

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.

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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?

17-SMF-0009324



print



more



Test for Platinum Guide_OTHER / Sutter Medical Foundation

Setup

- ✓ Schedule
- ✓ Estimates
- ✓ Project Settings
- ✓ Team

Project Schedule

Add/Remove Team Members

Project Description

Test for Platinum Guide

Includes Project Description, Project Start/Complete Date, Accounting, Custom Fields

Daily Feed

Monday, June 26, 2017

- Diary Note Test Conversation was added By Carolyn McConnell 11:01 AM
- Sheet Updated - Client Approval Form By Carolyn McConnell 11:01 AM
- Complete Date was changed to 8/18/2017 By Carolyn McConnell 10:50 AM
- 1 - Project Set Up was reassigned to Carolyn McConnell from Micheline La Mont By Carolyn McConnell 10:49 AM
- 12 - Close Project was reassigned to Carolyn McConnell from Micheline La Mont By Carolyn McConnell 10:49 AM

[view the entire feed](#)

Project Details

Production

Project Status

Misc Costs

Files

View/Upload Files

Creative Brief

Budget

Billing

Transactions

Quotes

Purchase Orders

Contact Information

Client

Sutter Medical Foundation

Project Request

NPR_OU-25

Test for Platinum Guide

Primary Contact

Carolyn McConnell

Email

Link to Project Request

Spec Sheets

Client Approval Form

Created: Carolyn McConnell 6/19/2017 10:09 AM
Updated: Carolyn McConnell 6/26/2017 11:01 AM

Deliverables

There are currently no deliverables on this project

Recent Conversations



Test Conversation
Carolyn McConnell
June 26, 2017 11:00 AM

Known as Diary in WMJ Flash


0 Replies

This is just a test.

Thanks.

Carolyn

[view all the conversations](#)

Custom Fields 

Requester Name
Carolyn McConnell

Title
Test


Department/Service Line
Test



Phone Number
Test


Is this New or an Update to Existing?
New Job



[More Detail](#)


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


Team 


Carolyn McConnell
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Team can also be
found under
Setup>Team

How do I change my personal settings and views?

The screenshot shows the WORKAMAJIG interface. At the top, there is a navigation bar with the WORKAMAJIG logo and a user profile dropdown menu. The user's name, Carolyn McConnell, is circled in red. A blue callout box points to the name, stating: "When you click on your name in the upper right corner, this screen will open." Below the navigation bar, there is a grid of icons for various functions: everyone, creatives, salesperson, project manager, resource manager, billing, purchasing, and campaign manager. Below this grid, there is a section for "today - pm" with icons for dashboard, projects, campaigns, and to do board. The main content area shows a list of campaigns under the heading "Campaigns". A sidebar on the right shows the user's profile information, including the name Carolyn McConnell, a log out button, and a "more" button. A blue callout box points to the "more" button, stating: "Update your contact information". Another blue callout box points to the "Campaigns" link in the sidebar, stating: "WMJ will open to your Default Page. Most common Default Pages will be Projects or Campaigns."

When you click on your name in the upper right corner, this screen will open.

Update your contact information

WMJ will open to your Default Page. Most common Default Pages will be Projects or Campaigns.

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**.

WORKAMAJIG

Projects + new project ... more

Search the project number and name and client name

Project Full Name

REFRESH LIST
DISPLAY OPTIONS
PROJECT TEMPLATES
SYSTEM SETTINGS
VIEWS

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

Project Full Name	Project Task Status	Project Status	% Complete	Open Assignments	Financial Status
17-SDH-0008809 - SURG_Preparing for Surgery_BKLT	Out for Client Approval	53%	1		
17-SHSO-0009234 - Sutter Coast Community_DM	Out for Client Approval	34%	9		
17-SDH-0009024 - EMER_Healing After Loss_BKLT	Out for Client Approval	12%	3		
17-SMF-0009324 - Test for Platinum Guide_OTHER	Production	0%	4		
wmj test - wmj test old creative-flash	Production	0%	1		
17-STCH-0009157 - MARCOM_New Mover_LathropMtnH_DM	Production	9%	1		
17-SHSO-0008477 - **IMPORTANT**_WMJ Updates_OTHER	Production	0%	1		
17-SHSO-0009349 - Technical Training_Talk to Training_PREM	Production	0%	4		
17-SHSO-0009406 - New test	Production	0%	2		
17-SDH-0009066 - ADM_Badge_NC	Sent to the printer	29%	2		
17-SMCS-0009313 - WC_Sutter Teen Programs_FLY	Sent to the printer	75%	1		

