WMJ Quick Start Guide for Marketing Users
Platinum Version
July 2017

Workamajig (WMJ) is our project management system. This guide will provide an overview of WMJ Platinum. Please see the topics and page numbers below.

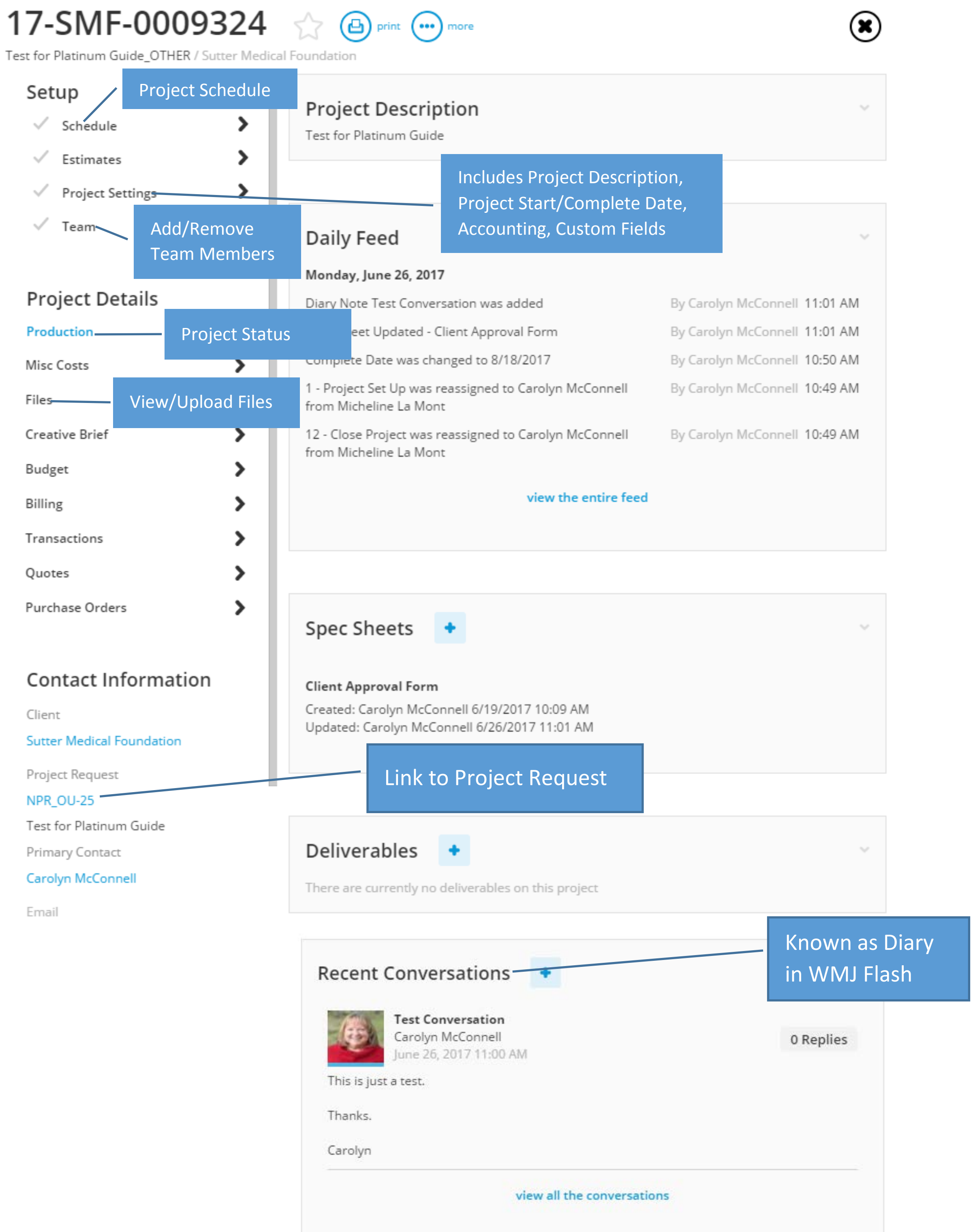
How do I log into WMJ Platinum?

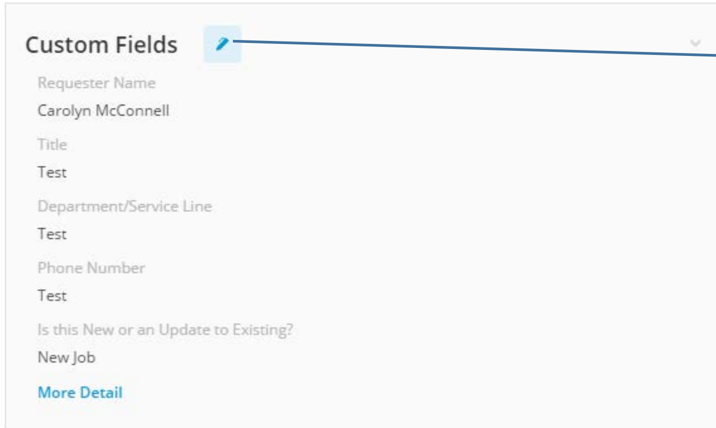
https://app18.workamajig.com/platinum

To log into WMJ, enter your full email address and password.

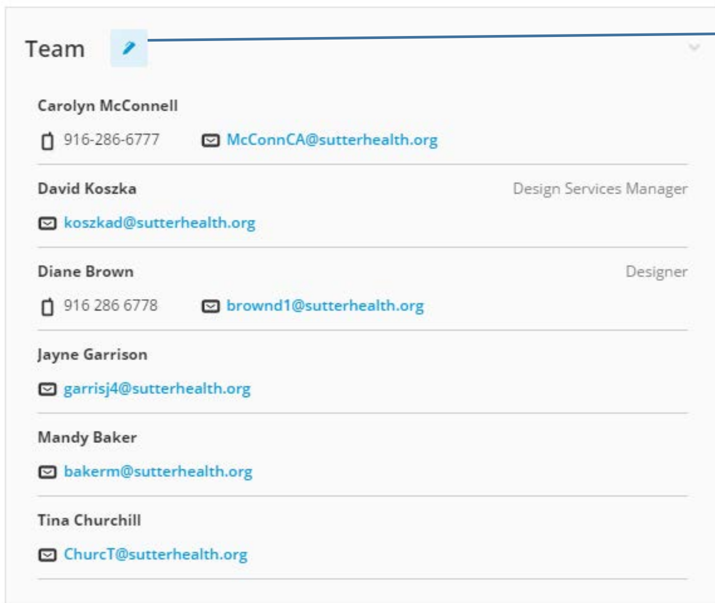
If you need to have a WMJ account created or have problems with your login, please contact Nathan Lintner at LintneN@sutterhealth.org or call 916-286-6534.

Where do I find the areas we use most in a Project?



