

Exciting new changes have been made to **WorkZone**[®] and you'll be happy to know it will streamline how you work with it!

OLD WorkZone:

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:

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: [] 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

4. Just like before: Click on upload document

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

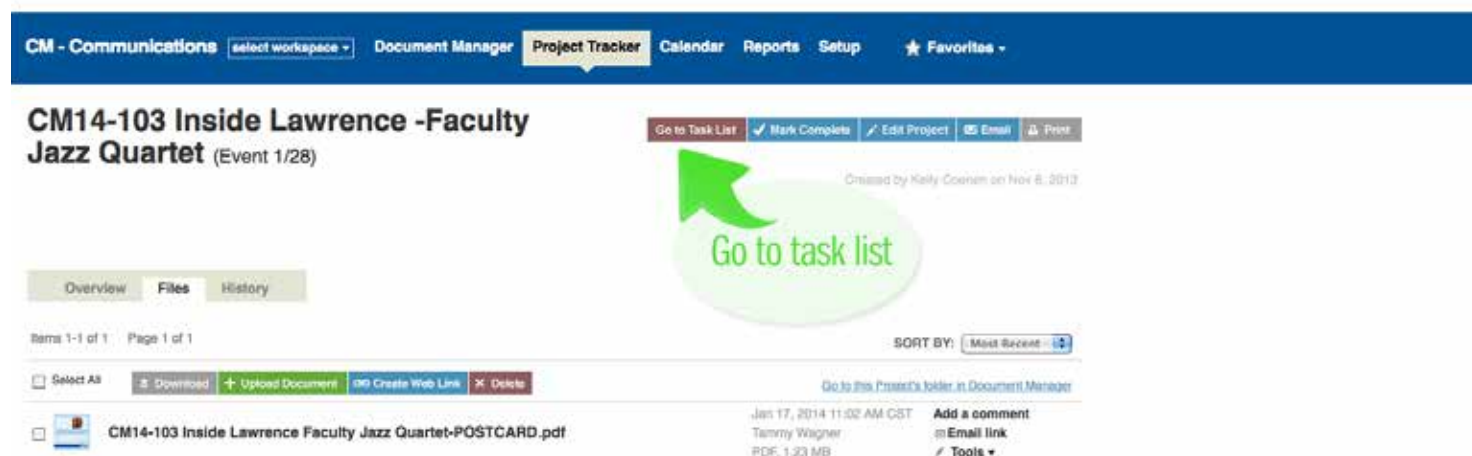
6. Just like before: **you'll automatically see that you have uploaded your document**

The screenshot shows the WorkZone interface. At the top is a navigation bar with 'CM - Communications' and a 'select workspace' dropdown. Below this are tabs for 'Document Manager', 'Project Tracker' (which is highlighted), 'Calendar', 'Reports', 'Setup', and 'Favorites'. The main header area displays the project name 'CM14-103 Inside Lawrence -Faculty Jazz Quartet (Event 1/28)' and a row of action buttons: 'Go to Task List', 'Mark Complete', 'Edit Project', 'Email', and 'Print'. Below the header, there's a sub-header with 'Overview', 'Files' (selected), and 'History' tabs. A status bar indicates 'Items 1-1 of 1' and 'Page 1 of 1'. A 'SORT BY:' dropdown is set to 'Most Recent'. Below this is a toolbar with 'Select All', 'Download', 'Upload Document', 'Create Web Link', and 'Delete' buttons. A link 'Go to this Project's folder in Document Manager' is also present. The file list shows one item: 'CM14-103 Inside Lawrence Faculty Jazz Quartet-POSTCARD.pdf', uploaded on 'Jan 17, 2014 11:02 AM CST' by 'Tammy Wagner' (PDF, 1.23 MB). To the right of the file name are links for 'Add a comment', 'Email link', and 'Tools'. A green arrow points to the file name with the text 'uploaded files appear here'.

