What needs to be done

1) Setting up of Organization

a) Set up MAIN Organization. This is the main entity which all other categories fall under,

b) Set up CUSTOMERS. All Sales Reps become individual customers in the ES System. CUSTOMERS/Sale Reps will be set up by market codes.

Example Customer: MI-Barnwell_Kim
MI-Blitz_Andy
MI-Browe_Pat

**There are ruffly 60 customers that will have to be set up, not including outside SOCT Customers/SalesReps.*

2) Set up PROJECTS for each CUSTOMER (Projects = Products)

Each CUSTOMER/Sales Rep will have a list of PROJECTS/Products assigned to them. CUSTOMERS/Sales Reps will only be able to see the PROJECTS/Products that they sell.

PROJECT/Product Examples:

1) Save_On_Everything-MI

2) Save_On_Everything-IL

3) Save_On Everything-MN

4) Save_On_Everything-DAL Cards

5) Red_Plum_Inserts/DALs

6) SOCT-MI

7) SOCT-MN

8) SOCT-UT 9) MOBIBO

3) Set up of User Groups and Group Roles

Groups and Group roles are used to define what each person who is using the ES system role is and what level of usability that person has with in the ES System. We can have unlimited User Groups but all User Groups will fall under one of three roles. Gate Keeper, Approver or Reviewer.

Example of Groups and roles:

Admin - Gate Keeper

Production Manager - Gate Keeper (Limited)

Art Coordinator - Gate Keeper (Limited)

Proof Reader - Approver

Designer - Reviewer

MI-CSR - Approver

IL-CSR - Approver

MN CSR- Approver

SOCT-CSR - Approver

City Admin - Gate Keeper (limited)

Sale Rep - Approver

Client - Reviewer

Example of CUSTOMER Project with GROUPS attached

Customer: MI_Barnwell_Kim

Project: Save_On_Everything-MI

Groups: Proof Reader - Bill G., Barb F. (Approvers)

Designer - All Production Designers (Reviewers)

MI-CSRs - Kathy M., Emily B. (Approvers)

Sale Rep - Kim B. (Approver)

There will be a dual approval system for all ads/products. A PROOF READER will have to Approve an ad before a CSR and or SALE Rep can view the ad. The CSR and or SALE REP will be the second APPROVER for the ad.

4) USER set up

This is where the actual user profiles are set up. Users can be attached to Organizations, Customers, Projects and or Groups. Users can be individuals (Sales Reps) or part of a Group (Proof Reader, CSRs). Each user will have there own log-in and password to enter the ES system. Once logged in they will only be able to view and or interact with the part of the ES system that has been assigned to them.

Example: If Kathy M. signs into the ES System she will only be able to see Michigan Customers since she is assigned the MI-CSR Role. If a Sale Rep logs into the ES System they will only be able to view the PROJECTS/Products that are assigned under there CUSTOMER. Kim B. would only see ads for SAVE On Everything, Red Plum Inserts/DALs and SAVE On Everything DALs. Where as Bill D. logs in he would see under his CUSTOMER only his PROJECTS/ Products. SAVE ON Everything, Red Plum Inserts/DALs, SAVE On Everything DALs, MI-SOCT.

** There are ruffly 100 user accounts and roles that need to be set up and assigned inside the ES System*

5) Workflow Set up

Workflows are attached to PROJECT/Product templates and are what make the Soft Proofing Approval/Rejections system work. This is where you assign who can approve and ad and after approval of ads where they go.

Each work flow has two part.

1) Project Workflow

2) Document WorkFlow

PROJECT WORKFLOWS - are how the approval cycles are set up. What groups or individuals need to approve/reject a document and at what time in the cycle they need to approve/reject a document.

DOCUMENT WORKFLOWS - tell the document what to do and where to go after they have been approved or rejected.

Example: Save On Everything Project Workflow would have a Proof Reader, Designer, CSR, Sales rep assigned to it. the Proof Reader would have to approve the document before a Sale Rep or CSR can view the Document. Once available a CSR and or a Sale Rep would have to approve the document a second time. Once the document is approved it is moved to a specific location on the production servers, based on market and product, and is no longer available for the Sales Rep and or CSR to view.

Example: Ad 1234-0112MI is approved in the ES System. The DOCUMENT Workflow would then move the approved file to the January 2012 Michigan Batched folder on the server and is now ready for Book Building. If rejected it would move to a rejected folder and the approval cycle would start over once a revised ad had been uploaded to the ES system.

