
Ingram Publisher Services

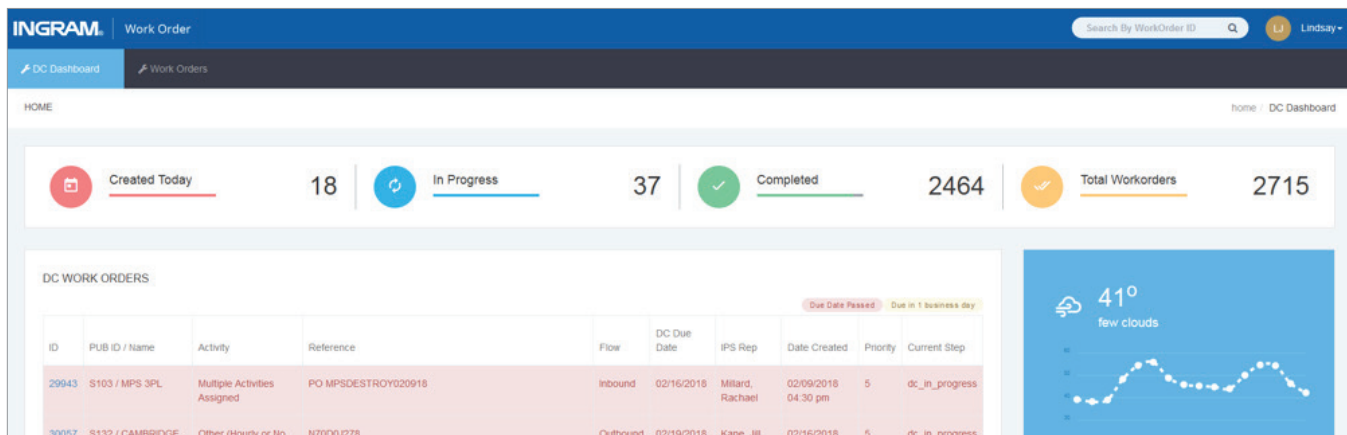
Work Order User Guide

Internal Use Only | Spring 2018

Ingram Work Orders

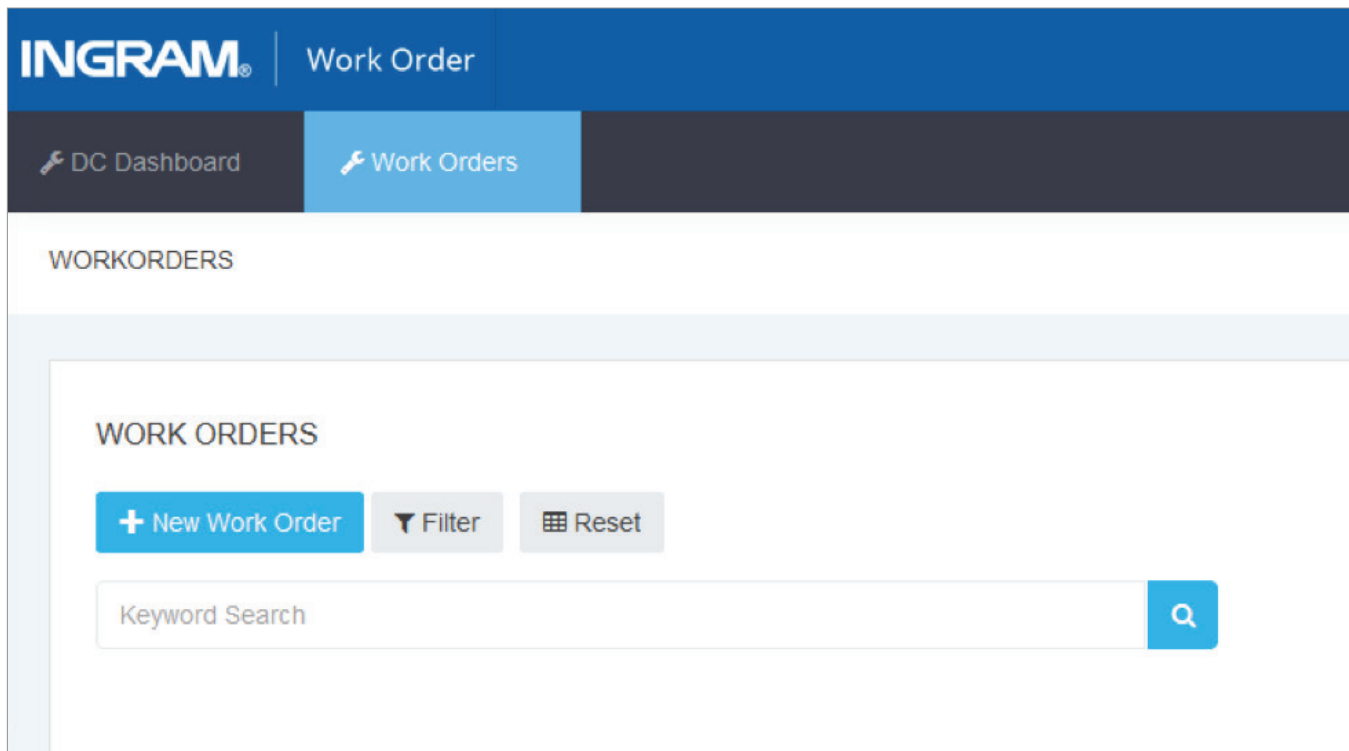
Work Order Website: <https://wo.ingramcontent.com/home/index>

