

# WorkZone

INSTRUCTION MANUAL



LAWRENCE UNIVERSITY

APPLETON, WISCONSIN

## LOGGING IN TO WORKZONE

https://lawrence.sharedwork.com

After your account is created, you will receive an initial email from WorkZone with the link, your email address and a temporary password. Click on the link to log into WorkZone. You will be prompted to change your password right away.

### Change Password

To better protect your account, make sure that your password is memorable for you but difficult for others to guess. Do not share your password with anyone else or leave it where it may be seen easily by others (e.g. taped to your monitor).

OLD PASSWORD:

NEW PASSWORD:

VERIFY PASSWORD:

After you change your password, you are taken to your To-Do List under Reports in WorkZone.

## TO-DO LIST

The to-do list shows a list of all the active projects a client is a part of.

**Testing Zone** Document Manager Project Tracker **Reports**

**Reports**  
Testing Zone

**Dashboards**  
To-do list  
Recent comments  
Comments by project  
Recent activity  
Late items  
Upcoming items  
My recent documents  
Approvals  
Completed tasks

### To-Do List: Monique Brickham

Testing Zone  
Oct 22, 2015

FILTERS/VIEW OPTIONS [edit](#)  
Responsible: Monique Brickham X; Dates: 7 days;

**TOMORROW, OCT 23, 2015**

ITEM	PROJECT	CATEGORY	START DATE	END DATE	STATUS	NOTES
<b><u>Approve Timeline or contact Communications. Contact Kerry Lana with mail file criteria if applicable</u></b>	TZ15-101 WorkZone Training #2 (Event 12/30)		Oct 23, 2015	Oct 23, 2015	<input checked="" type="checkbox"/> complete	
<b><u>Copy received from client</u></b>	TZ15-101 WorkZone Training #2 (Event 12/30)		Oct 23, 2015	Oct 23, 2015	<input checked="" type="checkbox"/> complete	

The to-do list is found under 'Reports' at the top of the screen, and then by clicking 'To-do list' under 'Dashboards' on the left side of the screen. The resulting list is organized by project status: late = red, current = yellow, future = gray, and within each project status by date.

Each of the tasks you are assigned for a project appears in the to-do list. Click on the bold, underlined task name to open the task list for that project.

You automatically receive email notifications starting seven days prior to each task date. These emails serve as reminders and cannot be turned off. They stop once each task is completed and checked off in the task list.

## TASK LIST

The task list lives under 'Project Tracker' at the top of the screen, which lists all active projects under a particular workspace. Most clients only have access to one workspace, but a few cross over into multiple areas. The project tracker only shows one workspace at a time, so if you need to switch, click on the name of the workspace in the upper left corner to select it. In the image below, the workspace name is 'Testing Zone'.

PROJECT / TASK	DESCRIPTION	CATEGORY	RESPONSIBLE	DURATION	START	END	STATUS	NOTES
<b>Z15-101 WorkZone Training #2 (Event 12/30)</b> (Target date: Dec 3, 2015)	QTY: 100 TBD SPECS:	Print	Monique Brickham	28.50 days	Oct 22, 2015	— Dec 3, 2015		
<input type="checkbox"/>	Project Initiation Form completed		Kelly Coenen	1 day	Oct 22, 2015	— Oct 22, 2015	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Approve Timeline or contact Communications. Contact Kerry Lang with mail file criteria if applicable		Monique Brickham	1 day	Oct 23, 2015	— Oct 23, 2015	<input type="checkbox"/>	Check this box to approve timeline.
<input type="checkbox"/>	<b>Booklet</b>			27.50 days	Oct 23, 2015	— Dec 3, 2015	<input type="checkbox"/>	
<input type="checkbox"/>	Copy received from client		Monique Brickham	1 day	Oct 23, 2015	— Oct 23, 2015	<input type="checkbox"/>	
<input type="checkbox"/>	Copy proofed and edited, send to layout		Jo Phillip	3 days	Oct 26, 2015	— Oct 28, 2015	<input type="checkbox"/>	
<input type="checkbox"/>	Design/Layout		Monique Rogers	4 days	Oct 29, 2015	— Nov 3, 2015	<input type="checkbox"/>	
<input type="checkbox"/>	Internal proofing of initial layout		Jo Phillip	1 day	Nov 4, 2015	— Nov 4, 2015	<input type="checkbox"/>	
<input type="checkbox"/>	Layout to client		Monique Rogers	4 hours	Nov 5, 2015	— Nov 5, 2015	<input type="checkbox"/>	
<input type="checkbox"/>	Client feedback due		Monique Brickham	2 days	Nov 5, 2015	— Nov 9, 2015	<input type="checkbox"/>	Check this box after submitting changes
<input type="checkbox"/>	Revise layout		Monique Rogers	2 days	Nov 9, 2015	— Nov 11, 2015	<input type="checkbox"/>	
<input type="checkbox"/>	Proof revised layout		Jo Phillip	1 day	Nov 11, 2015	— Nov 12, 2015	<input type="checkbox"/>	
<input type="checkbox"/>	Revised layout to client		Monique Rogers	4 hours	Nov 12, 2015	— Nov 12, 2015	<input type="checkbox"/>	
<input type="checkbox"/>	Final approval due		Monique Brickham	2 days	Nov 13, 2015	— Nov 16, 2015	<input type="checkbox"/>	Check this box after approving proof
<input type="checkbox"/>	To print		Monique Rogers	4 hours	Nov 17, 2015	— Nov 17, 2015	<input type="checkbox"/>	
<input type="checkbox"/>	Printing, send to client		Deb Gibbons	10 days	Nov 17, 2015	— Dec 3, 2015	<input type="checkbox"/>	
<b>TZ15-100 WorkZone Training (Event 12/18)</b> (Target date: Dec 16, 2015)	QTY: 81 Posters QTY: 100 TBD Postcards QTY: 200 TBD Program	Print	Kelly Coenen	42.50 days	Oct 15, 2015	— Dec 16, 2015		LY: I will enter in last years job number

