

Project Data Storage Procedure

OWNER: OPERATIONS

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VERSION HISTORY			
VERSION NO.	1.2	CURRENT VERSION DATE	7/24/20
EFFECTIVE DATE	7/27/20	EXPIRATION DATE	
RESPONSIBLE PERSON	Chad Blake	SIGNATURE	Chad Blake
QA MANAGER	Doug Westlund	SIGNATURE	Doug Westlund
WRITER	Chad Blake	APPROVAL	Doug Westlund

REVIEW PROCEDURE

List how often the SOP should be reviewed and updated and who is responsible.

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1. Introduction

Having a consistent data storage procedure ensures all members of the team can easily find all files pertaining to a project.

2. Definition

Establishes a file structure to store all documents, designs, and related files for an order.

3. Requirements

All files for any given project are to be stored on the server in the order that is associated with that project. No files should ever be stored on a user's desktop or locally on their computer.

4. File Folders

All Orders will be auto populated with the following folders. Each folder below is defined for its use.

- **_Project** – This contains all files used in the design, production, and installation of all projects.
 - **_Design** - All drawings/designs needed to complete the order
 - **_Design** - All Illustrator, Photoshop, Etc. drawings
 - **DWG** - All CAD drawings
 - **As-Built** (Final product designs that are ready for production.)
 - **Print** – Print files or Cut files for cut vinyl
 - **CNC** – Production Files for CNC, Laser, and Engraver.
 - **Fab-Plans** – Final Copies of build plans for Fabrication – PDF Files Preferred
 - **Install** - All specialty items needed for installation, warranty documentation, install method information, SSSS, etc.
 - **Permits** - All permitting information/consents/receipts/submitted and approved information/etc.
 - **Proof Pack** – The final approved proof pack for this project
 - **In From Client** - All information/documents/emails/photos/ideas/forms/etc that comes from the customer
 - **Site Survey** – Measurements and Photos taken before a job is started, generally during a site visit, for reference during design and production
 - **Forms** – Any required forms, notes, measurements, or other data recorded during a site visit not included in the photos
 - **Photos** – All photos taken during a site visit
 - **x_Line Item** - Used on larger orders to break the above information into individual line item organization. This Folder Contains all the following folders and their associated sub folders.
 - **_Design**
 - **As-Built**
 - **In From Client**
- **Billing** - All items that are needed to be submitted at the time of billing. Photos, scans, receipts, etc.
- **Photos** - Auto populated folder for when photos are submitted through app, all job photos should be within. Once Uploaded through the app, all photos should be sorted and placed in the appropriate file (Site Survey, Completion or Billing)
- **Completion** – Final photos that are taken to be submitted to customer and reviewed by project manager. These photos should only be here once the project item is cleaned and photo area has no debris in the shot. Imagine “Front Page” of a magazine photo
- **Scans** - All physical forms/documents/photos/notes that are scanned in from the office printers should be placed here. Generally, after a project is completed so final notes are recorded for future reference
- **Signatures** - Signatures captured through the app will generate within this folder

5. Forms

Data Storage Procedure to be found on the server at Y:\Westlund Concepts
Forms\SOP\Operations

6. Responsibilities

Designers must ensure all design files are saved with a progressive version numbering system as defined in the Data Naming Procedure. It is the responsibility of the Project Manager to work with the designer to ensure the approved version of a design is saved and moved in the corresponding As-Built File. Any Field Notes submitted by Fabrication or Install teams must find their way into the final files in the As-Built Folder. Any design changes will need updated files saved in the As-Built folder with old versions being archived into a folder named “_Old” The Project Manager is responsible to ensure all files, photos, and documents are moved into the appropriate folders during the project and upon completion.

7. Process Review

Operations manager will review this procedure. Failure to comply will result in discipline as outlined in the employee handbook.

STAFF SIGNATURES

Obtain signatures from employees to confirm that they have read and understood procedures.

[illegible]

Data Storage Plan - Projects



_Project



Billing



Photos



Completion



Scans



Signatures



_Design



_Graphics



As-Built



_Print



In From Client



Site Survey



Forms



x_Line Item



_Design



DWG



CNC



Laser



Engraver



Photos



As-Built



Fab_Plans



Install



Permits



Proof Pack



In From Client