Important Instructions – Read before opening PPM Guidelines

Steps for saving documents

1. Create a separate folder for the PPM Guidelines and PPM Worksheet.
2. The Only files to appear in the folder should be the PPM Guidelines and PPM Worksheet.
3. Do NOT change the names of the files, it will stop the PPM Worksheet from working properly.
4. Once the above tasks have been completed, you can now open and read the PPM Guidelines.

When you first open the PPM Worksheet

1. To 0pen the PPM Worksheet, you must ENABLE the macro when asked to...it will be highlighted (top near the menu bar). You will only need to do this once.
2. The PPM Worksheet Columns are locked with the exception of the Designer Comments column.
3. Changing Columns will stop the PPM worksheet from working properly and linking to the PPM Guidelines.

Quick Guide to using PPM Guidelines and PPM Worksheet

Once designers read and understand the **PPM Guidelines**, they need only use the attached Excel **PPM Worksheet**. The PPM Guidelines are primarily designed to be a reference document and the PPM Worksheet is the working document for designing/redesigning packaging.

There are 28 Design Guidelines & 21 Design Issues which are ranked in terms of importance and safety, so companies can quickly ascertain priorities. The PPM Worksheet summarizes all of the Design Guidelines & Design Issues including their rankings into a single page. There is a design Definitions page in the PPM Worksheet.

**Self-assessment**: There is a self-assessment column in the PPM Worksheet where designers need to determine if they are non-compliant, partially or fully compliant with each PPM Design Issue or PPM Design Guidelines.

**Reference:** There are links embedded in the PPM Worksheet that allow you to double click through to every Design Guideline & Issue for reference.

The Design Issues & Guidelines can be sorted using the PPM Worksheet, so companies can quickly determine how to best allocate resources for the greatest return.

**Basic Instructions – To sort and filter data**

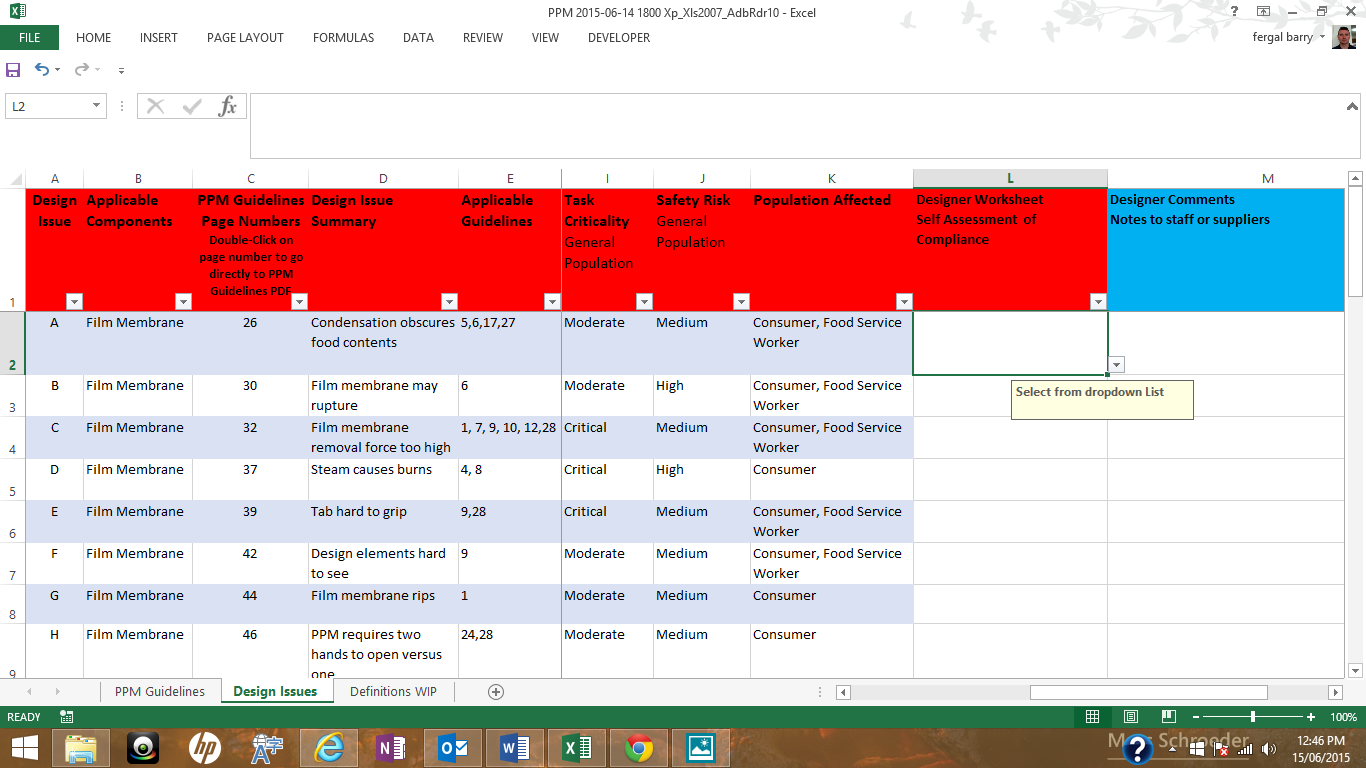
**How to use the Self-Assessment ranking (filter) – Go to Design Issues Worksheet – Column L**

