WorkZone

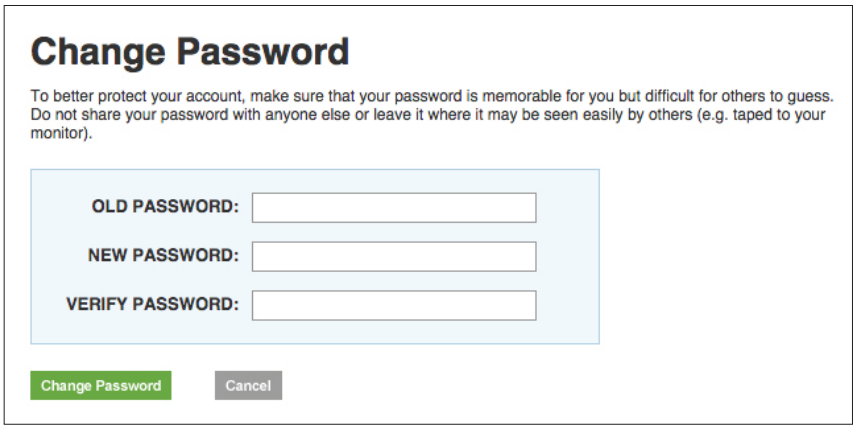
INSTRUCTION MANUAL

LAWRENCE UNIVERSITY
APPLETON, WISCONSIN

LOGGING IN TO WORKZONE

https://lawrence.sharedwork.com

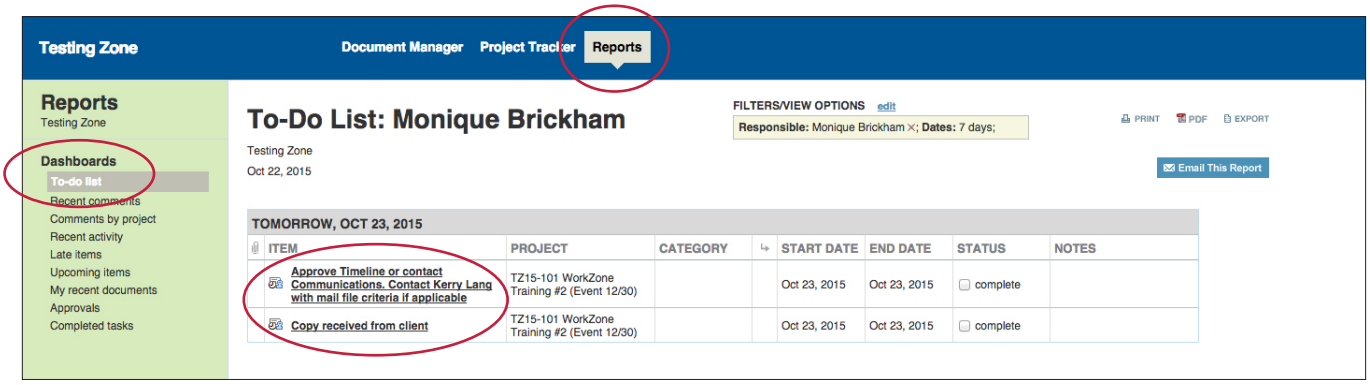
After your account is created, you will receive an initial email from WorkZone with the link, your email address and a temporary password. Click on the link to log into WorkZone.
You will be prompted to change your password right away.



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.



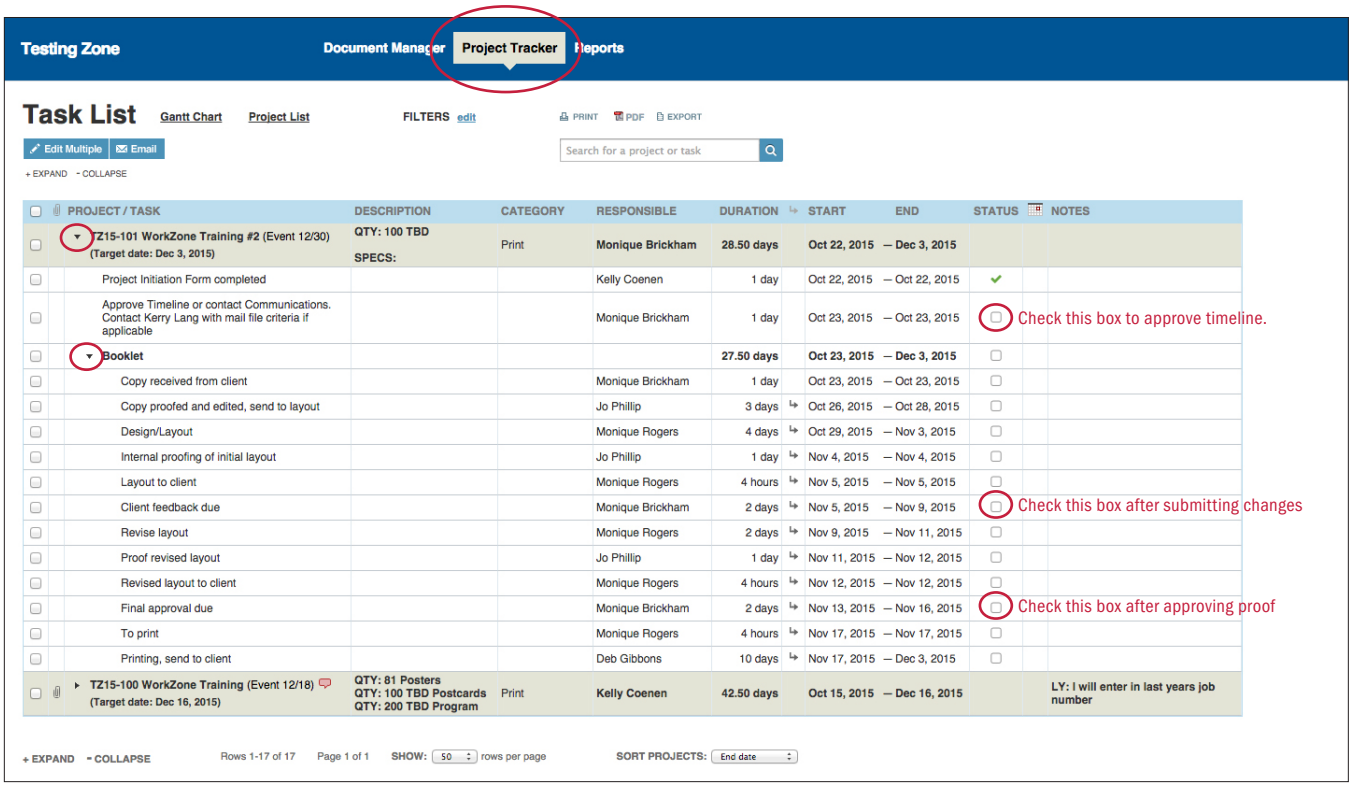
The to-do list is found under 'Reports' at the top of the screen, and then by clicking 'To-do list' under 'Dashboards' on the left side of the screen. The resulting list is organized by project status: late = red, current = yellow, future = gray, and within each project status by date.