Click the black arrow to the left of the bold project name. It will turn downward to reveal the pieces included in the project. Projects may have multiple pieces, each with its own black arrow that must be clicked to reveal its individual task list. (For example, a project may include a brochure, email, poster and program. Each has its own task list.)

## UNDERSTANDING THE TASK LIST AND PROJECT WORKFLOW

Most task lists follow a similar workflow. First, Kelly Coenen reviews the Project Initiation Form (PIF), creates the job in WorkZone and assigns a job number. She builds a project timeline and sends it to the client for approval. After reviewing the timeline, the client must go into WorkZone and check the box to the right of the task, 'Approve Timeline or contact Communications...' If you need to make changes to your project's timeline, contact Kelly to discuss. Also, if your project needs a mail list, contact Kerry Lang to discuss the criteria at this time.

Every time you check off a box, an email notification is sent to you and the next person on the task list to let them know that the previous task is complete and their task is ready to be worked on. **It is crucial for every task to be checked off to keep the project progressing towards approval.**

After you approve the timeline, you must upload all outstanding project-related copy and images to WorkZone. The new PIF allows completed copy to be uploaded when the form is submitted. If you submit copy when you submit the PIF, Kelly will check off the box for 'Copy received from client,' which will prompt the editor to proof and edit the copy. **Images cannot be uploaded using the new PIF due to file size restrictions**, so any images related to the project must be uploaded to WorkZone. See page 5 for instructions on how to upload copy and images to WorkZone.

The editor proofs copy and forwards it to a designer for layout. The designer lays it out and sends it back to the editor for review and initial revision. Then, it is sent to the client for review.

As the client, you will review the proof in WorkZone and either approve it or submit changes. It's very important for each client to check the box next to 'Client feedback due' and 'Final approval due' on the task list so the next person on the task list is notified that feedback or approval has been submitted. This is **in addition to** submitting changes and/or approving the proof itself. See page 8 for instructions on how to submit changes or approve a proof.

If a client submits changes, the designer makes the changes and then the editor reviews the changes for accuracy. A new proof is sent to the client, intended as a final proof. The client may submit final changes or approve the proof at this time. Once approved, the designer prepares the file for final output, whether for printing or electronic use, and sends the files to the print shop or the client.

If the project is being printed, the client must verify final print quantity with Kelly at the time of final approval. After the project is printed, the print shop sends the prints to the client or to the mail room as indicated on the PIF.

## UPLOADING COPY AND IMAGES

Click on the **bold project name** in the task list to access the area where copy and images are uploaded.

PROJECT / TASK	DESCRIPTION	CATEGORY	RESPONSIBLE	DURATION	START	END	STATUS	NOTES
<b>TZ15-101 WorkZone Training #2 (Event 12/18)</b> (Target date: Dec 3, 2015)	QTY: 100 TBD	Print	Monique Brickham	28.50 days	Oct 22, 2015	Dec 3, 2015		
Project Initiation Form	WorkZone Training #2		Kelly Coenen	1 day	Oct 22, 2015	Oct 22, 2015	✓	
	Approve Timeline or contact Communications. Contact Kerry Lang with mail file criteria if applicable		Monique Brickham	1 day	Oct 23, 2015	Oct 23, 2015		
▼ Booklet				27.50 days	Oct 23, 2015	Dec 3, 2015		
	Copy received from client		Monique Brickham	1 day	Oct 23, 2015	Oct 23, 2015		
	Copy proofed and edited, send to layout		Jo Phillip	3 days	Oct 26, 2015	Oct 28, 2015		
	Design/Layout		Monique Rogers	4 days	Oct 29, 2015	Nov 3, 2015		
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	Layout to client		Monique Rogers	4 hours	Nov 5, 2015	Nov 5, 2015		
	Client feedback due		Monique Brickham	2 days	Nov 5, 2015	Nov 9, 2015		
	Revise layout		Monique Rogers	2 days	Nov 9, 2015	Nov 11, 2015		
	Proof revised layout		Jo Phillip	1 day	Nov 11, 2015	Nov 12, 2015		
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	Final approval due		Monique Brickham	2 days	Nov 13, 2015	Nov 16, 2015		
	To print		Monique Rogers	4 hours	Nov 17, 2015	Nov 17, 2015		
	Printing, send to client		Deb Gibbons	10 days	Nov 17, 2015	Dec 3, 2015		
▶ TZ15-100 WorkZone Training (Event 12/18)	QTY: 81 Posters QTY: 100 TBD Postcards QTY: 200 TBD Program	Print	Kelly Coenen	42.50 days	Oct 15, 2015	Dec 16, 2015		LY: I will enter in last years job number

Click on the Files tab.