**Note:** The same usage instructions apply to self-assessment for PPM Guidelines worksheet as Design Issues worksheet, with exception of self- assessment is in column K versus L.

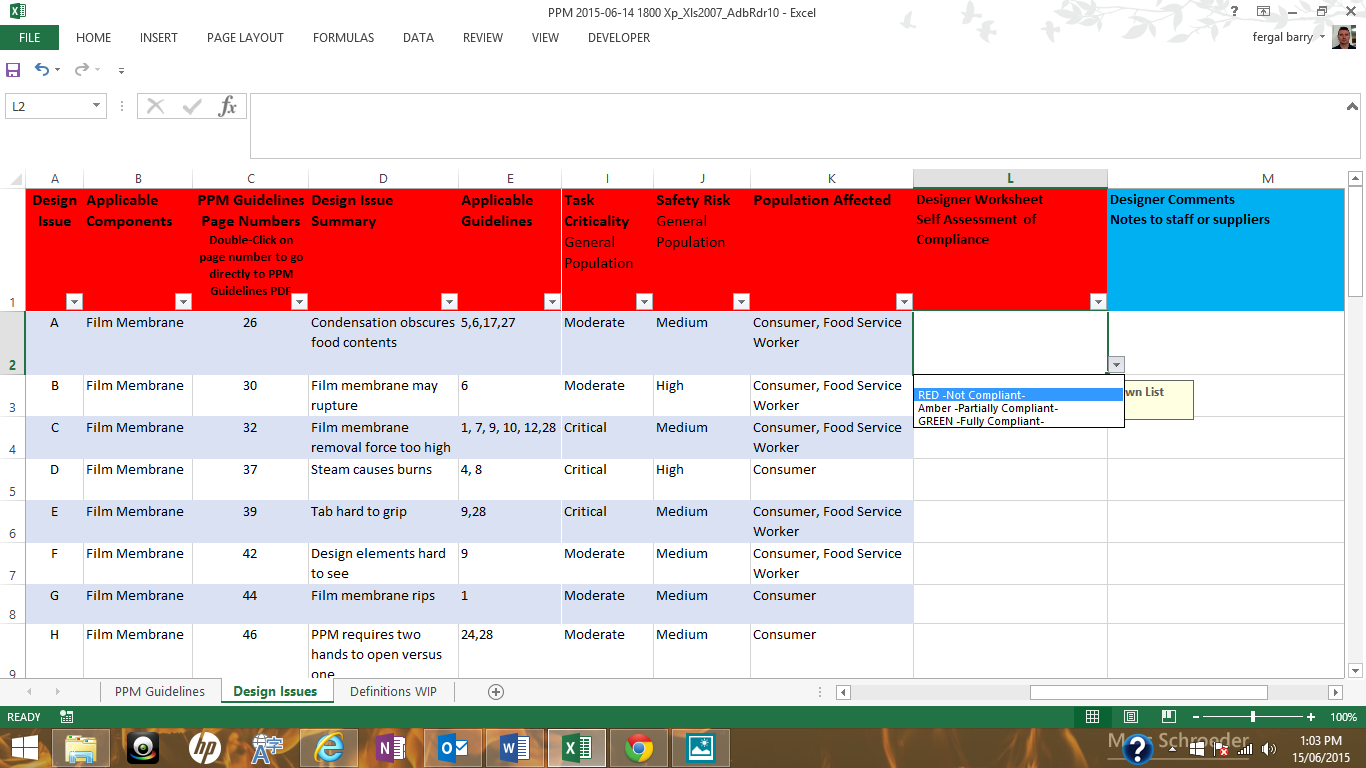
You **Must Read and Understand** **the PPM Guidelines** including definitions before completing this step. Users can then complete the Self-Assessment ranking i.e. Red- Non Complaint, Amber– Partially compliant and Green – Fully compliant.