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'.



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.

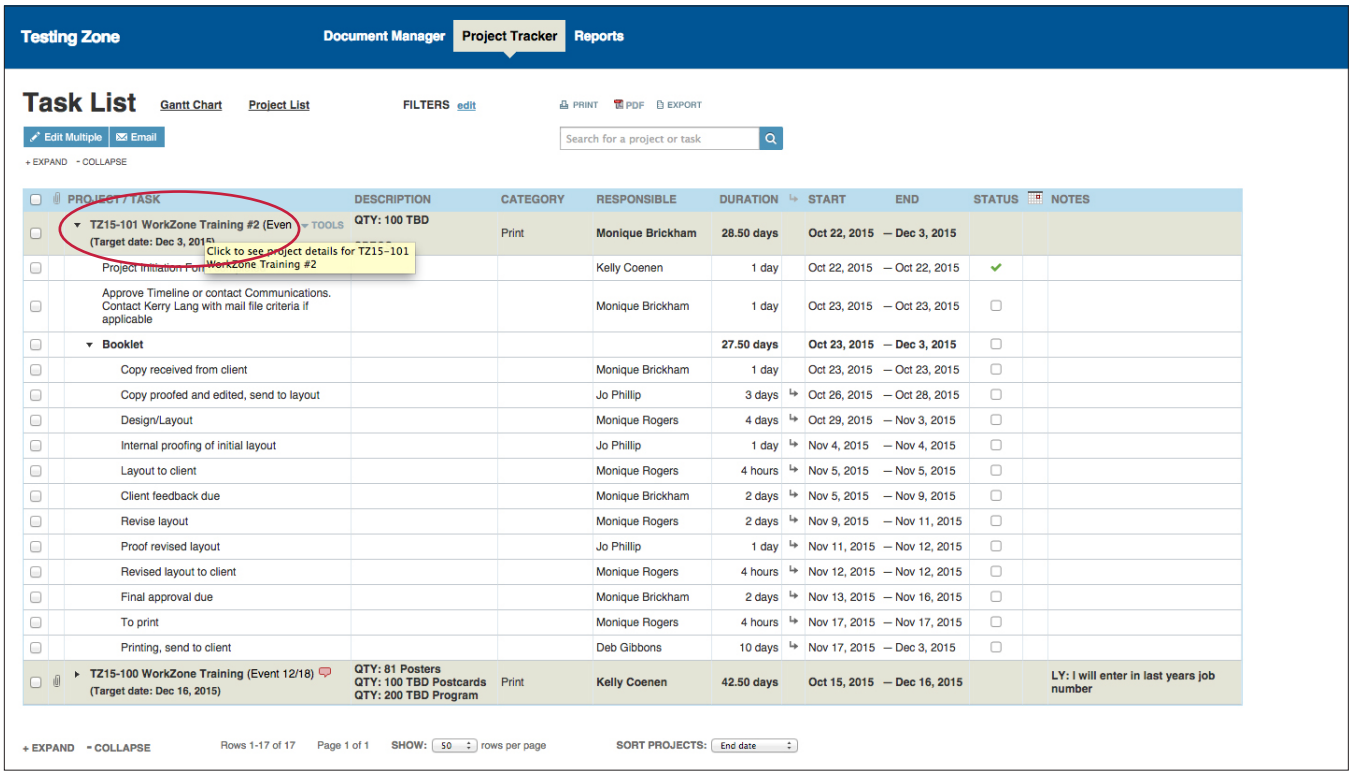
As the client, you will review the proof in WorkZone and either approve it or submit changes. It's very important for each client to check the box next to 'Client feedback due' and 'Final approval due' on the task list so the next person on the task list is notified that feedback or approval has been 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.