6) MetaData

With the installation of the new ES Server and the up grade to our TWIST workflow server that was part of our ES purchase, we now have the ability to utilize MetaData with in our PDF files.

This will allow us to enter information in an InDesign template, create a press ready PDF through our TWIST server and view the MetaData in the Dialogue mark up window on the ES Server. This is through a web browser only. The iPad app does not have the ability to view or show metadata.

There are several hurtles to get through to get this to flow and work properly, but it can be done! This will allow us to enter all current ad label information into a custom Electronic MetaData panel with in a InDesign template (Designers will do this when they create an ad). The Electronic Ad Label (EAL) will carry this information from creation to approval, to bookbuilding and to the web. The original ads built in indesign will also retain this information and be

able to be reused month over month with out having to re-input the information.

Example of information captured:

1) Market

2) Publication/Product

3) Customer Name

4) Current Ad Number

5) Current Issue Month

6) Sale Rep

7) Zones Running

8) Ad Code/Ad Size

9) Late Date Worked ON

10) Website Keyword

All of this information will also show up in the Soft Proofing system. This will let us use only one proof and can move away from a first proof/final proof system and use only one file from start to finish.

7) Mile Stones and Email Notification

One of the features in the ES System is email notifications. There are several different kinds of email that can be triggered when certain mile stones have been met.

Example: a new ad has been uploaded to the ES System. An ad has been approved or rejected. Email notifications can be sent out if ads have not been viewed with in 48hrs of upload. Reminders can be sent to sales reps once the 48 hr deadline has passed. Plus what ever notifications we choose to set.

8) Beta Testing of Soft Proofing System

Once all of the above is in place we can being to beta test the system on a large scale.

Beta testing will allow us to refine our procedures and fill in any gaps we may have missed with our original set up before we go LIVE with the system.

9) Training

After we have finished the beta testing of the ES System we can begin training. Training will consist of several different phases. We will start training by groups (user roles with in the system) Because everyone who uses the system will have different roles and levels of accessibility the best way to train will be by user groups.

Example:

Admin/gate Keeper - Over all use of the whole system

Proof Readers - uploading of files in to the ES system. Approving and or rejecting of files

Designers - How to view corrections to an ad using the History report and resubmitting of ads

CSRs - Viewing multiple Customers, reviewing and marking up ads with in the system, Approval/Rejection of ads

Sales - Viewing of THEIR projects/products, reviewing and marking up of ads. Approval/Rejection of ads. Training of Dialogue Touch App for the iPad. which will allow Sales Reps to review and mark up ads for approval or rejection from their iPads.

10) **Launch of System - Go LIVE!**

After the beta testing and training are done, we can go live starting with one market at a time. Adding markets to the system issue after issue until fully up and running and all markets/products are working in the soft proofing system.

New ad cycle starts when a CSR or Sales rep forwards layout sheet to Production Department

CSR/Sales rep

Layout sheet/ Artwork submitted to Production

PRODUCTION MANAGER or ART COORDINATOR will review layout for clear instructions

PM or **AC** will log the ad into the system (Pats Apps) An AD I.D. # is assigned

PM or **AC** forwards the layout sheet and paper envelope (Job Folder) to **PRODUCTION ASSISTANT**

PRODUCTION ASST. sets up the paper envelope (Job Folder) and prints label with ad # from system

A

PRODUCTION ASST. sets up Electronic Job Folder on the MAC servers, Copies over or restores from back-up any assets to current job folder on the server

PRODUCTION ASST. sorts paper envelopes (Job Folders) by Market and or product. Places into "TO BE WORKED" baskets

PRODUCTION MANAGER prioritizes ads based on shipping schedule and 48 hour ad turn around time

PRODUCTION MANAGER distributes paper envelopes (job folder) to DESIGNER's "in" basket *(ads start being worked on from here)*

DESIGNER creates ad from layout sheet and reference material sent from Sales Rep

DESIGNER runs the completed ad thru the TWIST PDF workflow system.

F-Keys

PROOF READER will mark up changes/ corrections to ad using Dialogue ES proof reader mark up tools

ES

Envelope is sent back to the **DESIGNER** who did the original layout

DESIGNER will Access ES System to look up and makes **PROOF READER** corrections

ES

TWIST PDF Workflow
Server creates PRESS PDF, WEB PDF and Web JPG.