The work order portal is a tracking system to communicate to the warehouse specific instructions for orders that require special handling. Publishers are billed for the work based on their contractual rates and the activities selected during the work order submission process.



Creating a New Work Order

To get started, click the Work Orders Tab on the menu bar:



1. Click **+ New Work Order** button to start a new work order.

2. Fill in your work order details.

[DC Dashboard](#) [Work Orders](#)

WORKORDERS

NEW WORKORDER

Documents

Browse...

No files selected.

IPS Associate

Jenkins, Lindsay (Lindsay.Jenkins@ingramcontent.com)

Publisher Client *

Please select publisher

3PL

Viewers

Please enter user emails to be notified seperated by comma (,)

Reference *

Contact name

Account name

Account number

Inbound/Outbound *

☐ Inbound ☐ Outbound

DC due date *

mm/dd/yyyy

DC start date

mm/dd/yyyy

Please note: Fields labeled with an * are required for submission.

A. Documents

Upload any supporting documents related to this work order request.

Click to add files directly to the work order

- Select the document(s) you wish to add and click open
- Please note, all files should be saved to your computer, the upload fields are not able to accept files from email attachments
- Examples include:
 - a. BOL
 - b. Routing Guide
 - c. Packing instructions

B. Publisher Client*

Add your publisher client by either typing the publisher number or the name.

- Please note, the 3PL field will populate based on the publisher client selected.

Publisher Client *	Please select publisher
3PL	Please select publisher
	P530 / 2DCLOUD
Viewers	P402 / 3D TOTAL PUB
	P348 / 826 BOOKS
	P701 / ABBEVILLE PR
Reference *	0006 / ABINGDON PR

C. Viewers

Copy in a publisher or add additional viewers by entering their email addresses with a comma separating each address.

D. Reference*

Easily identifiable point of reference related to the publisher's request –

Examples include:

- Outbound shipments – Order entry Number (OE#) or Purchase Order Number (PO#)
- Inbound shipments – EAN, title or bundle name
- Publisher requested PO numbers

E. Contact Name

Name of the publisher or internal contact requesting the work order.

F. Account Name

For use on outbound shipments only. Drop ship receiver or store name.

G. Account Number

For use on outbound shipments only. The ship to account number the order is submitted under. Could be the publishers DF account number or a retailer's account number.

H. Inbound/Outbound*

- Inbound – stock checks, bundles, destroys, etc. Inventory compliance
- Outbound – any order that will be prepared to ship

I. DC Due Date*

The work order deadline date for the warehouse.

J. DC Start date

DC Start Date is used to make the order visible to the warehouse on a specific date. The submitter can enter the work order now, but make it visible to the DC later. An example would be titles with a future release date.

K. Do Not Ship Before Date

Hard date setting, the order is not allowed to ship before this time.

L. Earliest Ship Date

Designates the beginning of a ship window.

M. Latest Delivery Date

N. Special Routing Instructions

Here you can add the shipping instructions that transportation will use to ship the order once the work order is complete.

Example:

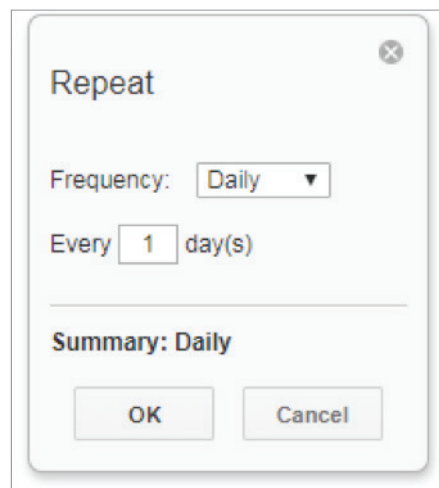
- Please contact IPS Transportation to verify/confirm ship method/freight terms.
**** IPS Transportation please ship best traceable method.
- If the order is to ship via free freight; you can add that here as well

O. Recurring?

There is a recurring option that will allow you to set a work order up so that it will renew by setting requirements.