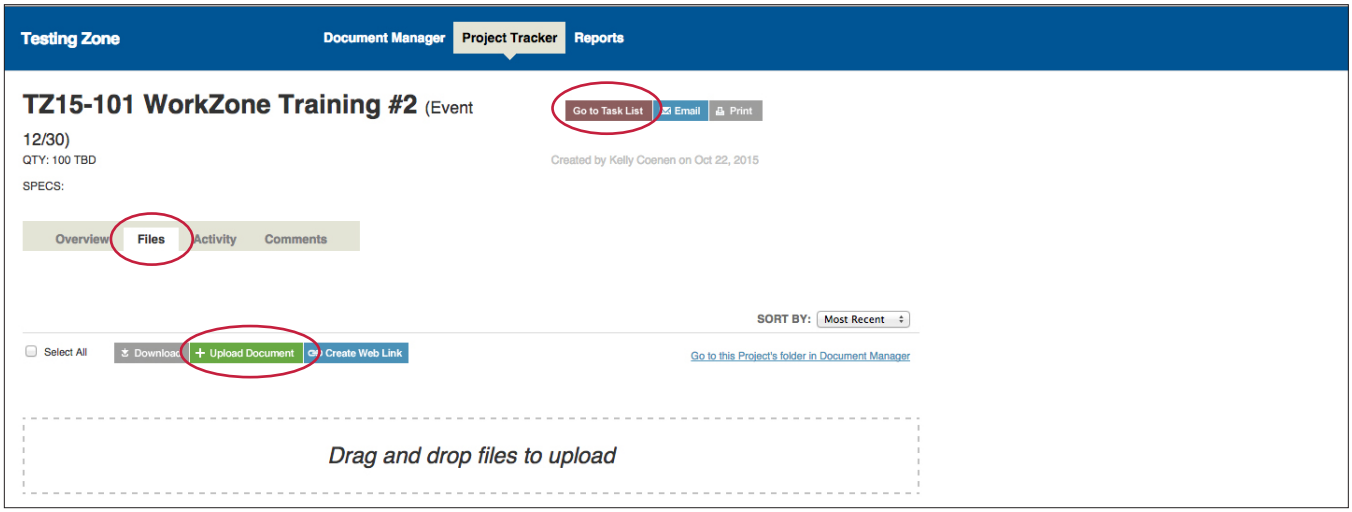
If the project is being printed, the client must verify final print quantity with Kelly at the time of final approval. After the project is printed, the print shop sends the prints to the client or to the mail room as indicated on the PIF.

UPLOADING COPY AND IMAGES

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



Click on the Files tab.



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.

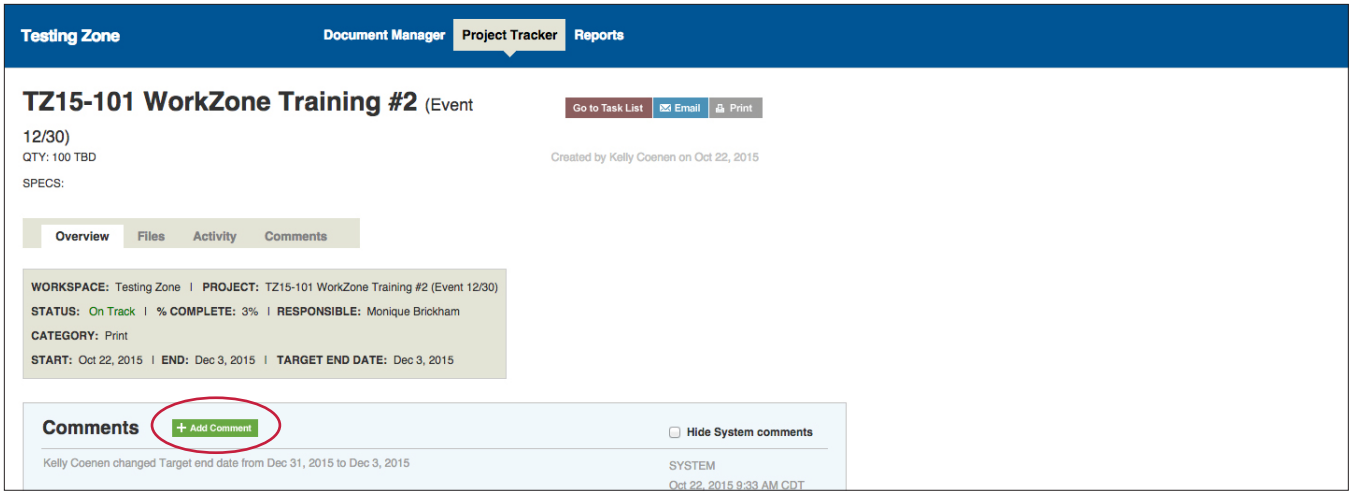
Turn down any black arrows to access the task list for the part of the project you just uploaded content for. Check off 'Copy received from client' on the task list.

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.

