Department of Administration
Division of Enterprise Operations
Document Sales and Distribution Program
Office Operations Associate
Position Number 008498

September 12, 2014

Position Summary: Under the direct supervision of the Enterprise Program Supervisor, this position processes incoming customer orders of state agency publications and forms, fulfills customer orders and coordinators financial responsibilities for the program. Activities include but are not limited to processing orders in the Document Sales order fulfillment system, handling telephone, mail and in-person orders, picking orders, packaging orders, shipping orders, researching information, resolving minor data discrepancies and compiling data for various processes and projects.

In addition, this position is responsible for daily financial accounting of all funds received, reporting all state and county sales taxes and other applicable taxes, management of electronic catalogs, inventory management, shipping and reporting sub-programs. The position is responsible to manage the General Service Billing System (GSBS) for purposes of billing sales and handling fees to state agencies. Additionally, this position serves as a website administrator for the program's website and troubleshoots the program's order fulfillment system.

This position is responsible to have full working knowledge of every aspect of the Document Sales and Distribution Program. The position will perform both front room and back room duties and is responsible to backup all other positions in the Program as needed. This position exercises considerable judgment and initiative.

TIME OBJECTIVES AND TASKS

25% A. Receive and process incoming customer orders via website, mail, phone, fax, or other electronic means for documents, publications and products. Coordinate and manage products, electronic data files for vendor agencies and mailing list databases.

A1. Provide quality customer assistance to those seeking products through the Document Sales and Distribution Program. Exercise professional level communications skills including patience when working with customers on inquiries and orders.

A2. Maintain expert working knowledge of and utilize the Document Sales and Distribution Program's order fulfillment system. Troubleshoot the system with the Division of Enterprise Technology (DET) as needed.

A3. Receive orders via the order fulfillment system, telephone, fax, email and walk-in traffic. Verify product, billing and shipping information. Quality-control all order information for clarity and accuracy. Process all order requests per customer specifications within 24 hours or in another timely manner as designated by the supervisor.

A4. Contact customers by mail, e-mail, fax or telephone to clarify order information whenever necessary and/or to notify of anticipated delays.

A5. When orders are received via telephone, fax, email or walk-in, check inventory to determine availability of requested merchandise. Enter order into the order fulfillment system according to

established standards. Complete transaction by processing cash, check or credit card transaction for the purchase.

A6. Obtain proper approval codes for all credit card sales.

A7. Receive and respond to customer inquiries and complaints. Inform supervisor of all complaints. Using best judgment, engage the supervisor to respond to complaints directly whenever appropriate.

A8. Coordinate activities associated with the sale of the Wisconsin Administrative Code, Legislative Subscription service and other documents and publications from the Legislative Reference Bureau or other sources.

A9. Maintain appropriate databases according to established standards using Microsoft Access or similar program. Coordinate and manage Mail List Management Database System using Microsoft Access. Maintain address data according to United States Postal Service standards. Enter all appropriate information on a regular basis and in a timely manner.

A10. Receive electronic files from the Legislative Reference Bureau (LRB) and elsewhere and import files for mailing. Independently review and evaluate source documents for content as needed. Create compound documents using Filezilla, Adobe or similar programs. Manage electronic data files for Print-on-Demand orders. Perform troubleshooting and problem analysis to maintain the integrity of electronic files.

A11. Ensure subscription renewal information is accurately recorded in the customer's record making corrections as needed. When necessary, research customer inquiries and respond. Generate renewal notices to customers when appropriate. Develop and maintain a tracking system to provide production timetables of input, output and quantities generated for subscription services.

A12. Coordinate the distribution of official state publications under Wis. Stat. 35.84, to include the review and correction of internal mailing lists, requesting required labels from the Wisconsin Department of Public Instruction. Communicate with County Governments, the Wisconsin Legislature and DOA Procurement on all issues.