**TZ15-101 WorkZone Training #2 (Event 12/18)**  
QTY: 100 TBD  
Created by Kelly Coenen on Oct 22, 2015

Overview **Files** Activity Comments

Go to Task List Email Print

SELECT BY: Most Recent

Select All Download Upload Document Create Web Link

Go to this Project's folder in Document Manager

Drag and drop files to upload

Drag and drop copy and images to upload, or click the green 'Upload Document' button and navigate to where the files are saved.

Click on the red 'Go to Task List' button near the top right of the screen.

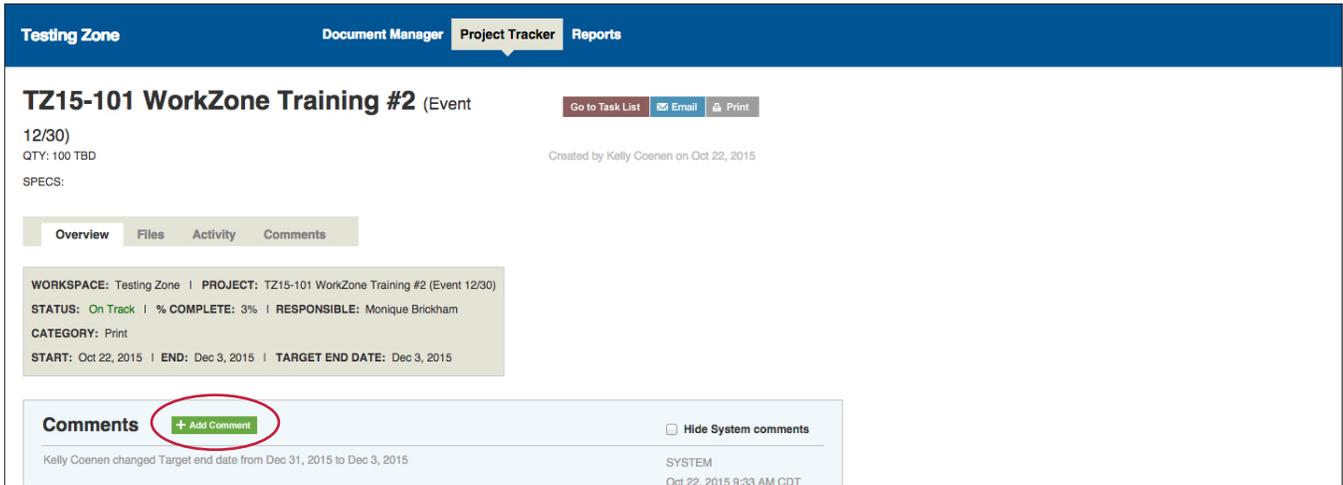
Turn down any black arrows to access the task list for the part of the project you just uploaded content for. Check off 'Copy received from client' on the task list.

## ADDING A COMMENT

Comments can be added as general notes about the project. **DO NOT submit changes via comments.** See page 8 for instructions on how to submit changes or approve a proof.

From the task list, click on the bold project name to get to the Overview tab.