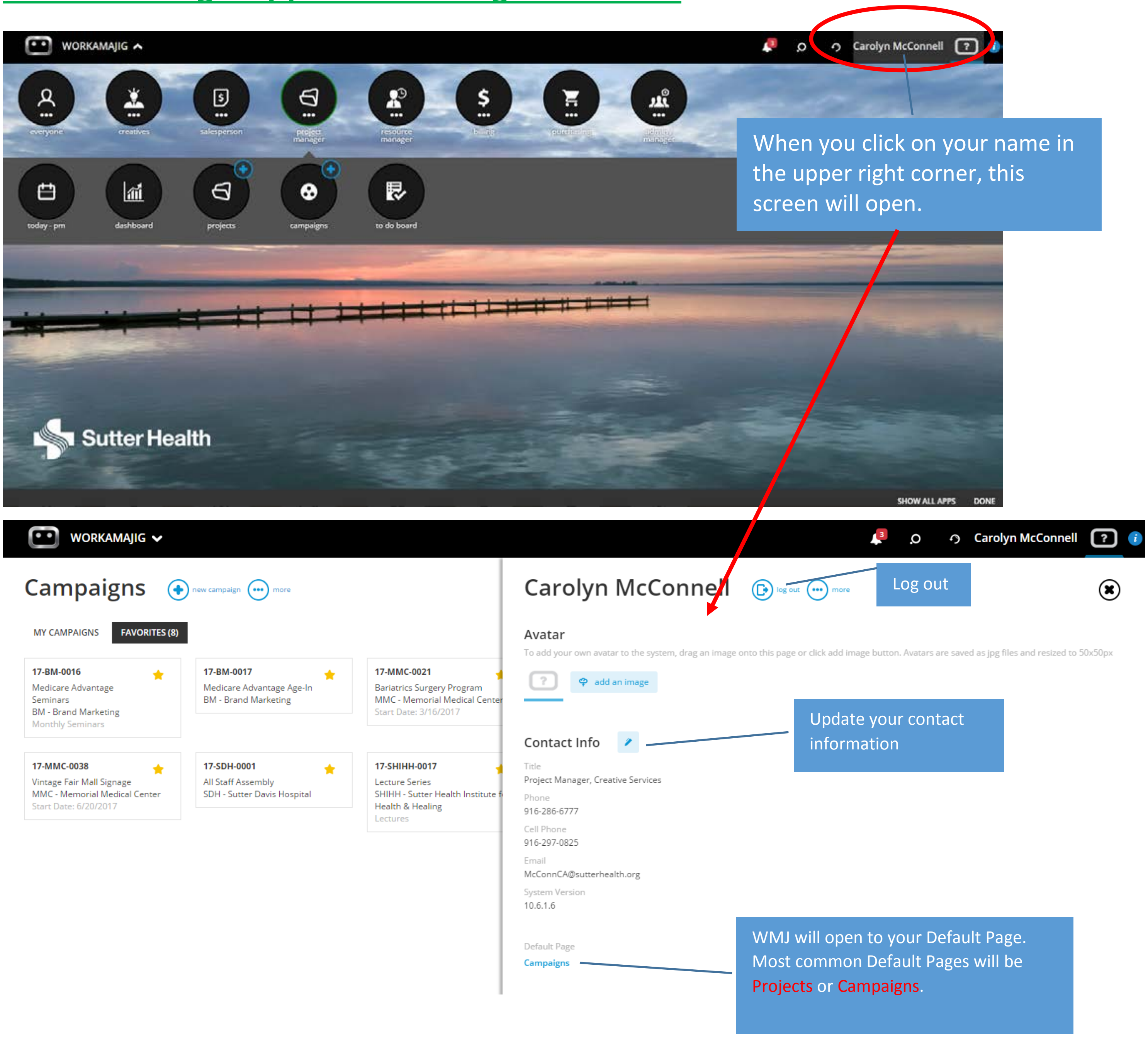


Also can be found in Setup>Project Settings> Custom Fields



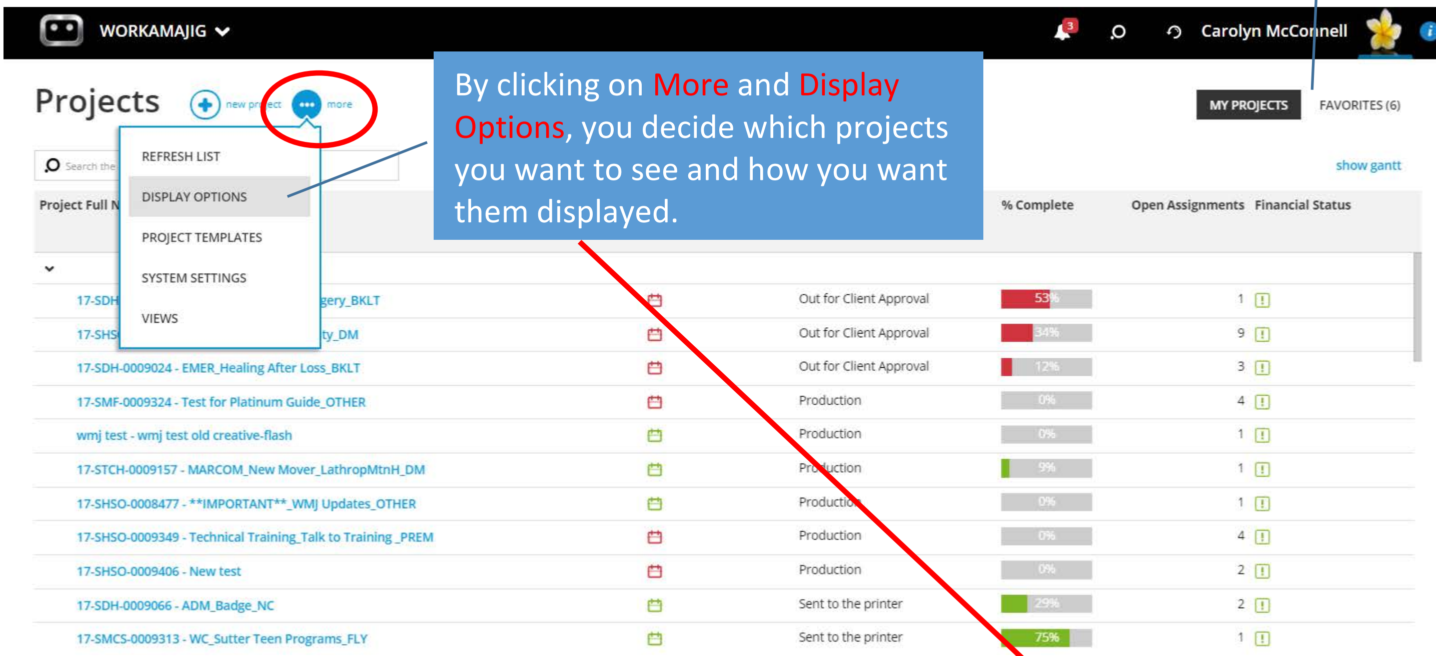
Team can also be found under Setup>Team

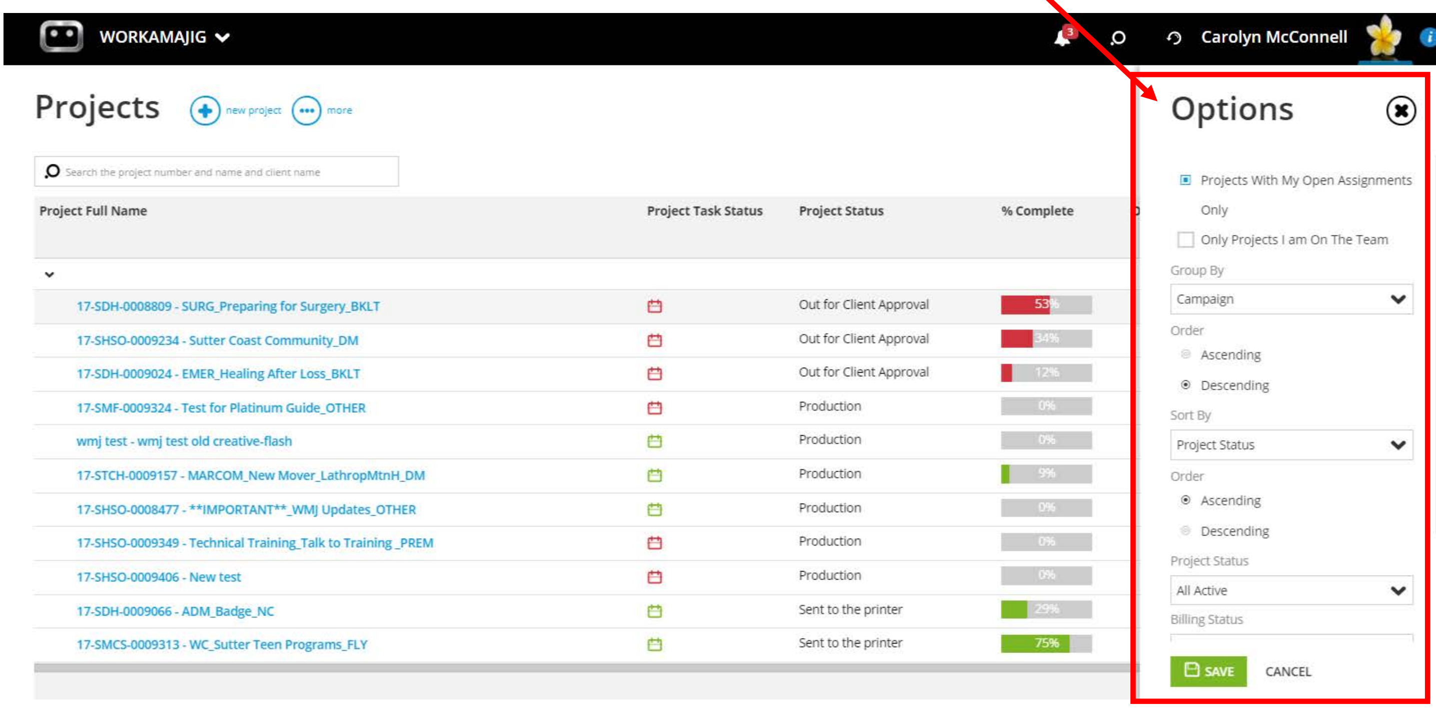
How do I change my personal settings and views?

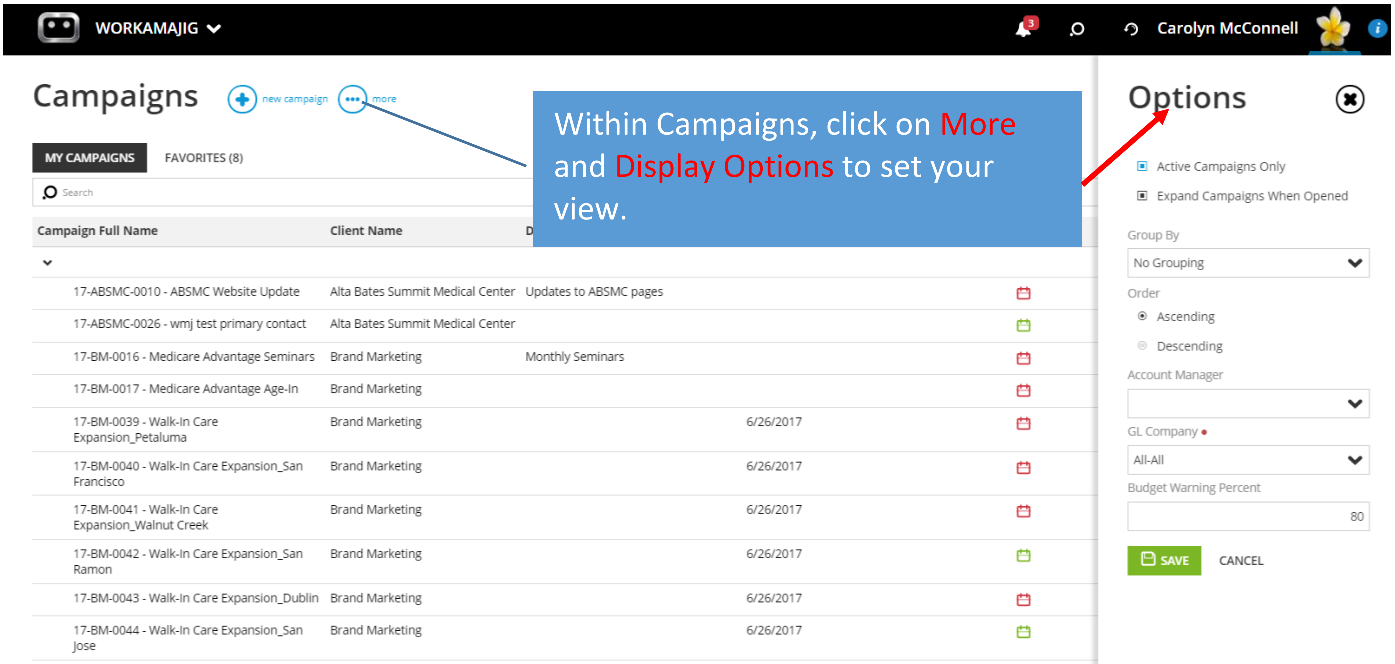


In a project, you can click on the star in the upper left corner to make it a favorite. Click on the My Projects tab to see all your projects or click on Favorites.