A13. Prepare and mail to County Clerks the Statute Distribution schedule for county officials; verify schedules returned by County Clerks and work with County Clerks to resolve discrepancies. Prepare shipping advisories for 72 counties to be used by printer for drop shipments.

A14. Serve as Document Sales liaison with DET, DOA Procurement, LRB and the Chief of Clerks of Senate and Assembly. Respond to inquiries regarding official distributions from constitutional officers, State agencies, judiciary, libraries and federal and local government agencies.

A15.Exercise proper judgment in determining production timetables; Prepare reports of mailings, renewals and expired subscriptions; Review output for errors and make necessary corrections; Assure the appropriate labels and lists are generated as needed

A16. Interact with the LRB staff as needed to ensure proper and timely transmission of electronic files for the printing of products to be distributed. Resolve problems and keep staff informed on the status of production and mailing of documents.

A17. Determine print quantities and deadlines for production. Update prices in catalog and the order fulfillment system as needed.

A18. Maintain an excellent working knowledge of Document Sales products and state agency vendor resources.

A19. Maintain official program records following State of Wisconsin records management procedures and program retention disposition authorizations.

25% B. Coordinate financial responsibilities for the program, process financial and other operational reports for the program. Manage overall program operational needs.

B1. Perform daily financial activities to include the reconciliation of the day's sales transactions including cash, checks and credit cards. Maintain detailed log of checks returned to customer for insufficient funds. Perform other accounting related work as needed.

B2. Prepare monthly reports to include product sales, refunds, time charges, storage charges, handling fees, shipping fees and consignment credits. Ensure accurate and timely distribution to state agency customers as necessary.

B3. Prepare and submit the monthly General Service Billing System (GSBS) report in a timely and accurate manner. Collect the necessary expense and time data.

B4. Respond to state agency customer inquiries regarding the GSBS billings. Manage the archiving of monthly transactions to ensure proper storage of data to comply with State of Wisconsin records management procedures and program retention disposition authorizations.

B5. Keep informed of program activities throughout the day to accurate process the daily reconciliation of funds, preparation of deposits and monthly sales reports to ensure accurate accounting, preparation and distribution.

B6. Produce reports as necessary to enable reconciliation of previous day's financial transactions. Analyze and reconcile discrepancies.

B7. Produce deposit reports. Ensure all checks, cash and credit card deposit slips reconcile with report. Assemble deposit package according to specified instructions and arrange for delivery or electronic processing to DOA's Division of Administrative Services or other areas as needed.

B8. Maintain catalogue of products and prices. Keep accurate on a regular basis and post on the Document Sales and Distribution website.

B9. Maintain administrative rights to the Document Sales and Distribution website. Make all updates, revisions and design changes as appropriate, working with DET as necessary.

B10. Maintain office supplies and materials as needed. Using the Program Purchasing Card, place orders as needed. Create requisitions and purchase orders for materials and services need by the program and pre-approved by the supervisor.

B11. Audit, analyze and process for payment invoices against purchase orders, direct payments and other specialized invoices. Keep supervisor informed of the receipt and status of the payments.

B12. Capture and document all pertinent data from vendor invoices as needed using Microsoft Excel or similar program.

B13. Compile information and statistics as needed. Create and produce reports using Microsoft Excel, Access and/or Word for various processes and projects as needed.

25% C. Shipping and Receiving

C1. Maintain expert working knowledge of and utilize the Document Sales and Distribution's shipping systems, e.g., United Parcel Service (UPS) application for order fulfillment. Train and instruct others as needed on the application. Serve as the interface with the vendor and DET to troubleshoot issues. Initiate and report on all system upgrades

C2. Run daily programs to produce packing slips, labels and pick lists for orders processed. Compare information on packing slips and labels with source documents.

C3. Locate, verify and pull materials from the pick list. Prepare materials for shipping; determine shipping container and packaging. Weigh package and determine best method of shipment via product contract, special customer request or cost efficiency.

