

## Document Manager Quick Start Guide

This Quick Start Guide covers the basics of getting started with Document Manager. For more details on Document Manager, Project Tracker or any other aspect of WorkZone, view the online help guides, accessible by clicking "Help" at the top right of the screen within WorkZone. **Or for help of any kind, contact WorkZone Customer Support at 610-275-9861 or help@workzone.com.**

Document Manager allows you to organize, share and collaborate on the documents associated with your projects. All project files are organized in a central location, accessible via the web, with flexible levels of access to permit each team member to see those folders and files appropriate to their role on the project.

### Loading New Content into a Workspace

From the **switch workspace** drop-down menu in the upper left, choose a workspace. Select **Document Manager** from the top navigation. To the left you'll be presented with the list of top-level folders into which you can place work. WorkZone provides a default set of top-level folders that work well for most client-service situations. [See the online users guide for descriptions of the intended uses for the default top-level folders.] They can be modified, as needed, by an Administrator or Account Manager (under **Setup – Settings - This Workspace - Top-level folders**) to better suit your needs. These are the same folders that the client user sees when they access WorkZone (other than any gray folders, which are not visible to client users).

### Creating a New Folder

To better organize your documents, you will want to create sub-folders inside your top-level folders.

To add a folder:

1. Click on the folder on the left menu. A new section appears on the right side of your screen.
2. Click on the **+ Create Folder** button. Type in a name for the folder (e.g., "Project #1") and a description of the folder's contents.
3. If you wish to restrict which users will have access to this folder, click on the **Locked** checkbox (a user list will appear on the following page).
4. Click **Create Folder**.

### Adding a New Document

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

1. Click on the **+ Upload Document** button.
2. 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. Any type of file can be loaded to WorkZone. File names must end with the appropriate suffix for its program (e.g., .doc, .pdf, .xls) in order to be recognized. **Note:** if you zip folders and documents on your computer and upload the .zip file, WorkZone will give you the option of automatically extracting the .zip file into WorkZone, a great way to load multiple folders and documents quickly.
3. 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, WorkZone 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").
4. You can send an email notification to WorkZone users that will provide a hyperlink that will take them directly to the document you are loading. Check the **Send e-mail notification** box. After the document uploads, click the **To:** button to reveal a list of users. Select the users who should receive the email



notification. Edit the default message, as desired. If you leave the **Send e-mail** box unchecked, the upload process will continue as normal, without sending an email.

5. If you wish to select which users will have access to this document, click on the **Locked** checkbox (a user list will appear on the following page).
6. Click **Upload**, and the document will load. A progress bar will appear. *Please note that due to the nature of the internet, uploading large files may take a few minutes.*

### Adding a Link to a Website

WorkZone allows users to view websites via a link within WorkZone, in the same location as other documents.


To create a link to a website, click to open the folder where you would like the link to appear. Click the

 button. In the **Upload a New Document** window, click the  button at the top right. Fill in the Site Name, a brief description, and the Internet URL of the site (i.e., http://www.yoursite.com). If you wish, you can also upload a thumbnail image that will be displayed next to the link. Click **Create Web Link**, and the link will be added inside your folder.

### Document Comments

Each file in WorkZone has an associated comment list, which can be a great place to capture comments and discussions among team members about that document, rather than simply using email, where comments can get lost among non-project emails. The comments list is also a great place to record notes from emails and conversations that occur outside of WorkZone, so that they are available to the entire team in a central location.


#### **To add a comment to a document:**

When looking at a list of files within a folder in Document Manager, click on **Add a Comment** to the right of the document. A new window will appear with the document name and icon (or thumbnail). Click the  button. A window will appear with a space to write your comment. Please note that once posted, comments cannot be edited and can be deleted only by an Administrator. WorkZone will automatically e-mail the comment to all users that you have selected. (If you would prefer to not send an e-mail, uncheck the **Send e-mail notification** box prior to clicking continue.) Click **Continue** to post the comment and choose the users to whom the e-mail should be sent.

### Document Approvals

WorkZone allows you to request an approval or signoff from other WorkZone users for a particular document. WorkZone automatically generates an email to send to each approver, who can then indicate his or her approval/disapproval and make comments.

#### **To request an approval on a document:**

When looking at a list of files within a folder in Document Manager, click on **Add a Comment** to the right of the document. Click the  button at the top of the comment log. The "Request Document Approval" window will appear. Select the approvers, due date and instructions, and then click **Continue**. WorkZone will generate an email to the approvers (which you can edit), with a link to the document needing approval. Also included is a link that allows Microsoft Outlook users to add your approval deadline to their own Outlook calendar.

WorkZone can automatically notify specified users whenever someone responds to an approval request. The status of outstanding approvals is reflected in the **Approvals Dashboard**, accessed on the left menu of the Document Manager folder tree. If a document is out for approval, a light blue "Out for approval" notice will show next to the document in Document Manager.

WorkZone can also send an email reminder when an approval becomes late. When enabled, the email notification will be sent to the approver, as well as the task creator. To activate auto-notifications for a specific workspace, go to **Setup – Settings – This Workspace - Auto notification**, and selected the desired auto-notifications.

*Revised October 10, 2009*