Press PDF sent to Dialgue ES

Dialogue ES Soft Proofing Workflow

Note: Everyone will access ES System at different points to Proof, Track and Approve all ADS

Access indicated by

ES

DESIGNER places paper envelope (job folder) into "to be proofed" basket based on Market/Product

PROOF READER retrieves paper envelope (job folder) "to be proofed" basket. Based on Market/ Product

PROOF READER will access ES system and look up ad by ad number, month and market

ES

PROOF READER will compare layout sheet and original assets to digital proof in ES System checking for accuracy

ES

Are there corrections to the ad?

Yes

No

Note: ads that are NEW, RE-DO, PC/PC+, are read and write in ES System and will be able to mark up changes to ad by CSR/ Sales Rep

PROOF READER will enter ad date in to system (Pats Apps) aka Logging ad out

NEW Re-Do PC+/PC

What is the ad type?

Pick Exp ECR

PROOF READER forwards the paper envelope (Job Folder) to **PRODUCTION ASST.**

What is the ad type?

NEW Re-Do PC+/PC

PROOF READER emails the RSS Link to ad to **SALES REP** and/or **CSR**

ES

Note: ads that are PICK, EXP, ECR, are read only in ES system but still need to be approved by CSR/ Sale Rep

PROOF READER will enter ad date in system (Pats Apps) aka Logging ad **"ALL THE WAY OUT"**

PRODUCTION ASST. files the paper envelope (Job Folder) APHABETICALLY into "**WAITING**" based on market and/or product

NEW Re-Do PC+/PC

Pick Exp ECR

PRODUCTION ASST. files the paper envelope (Job Folder) by AD LOG # into '**APPROVED**" based on market and/or product

Sales Rep/CSR recieves RSS link via email

Sales Rep/CSR Clicks on RSS link to access/ review clients ad*

** This is where Sales Rep/CSR will access the ES System*

Sales Rep/CSR will review ad in the ES System. Forwards RSS link to **CLIENT**.

ES

Are there any changes or corrections to the ad from the client?

Yes

NO

CLIENT works with **SALES REP** or **CSR** and makes any necessary changes in the ES System

ES

Sales Rep/CSR clicks the **REJECT** button after marking up ad to send back to **PRODUCTION**

ES

Ad is sent back to the ES System. Email is sent out to **PRODUCTION MANAGER/ART COORDINATOR** alerting them that there are changes to the ad**

PRODUCTION ASST. will log the ad back "in" to the system (Pats Apps)

A

REPEAT CYCLE UNTIL AD IS APPROAVED

ES

Sales Rep/ CSR Clicks "Approved" button

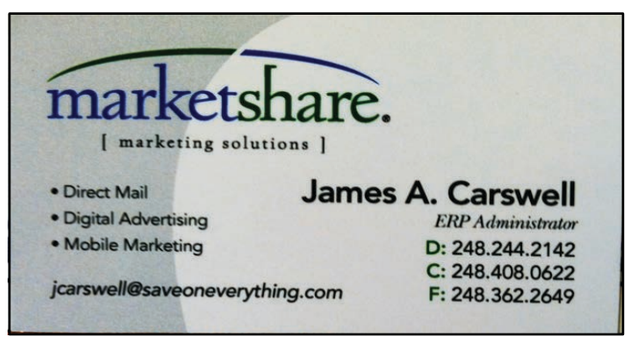
Ad will automatically move it's self to the the approved folder on the server. (A.K.A. Batched folder)

Ad is complete. Ad is APPROVED and no further action is needed

END CYCLE

NOTES: Once Proof Reader sends out email with RSS link to ad that needs to be reviewed to Sales Rep/CSR the Sales Rep/CSR will have 48 hours to review the ad. If the ad has not been reviewed with in 48 hours the ES System will send out a second notification to the Sales Rep/CSR notifing them that the ad has not been reviewed and will extend deadline 24 hours. If the ad has not been reviewed after the second notice has been sent out (24 hours) the ES system will send out a third email notification to the Sales Rep/CSR Plus CC: Sales manager alerting all parties that the ad has not been reviewed.

Misc Notes:
- Meta Data: What Meta Data will show up in ES? Will we be able to see meta Data- Zone Codes.
- How are emails generated with in ES. Do we have an option to create more than one email notification message? (First Proof/Final Proofs)
- Can ES projects be set up as ISSUES with individual ads that need to be approved?

Production Ad Workflow
(Digital Soft Proofing backbone)

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