



Quick Start Guide for Client Users Document Manager

Logging in to WorkZone

To log in to your WorkZone, go to:

<https://companyname.sharedwork.com>

(substitute your company name where it says “companyname” in the URL. With most browsers, you don’t need to type https://). Please contact your WorkZone administrator if you’re not sure of the exact URL for your company.

Hint: After you first log into WorkZone, click the “remember me” box and bookmark the opening page as a “favorite” in your web browser. This will allow you to have the system log you in automatically simply by clicking on the bookmark link.

Viewing Documents


To view a document:

- Click on the folders on the left hand side of the screen. Folders with a “▶” have subfolders inside. The contents of folders will be seen in the right panel.
- To open a file, click on its icon or underlined title.


To view comments on a document:

- Click to open a folder and reveal documents.
- Click the **Comments** or **Add a Comment** link to the right of the document.
- A new window will open. Comments appear in the bottom half of the new window, with access to the document in the top half.

To post a new comment to a document:

- Click the  button below the document icon. A window will appear with a space to write your comment. Please note that once posted, comments cannot be edited or deleted. If you choose, WorkZone will automatically e-mail the comment to other users that you choose. If you would prefer not to send an e-mail, uncheck the e-mail box prior to clicking continue.
- Click **Continue**.
- Select e-mail recipients
- Click **Continue** to post the comment and send email notifications.

Save a document to your hard drive or network

- Check the box to the left of the document(s) you wish to save.
- Click  from the header above.
- In the file download box, specify the location and file name.
- Click **Save**.
- If you have selected multiple files, a zip file containing all the files will be downloaded to your computer.

Creating a New Folder (Client Uploads folder only)

To help you organize your documents, you may want to make sub-folders to the main Client Uploads folder.

To add a folder to Client Upload:

- a. Click on the **Client Uploads** folder on the left menu. A new section appears on the right side of your screen.
- b. Click on the **+ Create Folder** button in the top navigation. Type in a name for the folder (e.g., "Schedules") and a description of the folder's contents.
- c. Click **Continue**, and the folder is created.

Adding a New Document (Client Uploads folder only)

Adding a new document to WorkZone is similar to attaching a file to an e-mail message. Once inside the folder where you want to place the document:

Click on the **+ Upload Document** button.

- a. To upload (attach) the file, click on the **Browse** button to bring up a list of the files on your computer's hard drive or company server. Double click on the appropriate file, just as you would to attach a file to an e-mail message.
- b. Type in the Document Name and a Description. The Document Name can be anything that you want; it does not need to match the original file name when the document was created. [If you do not specify a Document Name, it will use the file name as the Document Name.] The optional Description can be tailored to the specifics of the document (e.g., "This version includes the actual copy for the magazine ad" or "Header has been changed to blue as discussed").
- c. There will be a checkbox that allows you to send an email notification to other users. Click the **To:** button to reveal a list of users and select those who should receive the email. Edit the message text as necessary. If you leave the **Send e-mail** box unchecked, the upload process will continue as normal, without sending an e-mail.
- d. Click **Continue**. A progress bar will appear. *Please note that due to the nature of the internet, uploading large files may take a few minutes.*

Any type of file can be loaded. File names must end with the appropriate suffix for its program (e.g., .doc, .pdf, .xls) in order to be recognized.

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