MY PROJECTS FAVORITES (6)

show gantt

WORKAMAJIG

Projects + new project ... more

Search the project number and name and client name

Project Full Name

Project Task Status

Project Status

% Complete

Options

☒ Projects With My Open Assignments

Only

☐ Only Projects I am On The Team

Group By

Campaign

Order

Ascending

Descending

Sort By

Project Status

Order

Ascending

Descending

Project Status

All Active

Billing Status

SAVE CANCEL

Project Full Name	Project Task Status	Project Status	% Complete
17-SDH-0008809 - SURG_Preparing for Surgery_BKLT	Out for Client Approval	53%	
17-SHSO-0009234 - Sutter Coast Community_DM	Out for Client Approval	34%	
17-SDH-0009024 - EMER_Healing After Loss_BKLT	Out for Client Approval	12%	
17-SMF-0009324 - Test for Platinum Guide_OTHER	Production	0%	
wmj test - wmj test old creative-flash	Production	0%	
17-STCH-0009157 - MARCOM_New Mover_LathropMtnH_DM	Production	9%	
17-SHSO-0008477 - **IMPORTANT**_WMJ Updates_OTHER	Production	0%	
17-SHSO-0009349 - Technical Training_Talk to Training_PREM	Production	0%	
17-SHSO-0009406 - New test	Production	0%	
17-SDH-0009066 - ADM_Badge_NC	Sent to the printer	29%	
17-SMCS-0009313 - WC_Sutter Teen Programs_FLY	Sent to the printer	75%	

WORKAMAJIG

3

Carolyn McConnell

Campaigns

new campaign

more

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

Within Campaigns, click on **More** and **Display Options** to set your view.

Where do I find existing projects?

The screenshot shows the WORKAMAJIG dashboard. The top navigation bar includes icons for 'everyone', 'creatives', 'salesperson', 'project manager' (highlighted with a red box and a red arrow from the text 'Where do I find existing projects?'), 'resource manager', 'billing', 'purchasing', and 'admin / manager'. Below this, there are icons for 'today - pm', 'dashboard', 'projects' (highlighted with a red box and a red arrow from the text 'Where do I find existing projects?'), 'campaigns', and 'to do board'.

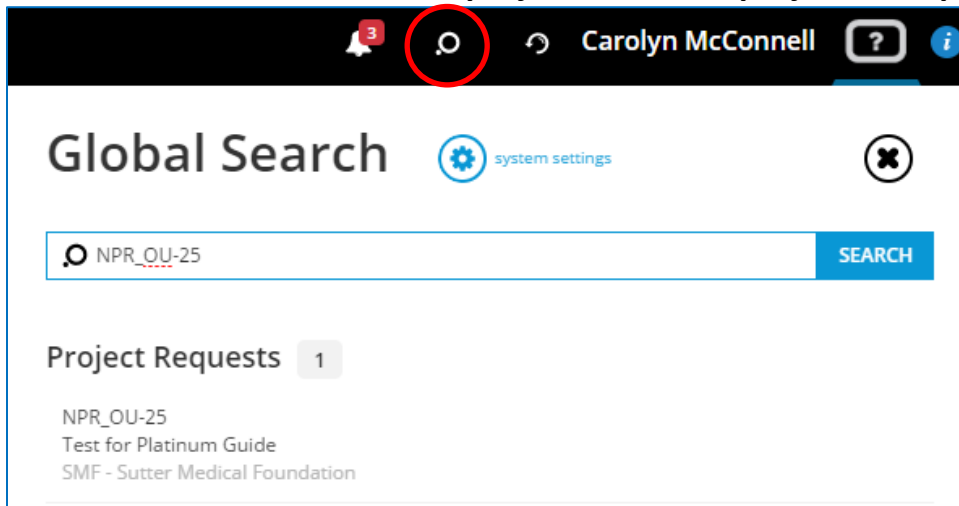
The 'Projects' section is highlighted with a red circle. It shows a list of projects with columns: Project Full Name, Project Task Status, Project Status, % Complete, Open Assignments, and Financial Status.