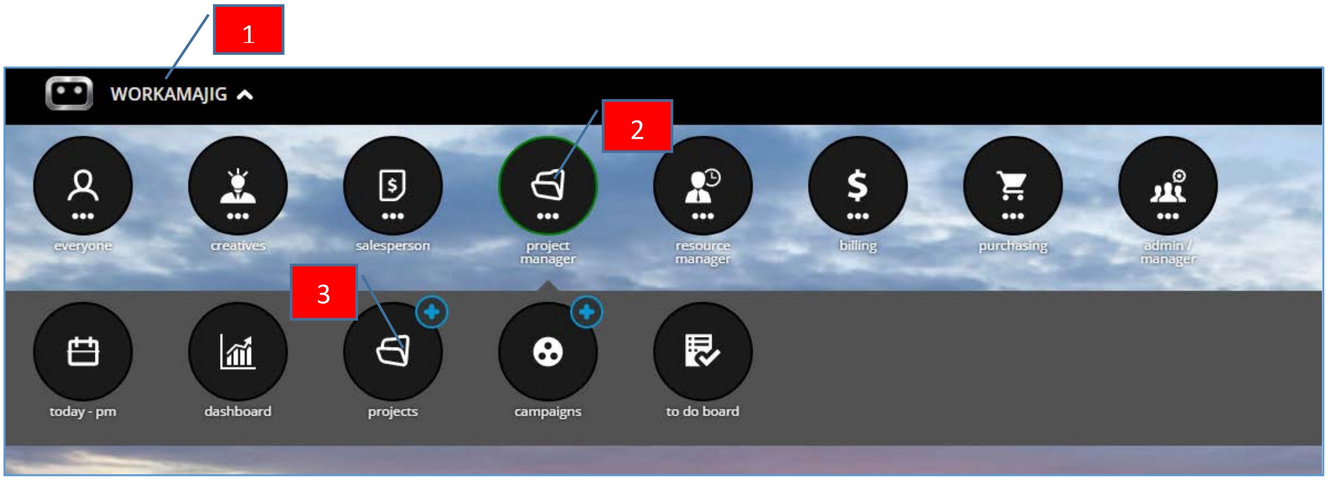
By clicking on More and Display Options, you decide which projects you want to see and how you want them displayed.

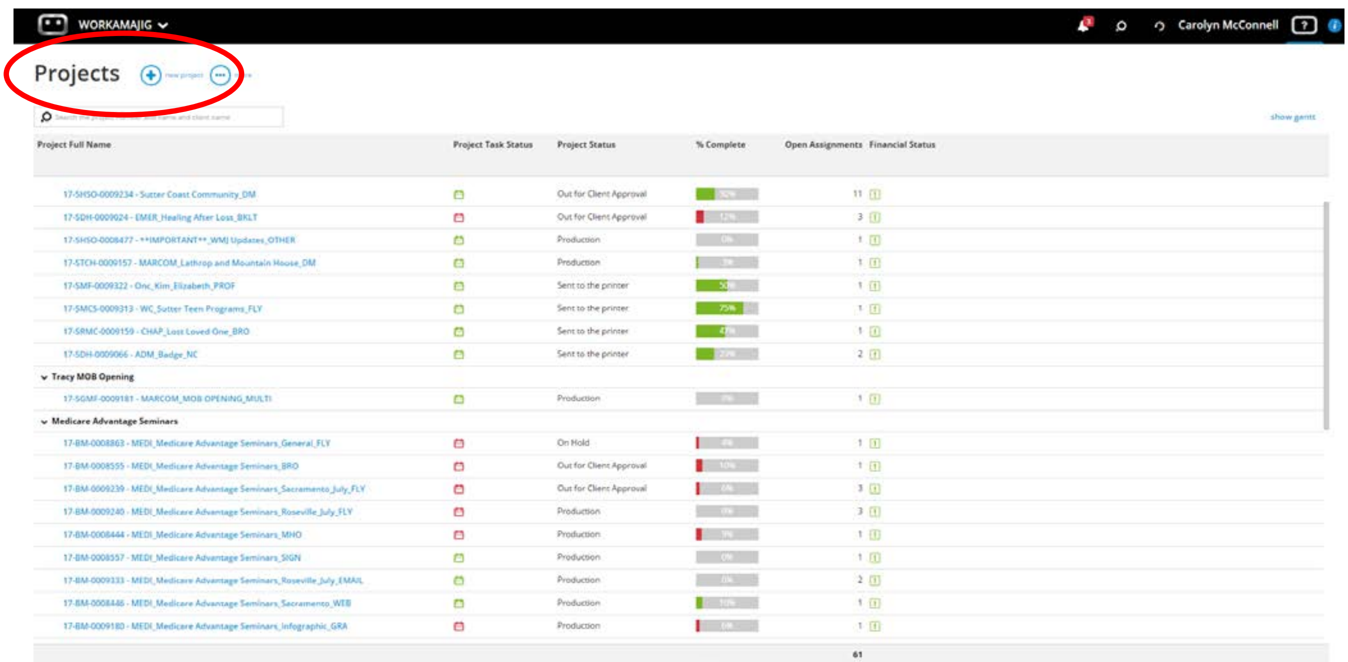





WORKAMAJIG
Carolyn McConnell
Campaigns
new campaign
more
Within Campaigns, click on More and Display Options to set your view.
MY CAMPAIGNS
FAVORITES (8)
Search
Campaign Full Name
Client Name
17-ABSMC-0010 - ABSMC Website Update
Alta Bates Summit Medical Center
Updates to ABSMC pages
17-ABSMC-0026 - wmj test primary contact
Alta Bates Summit Medical Center
17-BM-0016 - Medicare Advantage Seminars
Brand Marketing
Monthly Seminars
17-BM-0017 - Medicare Advantage Age-In
Brand Marketing
17-BM-0039 - Walk-In Care Expansion_Petaluma
Brand Marketing
6/26/2017
17-BM-0040 - Walk-In Care Expansion_San Francisco
Brand Marketing
6/26/2017
17-BM-0041 - Walk-In Care Expansion_Walnut Creek
Brand Marketing
6/26/2017
17-BM-0042 - Walk-In Care Expansion_San Ramon
Brand Marketing
6/26/2017
17-BM-0043 - Walk-In Care Expansion_Dublin
Brand Marketing
6/26/2017
17-BM-0044 - Walk-In Care Expansion_San Jose
Brand Marketing
6/26/2017
Options
Active Campaigns Only
Expand Campaigns When Opened
Group By
No Grouping
Order
Ascending
Descending
Account Manager
GL Company
All-All
Budget Warning Percent
80
SAVE
CANCEL

Where do I find existing projects?

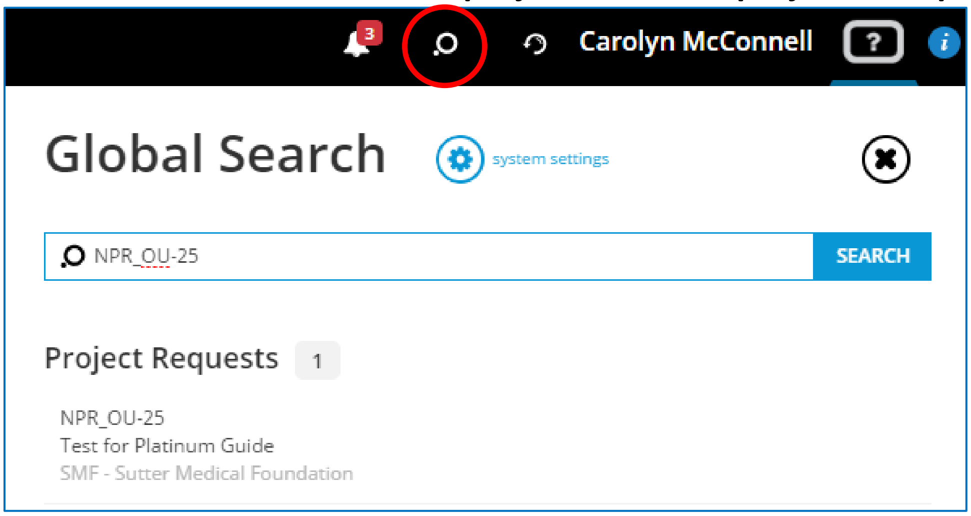




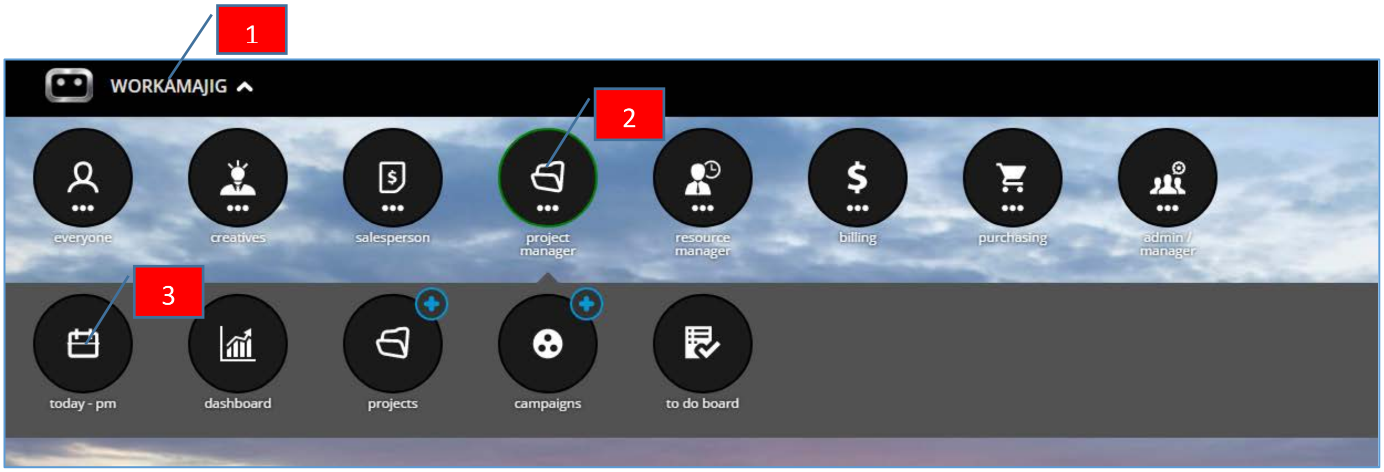
See prior section regarding how to change your Display Options. Your settings will determine which projects are displayed in your list (i.e., projects with open assignments, projects that you are on the team, etc.).