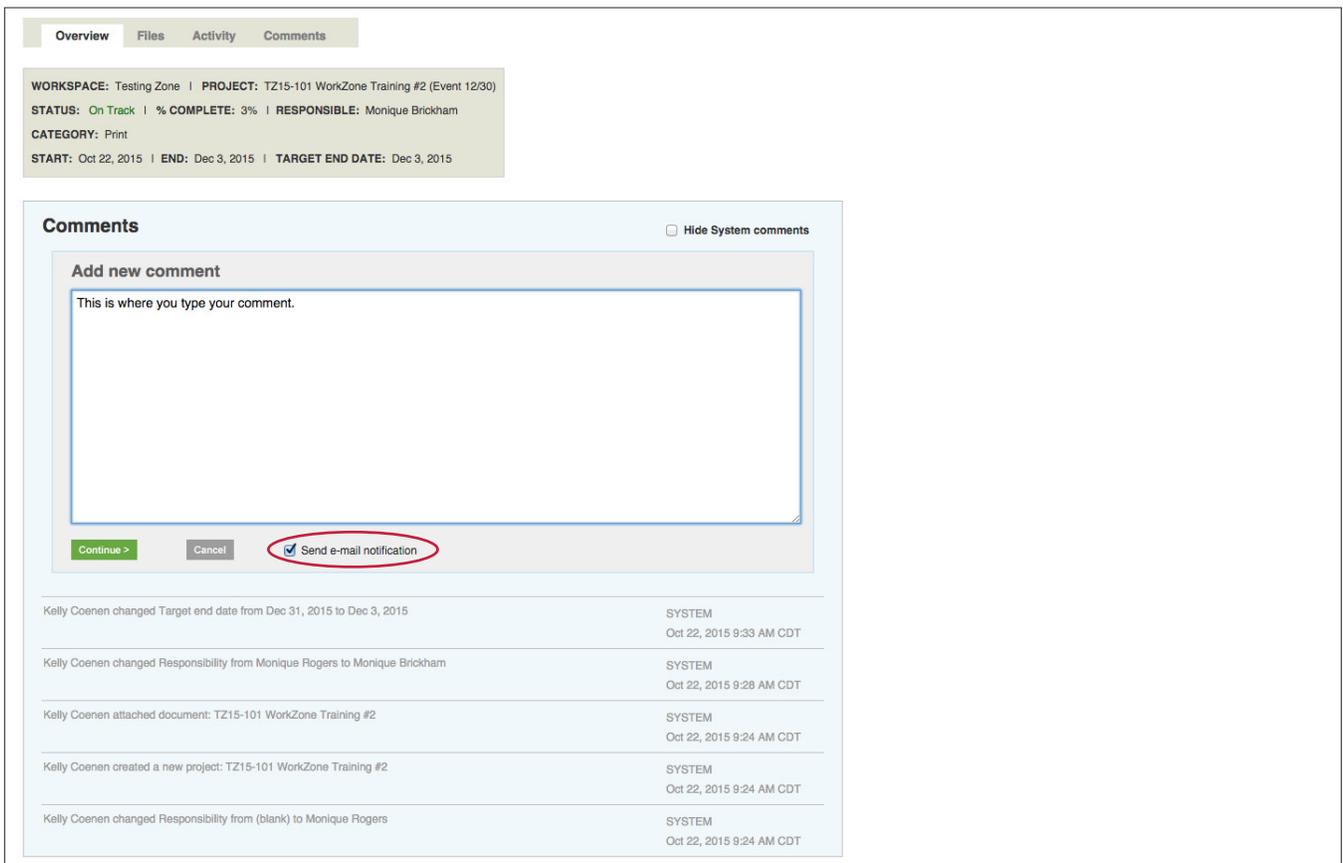
Click the green 'Add Comment' button.



The screenshot shows the 'Project Tracker' interface for 'TZ15-101 WorkZone Training #2'. The 'Comments' tab is selected, and the '+ Add Comment' button is circled in red. The interface includes a header with 'Testing Zone', 'Document Manager', 'Project Tracker', and 'Reports'. Below the header, there are tabs for 'Overview', 'Files', 'Activity', and 'Comments'. The main content area displays project details: 'WORKSPACE: Testing Zone | PROJECT: TZ15-101 WorkZone Training #2 (Event 12/30)', 'STATUS: On Track | % COMPLETE: 3% | RESPONSIBLE: Monique Brickham', 'CATEGORY: Print', and 'START: Oct 22, 2015 | END: Dec 3, 2015 | TARGET END DATE: Dec 3, 2015'. A 'Comments' section is visible with a '+ Add Comment' button circled in red and a 'Hide System comments' checkbox. Below the button, a comment is shown: 'Kelly Coenen changed Target end date from Dec 31, 2015 to Dec 3, 2015' by 'SYSTEM' on 'Oct 22, 2015 9:33 AM CDT'.

Type in your comment. Make sure email notification is checked.

Click the green 'Continue' button.



The screenshot shows the 'Add new comment' form in the 'Project Tracker' interface. The 'Comments' tab is selected, and the 'Add new comment' form is open. The form includes a text area with the placeholder text 'This is where you type your comment.' Below the text area, there are three buttons: 'Continue >', 'Cancel', and 'Send e-mail notification'. The 'Send e-mail notification' checkbox is checked and circled in red. Below the form, a list of system comments is visible, including: 'Kelly Coenen changed Target end date from Dec 31, 2015 to Dec 3, 2015', 'Kelly Coenen changed Responsibility from Monique Rogers to Monique Brickham', 'Kelly Coenen attached document: TZ15-101 WorkZone Training #2', 'Kelly Coenen created a new project: TZ15-101 WorkZone Training #2', and 'Kelly Coenen changed Responsibility from (blank) to Monique Rogers'. All comments are from 'SYSTEM' and dated 'Oct 22, 2015'.

**Testing Zone** Document Manager Project Tracker Reports

### E-mail Comment: TZ15-101 WorkZone Training #2

To:

Cc:

Bcc:

**SUBJECT:** Comment on 'TZ15-101 WorkZone Training #2' project by Monique Brickham

A new comment has been added on the 'TZ15-101 WorkZone Training #2' project by Monique Brickham in the Testing Zone workspace:

"This is where you type your comment."

To comment on this item, click on this email (add a comment about the item) or click [here](#).

Send a blind carbon copy of this email to me.