**Note:** It is strongly recommended that the accessibility assessment be validated by an independent expert before any major design changes or investment is made.

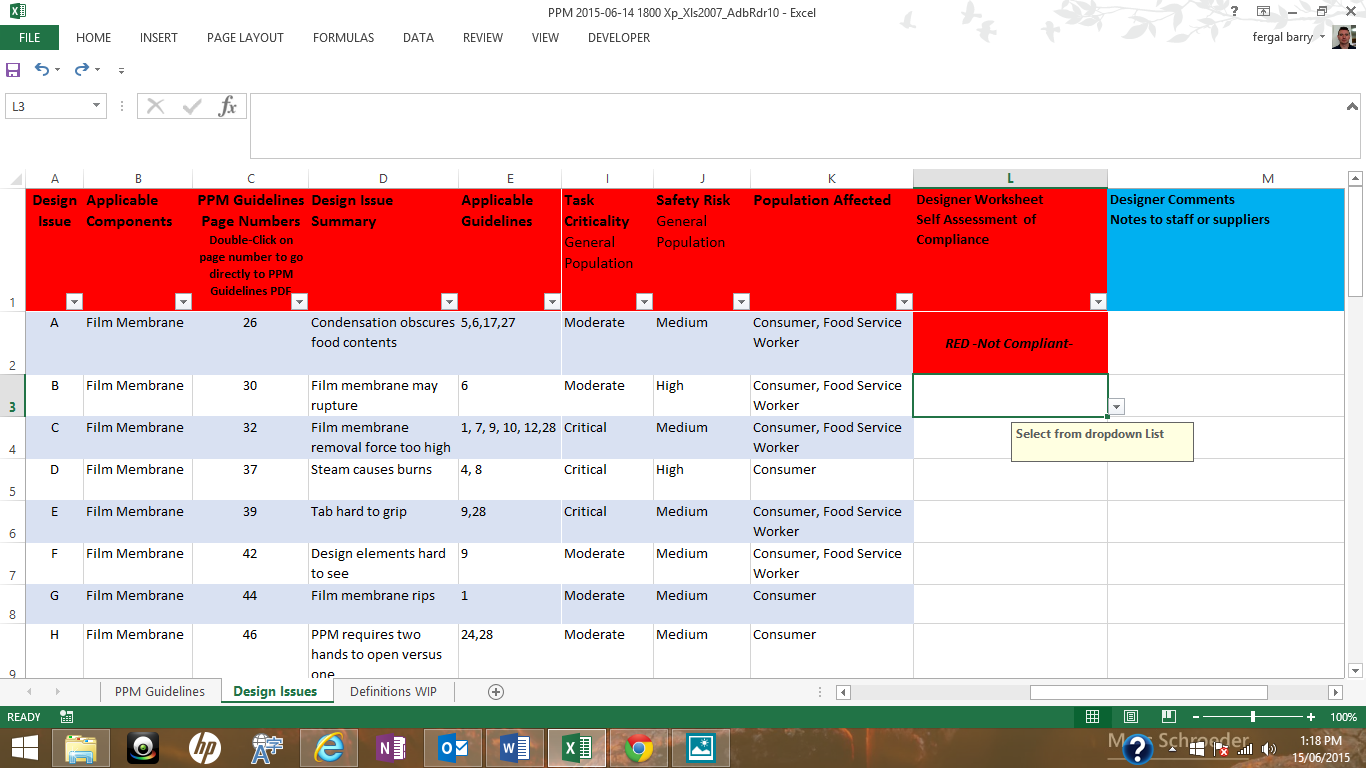
1. **Position** the mouse over the Cell L2 for Design Issues page(K2 for Design Guidelines)
2. A**drop-down arrow** The drop-down arrow will appear and a message to ‘Select from the drop down list’.