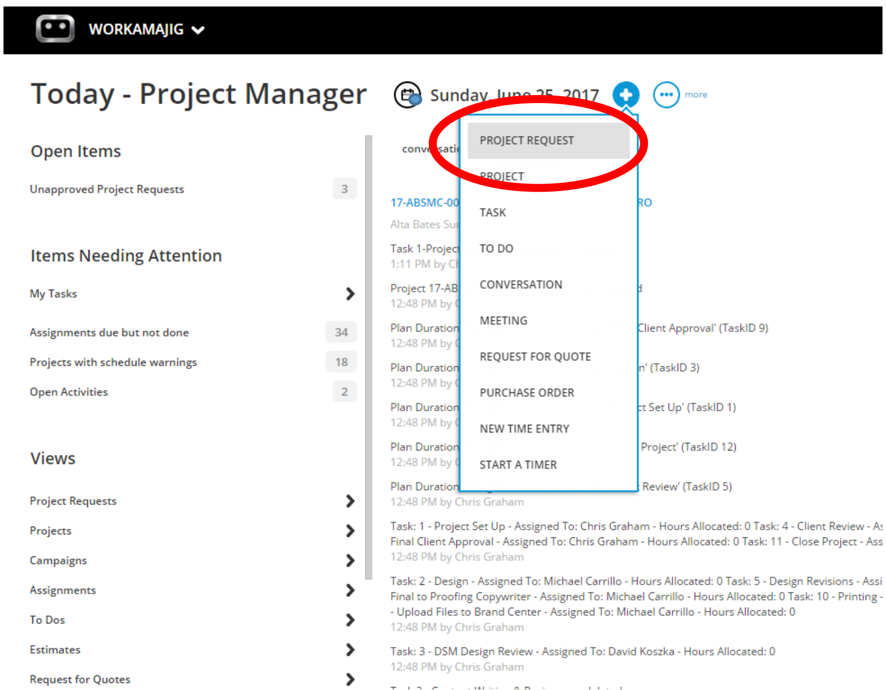
How do I search for a project that isn't in my project list?

Click on the magnifying glass; enter the project/project request number; click Search. The search will include active projects, inactive projects and project requests.

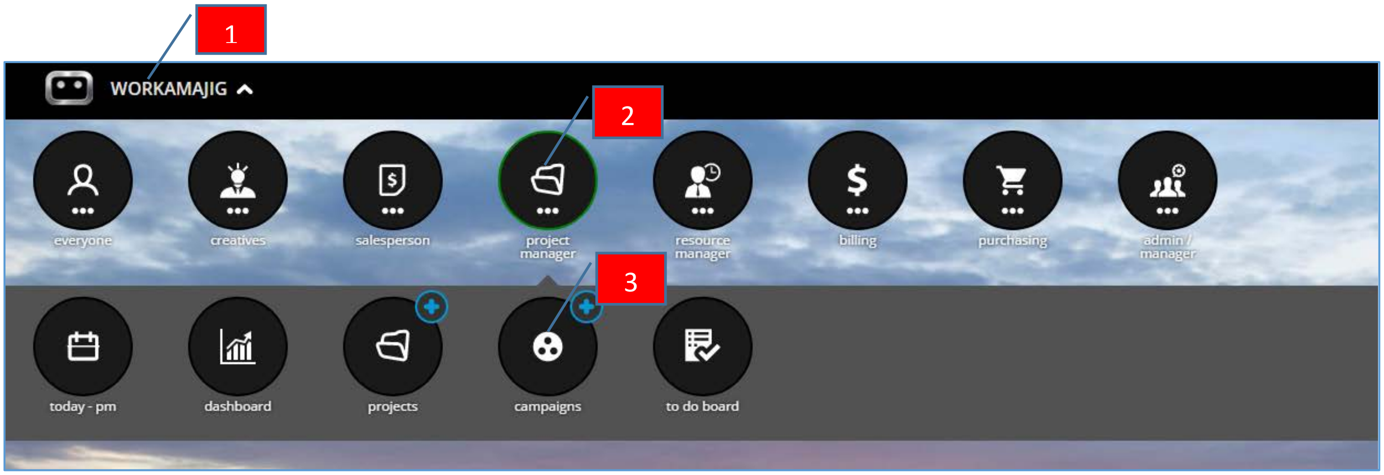


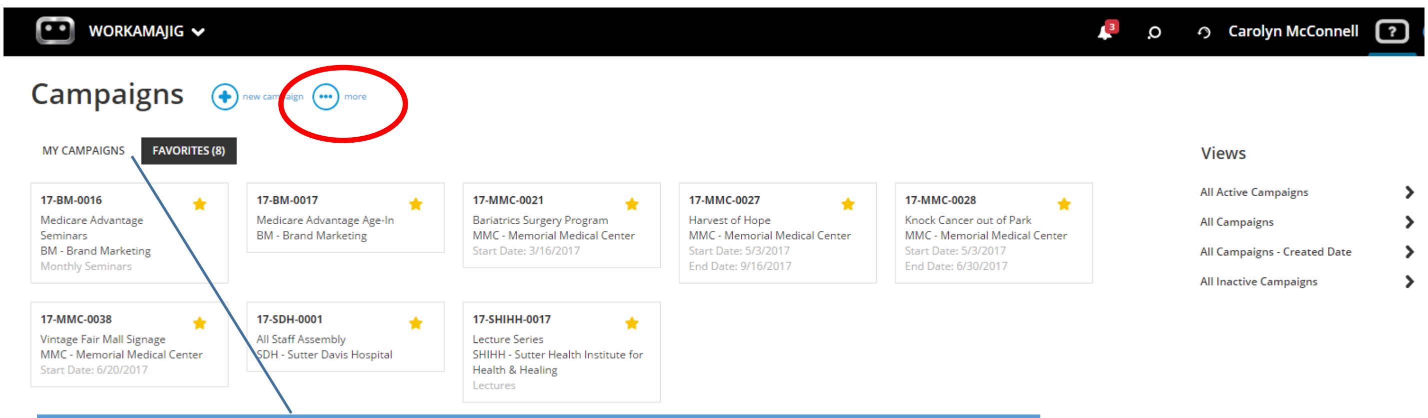
How do I create a new project request?





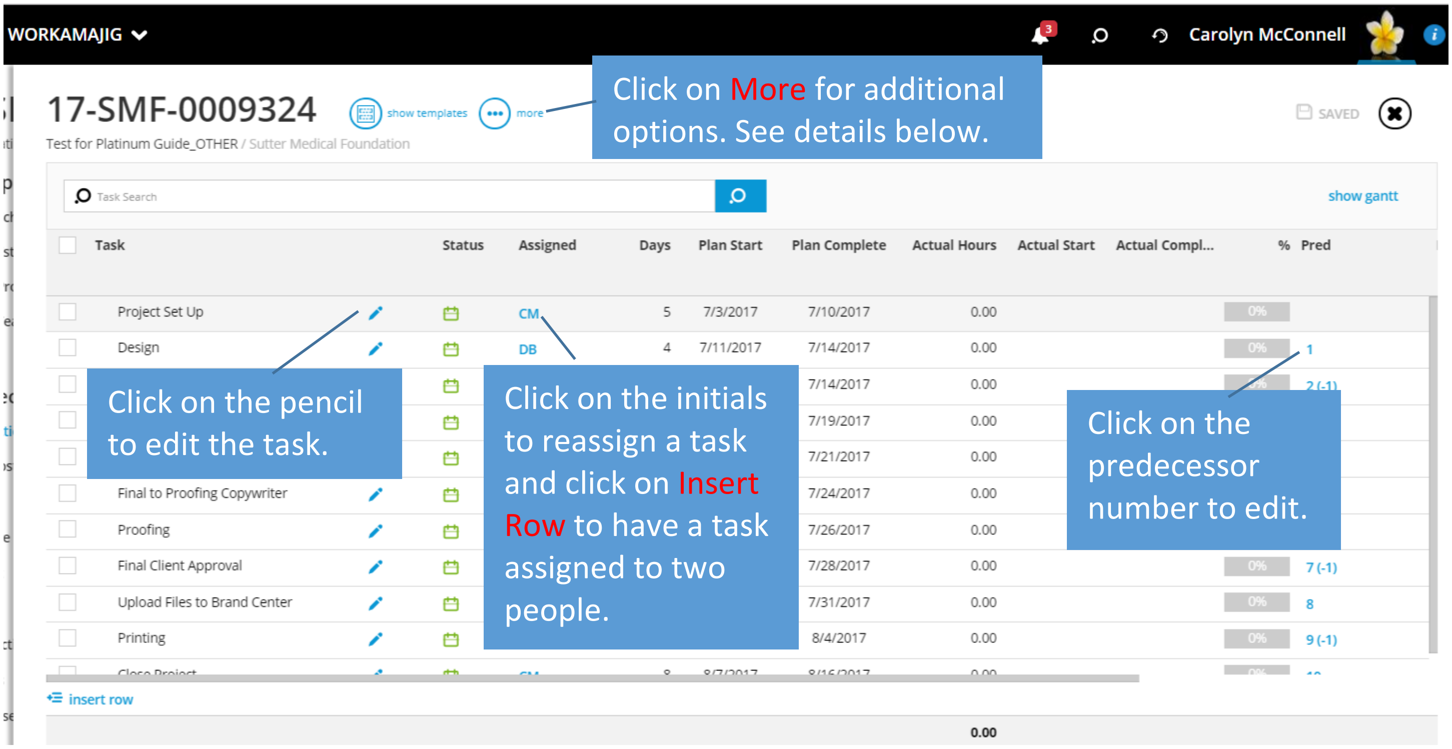
Where do I find existing campaigns?