Click the gray 'To' button and check the box next to the names of whom you'd like to send an email notification. WorkZone will send the comment as an email as well as store it in the project's comments section.

Uncheck 'Send a blind carbon copy of this email to me' if you do not also want to receive an email notification with the comment.

Click the green 'Send' button.

## VIEWING COMMENTS

You can tell a comment has been added because there is now a comment symbol near the project name.

<input type="checkbox"/>	PROJECT / TASK	DESCRIPTION	CATEGORY	RESPONSIBLE	DURATION
<input type="checkbox"/>	<b>TZ15-101 WorkZone Training #2 (Event 12/30)</b> (Target date: Dec 3, 2015)	QTY: 100 TBD SPECS:	Print	Monique Brickham	28.50 days
<input type="checkbox"/>	Project Initiation Form completed			Kelly Coenen	1 day
<input type="checkbox"/>	Approve Timeline or contact Communications. Contact Kerry Lang with mail file criteria if applicable			Monique Brickham	1 day

From the task list, click on the bold project name to get to the Overview tab.

Click the Comments tab to see a list of all the comments that have been added to the project.

**Testing Zone** Document Manager **Project Tracker** Reports

### TZ15-101 WorkZone Training #2 (Event 12/30)

QTY: 100 TBD  
Created by Kelly Coenen on Oct 22, 2015

Overview Files Activity **Comments**

#### Comments: TZ15-101 WorkZone Training #2 (Event 12/30)

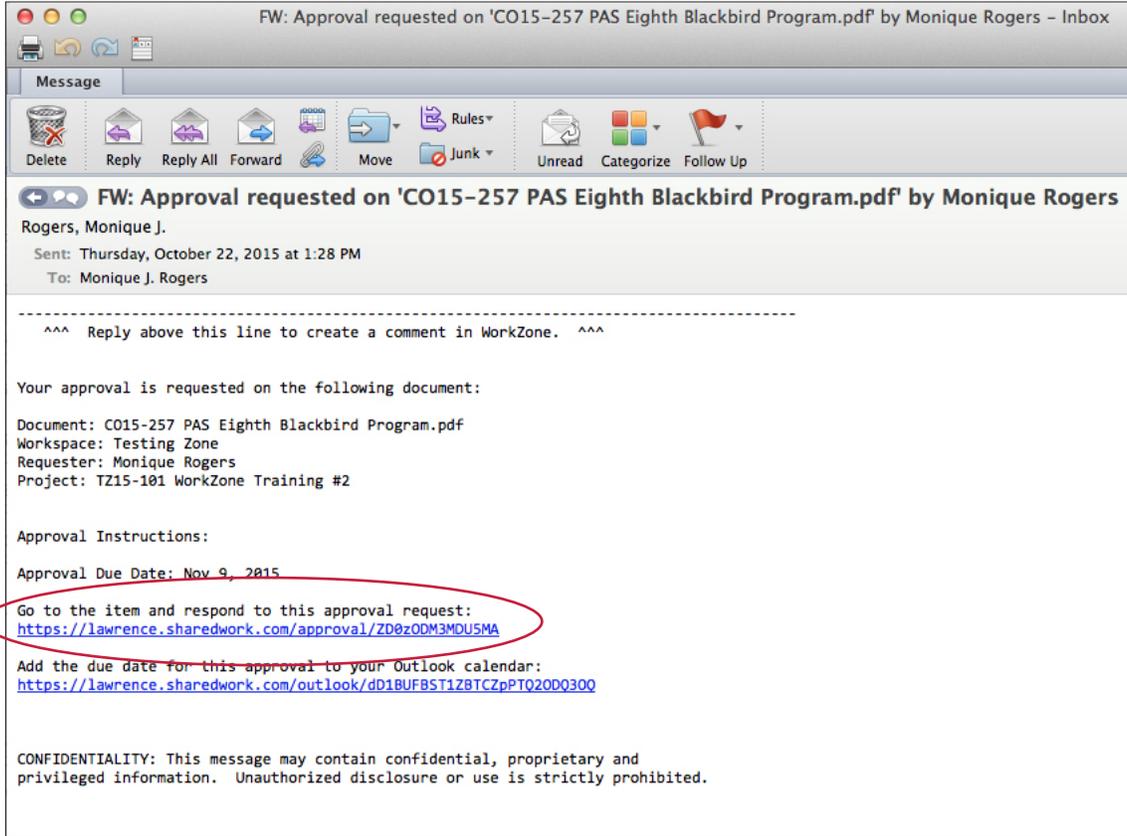
DATE/TIME	ITEM	USER	COMMENT
10/22/15 12:59 PM	TZ15-101 WorkZone Training #2	Monique Brickham	This is where you type your comment.