1. Click the **drop-down arrow**. Three compliance option will appear.
2. **Click** the compliance option that best applies to your packaging for each Design Issue. In this example, we will check Red –Non Compliant.



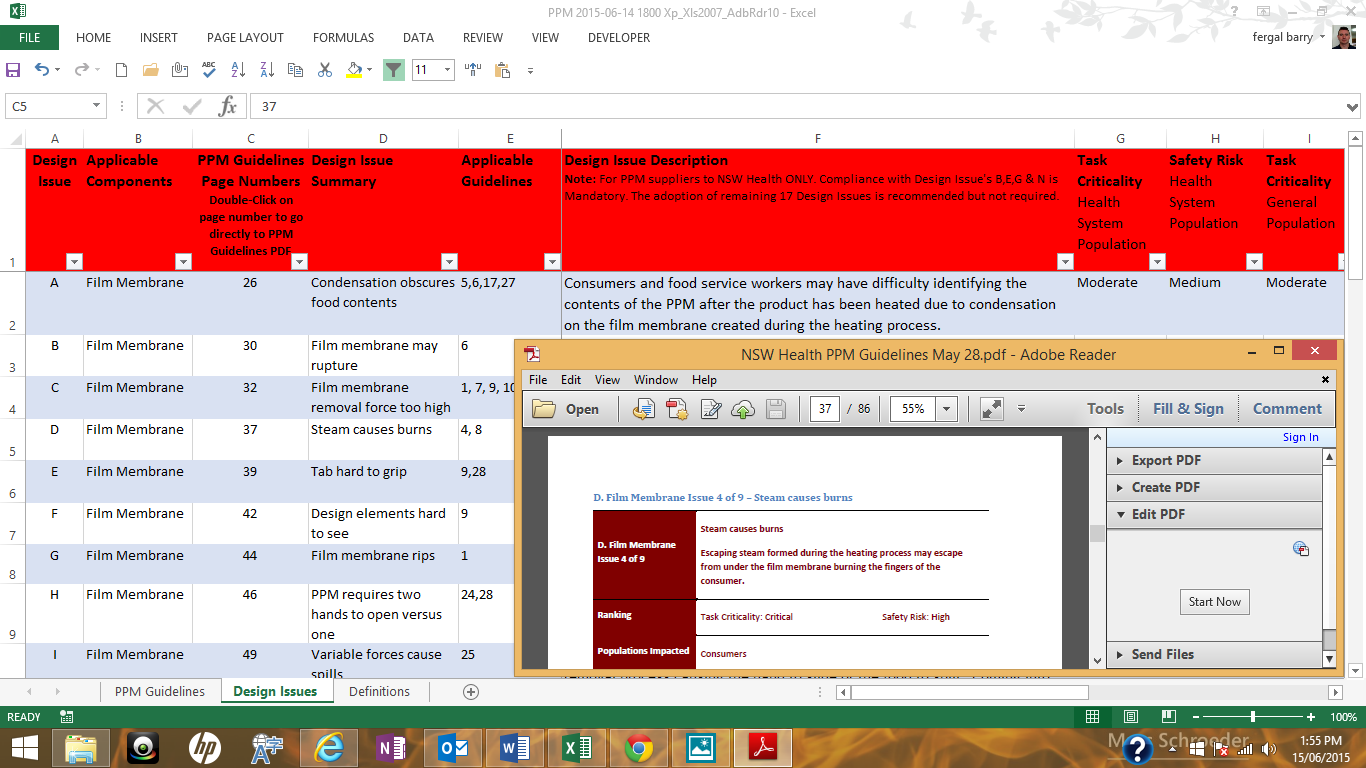
1. The Compliance option you selected will appear. In example below, Red –Non Compliant appears.