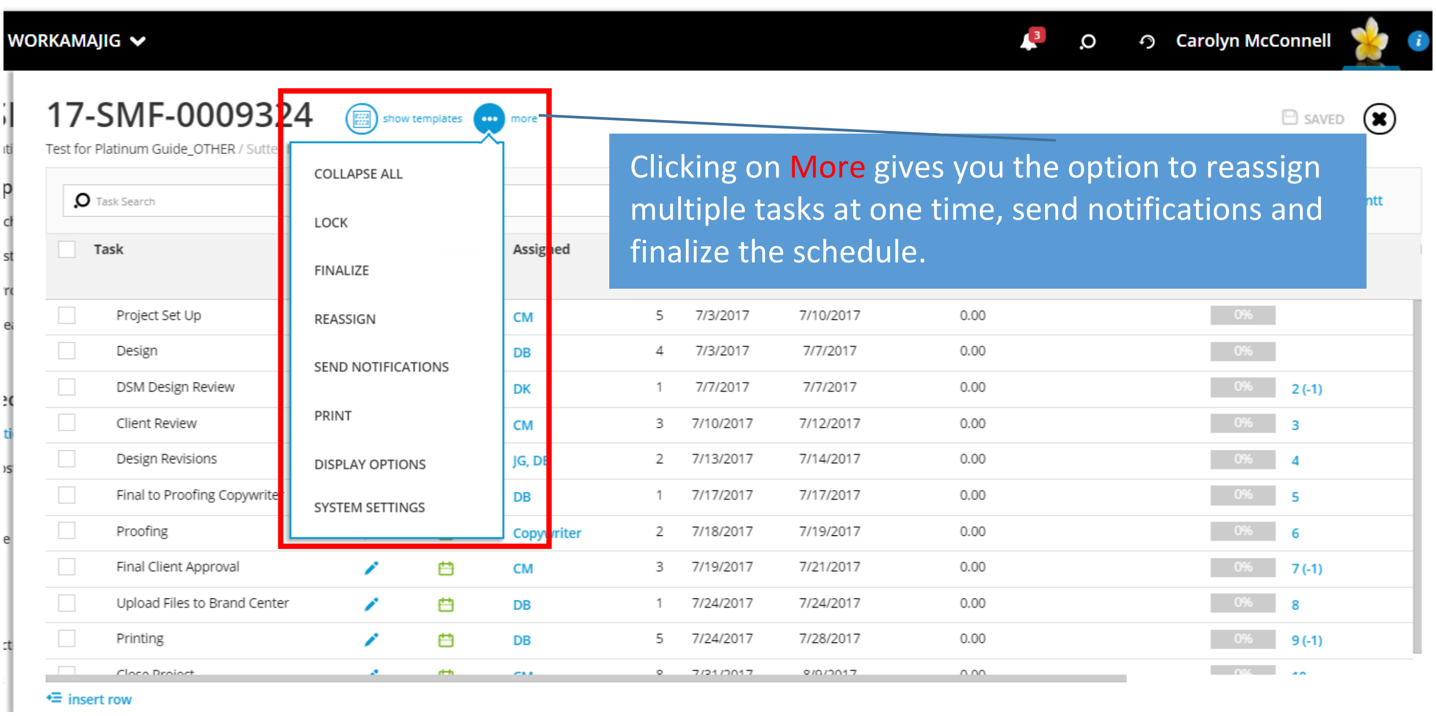


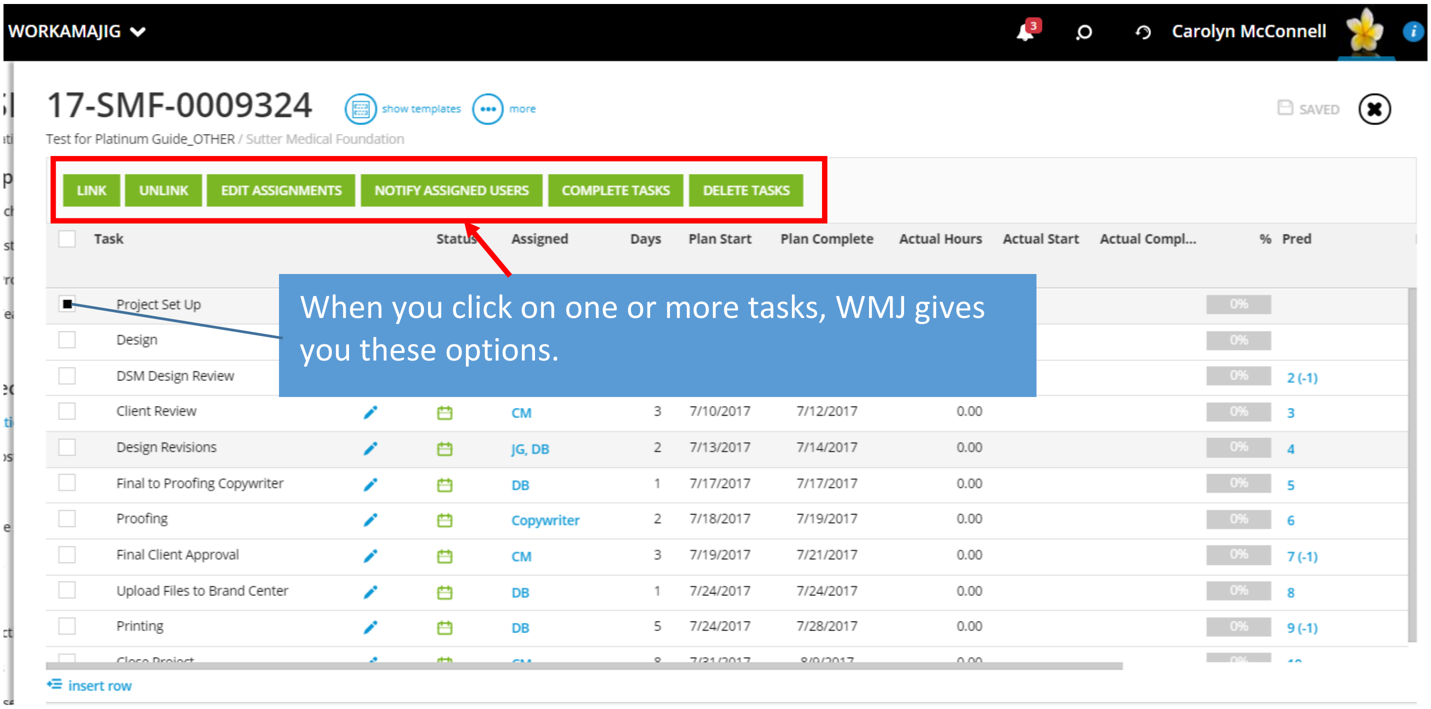


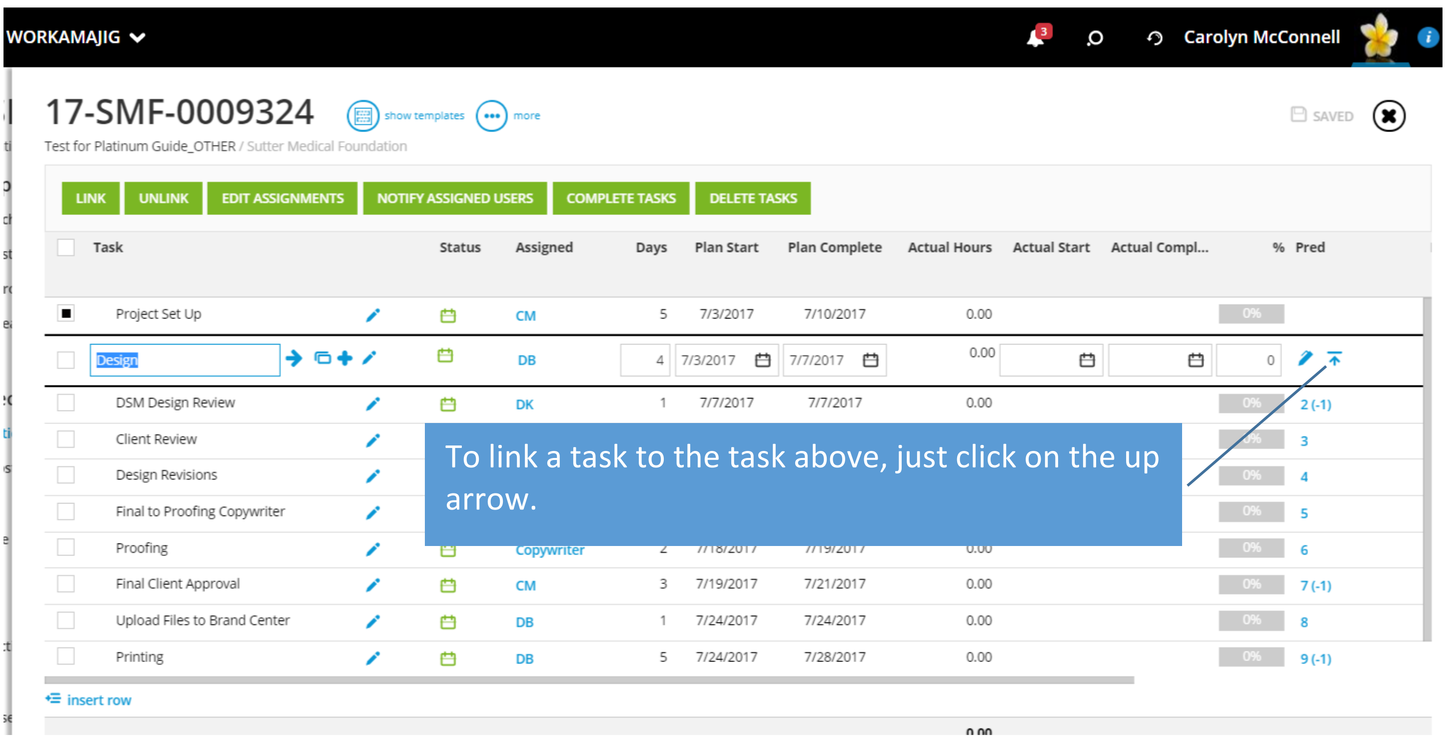
You can either view My Campaigns or Favorites. To make a campaign a favorite, click on the star in the upper left corner. Click on More and Display Options to update how your campaigns are displayed.

How do I update the project schedule?






