

# Exciting new changes have been made to **WorkZone**<sup>®</sup> and you'll be happy to know it will streamline how you work with it!

## OLD WorkZone:

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Previously, the document manager had two folders: "Client Uploads" and "Work in Progress"; depending on the status of your project, you would have to go to one or the other.

## NEW WorkZone:

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Going forward, you will do everything in ONE FOLDER. A NEW folder, labeled **PROJECTS**. You will no longer have to use the "Client Uploads" or "Work in Progress" folders. Everything you give to communications for particular project will be done through the NEW **PROJECTS** folder—and better yet, the project tracker now automatically links to this folder. There is no more going in to document manager and clicking between folders.

### To see how the new WorkZone works, keep reading!

1. Log into WorkZone: **lawrence.sharedwork.com**
2. The first thing you'll see is your **TO-DO-LIST**
3. Click on the **PROJECT TRACKER** in the blue bar at the top of the screen.
4. In the **TASK LIST**, click on the work space for your project
5. Like before, you'll see a **TASK LIST**. Find your project number in the list—the project number was provided to you in an earlier WorkZone email from Kelly Coenen.

# Uploading your files to WorkZone

1. **NEW!** Click on the project number—Do NOT click on the arrow that is to the left of the project number, click on the actual number/name of the project

CM - Communications | select workspace | Document Manager | **Project Tracker** | Calendar | Reports | Setup | ★ Favorites

### Task List

PRINT PDF EXPORT

Filters edit

Search Project Tracker

EXPAND COLLAPSE

PROJECT/TASK	DESCRIPTION	CATEGORY	RESPONSIBLE	DURATION	START	END	STATUS	NOTES
CM14-102 Fox Cities Magazine Ad - September 2014 Issue (Target date: Aug 5, 2014)	QTY 1	Ad-magazine/new	Craig Gagnon	186.50 days	Oct 22, 2013	— Aug 5, 2014		
CM14-103 Inside Lawrence -Faculty Jazz Quartet (Event 1/28)		Print	Craig Gagnon	54 days	Nov 6, 2013	— Feb 7, 2014		
CM14-104 Inside Lawrence Events handout (Event 1/28) (Target date: Jan 28, 2014)		Print	Craig Gagnon	11 days	Jan 14, 2014	— Jan 28, 2014		

Click on project number

2. **NEW!** You will see a reconfigured landing screen / “Overview” screen.

CM - Communications | select workspace | Document Manager | **Project Tracker** | Calendar | Reports | Setup | ★ Favorites

## CM14-103 Inside Lawrence -Faculty Jazz Quartet (Event 1/28)

Go to Task List | Mark Complete | Edit Project | Email | Print

Created by Kelly Coenen on Nov 6, 2013

Overview | Files | History

WORKSPACE: CM - Communications | PROJECT: CM14-103 Inside Lawrence -Faculty Jazz Quartet

STATUS: % COMPLETE: 90% | RESPONSIBLE: Craig Gagnon

CATEGORY: Print

START: Nov 6, 2013 | END: Feb 7, 2014 | TARGET END DATE: Jan 24, 2014

Comments | Add Comment | Hide System comments

**3. NEW! Click on “Files” tab**—Located on the left side, above the large rectangle

The screenshot shows the top navigation bar with 'Project Tracker' selected. Below it, the project title 'CM14-103 Inside Lawrence -Faculty Jazz Quartet (Event 1/28)' is displayed. A green arrow points to the 'Files' tab in the left-hand navigation area, with the text 'Click on Files' next to it. Other tabs include 'Overview' and 'History'. Action buttons like 'Go to Task List', 'Mark Complete', 'Edit Project', 'Email', and 'Print' are visible at the top right. Below the tabs, there are buttons for 'Select All', 'Download', 'Upload Document', 'Create Web Link', and 'Delete'. A message states 'This folder is empty.'

**4. Just like before: Click on upload document**

This screenshot is similar to the previous one, but the 'Upload Document' button is highlighted with a green arrow and the text 'Click on Upload Document'. Below the navigation bar, the project title and action buttons are visible. The main content area shows a list of items with one item: 'Project Initiation Request (Design- Brochure).eml'. The item details include the date 'Oct 15, 2013 12:29 PM CDT', the user 'Kelly Coenen', and the file size 'EML, 4 KB'. There are also options to 'Add a comment', 'Email link', and 'Tools'. The bottom of the page shows 'Items 1-3 of 3' and 'Page 1 of 1'.