Project Full Name	Project Task Status	Project Status	% Complete	Open Assignments	Financial Status
17-SHSO-0009234 - Sutter Coast Community_DM	🟢	Out for Client Approval	10%	11	🟢
17-SDH-0009024 - EMER_Healing After Loss_BRLT	🔴	Out for Client Approval	12%	3	🟢
17-SHSO-0008477 - **IMPORTANT**_WMJ Updates_OTHER	🟢	Production	0%	1	🟢
17-STCH-0009157 - MARCOM_Lathrop and Mountain House_DM	🟢	Production	1%	1	🟢
17-SMF-0009322 - Onr_Kim,Elizabeth_PROF	🟢	Sent to the printer	33%	1	🟢
17-SMCS-0009313 - WC_Sutter Teen Programs_FLY	🟢	Sent to the printer	72%	1	🟢
17-SBMC-0009159 - CHAP_Lost Loved One_BRO	🟢	Sent to the printer	47%	1	🟢
17-SDH-0009066 - ADM_Budget_NC	🟢	Sent to the printer	17%	2	🟢
▼ Tracy MOB Opening					
17-SGMY-0009181 - MARCOM_MOB OPENING_MULTI	🟢	Production	0%	1	🟢
▼ Medicare Advantage Seminars					
17-BM-0008863 - MEDI_Medicare Advantage Seminars_General_FLY	🔴	On Hold	0%	1	🟢
17-BM-0008555 - MEDI_Medicare Advantage Seminars_BRO	🔴	Out for Client Approval	10%	1	🟢
17-BM-0009239 - MEDI_Medicare Advantage Seminars_Sacramento_July_FLY	🔴	Out for Client Approval	0%	3	🟢
17-BM-0009240 - MEDI_Medicare Advantage Seminars_Roseville_July_FLY	🔴	Production	0%	3	🟢
17-BM-0008444 - MEDI_Medicare Advantage Seminars_MHO	🔴	Production	0%	1	🟢
17-BM-0009357 - MEDI_Medicare Advantage Seminars_SIGN	🟢	Production	0%	1	🟢
17-BM-0009333 - MEDI_Medicare Advantage Seminars_Roseville_July_EMAIL	🟢	Production	0%	2	🟢
17-BM-0008446 - MEDI_Medicare Advantage Seminars_Sacramento_WTB	🟢	Production	10%	1	🟢
17-BM-0009180 - MEDI_Medicare Advantage Seminars_Infographic_GRA	🔴	Production	0%	1	🟢