C4. Inspect incoming shipments for quality, actual quantity and unit of issue against packing slip and purchase order. Inform vendor of shipment and any discrepancies. Inform supervisor of any quality or quantity issues in received shipments from vendors which may impact the state agency's ability to utilize the product with their constituents or to meet their statutory obligations.

10% D. Warehousing and Maintaining Inventory

D1. Input or upload new products into the Document Sales and Distribution order fulfillment system to maintain a complete and accurate listing of all products with pricing and other needed information.

D2. Monitor inventory levels and reports on a regular basis. Utilize just-in-time delivery techniques with over 50 vendors to order and receive new supplies at a rate and volume to best manage the limited storage capacity available to the program. Initiate re-order, review and back order reports. Notify appropriate agency program manager when stock is below their set Re-Order Point (ROP). Track unused and little-used inventory and make recommendations to supervisor on their disposition. Update staff and reports with information from vendors.

D3. Mark all stock and location with assigned Stock Keeping Unit (SKU) number. Store materials on shelves and/or racks using the following methods: First In, First Out (FIFO), bulk issue and fast/slow moving item.

D4. Track all LOT and expiration dates, issuing materials by expiration date.

D5. Maintain inventory in two storage facilities in Madison. Identify where inventory is most needed and transfer stock via a 16' box truck or similar and/or coordinate transfer of stock as needed. Load and unload the materials and stock each facility to maximize storage capacity.

D6. Be responsible for two storage facilities with security clearance to access inventory in each location. Maintain security in each location and notify supervisor and Capitol Police if security issues arise. Stay alert to potential facilities issues such as water damage and notify supervisor for corrective action.

D7. Assist with specifications in requests for bids related to delivery of materials to assure adequate storage of products can be maintained.

10% E. Meet or exceed the DOA established employee Core Competencies of Communicator; Team Player; Innovator; Learner; Role Model; and Work Ethic.

E1. Communicate clearly and concisely in verbal, written and electronic formats. Listen to achieve understanding. Always be professional and courteous. Solicit clarification on work assignments, check-in points and deadlines as necessary. Keep supervisor and other staff informed as appropriate.

E2. Contributes toward making each workday a favorable experience by maintaining a positive attitude, avoiding negativity and being someone co-workers like to be around.

E3. Is open minded, flexible and responsive to innovations that improve business processes. Is creative when bringing common sense solutions to the table for problems or issues that are identified.

E4. Demonstrate a basic command of and a willingness to learn skills important to the success of all employees, including effective time management, interpersonal skills and appropriate technical expertise.

E5. Display a positive attitude through respectful, courteous, enthusiastic and confident interactions with co-workers, customers and supervisors.

E6. Show dependability in attendance, being fully engaged in job duties and meeting deadlines. Makes decisions within the parameters of one's job and authority and accepts responsibility for those decisions.

5% F. Perform other duties as assigned.

F1. Perform other related tasks or duties in the program area as necessary or assigned.
F2. Assist in any other unit of the section as needed or directed.

KNOWLEDGE, SKILLS AND ABILITIES:

- Ability to create, record and maintain hard copy, electronic documents, files and data files
- Grammar, punctuation, and proofreading skills
- Research skills
- Problem solving skills
- Customer service skills
- Proficiency in computer software applications. e.g., Microsoft Word, Excel, Access, etc.
- Proficiency in updating and maintaining information on websites
- Ability to work independently and exercise initiative
- Ability to utilize sound judgment
- Effective inter-personal skills with the ability to communicate verbally and in writing with customers, co-workers and management
- Ability to prioritize work to meet deadlines and commitments
- Ability to effectively operate program related software and applications
- Ability to analyze, plan and develop procedures to enhance efficiencies
- Ability to train, tutor and direct the activities of new staff to effectively learn their job duties.
- Ability to work independently
- Ability to perform a variety of routine physical activities throughout the day including climb ladders; bend; twist; and, push, pull and lift up to 50 pounds
- Knowledge of safe lifting and carrying techniques
- Knowledge of the use of warehouse equipment such as pallet jacks