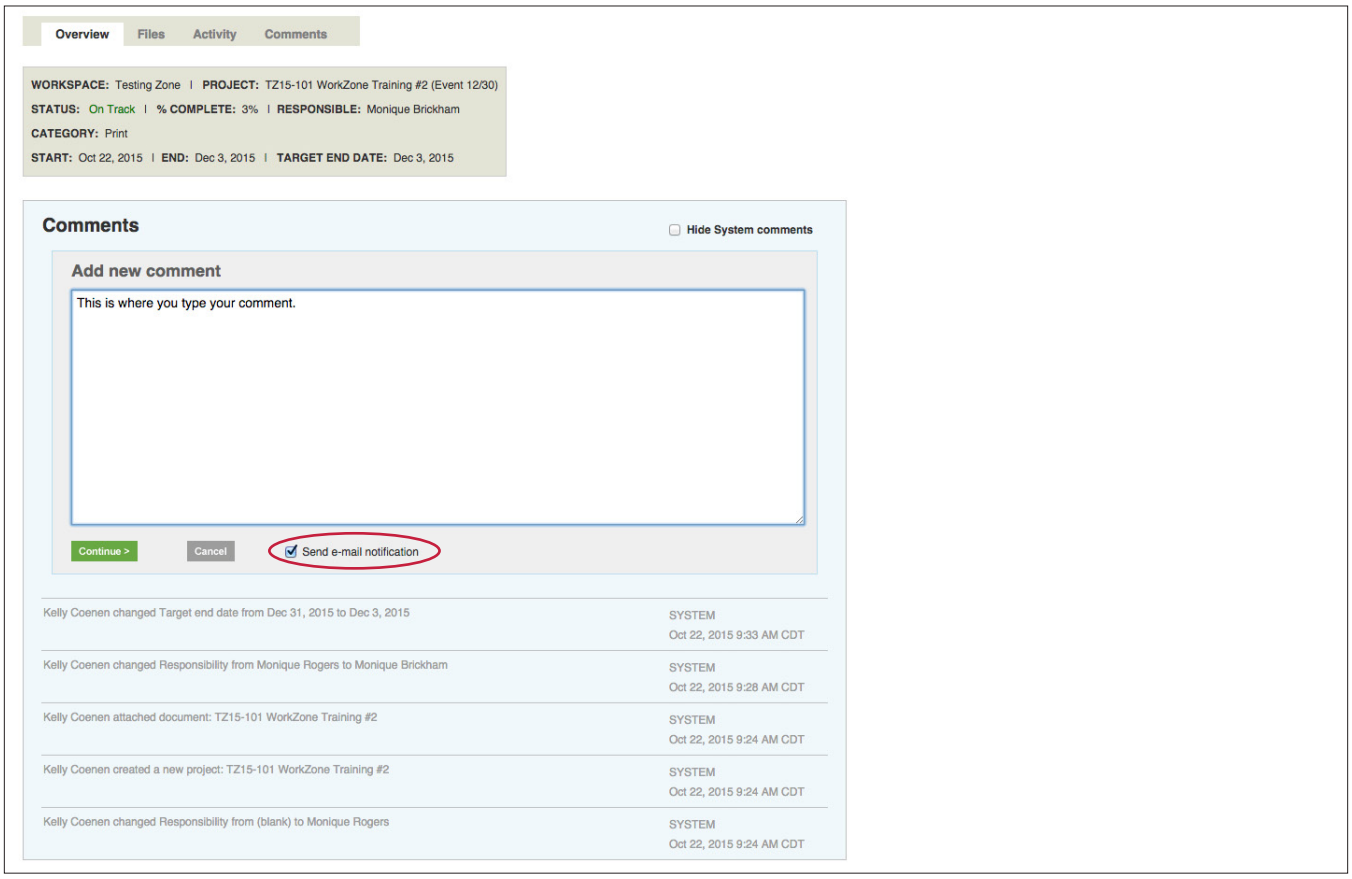
From the task list, click on the bold project name to get to the Overview tab.

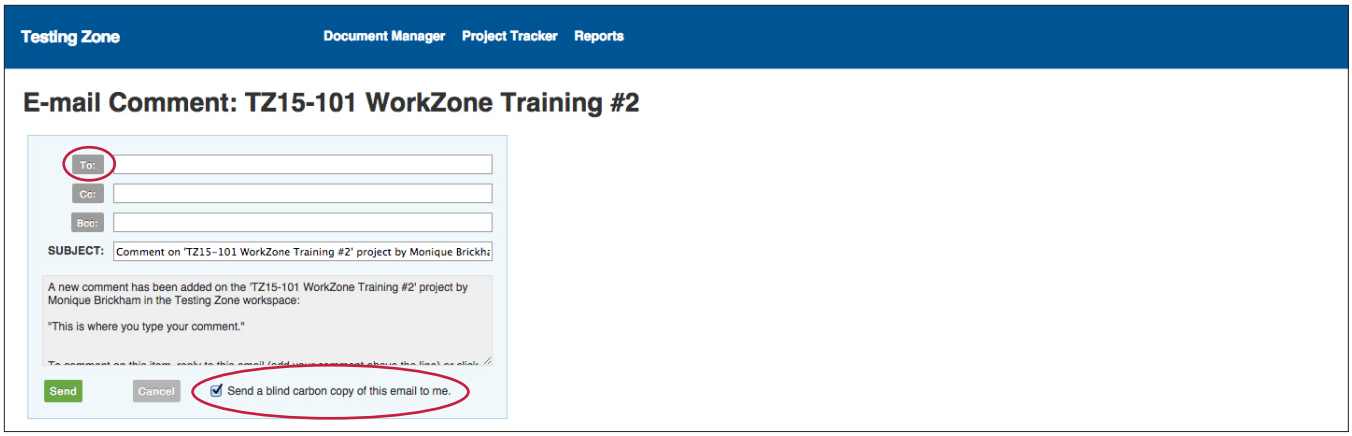
Click the green 'Add Comment' button.



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

Click the green 'Continue' button.





