ANR COMMUNICATIONS PRODUCT TEAM
PROJECT WORKFLOW

STEP 1: Intake, Review & Estimate

Project Request Form is submitted by client to ANR Communications. (download at *anrcom.msu.edu*)

- Check form for missing information such as account number and deadline. Determine if immediate response is needed (for example, in case of an ASAP deadline). *(Kate Menge)*
- Contact client to let them know form is received. If pertinent details are missing, request that they be provided. Let client know they will be contacted by a team member to start project and explain process. *(Kate Menge)*

- Decide if client meeting or call is needed to discuss project needs, timeline, budget, and more. *(Becky Hulbert)*
- If "fast track" job, go immediately to assigning staff for production and notify client. *(Becky Hulbert)*

OR

- If time allows, bring form to weekly Product Team meeting and to assign production staff. *(Becky Hulbert)*

- Project scope is determined after reviewing manuscript, client information. *Editor and designer* provide estimates to *Becky Hulbert* who sends to client for review. Once approved, production can begin.

STEP 2: Production

- Assign project number. *(Kate Menge)*
- Enter project in Intervals (online tracking program) and onto production chart. *(Kate Menge)*
- Put PDF of Intake form and pertinent documents into Intervals (NOTE: No intellectual property will be uploaded per MSU policy. Hard copies may be filed for reference.) *(Kate Menge)*
- If necessary, create paper file (note in Intervals if there is a paper file and where it's located).
- Notify production staff assigned to project that job is in Intervals. *(Kate Menge)*
- Everyone involved in the project enters project time, project notes, print estimates, and other pertinent information in Intervals. Job updates are entered into production chart before weekly team meetings.
- Monitor time spent on project and notify client if production time may exceed initial estimate due to changes or unforseen issues that have arisen during production. *(Becky Hulbert)*

- If the project will be used online, accessibility workflows are added to editing, design, and PDF preparation.

- If the project requires purchasing printing or other processes, follow these steps: Obtain print bids, notify client of costs, determine if final printing can be purchased on P-Card or if a requisition is required. Monitor project progress and client delivery date. *(Kate Menge)*

STEP 3: Distribution

- If job will be distributed through MSU Extension Bookstore, determine pricing. *(Fran Adelaja)*
- Provide files or products, description and cover thumbnail image to bookstore manager or web communications staff depending on how it will be distributed. (*Designer* provides files and thumbnail; *Editor* provides description)

STEP 4: Billing

- Designer and editor notify *Becky Hulbert* that project is completed and hours are in Intervals.
- *Becky Hulbert* will send client an invoice that includes the hours spent on the project and the total costs to be billed, if applicable (refer to ANR Communications Core Services documentation).

STEP 5 Archiving

- *Production Team* staff archive files, fonts, manuscripts, correspondence, purchasing information – any pertinent information needed to reprint or revise job in future.
- *Accounting* staff archive project in Intervals after invoicing is completed. Invoice will be available in the Intervals project information.
- If project is ongoing there is no need to archive.

6/11/15