A screenshot of a web form element. It consists of a label "Recurring?" followed by a dropdown menu. The dropdown menu is currently set to "- not recurring -" and has a small downward arrow icon on its right side.

Using the drop-down menu, select Set Schedule to specify the frequency of the recurring work order request.

A screenshot of a "Repeat" dialog box. The dialog box has a title bar with a close button (X). Inside, there is a "Frequency:" label followed by a dropdown menu set to "Daily". Below that is a label "Every" followed by a text input field containing the number "1" and the text "day(s)". At the bottom, there is a "Summary: Daily" label. At the very bottom are two buttons: "OK" and "Cancel".

P. Recurring until

A date to stop the recurring work order. Reoccurring work orders should not exceed a year.

Q. Priority

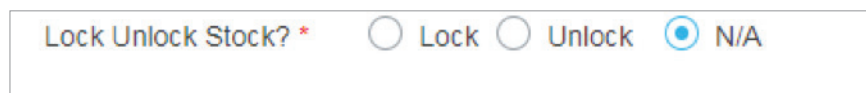
There is an option set a priority based off importance that the warehouse should work the work order.

- Default is 5
- Highest priority is a 1
- If you are unsure of the priority, leave at default
- Changes to priority need to be escalated to IPS Business Operations and DC leadership

A screenshot of a web form showing a 'Priority' dropdown menu. The dropdown is currently set to '5'. Below the dropdown, there is a text label: 'Highest priority: 1, lowest priority: 5'.

R. Lock Unlock Stock? *

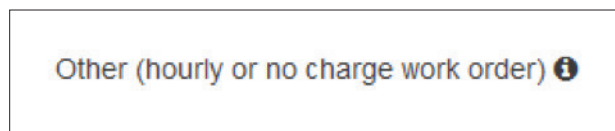
The Lock stock feature is an option that can be used to advise the warehouse to lock or unlock stock.

A screenshot of a web form showing the 'Lock Unlock Stock? *' section. It contains three radio button options: 'Lock', 'Unlock', and 'N/A'. The 'N/A' option is selected, indicated by a blue dot.

S. Hourly Workorder

Most work orders are not hourly and is something that inventory managers use most. This option can be used when we need to charge the publisher by the hour rather than by the task.

- Please note, If marking as 'hourly' a task option will be provided in the next section:

A screenshot of a web form showing a button labeled 'Other (hourly or no charge work order)' with an information icon (i) to its right.

Clicking on this task will allow you to enter in additional notes.

- Hourly and no charge work orders route to IPS Business Operations leadership for approval prior to be submitted to the DC. Some publishers are charged hourly plus materials while other publishers are charged based on tasks completed.

T. No Charge Workorder

Used to request a task for the publisher that we are doing as a courtesy.

- Please note, if marking as 'no charge' a task option will be provided in the next section:

Other (hourly or no charge work order) ⓘ

Clicking on this task will allow you to enter in additional notes.

U. Minimum Charge Does Not Apply

Some clients have a minimum work order limit.

V. Distribution Centers *

Select the warehouse(s) to process the order

Distribution Centers * ☐ Nashville ☐ Roseburg ☐ Ft. Wayne ☐ Chambersburg ☐ Returns Center
☐ Jackson American ☐ Jackson Edwards

W. Question For Distribution Centers

Please include any questions related to the work order. The notes here will be emailed to the DC(s) selected and also posted in the comment section of the work order.

3. Add the EANS to the Work Order

EANS	
EAN List	
+ Add EAN	
EAN	Title
	Retail Price
	Quantity

- If entering in multiple EANs at a time, include a space between each one.
- Click [+ Add EAN](#) to add
- The Quantity will default to one.

4. Select all Task Details and provide instructions for each selection.

Task Details and Instructions		
Task	Required Qty	Additional Instructions

Task Detail Options:

All tasks selected require additional notes, the field will be provided when the task is check marked.