WORKAMAJIG
Carolyn McConnell
17-SMF-0009324
show templates
more
SAVED
Test for Platinum Guide_OTHER / Sutter Medical Foundation
LINK
UNLINK
EDIT ASSIGNMENTS
NOTIFY ASSIGNED USERS
COMPLETE TASKS
DELETE TASKS
When you click on one or more tasks, WMJ gives you these options.
insert row

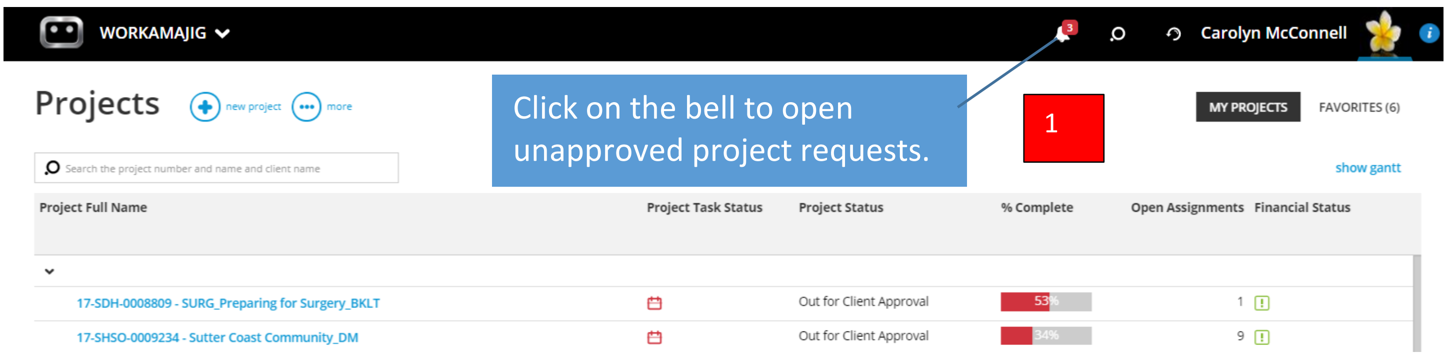

WORKAMAJIG
Carolyn McConnell
17-SMF-0009324
show templates
more
SAVED
Test for Platinum Guide_OTHER / Sutter Medical Foundation
LINK
UNLINK
EDIT ASSIGNMENTS
NOTIFY ASSIGNED USERS
COMPLETE TASKS
DELETE TASKS
To link a task to the task above, just click on the up arrow.
insert row

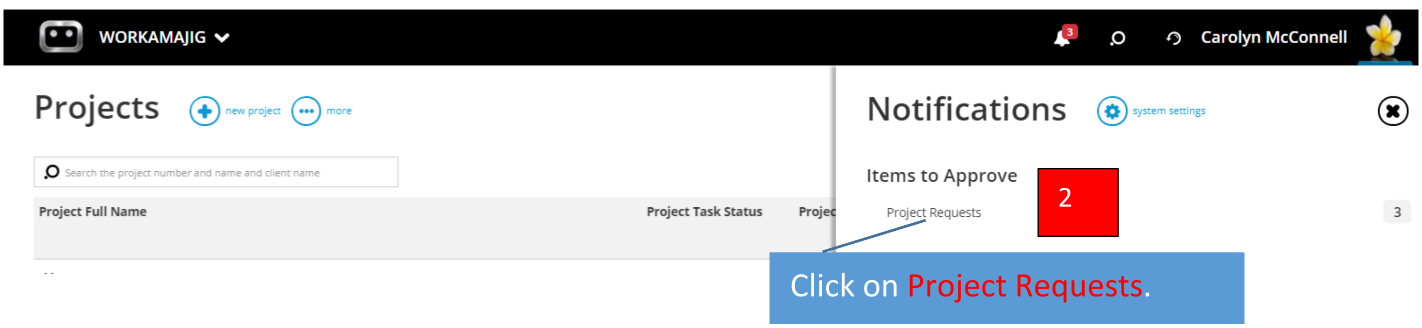
How do I process project requests that come to me for approval?

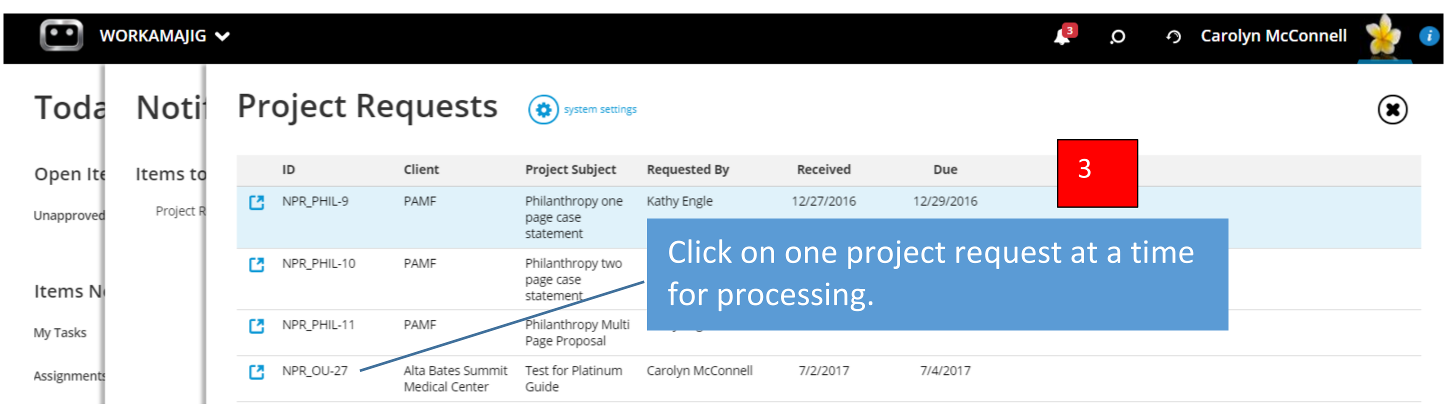
You can process a request through WMJ or through the email you'll receive. The email says you "have 2 business days to reply". This is a loose guideline for processing. The user does not receive any notification on the timeframe. When you are processing a request, you should make sure you have plenty of dedicated time to work on this without distractions. If for some reason you "lose" the request, you can look it up by clicking on the magnifying glass and searching for the project request number (i.e., NPR_OU-25).

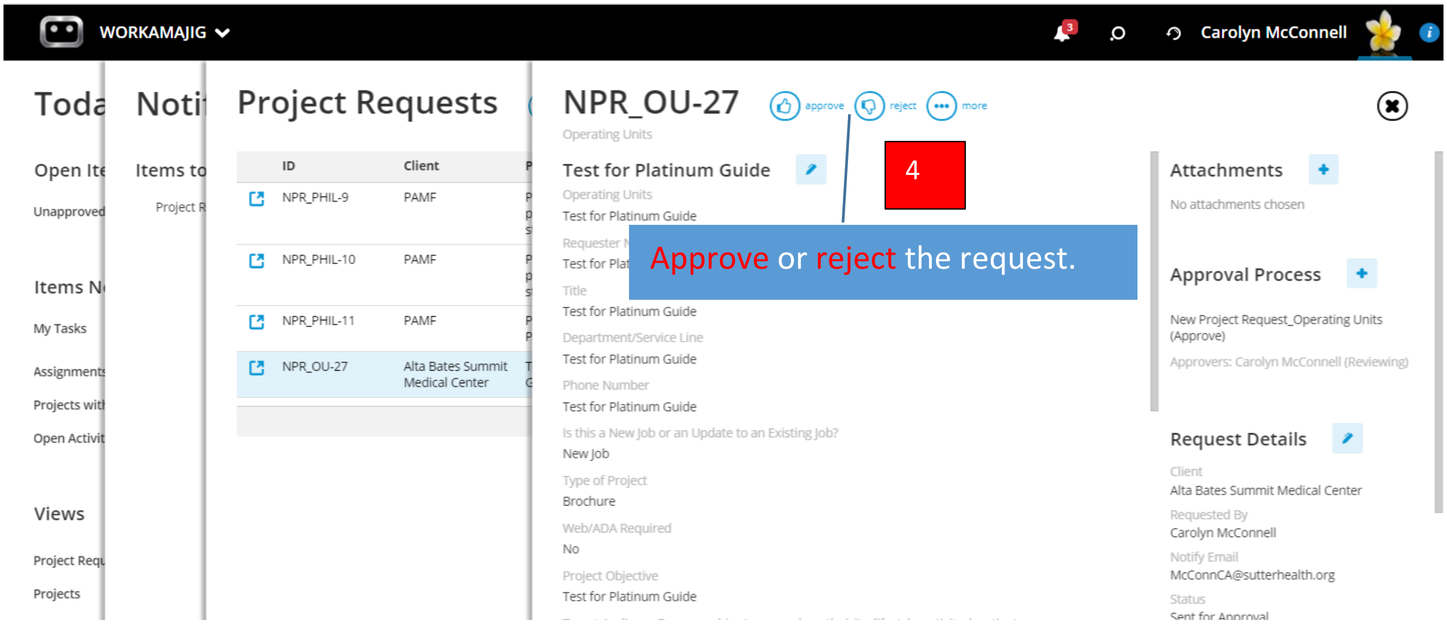
Note: A project request email should not be forwarded to another person to process from the email. If improperly directed, you should process the request and then assign to the correct person to manage the project.