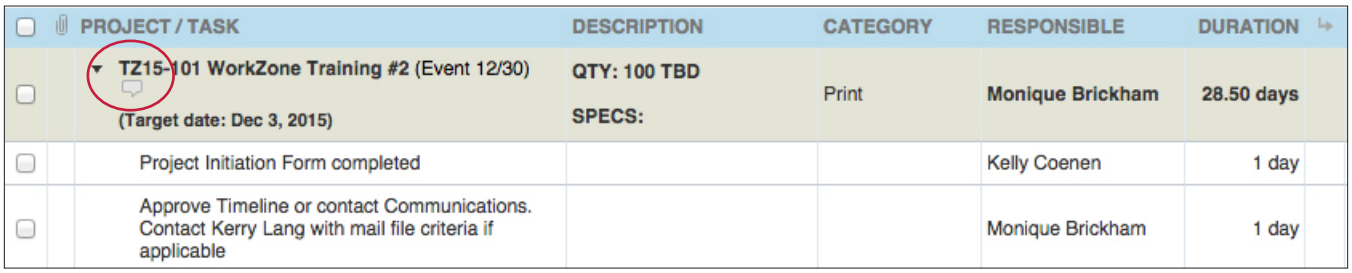
Click the gray 'To' button and check the box next to the names of whom you'd like to send an email notification. WorkZone will send the comment as an email as well as store it in the project's comments section.

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.

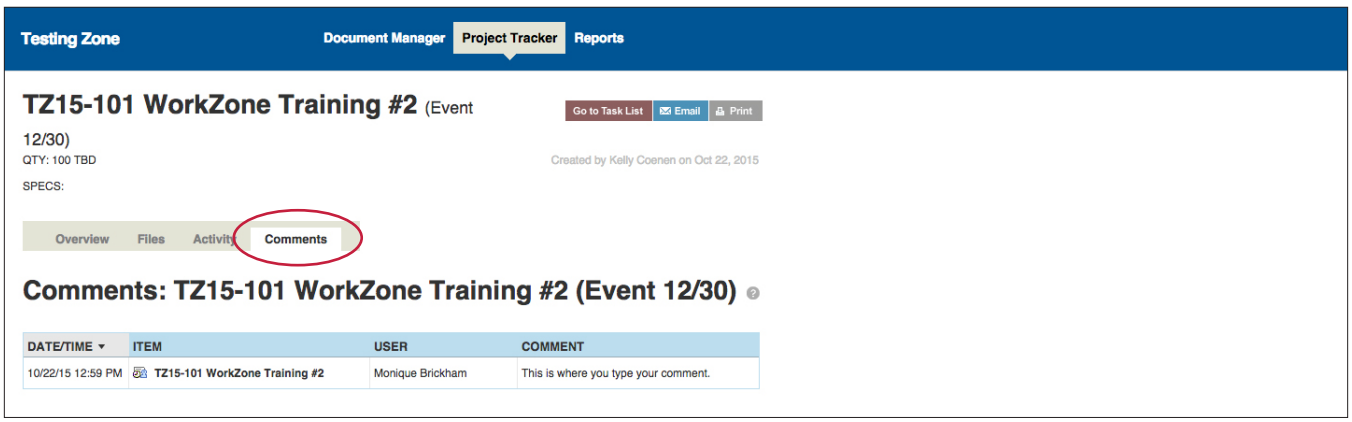
VIEWING COMMENTS

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



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.