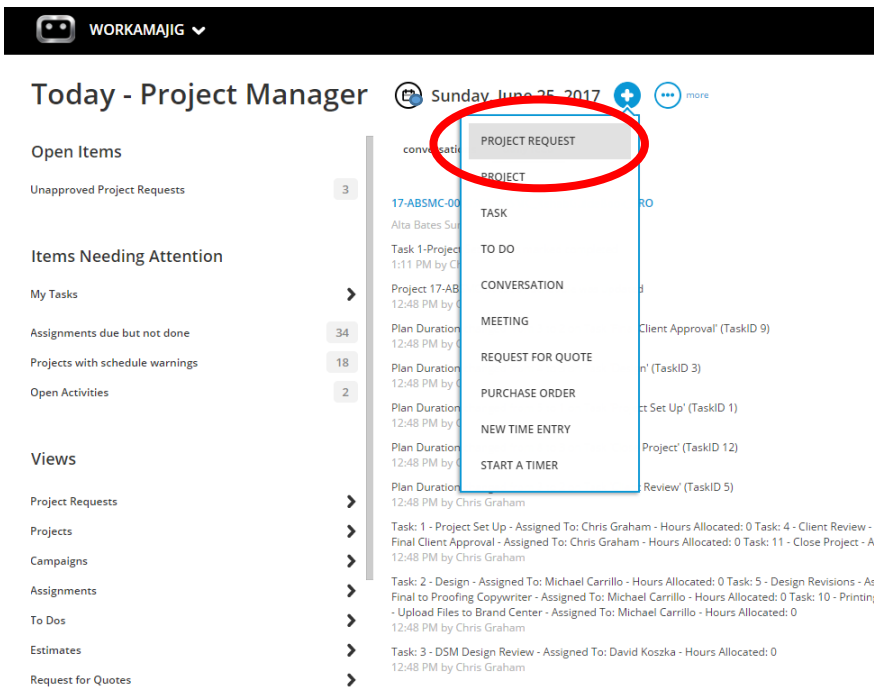
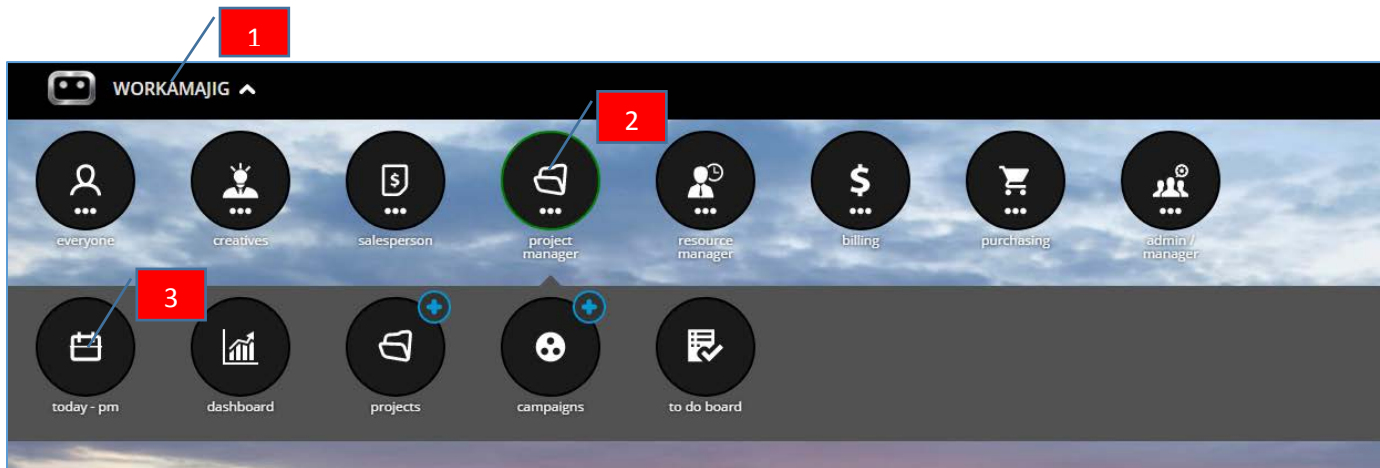
See prior section regarding how to change your Display Options. Your settings will determine which projects are displayed in your list (i.e., projects with open assignments, projects that you are on the team, etc.).

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

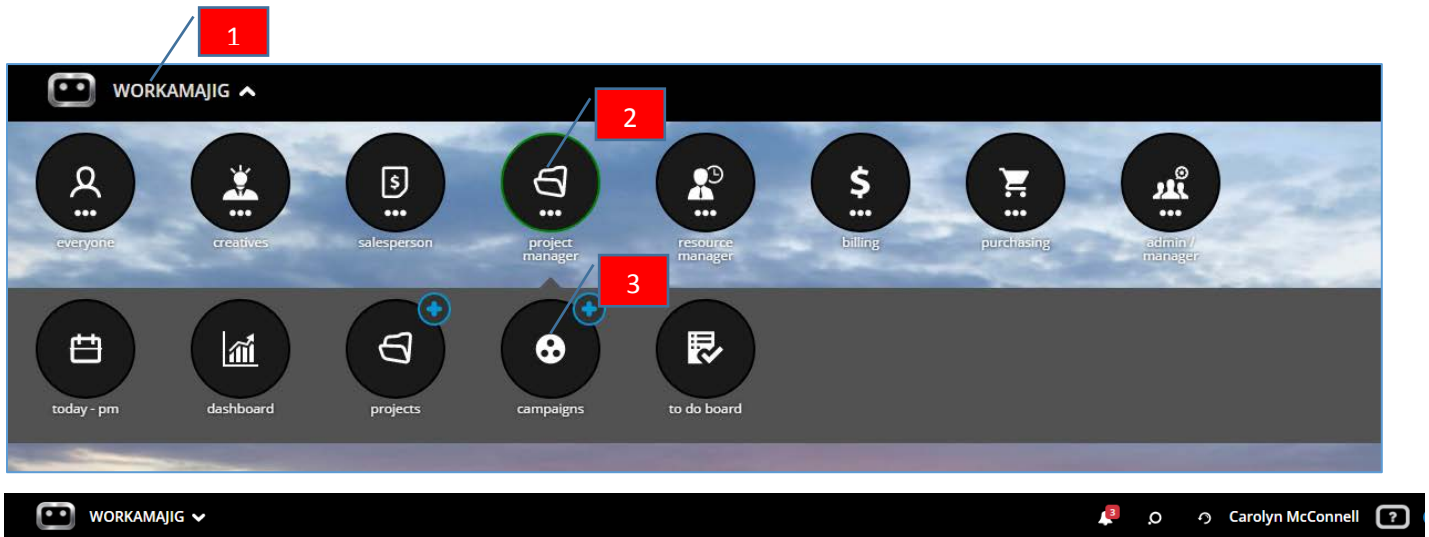
Click on the magnifying glass; enter the project/project request number; click Search. The search will include active projects, inactive projects and project requests.