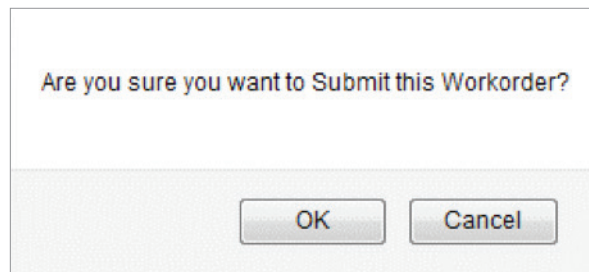
- Applying adhesive
- Breakdown assortments/displays
 - Deconstructing a display and possibly removing a product
- Carton labeling per carton
- Cartoning binders parcels per unit
 - Books not in cartoons when recieved
- Clipping (per unit)
 - Removing price from inside cover of dust jacket
- Construct assortments (per component unit)
 - An assortment consists of various kinds of books and may require special assembly
- Construct displays per component unit
- Custom packing list
- De-stickering (per unit)
- Destroy active inventory per unit
- Hurts pull
- Insertions / attachments (per unit)
- Attaching something inside a book, such as an adhesive envelope containing a CD, internet access code, etc
- International outbound pallet fee
- Labeling per unit
- Lock/unlock stock only
- Other (hourly or no charge work order)
 - This task is only populated when the work order is designated as hourly or no charge
- Out of cycle inventory count
- Rejacketing (per unit)

- Repackaging cartons (per unit)
- Repalletize per pallet
 - Re-palletizing product received on substandard pallets.
- Review mailings per unit
- Shrink-wrap
- Special insertions/catalogs (per-unit)
 - Inserting an additional "paper only" item (errata sheet, survey card, catalog) in a book or cartoon.
- Stamping/marking (per unit)
 - Marking for remainder by placing black mark across bottom pages of book, special remainder stamp, etc.
- Stickers (per unit ips created)
- Stickers (per unit pub provided)
- Stock checks for defects
- Stop receipt and lock stock
- Stop receipt only

5. Submit the Work Order Request.

Once ready to submit, click the  button.

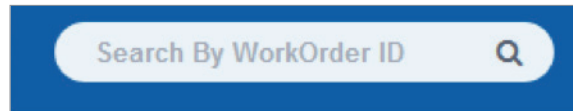
The system will ask you to confirm you are ready to submit the order. Click OK to proceed.



If you are not ready to submit the order, click the  button. The system will assign it a Work order number. You must save this number in order find and submit your work order at a later time.

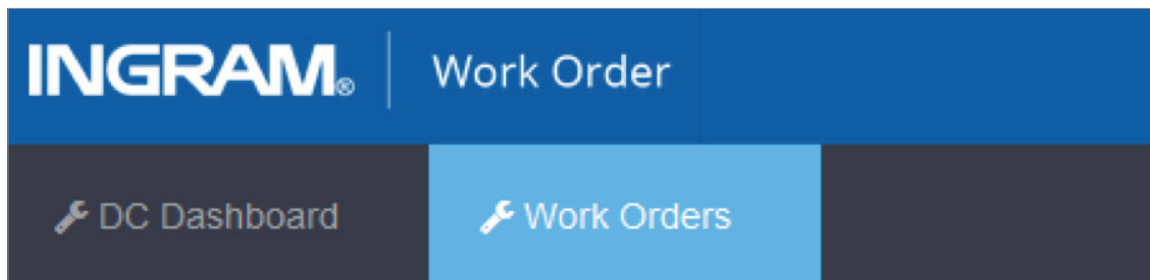
How to Search for a Work Order

If you have the work order number, you can search for it on any screen using the banner search bar.



For more in-depth search options, the work order dashboard shows you all the current work orders that have been submitted.

Clicking on the Work Orders tab will allow you to search by filters.



The following filters may be used to search for specific work orders:

- ID – this is the work order number
- Pub ID/Name
- Activity – tasks that may have been chosen
- Reference – any keywords used in the reference field
- Flow – inbound or outbound
- DC Due date – this is the date the DC should have the work order finished
- IPS rep – this is the rep that created the work order
- Date created
- Priority
- Status
- Distribution Centers

You can pick one or more and click the filter button.

WORK ORDERS

[+ New Work Order](#) [▼ Filter](#) [Reset](#)

Keyword Search

ID	PUB ID / Name	Activity	Reference	Flow	DC Due Date	IPS Rep	Date Created	Priority	Status	Distribution Center

Due Date Passed Due in 1 business day

Click on the work order ID number to access the work order details.

DC Dashboard [Work Orders](#)

WORKORDERS [home](#)

Work Order # 25004 | DC Due Date: 06/08/2017 [Copy](#) [Print](#)

Core Information

Status: COMPLETED

Publisher/Client Name: S170 / KENDALL HUNT PUB CO

3PL: No

Recurring: No

Reference: SACRAMENT PREPARATION RCL

Contact Name: Kathy Kristing

Account Name: Kendall Hunt 3pl

Account Number:

Tasks

Nashville (COMPLETED)

DC Hours	Leadership Hours	DC Close Date
2.0		

> Stickers (per unit IPS created) ⓘ

Requested Quantity: 1890

Updating a Work Order with Notes

Once a work order is submitted, you have the option to add additional comments as need. To access the work order, click the link in the confirmation email or login to the work order website and enter in the work order ID in the search field to locate it.