## LOCATING A PROOF

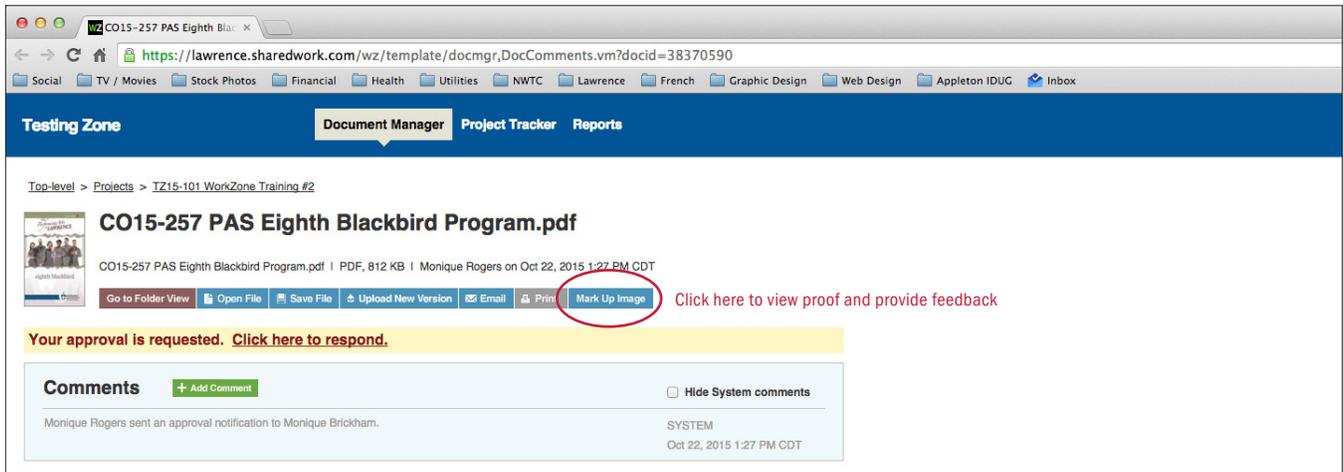
There are two ways to locate a proof in order to review and submit changes or approve.

### 1: Via Email

The client receives an email notification when a proof is uploaded.



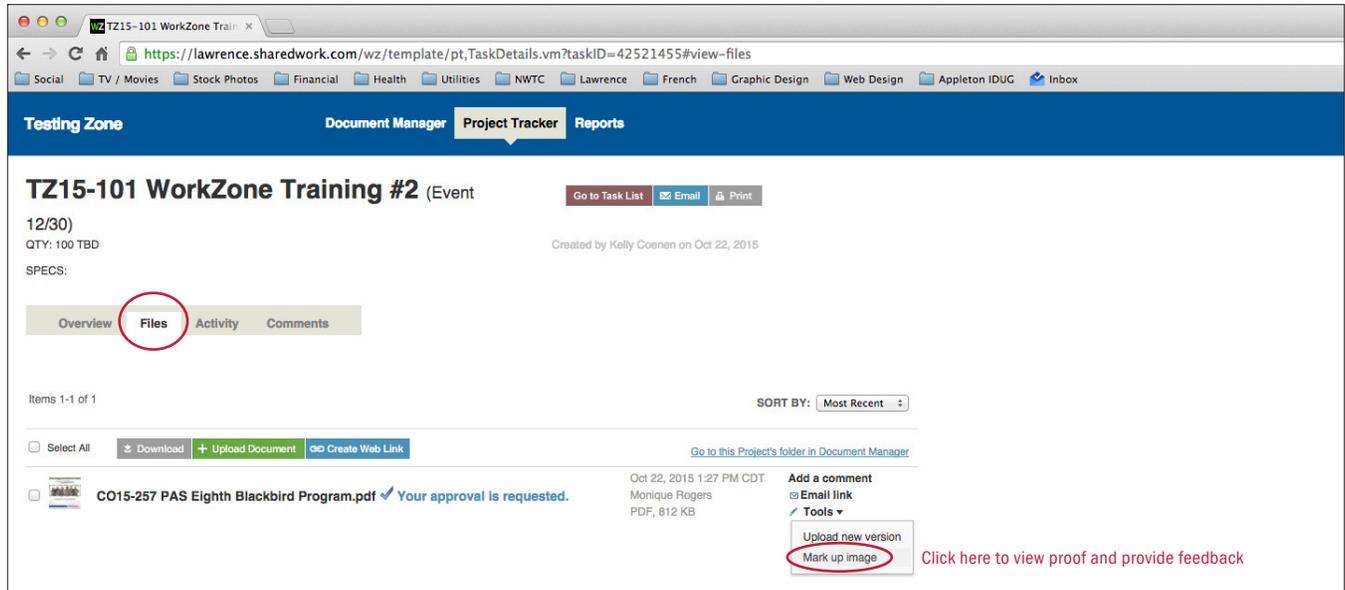
Clicking on the link in the email takes the client to the Document Manager where they can see the proof.



## 2: Via WorkZone

From the task list, click on the bold project name to get to the Overview tab.

Click on the Files tab. The proof will be one of the files in the list. It says 'Your approval is requested' in blue to the right of the file name, but don't click on that ... yet.



## VIEWING A PROOF

There are many ways to interact with a proof in WorkZone. The following instructions describe the workflow process Communications prefers its clients follow.