How do I create a new project request?



Where do I find existing campaigns?



Campaigns

+ new campaign ... more

MY CAMPAIGNS

FAVORITES (8)

17-BM-0016
Medicare Advantage
Seminars
BM - Brand Marketing
Monthly Seminars

17-BM-0017
Medicare Advantage Age-In
BM - Brand Marketing

17-MMC-0021
Bariatrics Surgery Program
MMC - Memorial Medical Center
Start Date: 3/16/2017

17-MMC-0027
Harvest of Hope
MMC - Memorial Medical Center
Start Date: 5/3/2017
End Date: 9/16/2017

17-MMC-0028
Knock Cancer out of Park
MMC - Memorial Medical Center
Start Date: 5/3/2017
End Date: 6/30/2017

17-MMC-0038
Vintage Fair Mall Signage
MMC - Memorial Medical Center
Start Date: 6/20/2017

17-SDH-0001
All Staff Assembly
SDH - Sutter Davis Hospital

17-SHIHH-0017
Lecture Series
SHIHH - Sutter Health Institute for
Health & Healing
Lectures

Views

All Active Campaigns

All Campaigns

All Campaigns - Created Date

All Inactive 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

17-SMF-0009324 [show templates](#) [more](#) Click on **More** for additional options. See details below. SAVED

Test for Platinum Guide_OTHER / Sutter Medical Foundation

Task Search show gantt

Task	Status	Assigned	Days	Plan Start	Plan Complete	Actual Hours	Actual Start	Actual Compl...	% Pred
<input type="checkbox"/> Project Set Up		CM	5	7/3/2017	7/10/2017	0.00		0%	
<input type="checkbox"/> Design		DB	4	7/11/2017	7/14/2017	0.00		0%	1
<input type="checkbox"/> Final to Proofing Copywriter					7/14/2017	0.00		0%	2 (-1)
<input type="checkbox"/> Proofing					7/19/2017	0.00		0%	
<input type="checkbox"/> Final Client Approval					7/21/2017	0.00		0%	
<input type="checkbox"/> Upload Files to Brand Center					7/24/2017	0.00		0%	
<input type="checkbox"/> Printing					7/26/2017	0.00		0%	
<input type="checkbox"/> Close Project					7/28/2017	0.00		0%	7 (-1)
					7/31/2017	0.00		0%	8
					8/4/2017	0.00		0%	9 (-1)
						0.00			

[insert row](#)

Click on the pencil to edit the task. Click on the initials to reassign a task and click on **Insert Row** to have a task assigned to two people. Click on the predecessor number to edit.

WORKAMAJIG

17-SMF-0009324 [show templates](#) [more](#) Clicking on **More** gives you the option to reassign multiple tasks at one time, send notifications and finalize the schedule. SAVED

Test for Platinum Guide_OTHER / Sutte

Task Search show gantt

Task	Status	Assigned	Days	Plan Start	Plan Complete	Actual Hours	Actual Start	Actual Compl...	% Pred
<input type="checkbox"/> Project Set Up		CM	5	7/3/2017	7/10/2017	0.00		0%	
<input type="checkbox"/> Design		DB	4	7/3/2017	7/7/2017	0.00		0%	
<input type="checkbox"/> DSM Design Review		DK	1	7/7/2017	7/7/2017	0.00		0%	2 (-1)
<input type="checkbox"/> Client Review		CM	3	7/10/2017	7/12/2017	0.00		0%	3
<input type="checkbox"/> Design Revisions		JG, DB	2	7/13/2017	7/14/2017	0.00		0%	4
<input type="checkbox"/> Final to Proofing Copywrite		DB	1	7/17/2017	7/17/2017	0.00		0%	5
<input type="checkbox"/> Proofing		Copy writer	2	7/18/2017	7/19/2017	0.00		0%	6
<input type="checkbox"/> Final Client Approval		CM	3	7/19/2017	7/21/2017	0.00		0%	7 (-1)
<input type="checkbox"/> Upload Files to Brand Center		DB	1	7/24/2017	7/24/2017	0.00		0%	8
<input type="checkbox"/> Printing		DB	5	7/24/2017	7/28/2017	0.00		0%	9 (-1)
<input type="checkbox"/> Close Project					8/3/2017	0.00		0%	