**5. Just like before: Click on browse, find your document, and click the green upload button**

The screenshot shows the 'Upload Files' dialog box for the project. The title is 'Upload Files: CM14-103 Inside Lawrence -Faculty Jazz Quartet'. The dialog has a 'Browse...' button and an 'Upload' button. A green arrow points to the 'Browse...' button with the text 'Click on Browse'. Another green arrow points to the 'Upload' button with the text 'Click on Upload'. The dialog also contains instructions: 'and drop files here...' and 'You can also drag and drop files directly into WorkZone without coming to this page first!'. A note at the bottom says '(does not work on Internet Explorer 8/9) get a browser that supports this'. There is a 'Cancel' button at the bottom left.

## 6. Just like before: you'll automatically see that you have uploaded your document

The screenshot shows a project management interface. At the top, there is a navigation bar with 'CM - Communications' and a 'select workspace' dropdown. Below this, the 'Project Tracker' tab is active, showing the project 'CM14-103 Inside Lawrence -Faculty Jazz Quartet (Event 1/28)'. A toolbar includes 'Go to Task List', 'Mark Complete', 'Edit Project', 'Email', and 'Print'. The document was created by Kelly Coenen on Nov 5, 2013.

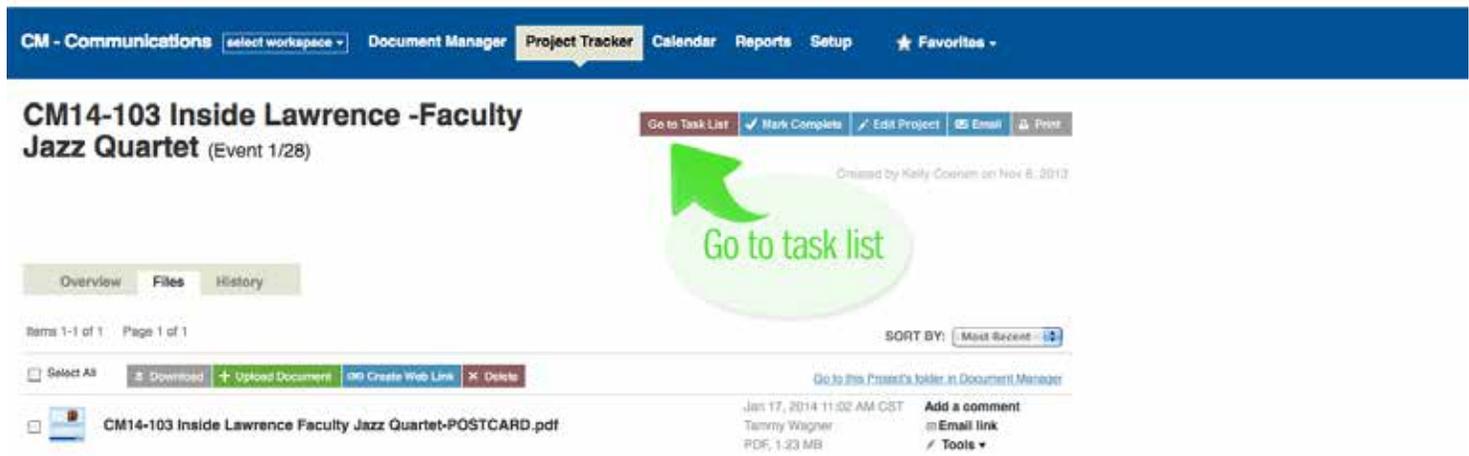
Below the project title, there are tabs for 'Overview', 'Files', and 'History'. The 'Files' tab is selected, showing a list of items. The list includes a file named 'CM14-103 Inside Lawrence Faculty Jazz Quartet-POSTCARD.pdf' uploaded on Jan 17, 2014, 11:02 AM CST by Tammy Wagner. A green callout bubble with an arrow points to the file icon, containing the text 'uploaded files appear here'.

At the bottom of the interface, there are pagination controls showing 'Items 1-1 of 1' and 'Page 1 of 1'.

- After uploading is complete, you must update the Task List so your project can move forward. See pages 5 and 6.