If you clicked the link in the email and your screen looks like the image on the bottom left of page 8, click the blue 'Mark Up Image' button on the right side of the screen.

If you accessed the proof in WorkZone and your screen looks like the image above, click the Tools drop down menu and select 'Mark up image.'

Either of these methods will get you to the same place, where you can provide feedback.

## MARKING UP AN IMAGE

Click on the page thumbnails on the left to view each page in the proof.

If you have changes, click the green 'Add Markup' button. If you don't have any changes, click the red 'Exit Markup' button and see page 12 for instructions on how to approve a proof.

Drag the red box that appears in the upper left corner of the proof page to the area that the feedback is about.

Type the feedback into the box.

Uncheck the 'Send email notification' checkbox. (Instead of sending a notification for each comment, you'll send one notification during the next step, Not Approving a Proof.)

Click the green 'Save' button.

Repeat as necessary on each page until all feedback is provided.

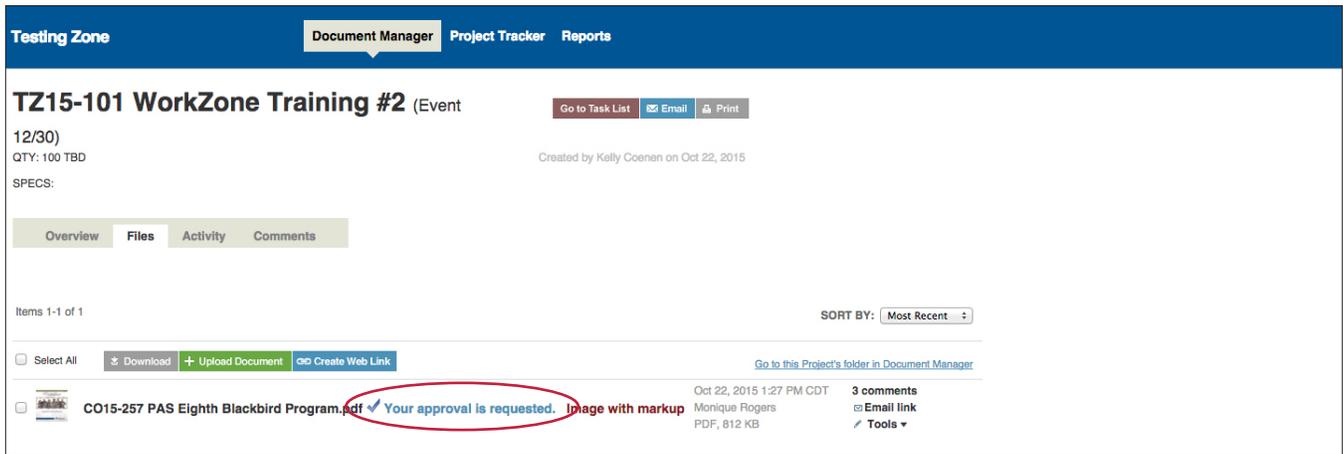
Click the red 'Exit Markup' button.

The screenshot displays a web-based proofing tool. At the top, there's a navigation bar with 'Testing Zone', 'Document Manager', 'Project Tracker', and 'Reports'. The main header reads 'Markup: CO15-257 PAS Eighth Blackbird Program.pdf' with a 'PRINT' icon. Below the header, there are controls for 'Exit Markup' (circled in red), 'Add Markup' (circled in green), 'view original size', and 'Instructions'. A 'hide markup boxes' link is also present. On the left, a vertical strip shows thumbnails for pages 1 through 5, with a 'Pages: 1 - 5 of 8' indicator at the bottom. The central document area shows a poster for 'The Performing Arts at LAWRENCE' featuring a group of performers. A red box highlights a photo of a man, and a dialog box 'Swap to other photo' is open over it, containing 'Save', 'Cancel', and 'Send email notification' options. On the right, a sidebar lists two comments: '1. Monique Brickham on Oct 22, 2015 3:15 PM' with 'Capitalize E' and '2. Monique Brickham on Oct 22, 2015 3:15 PM' with 'Capitalize B'. The footer includes the Lawrence University logo and 'LAWRENCE UNIVERSITY APPLETON, WISCONSIN'.

## NOT APPROVING A PROOF

The client must also not approve the proof after adding feedback in the 'Mark Up Image' area.