1. **Repeat** this step until all Design Issue’s have been selected.

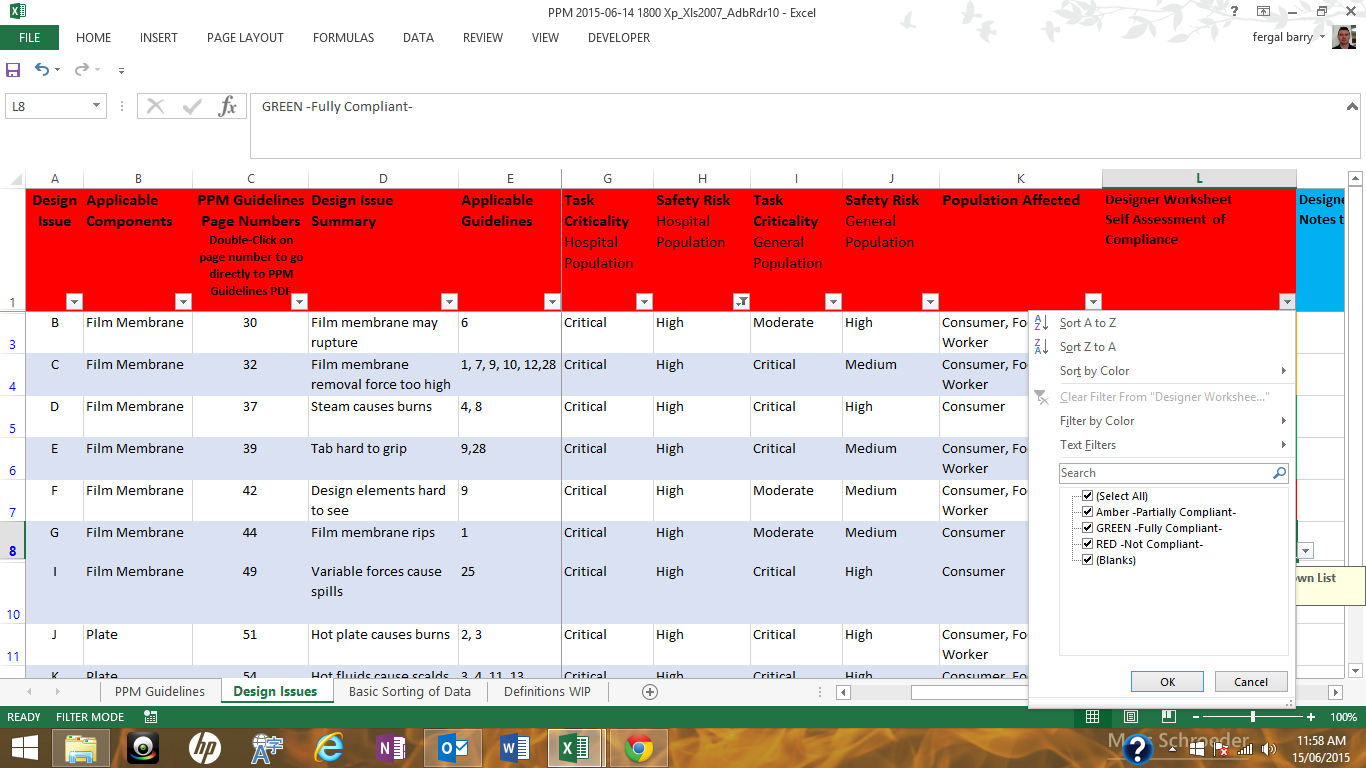


1. **For Reference**. Go to Column C. Poistion the mouse over the Page number of the relevent Design Issue.
2. **Double Click** on the Page Number. The PPM Guidelines and relevent Design Issue will appear on the screen.