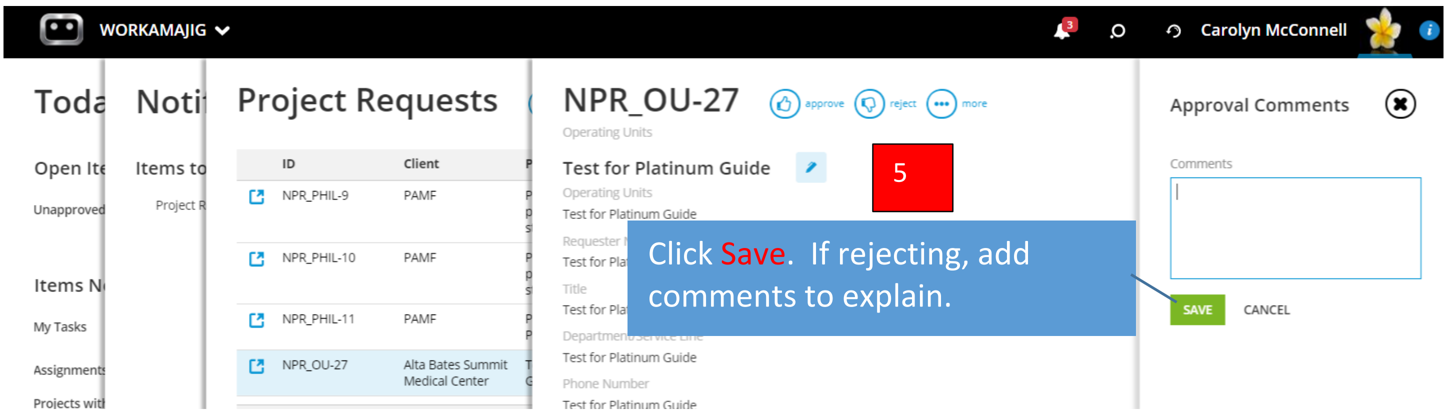
Processing a project request through WMJ:

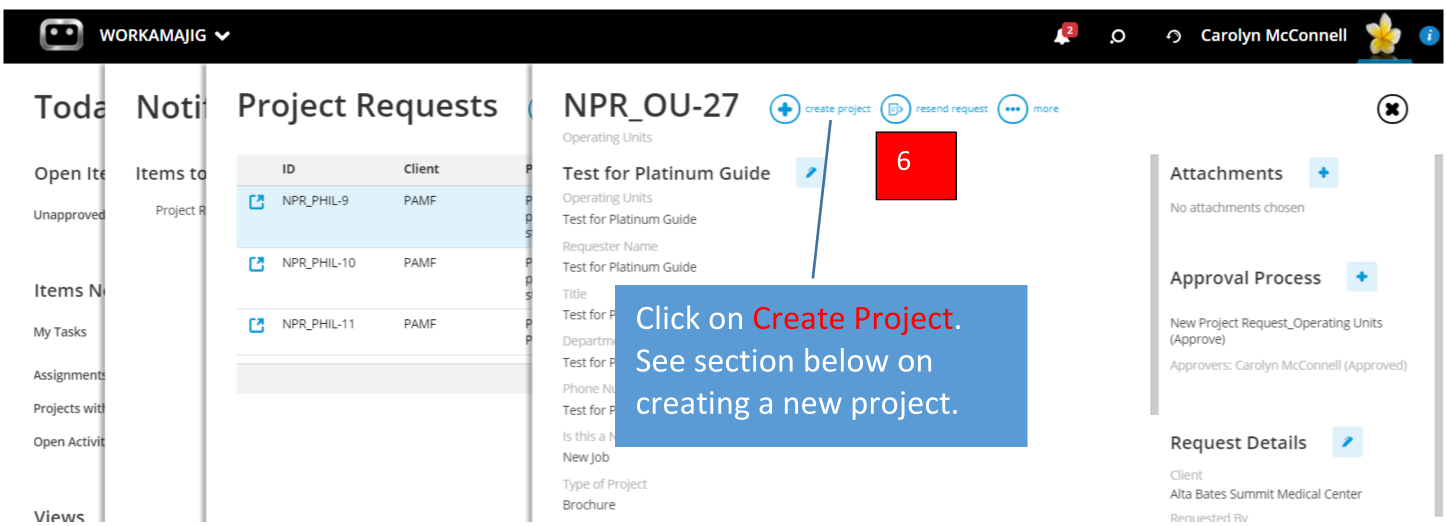






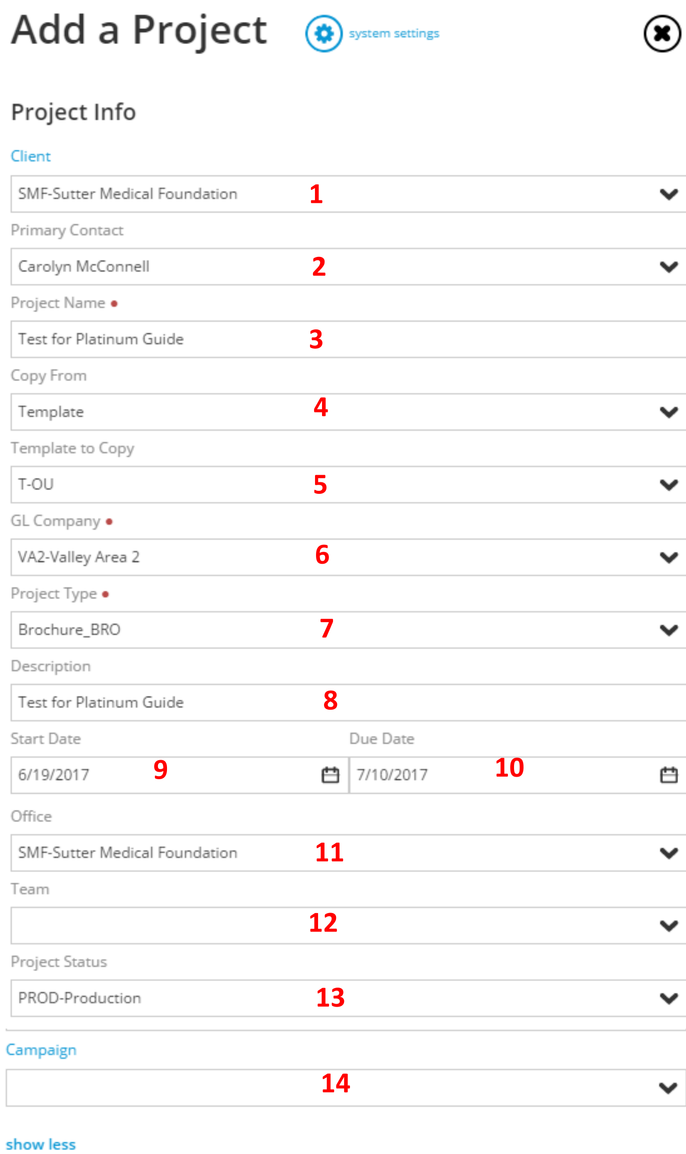

4
Approve or reject the request.


5
Click Save. If rejecting, add comments to explain.

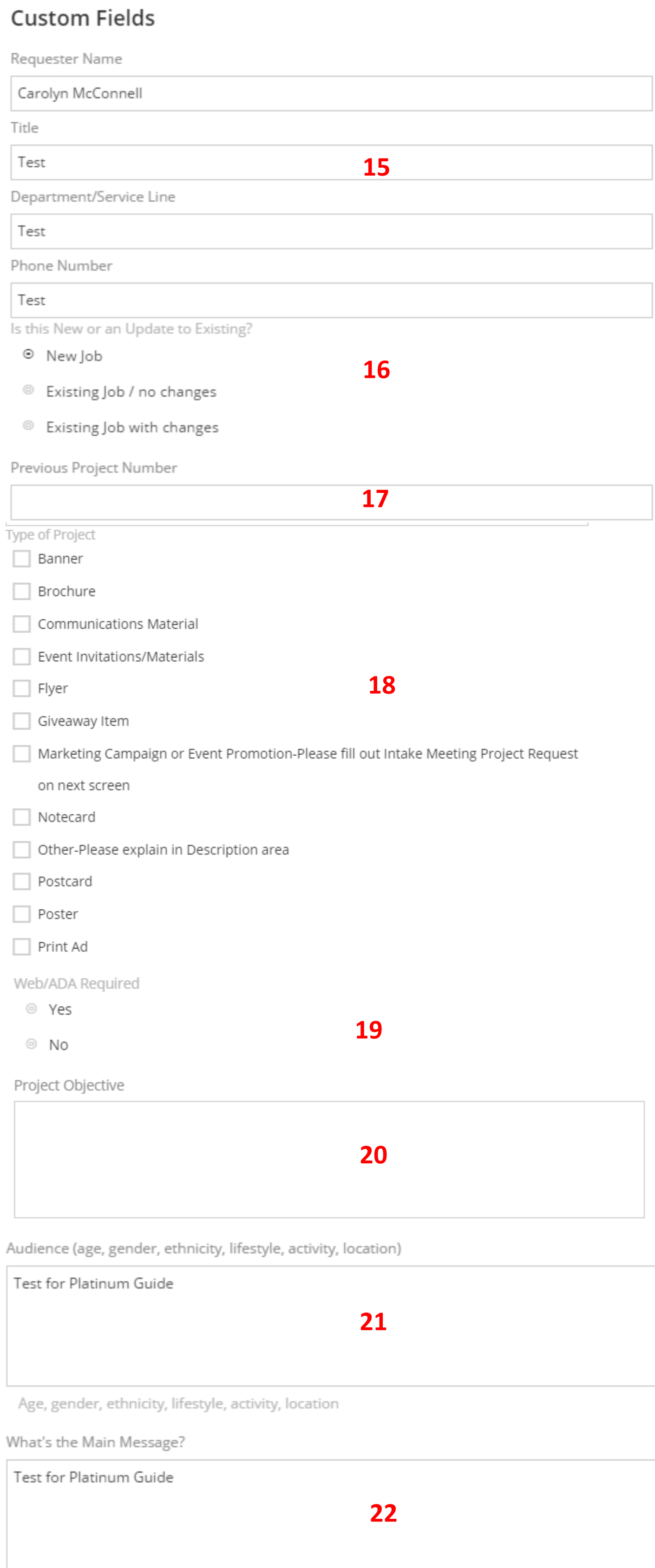

6
Click on Create Project. See section below on creating a new project.

How do I create a new project?

The instructions below apply when a project is being created from a project request.



1) In most cases, client information will be correct. Correct if necessary.
2) The primary contact should be the person who submitted the request.
3) Change to the "official" name that WMJ will use, based on the project naming convention: Service line_Project Identifier_Type (e.g., FBC_ CribCardsBoy_NC).
4) It is most common to copy tasks from a Template but you can also copy from another project.
5) Template to copy – Select the template for your FM area, project management area or specialized template.
6) Make sure that your field marketing area, PM area or proper area is selected. This is usually auto assigned.
7) Select project type. Make sure your project name ends with the project type (e.g., _NC).
8) This is the key area for you to enter terse details about the project. Enter anything that will help the rest of the team with their work. If there are only minor changes to copy, these can be referenced here.
9) This is usually automatically filled in.
10) If necessary, change due date to adjust for the client's needs and the team's readiness, generally 2 weeks minimum.
11) Will correspond with the Client information and will be automatically filled in.
12) Leave blank.
13) Leave in Production if project is ready to start. Otherwise, put into Field Marketer On Hold until ready.
14) If project is associated with a campaign, enter the campaign by typing the year (e.g., 17); click on the campaign. No campaign if single asset project.