After clicking the 'Exit Markup' button, the screen should look like the following:



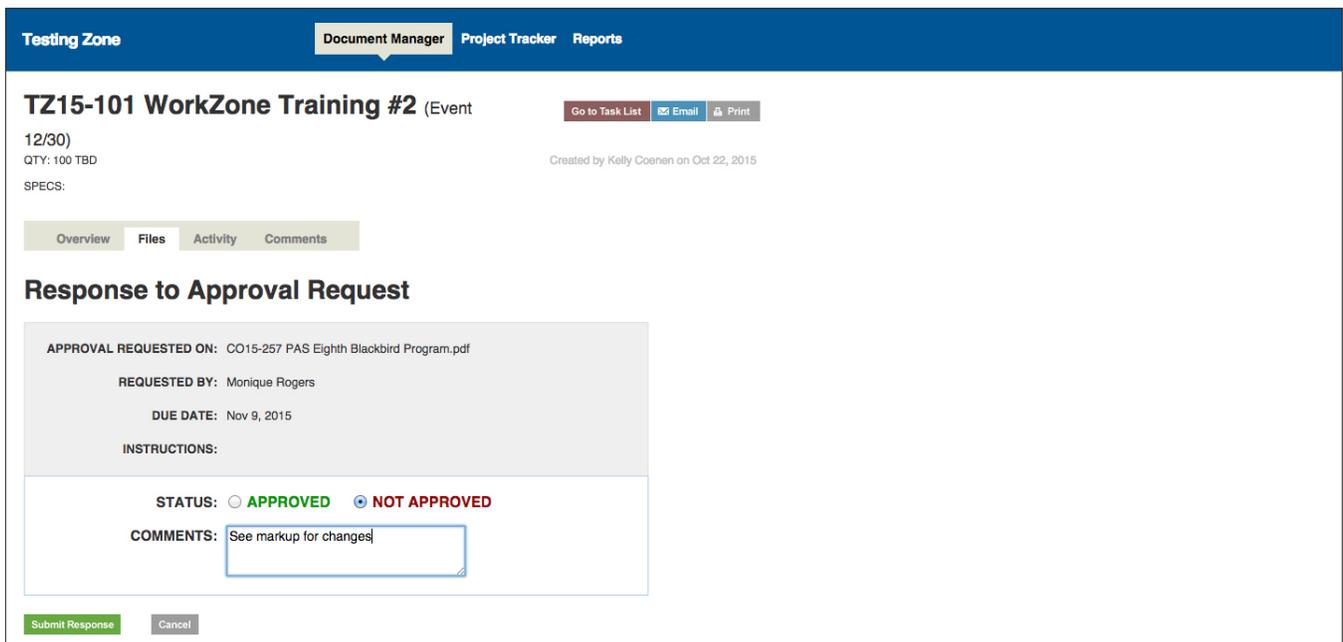
The screenshot shows the 'Document Manager' interface for 'TZ15-101 WorkZone Training #2'. The file 'CO15-257 PAS Eighth Blackbird Program.pdf' is listed with a status of 'Your approval is requested. Image with markup'. The status text is circled in red. The interface includes navigation tabs for 'Overview', 'Files', 'Activity', and 'Comments', and a 'SORT BY: Most Recent' dropdown. Action buttons for 'Select All', 'Download', 'Upload Document', and 'Create Web Link' are visible.

Click 'Your approval is requested.'

Check 'Not Approved.'

Type 'See markup for changes.'

Click the green 'Submit Response' button.



The screenshot shows the 'Response to Approval Request' form. The 'APPROVAL REQUESTED ON' is 'CO15-257 PAS Eighth Blackbird Program.pdf'. The 'REQUESTED BY' is 'Monique Rogers' and the 'DUE DATE' is 'Nov 9, 2015'. The 'INSTRUCTIONS' field is empty. The 'STATUS' is set to 'NOT APPROVED' (selected with a radio button). The 'COMMENTS' field contains the text 'See markup for changes'. The form includes 'Submit Response' and 'Cancel' buttons.

The designer is notified via email that the proof is not approved and changes have been marked up.

Click on the red 'Go to Task List' button near the top right of the screen. Click any black arrows to access task lists for the part of the project for which you just submitted feedback.

Check off 'Client feedback due' on the task list.

## APPROVING A PROOF

If you don't have any changes after viewing the proof and it is approved, click the red 'Exit Markup' button. Your screen should look like this:

The screenshot displays the 'Testing Zone' interface for a project titled 'TZ15-101 WorkZone Training #2'. The document 'CO15-257 PAS Eighth Blackbird Program.pdf' is highlighted with a red circle around the text 'Your approval is requested.' The interface includes a navigation bar with 'Document Manager', 'Project Tracker', and 'Reports'. Below the document title, there are buttons for 'Go to Task List', 'Email', and 'Print'. The document details include '12/30', 'QTY: 100 TBD', and 'Created by Kelly Coenen on Oct 22, 2015'. The document is listed in a table with columns for 'Select All', 'Download', 'Upload Document', 'Create Web Link', 'Go to this Project's folder in Document Manager', 'Date', 'User', 'File Name', 'Size', 'Comments', 'Email link', and 'Tools'. The document 'CO15-257 PAS Eighth Blackbird Program.pdf' is shown with a status of 'Your approval is requested.' and a red circle around this text.

Click 'Your approval is requested.'

Check 'Approved.'

Click the green 'Submit Response' button.

Click on the red 'Go to Task List' button near the top right of the screen. Turn down black arrow(s) to access the task list for the part of the project for which you just submitted feedback.

Check off 'Final approval due' on the task list.

If the project is being printed, contact Kelly to verify final print quantity at this time.

That's it! Your tasks for the project are complete!

## CONTACT INFORMATION

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