Please make sure to elect which department needs to view the message by electing the proper check box. Those included will receive an email notification.

Examples of comments include:

- Warehouse asks a question or requests additional information.
- Advise of any updates to the work order after it has been submitted.

Comments

Email notification will be sent to everyone, unless specified below:

☐ Corbin, Carrie (Creator)

☐ **All Distribution Centers**

☐ Chambersburg DC

☐ **All Transportation**

☐ Chambersburg Transp.

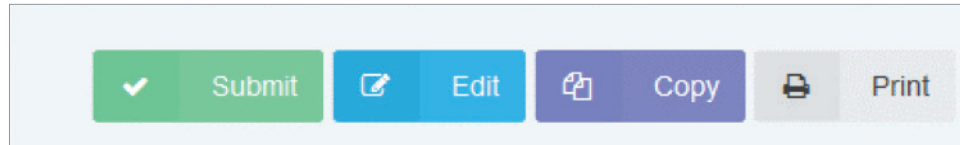
Comment

Submit comment

How to Copy a Work Order

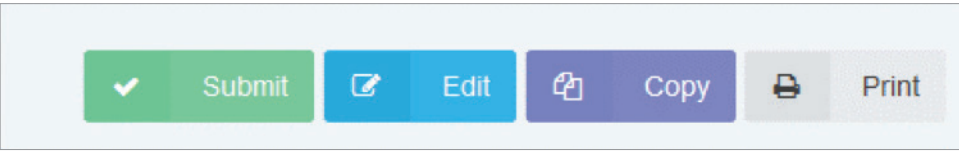
Copying a work order can save you time if you have multiple orders to place for the same account with similar tasks. Please note, it is very important to review all fields before submitting the work order.

Locate the Work Order you wish to copy and click the Copy button at the top right of the screen.



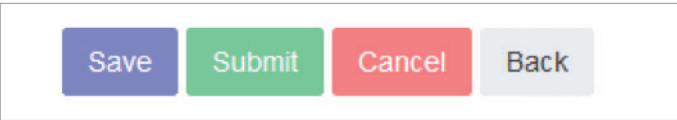
How to Edit or Cancel a Work Order

Work orders can only be edited or cancelled if they are in a Saved or Submitted status. Any orders with an In-Progress status will need supervisor permissions to intercept.

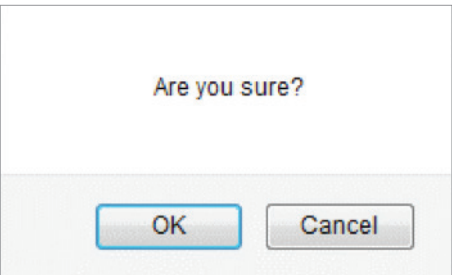


To edit a work order, click the Edit button to reopen the entry screens. Make your changes and click Submit to save.

If you need to cancel the work order, scroll to the bottom of the screen and click the cancel button.



The website will ask you to confirm your choice. Press Ok to Cancel the work order.

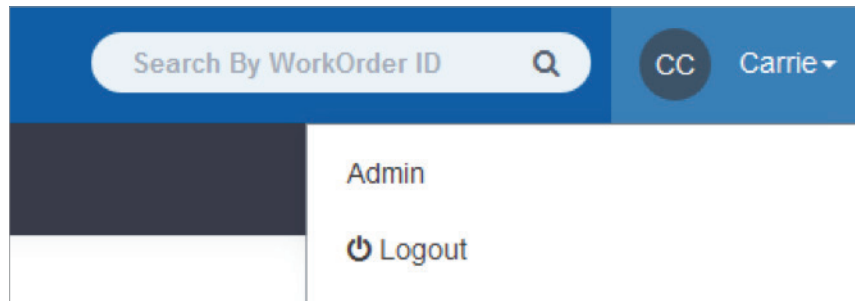


Admin Functions

Admin permissions allow the user to update and add additional features within the work order system. There are four main responsibilities for admins to review.