15) These fields are generally auto-populated by WMJ from the requestor's entry but fill it in if missing.

16) If a new job previously not in the system, select *New Job*. If a straightforward reprint, select *Existing Job/no changes*. If changes (e.g., logo swap), select *Existing Job with changes*.

17) If this is an existing job, enter the form reference number here if you have one. If in WMJ before or in the Brand Center, the number should be more or less the same format as the one indicated; but if older (like 3+ years old), it may have another form number.

18) Select the type of project. If not on the list, check *Other* and explain in the *Project Description* field (#8).

19) When a PDF is placed on the website, it first needs to be made ADA compliant. This is mainly for documents that will go online and is rarely used. If you have something that qualifies, please check with your supervisor on how to proceed.

20) This field is completed by the client. If this is a reprint or reprint with changes, "N/A" can be put into in this field.

21) Including the audience is important in order to give the writer and designer an idea of the audience they are targeting for copy and with images.

22) Completed by the client; but for the most part, it will be a message promoting their service line.

Company Number

Test for Platinum Guide

Cost Center

Test for Platinum Guide **23**

S3 Approver

Test for Platinum Guide

Specifications

Quantity

Test for Platinum Guide **24**

PDF Only?

- Yes
- No

25

Delivery Name

Test for Platinum Guide **26**

Delivery Address

Test for Platinum Guide **27**

Logo

Test for Platinum Guide **28**

Image (Brand Center/iStock#; General Feel/Subjects)

29

Size (WxH Inches; WxH Pixels, if Digital)

30

Ad Deadline

31

Color or Black and White?

- Color
- Black and White

Mounting Needed? (Posters on Foamcore)

- Yes
- No

32

Laminate

- Yes
- No

Budget

33

Additional Comments

34

23) Company and cost center numbers **must** be entered. S3 Approver is generally the requestor's supervisor, but may vary.

24) **Very important** to make sure this field is completed with the print quantity, if applicable.

25) If the client is just requesting a PDF, usually because they will print from their own printer, use their own vendor or are circulating by email, select *Yes*. If print copies are needed, select *No*.

26) Make sure the person is listed who should receive the delivery.

27) Double check to make sure it is correct and a good shipping address.

28) Double check to make sure the correct logo is listed.

29) Give the designer ideas for images.

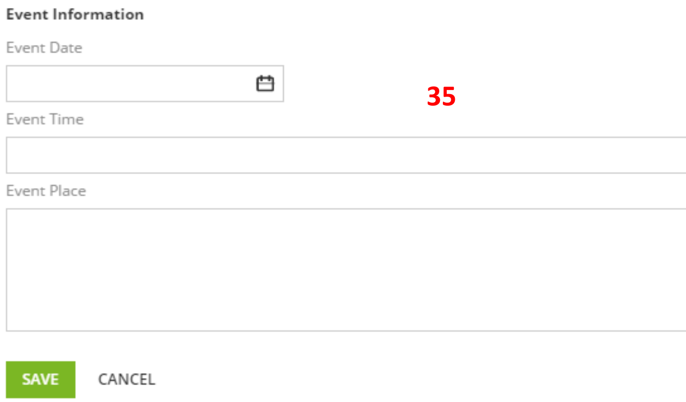
30) List the size in inches or pixels, if digital.

31) If ad, complete ad deadline.

32) Client may have filled this information out in their request. If not filled out by client, complete these fields for the designer.

33) We assume that all clients have budget for printing. If for another type of project, we may need a budget number if Marketing is not expected to pay.

34) This is for any additional spec information client may have or you want to include for the designer or copywriter.



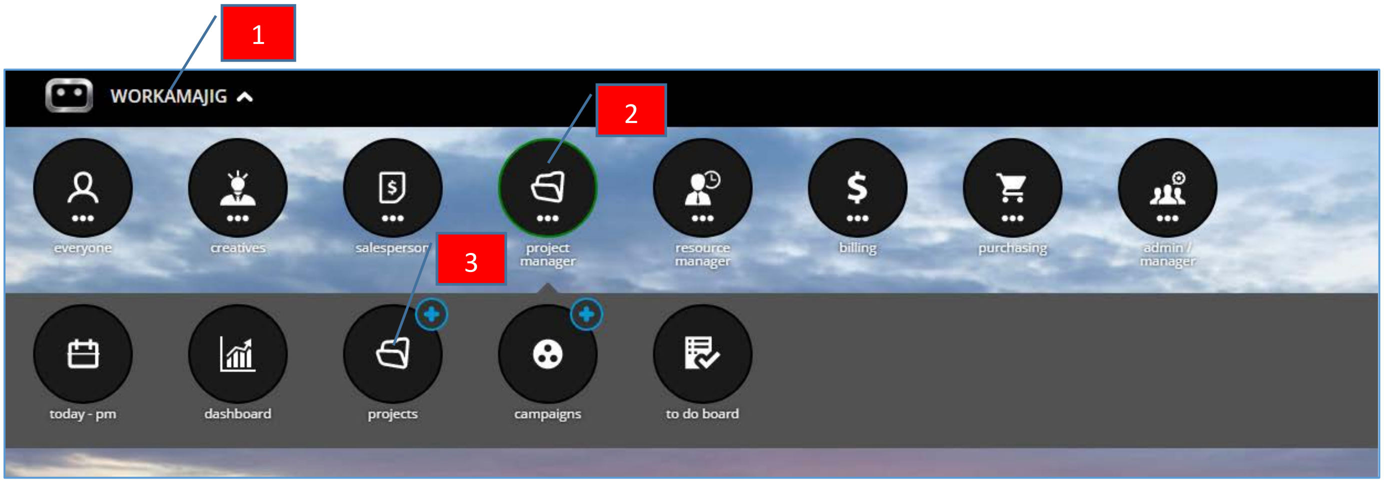
35) Event information should be auto-populated by WMJ from the client's request. Of course, this only applies if an event is involved, (e.g., a flyer for an event).

36) Click **Save**. WMJ will create a project number.

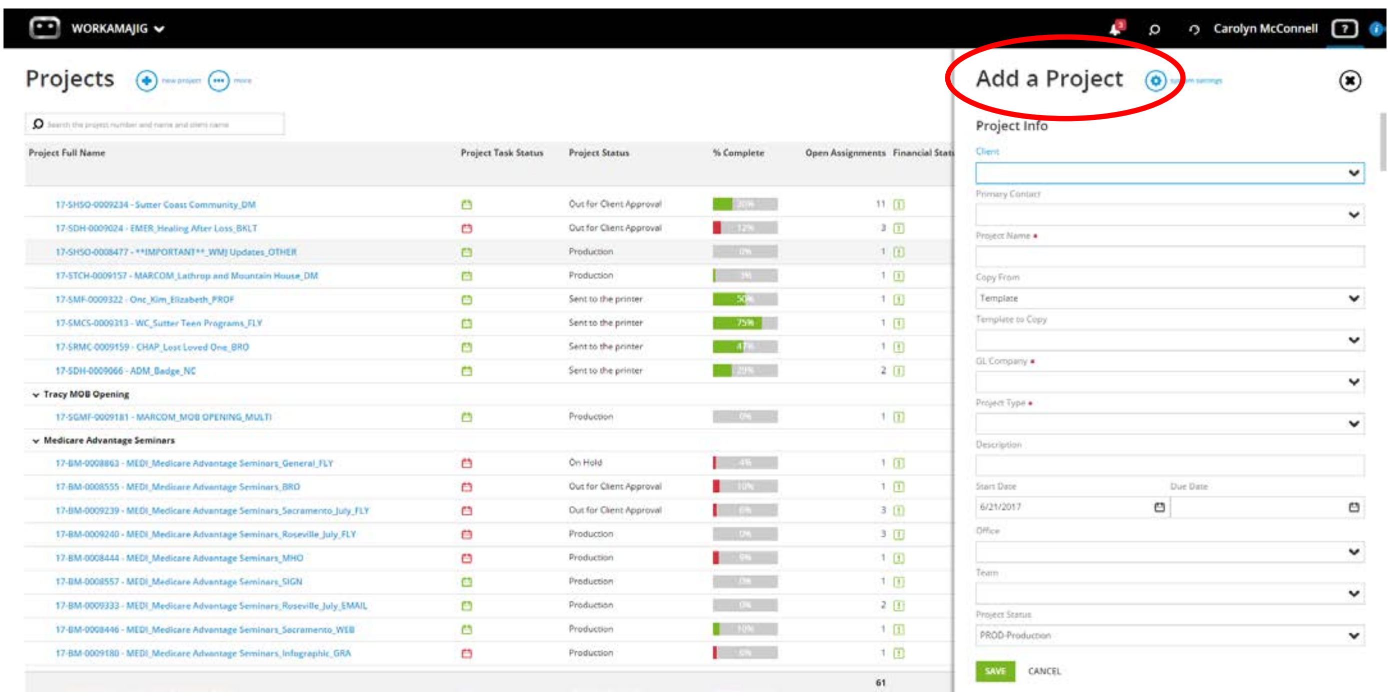
37) Check the schedule to make sure all tasks are properly assigned; remove any unnecessary tasks; confirm there are predecessors for all tasks except the first task; send notifications; mark Project Setup task complete.

38) Confirm necessary files are uploaded into Files.

To create a new project from scratch, 1) click on Workamajig; 2) click on Project Manager; 3) click on the plus sign on Projects.



Once you have clicked on the plus sign, you will get the screen below. For the most part, you need to just complete the fields as indicated in the previous section. The main difference is that the fields will not be pre-populated with information the client filled out so you will have to fill these out.



Who can I contact if I have any questions about WMJ?

If you have any questions, please contact Carolyn McConnell at mcconnca@sutterhealth.org or call 916-286-6777.