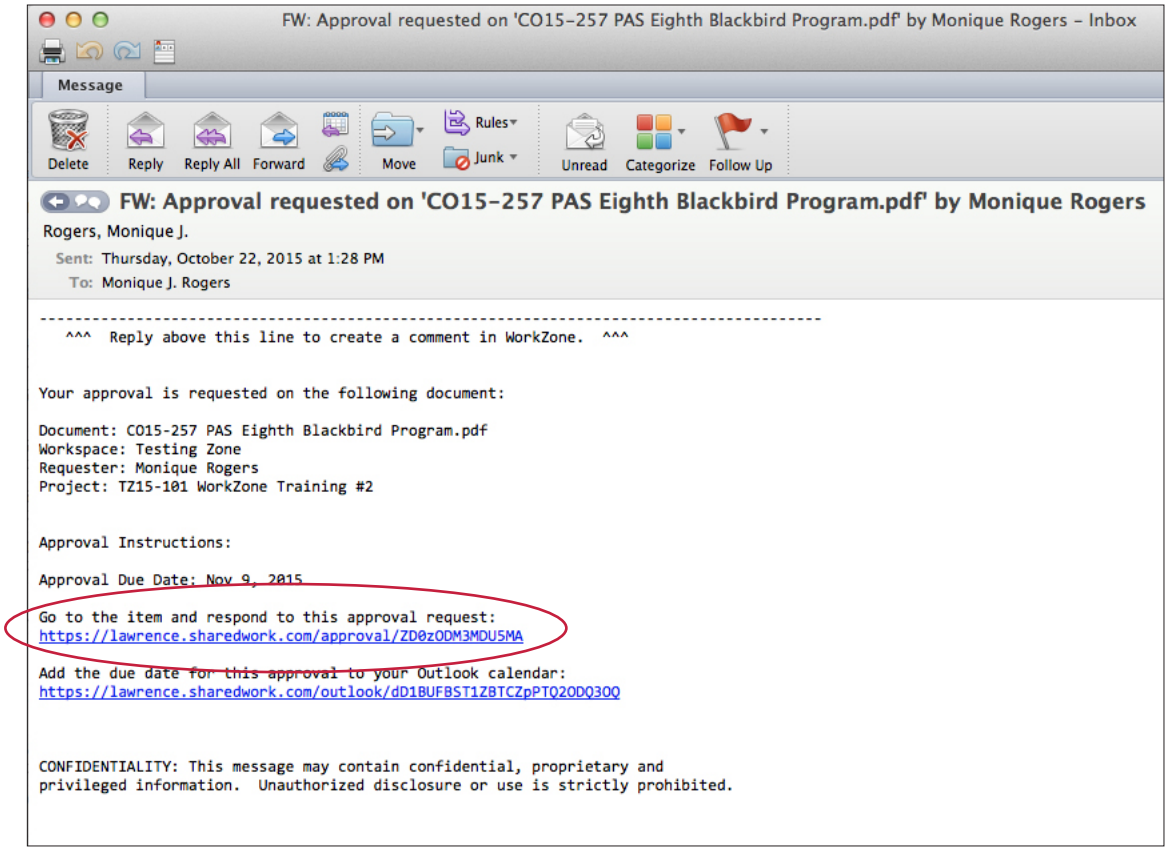


LOCATING A PROOF

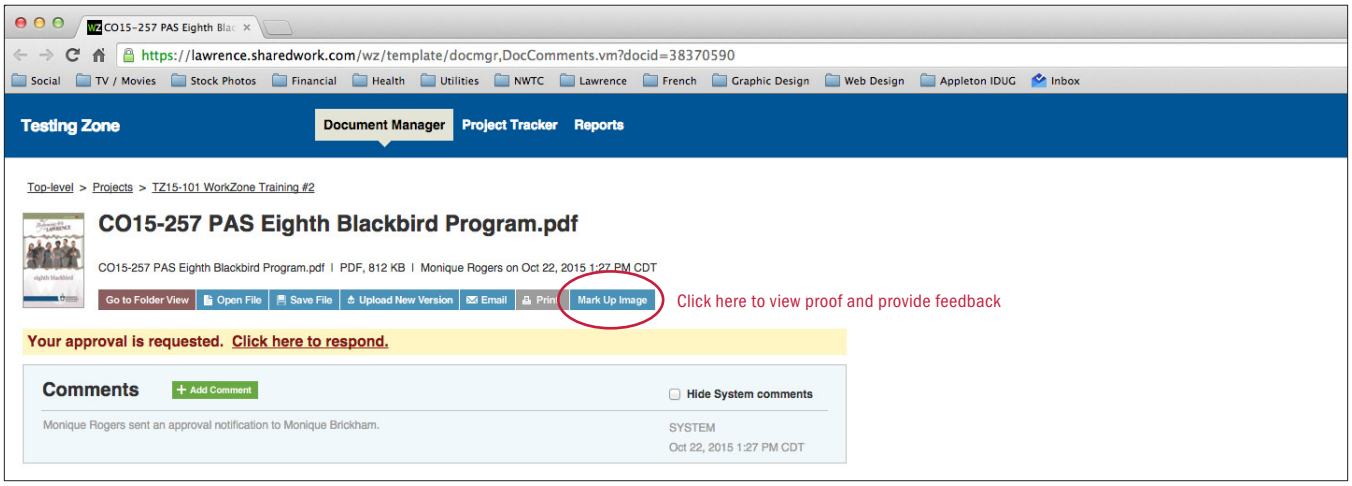
There are two ways to locate a proof in order to review and submit changes or approve.

1: Via Email

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



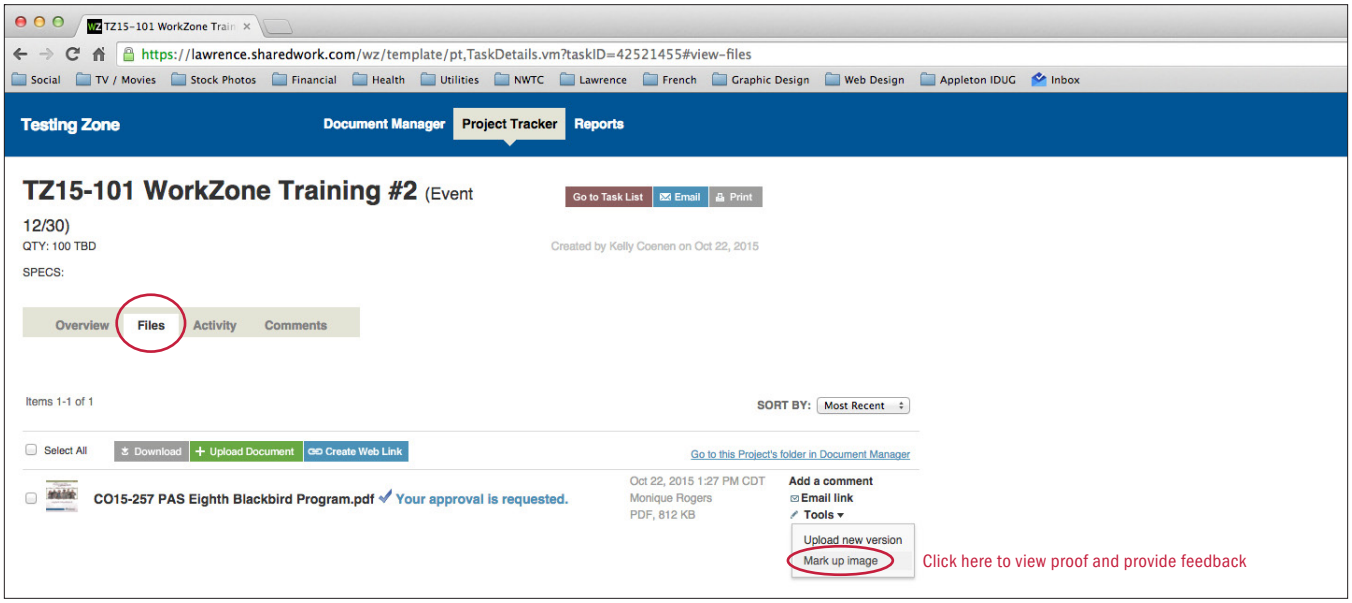
Clicking on the link in the email takes the client to the Document Manager where they can see the proof.



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.