1. Adding a new user

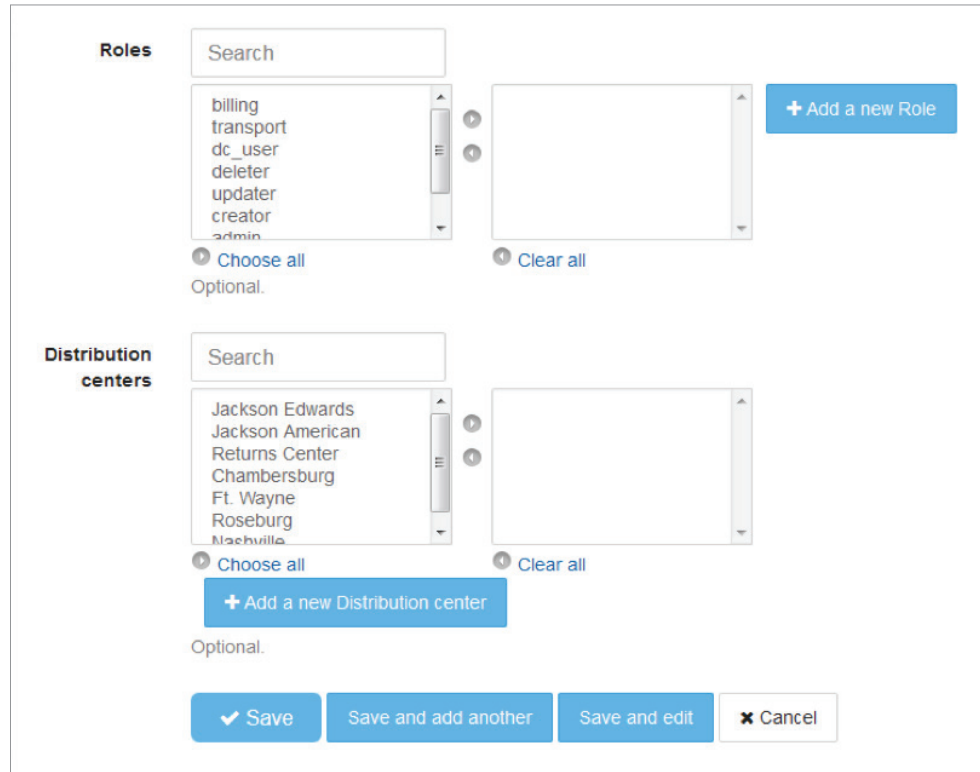
- Locate the Admin Screen by click on your profile and selecting the Admin menu.



- Click Users in the admin task bar
- Select **+ Add new**
- Fill in the required fields to set up the user.
 - User name will be the ICQ user name
 - Fill in the term "testing" for both the Password and password conformation fields

A screenshot of a web form titled 'NEW USER'. The form has a blue header bar with the title. Below the header, there is a breadcrumb trail: 'Dashboard / Users / New'. Underneath, there are three buttons: 'List' (with a list icon), '+ Add new' (highlighted), and 'Export' (with a download icon). The form contains several input fields with labels and validation text: 'First name' (Required. Length up to 255.), 'Last name' (Required. Length up to 255.), 'Email' (Required. Length up to 255.), 'Username' (Required. Length up to 255.), 'Name' (Required. Length up to 255.), and 'Password' (Optional. Length of 6-128.). The 'Name' field is currently selected with a blue border.

- Assign the roles and Distribution Centers
 - Unless a specific role is needed, leave at default to allow the user to have view rights only.
 - Must select at least one Distribution Center
- When completed, Click  to automatically send the new user welcome email.



The screenshot shows a user assignment interface with two main sections: **Roles** and **Distribution centers**.

Roles Section:

- A search bar labeled "Search".
- A list of roles: billing, transport, dc_user, deleter, updater, creator, admin.
- A "Choose all" button and a "Clear all" button.
- An "Optional." label.
- A "+ Add a new Role" button.

Distribution centers Section:

- A search bar labeled "Search".
- A list of distribution centers: Jackson Edwards, Jackson American, Returns Center, Chambersburg, Ft. Wayne, Roseburg, Nashville.
- A "Choose all" button and a "Clear all" button.
- An "Optional." label.
- A "+ Add a new Distribution center" button.

