selection menu, and submit the order. Once this is done and the order is paid, they can just sit back and relax while the order is processed at XYZ. Customers can track their job as it moves through the workflow from their home page.

Create Order

Job Name: [   ] *

Final Size: [   ] in. x [   ] in. *

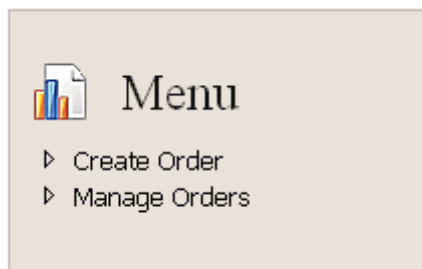Qty. to print: [   ] *

Stock Finish: Glossy ▼

Stock Weight: Heavy ▼

☐ Two Sided

☐ Folded

☐ Ship

Menu
▷ Create Order
▷ Manage Orders

Please upload desired artwork.

Upload File: [   ] Browse... *

[Upload]

[Save Order] [Clear]

Paying for an Order

Orders need to be paid in advance before they can be put into production. Once an order is created, the customer can pay for it by clicking on the Manage Orders link, and selecting on the Pay Now button for the Order that he wants to pay. After the button is clicked, the order is marked as Paid, and it can no longer be edited (notice that the edit button is grayed out). Then the order is available to be added to a Print Run.

Menu

▷ Create Order
▷ Manage Orders
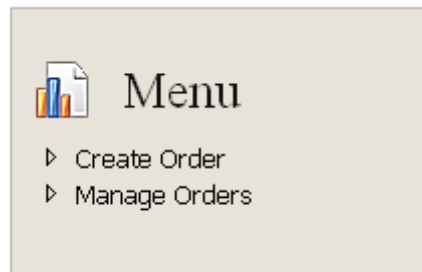
Order List

		Job #	Job Name	Price	Status	Date
✎	🔍	16	My Business Cards	$2,205,000.00	Paid	12/8/2009 7:26:34 PM
✎	🔍	17	Business Flyers	$2,025,000.00	Paid	12/8/2009 7:27:35 PM
✎	🔍	18	South Beach Magazine	$4,050,000.00	Pay Now	12/8/2009 7:26:25 PM

Modifying an Order

Sometimes a user may wish to modify an order before paying for it. The User can click on the Manage Orders link on the Menu to get to the Order List page. Then the user can click on the Edit button (the one with the pencil). Only orders that have not been paid for can be edited. A form with the pre-filled order details will show up, then the user can edit it and resubmit.

PRINT RUNS

The brain is a wonderful organ. It starts working the moment you get up in the morning, and does not stop until you get into the office. ~Robert Frost

About Print Runs

The majority of errors in the printing industry happen at the print run assembly stage. This is the point were orders get mixed up, lost, etc… because workers sometimes can't handle the high volume by hand. Here is where PWAS really shines, as it assists plant workers into correctly assembling print runs from the available work pool. The orders don't need to be manipulated in any way beyond selecting them and adding them to the run, minimizing the possibility of errors and speeding up productions. All plant workers should be completely familiar with these functions.   Once the run is assembled, it's ready to be released into the workflow, where workers simply need to update the run status as it moves from stage to stage.

The available statuses for a print run are:

1. Created: Print Run has been created, but it still doesn't have any orders added to it.
2. PrePrinting: Print Run has been populated with orders and it's been sent to printing.
3. Printing: The Print Run has been sent to press for printing.
4. Finishing: Printing has been completed, and orders are being individually finished.
5. Shipping: The orders associated with this print run are prepared for shipping.
6. Closed: Orders for this print run have been shipped. Then the print run is considered done.

Creating a New Print Run

Similar to creating a new order, the New Print Run menu allows workers to easily create a new run by choosing all the specs associated to it. Once all specs have been selected, the print run is created, and ready to be populated with jobs.

Create Print Run

Print Run Name: [   ] ✳

Run Size: [   ] ✕ [   ] ✳

Run Quantity: [   ] ✳

Stock Finish   [Glossy ▾]   ✳

Stock Weight: [Heavy ▾]   ✳

[Create Print Run]

Populating a Print Run

Once the print run has been created, it can be populated. This means that orders can be selected from the open order pool, and added to the printing run. To do this, workers must go to the link called Add Orders to Print Run on the Menu. This is a split screen that shows all available print runs on top, and a list of all available orders. Available print run is any print run in the Created state. Available order is any order in the Paid state. Workers can simply check all the orders that they wish to include in a print run. Once these are checked, the worker selects the run from the drop down list, and clicks the "Move Orders" button to add the selected Orders to the selected Print Run.

Move Selected Orders to Print Run -> [Run 4 - My New Print Run ▾]

Select	Order ID	Order Name	Order Quantity	Order Height	Order Width
☐	16	My Business Cards	1000	80	80
☐	17	Magazine Order	1000	80	80
☐	18	Business Cards - Spa	100	10	10

[Move Orders]

<u>Updating Status of a Print Run</u>

This step needs to be taken in order to send the run to the next stage of processing. Once a worker is finished with a certain process, he must update the status of the run. This will cause all orders associated to this run to update their status as well, thus allowing the owners of these orders to track progress. To get to this page, click on the Update Print Run Status on the Menu.

	Run ID	PrintRun Name	Status	Action
	1	My Print Run 1	Finishing	Update
	2	My New Run	PrePrinting	Update
	3	Run - ABC, Inc	Created	Update
	4	My New Print Run	Created	Update

TROUBLESHOOTING
The problem with troubleshooting is that trouble shoots back. ~Author Unknown

This section highlights common problems encountered when using PWAS and their possible solutions:

Q.- I don't see any open orders in the open work pool, what is causing this?
A.- Sales are slow. Hire more salespeople and consider advertising more aggressively.

Q.- The screen is dark, am I going blind?
A.- Verify that the monitor is plugged in. Verify that brightness and contrast are set to maximum. Consider seeing an eye doctor.

Q.- I can't log into the system, even though my user name and password are correct!
A.- That wasn't a question.

Q.- Why can't I log into the system, even though my user name and password are correct?
A.- The System Administrator must be angry at you. Try to appease him with expensive gifts.

Q.- Workers seem to be idle for long periods of time. Why is this happening?
A.- This is a normal effect after installing PWAS. The system is very efficient, so it's working exactly as intended. Lay off unnecessary workers.

Q.- My question isn't listed here. What should I do?
A.- You may call 1-888-456-3848 for support.