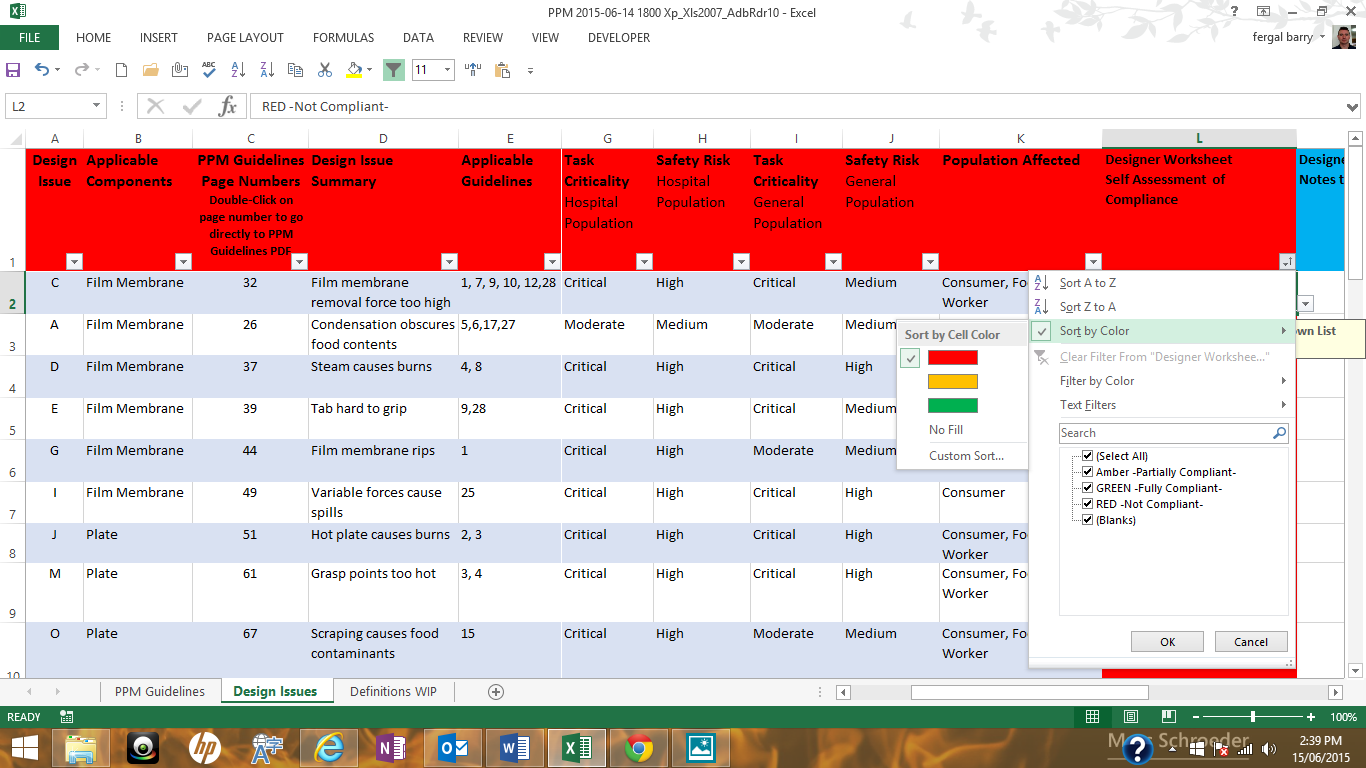


**How to sort Self Assessment by Compliance and/or Colour**

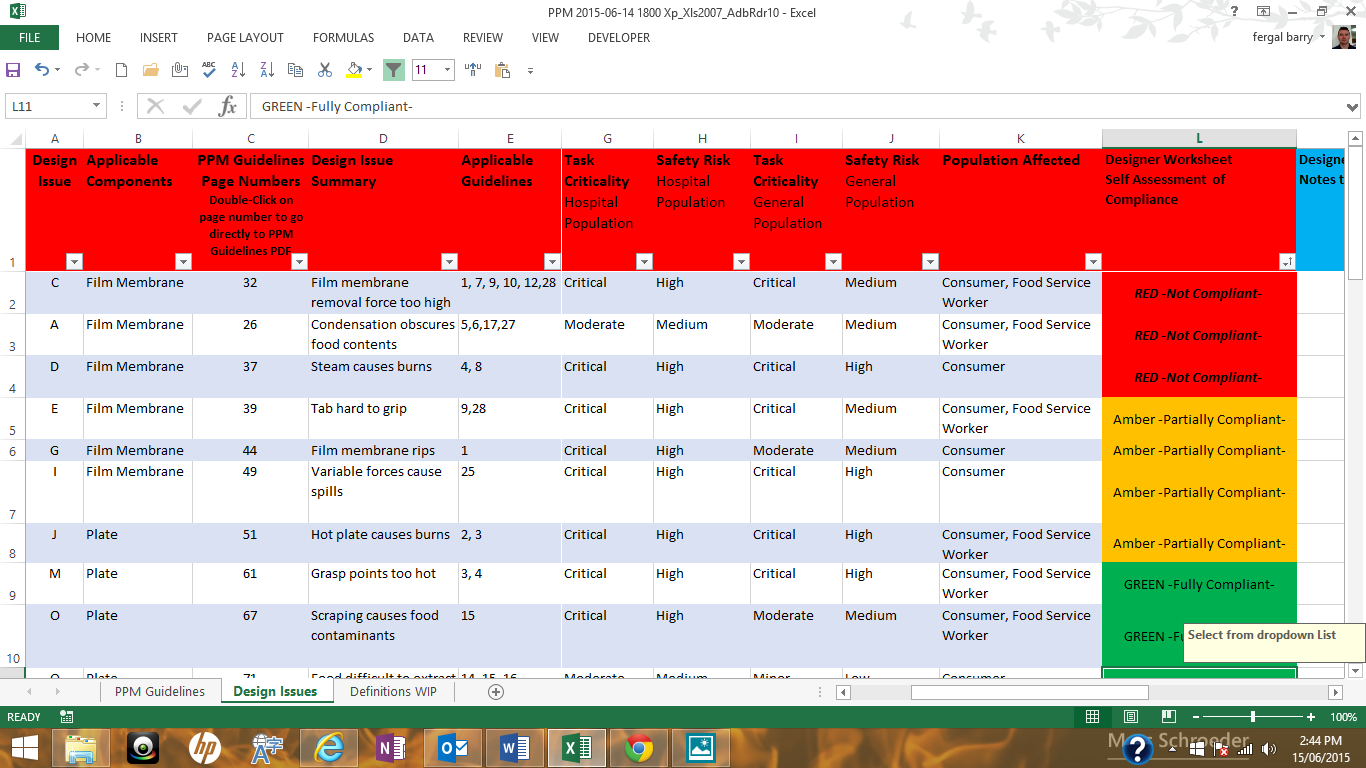
1. Click the **drop-down arrow** at the top of the **self-assessment compliance column L, and** the **Filter** **menu** will appear.



1. **Click on ‘**Sort by Colour’ and the Three Colour Compliance Options will appear.
2. **Click** on red.



1. All Design Issue’s will be sorted in order of Red – Non Compliance, Amber –Partially Complaint and Green- Fully Complaint. This allows you to determine your highest priorities.



**Note PPM Guidelines** Worksheet**:** The same usage instructions apply to self-assessment, referencing and sorting of PPM Guidelines worksheet as Design Issues worksheet. With exception of self- assessment is in column K versus L.

**Additional functionality - For sorting/filtering multiple columns at once.**

For example sorting Design issues by Compliance, Task Criticality, and Applicable Component like film membrane can all be done at once.

Instructions for all the options have not been provided here but… Click on this four minute USA Excel instruction video link <http://www.gcflearnfree.org/excel2013/19> and it will explain how to perform these tasks. If the link

**Note:** It's a generic Excel 2013 instruction video, not focused on the PPM Worksheet. So some filter features are NOT available in this PPM Worksheet but many of the "how to steps" are similar.

The PPM Worksheet uses Microsoft Excel 2007 and Adobe 2010 to enable the maximum numbers of users to utilise the PPM Guidelines.