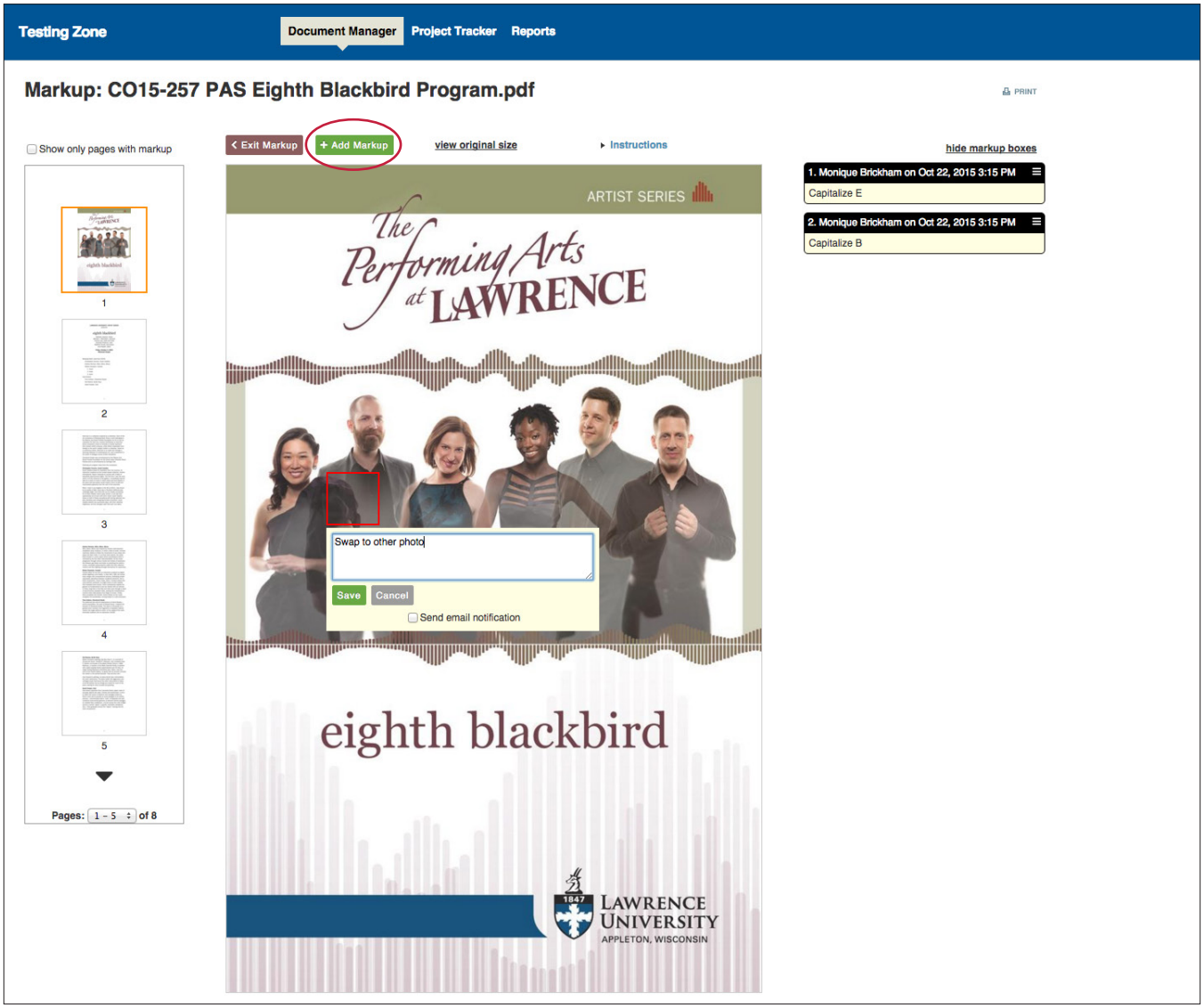
Type the feedback into the box.

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.

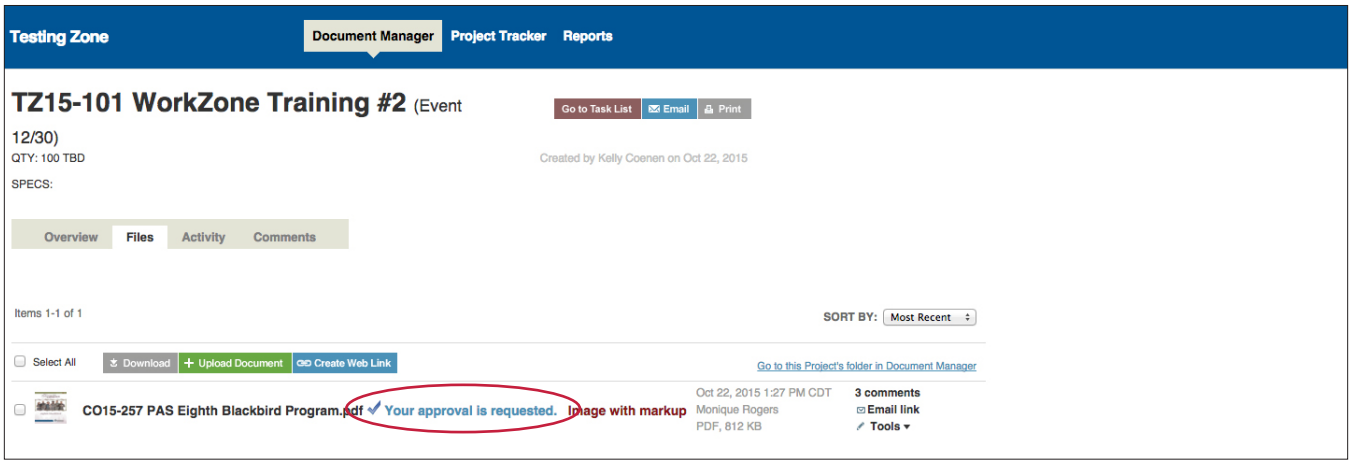
Click the red ‘Exit Markup’ button.