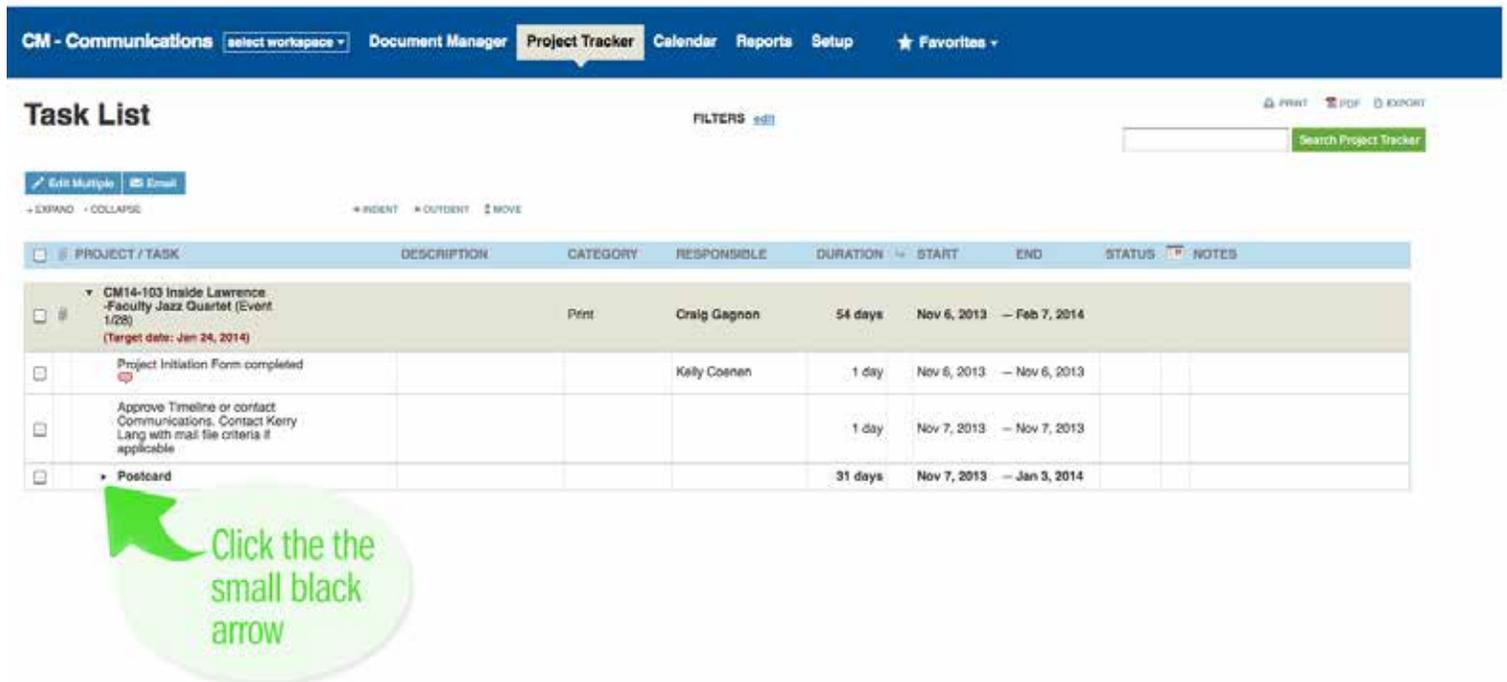
# Updating Task List/checking off your assigned tasks as you complete them

1. Just like before: **Click on the “Go to Task List” box**—toward the top right side of the page



The screenshot shows the 'Project Tracker' section for 'CM14-103 Inside Lawrence -Faculty Jazz Quartet (Event 1/28)'. At the top right, there is a navigation bar with buttons: 'Go to Task List', 'Mark Complete', 'Edit Project', 'Email', and 'Print'. A green arrow points to the 'Go to Task List' button. Below the navigation bar, there are tabs for 'Overview', 'Files', and 'History'. The 'Files' tab is active, showing a list of items. The first item is 'CM14-103 Inside Lawrence Faculty Jazz Quartet-POSTCARD.pdf'. To the right of this item, there is a date 'Jan 17, 2014 11:02 AM CST', the name 'Tammy Wagner', and the file size 'PDF, 1.23 MB'. There are also options for 'Add a comment', 'Email link', and 'Tools'.

2. Just like before: **find your project number, click on the small black arrow next to it** (the one that's in the white box, pointing at the name of the project); this reveals the task list.