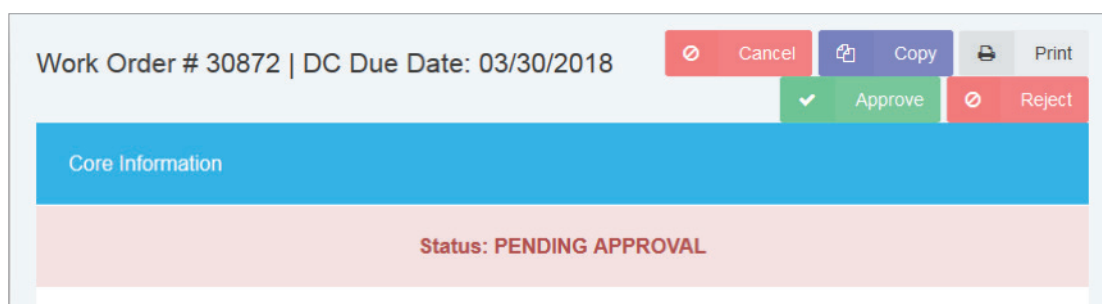
Action Buttons:

- 
- 
- 
- 

Admins are also able to update roles and distribution centers for existing users by clicking on the users profile and selecting Edit.

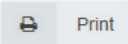
2. Approve hourly and no charge work orders.

- Locate the Admin Screen by click on your profile and selecting the Admin menu.
- Review work order details to ensure accurate and complete information is provided and falls within business guidelines.
- Click Approve or Reject



The screenshot shows a work order details page for **Work Order # 30872** with a **DC Due Date: 03/30/2018**.

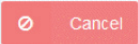
Action Buttons:

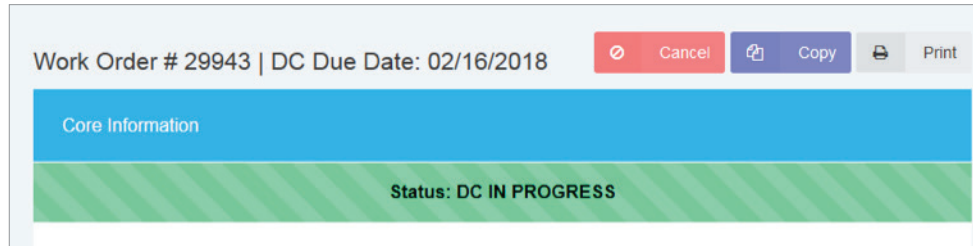
- 
- 
- 
- 
- 

Core Information Section:

- A blue header bar labeled "Core Information".
- A red banner indicating the status: **Status: PENDING APPROVAL**.

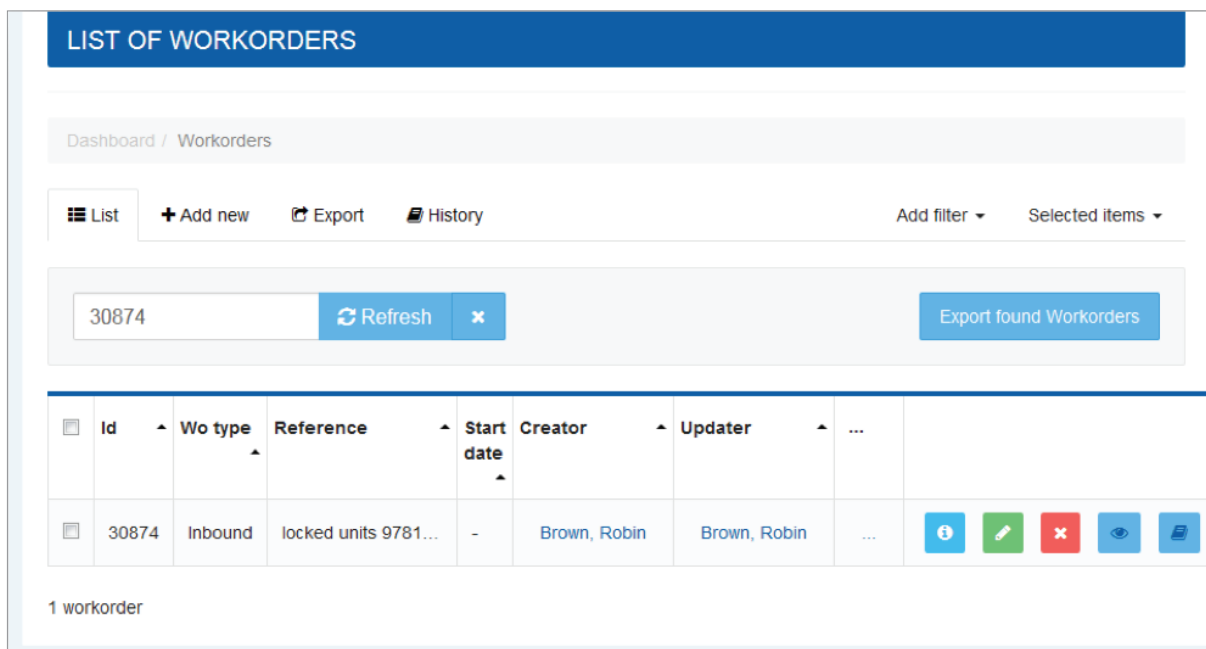
3. Cancelling an existing work order

- Locate the work order using the search function and review to confirm the current status. Work orders can only be cancelled or edited while in a DC interruption status.
- Before proceeding, you must confirm that the warehouse has not processed any tasks against the open work order – if confirmed the order can be cancelled by clicking .
- If the warehouse has open tasks, they will need to close the work order to log any details.