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:

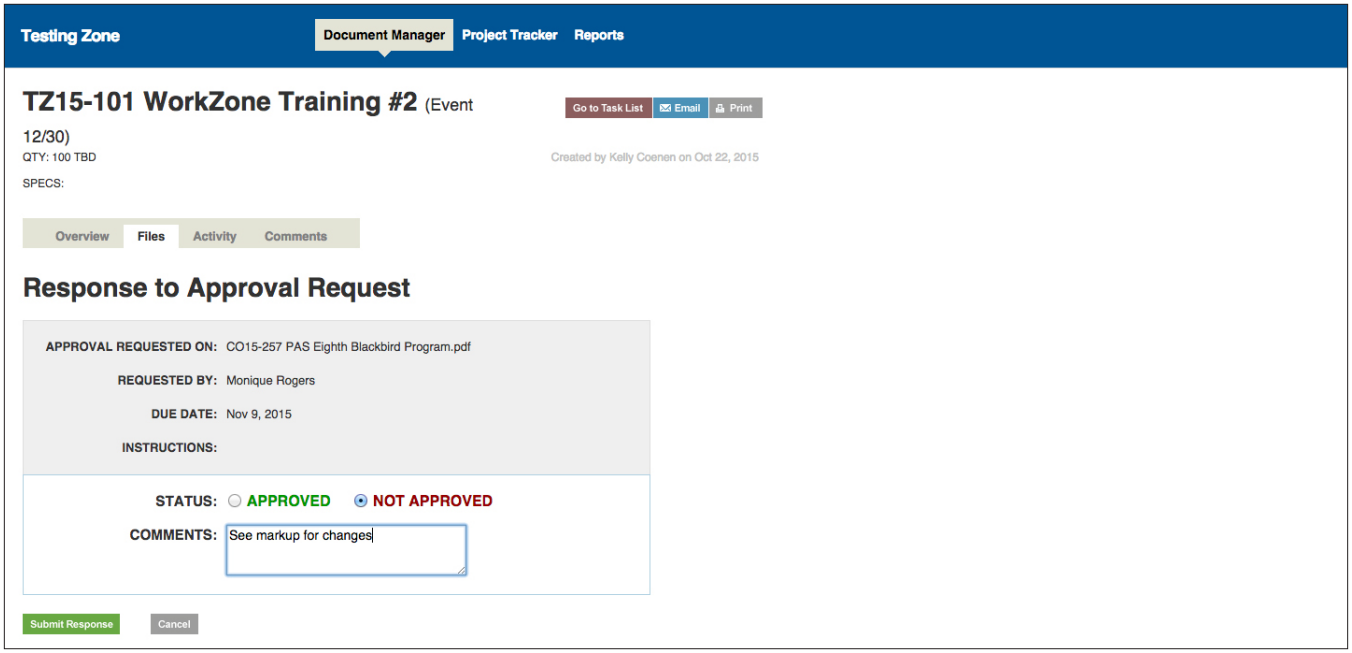


Click 'Your approval is requested.'

Check 'Not Approved.'

Type 'See markup for changes.'

Click the green 'Submit Response' button.



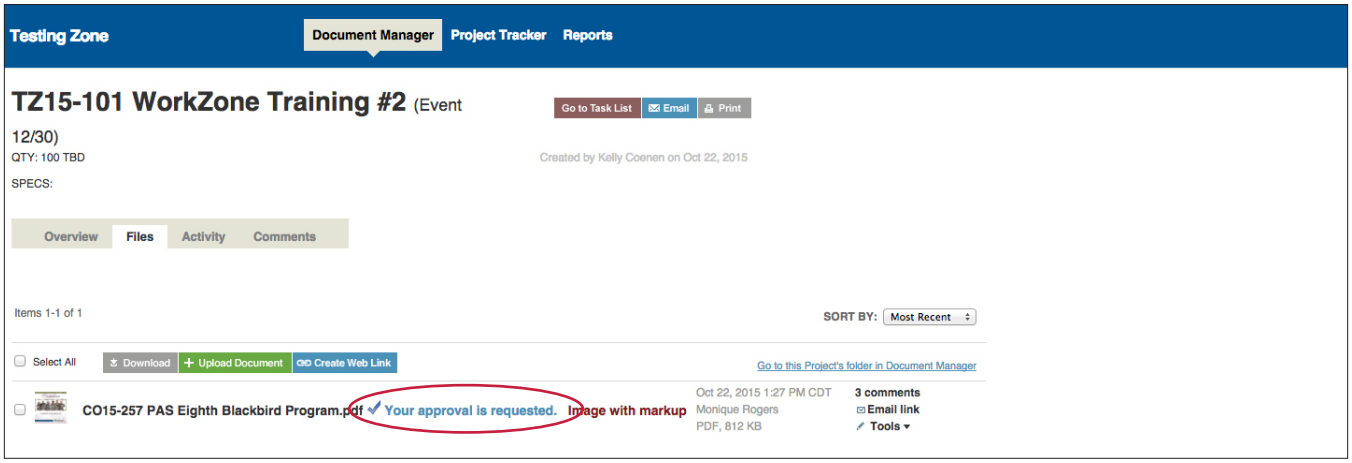
The designer is notified via email that the proof is not approved and changes have been marked up.

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:



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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