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

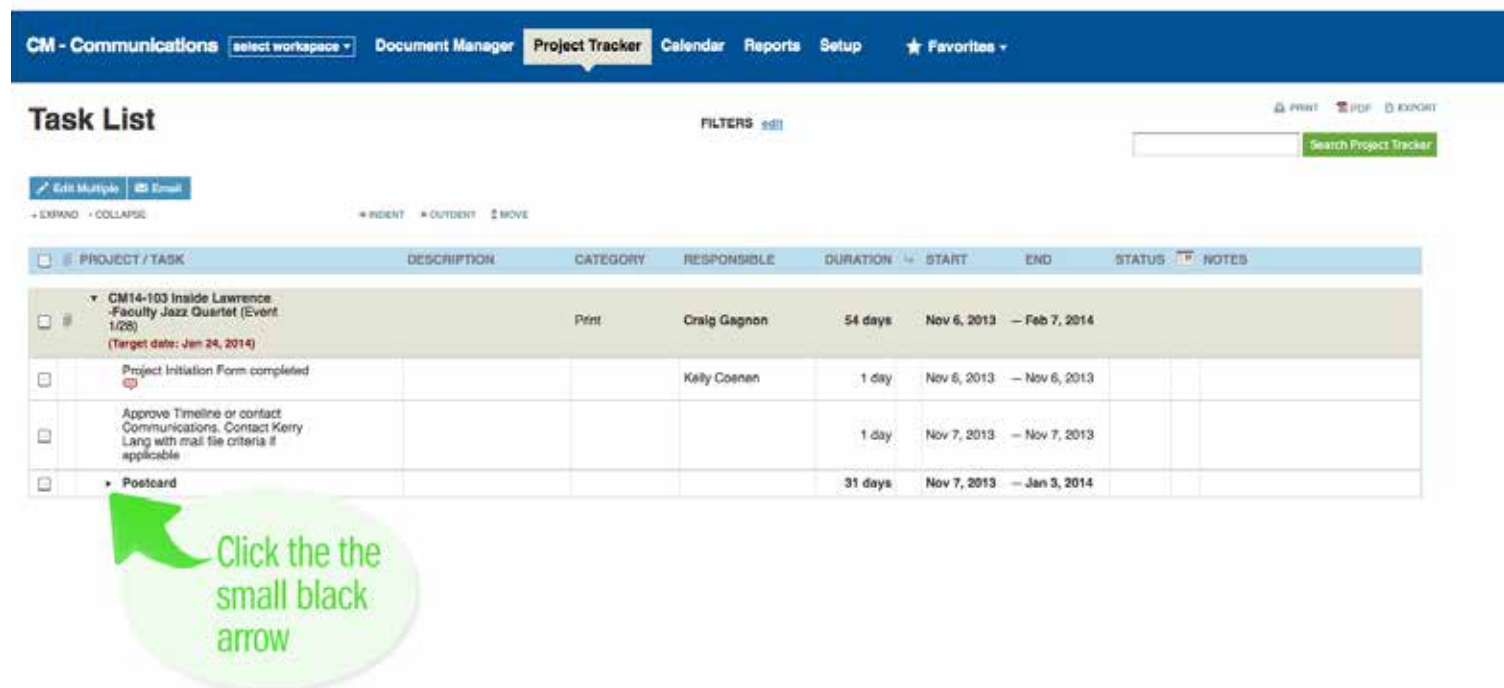
Updating Task List/checking off your assigned tasks as you complete them

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' tab selected in the top navigation bar. Below the navigation bar, the project title 'CM14-103 Inside Lawrence -Faculty Jazz Quartet (Event 1/28)' is displayed. A green arrow points to the 'Go to Task List' button, which is located in the top right corner of the project details section. Other buttons like 'Mark Complete', 'Edit Project', 'Email', and 'Print' are also visible. Below the project title, there are tabs for 'Overview', 'Files', and 'History'. The 'Files' tab is active, showing a list of files. The first file is 'CM14-103 Inside Lawrence Faculty Jazz Quartet-POSTCARD.pdf'. To the right of the file name, there is a small black arrow pointing to the right, which is the 'Go to Task List' button.

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' view. The top navigation bar is the same as in the previous screenshot. Below the navigation bar, the title 'Task List' is displayed. A search bar is located on the right side. Below the search bar, there are buttons for 'Edit Multiple' and 'Email'. Below these buttons, there are tabs for 'EXPAND' and 'COLLAPSE'. Below the tabs, there are buttons for 'IDENT', 'OUTIDENT', and 'MOVE'. Below these buttons, there is a table with the following columns: PROJECT / TASK, DESCRIPTION, CATEGORY, RESPONSIBLE, DURATION, START, END, STATUS, and NOTES. The table contains the following data:

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		
Project Initiation Form completed			Kelly Coenen	1 day	Nov 6, 2013	Nov 6, 2013		
Approve Timeline or contact Communications. Contact Kerry Lang with mail file criteria if applicable				1 day	Nov 7, 2013	Nov 7, 2013		
Postcard				31 days	Nov 7, 2013	Jan 3, 2014		

A green arrow points to the small black arrow next to the project name in the first row of the table.

3. 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](#) [Search Project Tracker](#)

[Edit Multiple](#) [Email](#) [EXPAND](#) [COLLAPSE](#) [IDENT](#) [OUTDENT](#) [MOVE](#)

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		
▼ 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.