4. Editing an existing work order

- Locate the Admin Screen by click on your profile and selecting the Admin menu.
- Click Work Orders in the admin task bar.
- Search for the work order and click  to make changes. Header details and additional tasks can be added.
- Click  to submit updates.



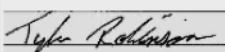
Transportation Documents

All Shipping Documents are to be uploaded and submitted to the work orders. These documents are necessary for any manual freight billing submitted to the Finance Workflow portal.

This includes the Bill of Lading, Customs Documents, Airway Bolls, Australia Wood Packing Declaration Forms, VGM Forms, and any document created for the shipment.

Locate the work order by searching for and opening it through the website.

Click  to select your file to upload then click  to save the document to the work order.

3/22/18		MASTER		BILL OF LADING		Page 1	
SHIP FROM				Bill of Lading Number: C00318879			
INGRAM TRANSPORTATION CO 1240 INGRAM DRIVE CHAMBERSBURG, PA				 (402) C00318879			
SHIP TO				Carrier Name: North / R + L Carriers			
WILLIAMS-SONOMA INC WCDC 21508 BAKER PKWY CITY OF INDUSTRY, CA 91789-5240 CID#: 20J9410 US Sold To: WILLIAMS-SONOMA INC				Trailer Number: Seal Number(s): Notes: SCAC: RNLO Pro Number: 805683735			
THIRD PARTY FREIGHT CHARGES BILL TO:				 (9012K) RNLO805683735			
SPECIAL INSTRUCTIONS: INSIDE DELIVERY CALL FOR DELIVERY APPT#901.547.7231 OR 877.744.7750				Freight Charge Terms: (freight charges are prepaid unless marked otherwise) Prepaid ☒ Collect ☐ 3rd Party ☐ ☐ Master Bill of Lading with attached underlying Bills of Lading (check box)			
CUSTOMER ORDER NUMBER		#PKGS	WEIGHT	ADDITIONAL SHIPPER INFO			
20914281PBR		29	459.6	PALLET SLIP (CIRCLE ONE) ☒ Y ☐ N ☐ Y ☐ N ☐ Y ☐ N ☐ Y ☐ N ☐ Y ☐ N			
GRAND TOTAL		29	460				
CARRIER INFORMATION							
HANDLING UNIT	PACKAGE	WEIGHT	H.M. (X)	COMMODITY DESCRIPTION	LTL ONLY		
QTY	TYPE	QTY	TYPE		NMFC#	CLASS	
1	Pit	29	Cl'n	459.6	Books	161560	65.0
1 PK		29					
1		29		GRAND TOTAL 1-SKID			
Where the rate is dependent on value, shippers are required to state specifically in writing the agreed or declared value of the property, as follows: The agreed or declared value of the property is specifically stated by the shipper to be not exceeding \$ _____				COD Amount: \$ _____ Fee Terms: Collect ☐ Prepaid ☐ Customer check acceptable: ☐			
NOTE: Liability limitation for loss or damage in this shipment may be applicable. See 49 U.S.C. 14706(c)(1)(A) and (B). SHIPPER'S RESPONSIBILITY: Shipper is responsible for the accuracy of the information provided and for the proper packaging and labeling of the goods. Shipper is responsible for the payment of freight and any other charges. CARRIER'S RESPONSIBILITY: Carrier is responsible for the safe and timely delivery of the goods to the consignee. Carrier is responsible for the payment of freight and any other charges.							
SHIPPER SIGNATURE / DATE Load closed by user: TROBIL 				CARRIER SIGNATURE / PICKUP DATE  3-22-18			
Trailer Loaded: ☐ By Shipper ☐ By Driver				Freight Counted: ☐ By Shipper ☐ By Driver/pallets ☐ By Driver/Pieces			

Transportation Closing

Once order shipment has been confirmed, the Transportation team will update the order with the shipment details.

Locate the work order and fill in the required fields for the carrier name and tracking. If no tracking details are available, you will put in the Bill of Lading number.

Click on the Complete button to close and complete the work order.

- Chambersburg
(TRANSPORTATION PENDING)

Top of Form

Shipped Date

Tracking Number

Complete