The screenshot shows the 'Task List' interface. At the top, there is a navigation bar with buttons: 'CM - Communications', 'select workspace', 'Document Manager', 'Project Tracker', 'Calendar', 'Reports', 'Setup', and 'Favorites'. Below the navigation bar, there is a search bar and a 'Search Project Tracker' button. The main content area shows a table of tasks. The table has columns: 'PROJECT / TASK', 'DESCRIPTION', 'CATEGORY', 'RESPONSIBLE', 'DURATION', 'START', 'END', 'STATUS', and 'NOTES'. The first row is expanded, showing the project name 'CM14-103 Inside Lawrence -Faculty Jazz Quartet (Event 1/28)' and its target date 'Jan 24, 2014'. Below this, there are three tasks: 'Project Initiation Form completed', 'Approve Timeline or contact Communications. Contact Kerry Lang with mail file criteria if applicable', and 'Postcard'. A green arrow points to the small black arrow next to the project name in the first row of the table.

PROJECT / TASK	DESCRIPTION	CATEGORY	RESPONSIBLE	DURATION	START	END	STATUS	NOTES
CM14-103 Inside Lawrence -Faculty Jazz Quartet (Event 1/28) (Target date: Jan 24, 2014)		Print	Craig Gagnon	54 days	Nov 6, 2013	— Feb 7, 2014		
<input type="checkbox"/>	Project Initiation Form completed		Kelly Coenen	1 day	Nov 6, 2013	— Nov 6, 2013		
<input type="checkbox"/>	Approve Timeline or contact Communications. Contact Kerry Lang with mail file criteria if applicable			1 day	Nov 7, 2013	— Nov 7, 2013		
<input type="checkbox"/>	Postcard			31 days	Nov 7, 2013	— Jan 3, 2014		

- Just like before: **to the far right of the line that says “copy received from client,” underneath the “Status” column click in the empty box until you see a green check mark.** Once you check this box, we’re ready to begin work on your project. If you don’t check this box, we won’t know that your document has been uploaded.

CM - Communications select workspace ▾ Document Manager **Project Tracker** Calendar Reports Setup ★ Favorites ▾

### Task List

FILTERS [edit](#) PRINT PDF EXPORT

[Edit Multiple](#) [Email](#)

[EXPAND](#) [COLLAPSE](#) [INDENT](#) [OUTDENT](#) [MOVE](#)

PROJECT / TASK	DESCRIPTION	CATEGORY	RESPONSIBLE	DURATION	START	END	STATUS	NOTES
<input type="checkbox"/> CM14-103 Inside Lawrence Faculty Jazz Quartet (Event 1/28) (Target date: Jan 24, 2014)		Print	Craig Gagnon	54 days	Nov 6, 2013	— Feb 7, 2014		
<input type="checkbox"/>	Project Initiation Form completed		Kelly Coenen	1 day	Nov 6, 2013	— Nov 6, 2013		
<input type="checkbox"/>	Approve Timeline or contact Communications. Contact Kerry Lang with mail file criteria if applicable			1 day	Nov 7, 2013	— Nov 7, 2013		
<input type="checkbox"/>	Postcard			31 days	Nov 7, 2013	— Jan 3, 2014		
<input type="checkbox"/>	Copy received from client		Marti Gillespie	11 days	Nov 7, 2013	— Nov 21, 2013	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Design/Layout (mail and/or email versions)		Monique Rogers	3 days	Nov 22, 2013	— Nov 26, 2013		
<input type="checkbox"/>	Internal proofing of initial layout		Marti Gillespie	4 hours	Nov 27, 2013	— Nov 27, 2013		
<input type="checkbox"/>	Layout to client		Monique Rogers	4 hours	Nov 27, 2013	— Nov 27, 2013		
<input type="checkbox"/>	Client feedback on email version due		Craig Gagnon	1 day	Dec 2, 2013	— Dec 2, 2013		
<input type="checkbox"/>	Client feedback on mail version due		Craig Gagnon	1 day	Dec 2, 2013	— Dec 2, 2013		

Click the empty box until a checkmark appears

► **REMEMBER:** every task that you are assigned to must be “checked off” in order for your project to keep moving. Don’t forget to check the box!

### ANOTHER VERY IMPORTANT NOTE:

During the progress of your project, you will get periodic emails from WorkZone updating you on the status of your project. In the body of the email you will find links taking you to your task. Clicking on one of these links provides a handy shortcut into WorkZone and may eliminate some of the steps you previously had to take.