[insert row](#)

COLLAPSE ALL
LOCK
FINALIZE
REASSIGN
SEND NOTIFICATIONS
PRINT
DISPLAY OPTIONS
SYSTEM SETTINGS

WORKAMAJIG

3

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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

Task	Status	Assigned	Days	Plan Start	Plan Complete	Actual Hours	Actual Start	Actual Compl...	% Pred
<input checked="" type="checkbox"/> Project Set Up								0%	
<input type="checkbox"/> Design								0%	
<input type="checkbox"/> DSM Design Review								0%	2 (-1)
<input type="checkbox"/> Client Review		CM	3	7/10/2017	7/12/2017	0.00		0%	3
<input type="checkbox"/> Design Revisions		JG, DB	2	7/13/2017	7/14/2017	0.00		0%	4
<input type="checkbox"/> Final to Proofing Copywriter		DB	1	7/17/2017	7/17/2017	0.00		0%	5
<input type="checkbox"/> Proofing		Copywriter	2	7/18/2017	7/19/2017	0.00		0%	6
<input type="checkbox"/> Final Client Approval		CM	3	7/19/2017	7/21/2017	0.00		0%	7 (-1)
<input type="checkbox"/> Upload Files to Brand Center		DB	1	7/24/2017	7/24/2017	0.00		0%	8
<input type="checkbox"/> Printing		DB	5	7/24/2017	7/28/2017	0.00		0%	9 (-1)
<input type="checkbox"/> Close Project								0%	

insert row

When you click on one or more tasks, WMJ gives you these options.

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3

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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

Task	Status	Assigned	Days	Plan Start	Plan Complete	Actual Hours	Actual Start	Actual Compl...	% Pred
<input checked="" type="checkbox"/> Project Set Up		CM	5	7/3/2017	7/10/2017	0.00		0%	
<input type="checkbox"/> Design		DB	4	7/3/2017	7/7/2017	0.00		0%	0
<input type="checkbox"/> DSM Design Review		DK	1	7/7/2017	7/7/2017	0.00		0%	2 (-1)
<input type="checkbox"/> Client Review								0%	3
<input type="checkbox"/> Design Revisions								0%	4
<input type="checkbox"/> Final to Proofing Copywriter								0%	5
<input type="checkbox"/> Proofing		Copywriter	2	7/18/2017	7/19/2017	0.00		0%	6
<input type="checkbox"/> Final Client Approval		CM	3	7/19/2017	7/21/2017	0.00		0%	7 (-1)
<input type="checkbox"/> Upload Files to Brand Center		DB	1	7/24/2017	7/24/2017	0.00		0%	8
<input type="checkbox"/> Printing		DB	5	7/24/2017	7/28/2017	0.00		0%	9 (-1)

insert row

To link a task to the task above, just click on the up arrow.

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:

The first screenshot shows the main dashboard with a red box labeled '1' pointing to the notification bell icon. A blue callout box says: "Click on the bell to open unapproved project requests."

The second screenshot shows the 'Notifications' panel with a red box labeled '2' pointing to the 'Project Requests' link. A blue callout box says: "Click on Project Requests."

The third screenshot shows the 'Project Requests' table with a red box labeled '3' pointing to the first row. A blue callout box says: "Click on one project request at a time for processing."

ID	Client	Project Subject	Requested By	Received	Due
NPR_PHIL-9	PAMF	Philanthropy one page case statement	Kathy Engle	12/27/2016	12/29/2016
NPR_PHIL-10	PAMF	Philanthropy two page case statement			
NPR_PHIL-11	PAMF	Philanthropy Multi Page Proposal			
NPR_OU-27	Alta Bates Summit Medical Center	Test for Platinum Guide	Carolyn McConnell	7/2/2017	7/4/2017

WORKAMAJIG

Carolyn McConnell

Project Requests

ID	Client
NPR_PHIL-9	PAMF
NPR_PHIL-10	PAMF
NPR_PHIL-11	PAMF
NPR_OU-27	Alta Bates Summit Medical Center

NPR_OU-27

Operating Units

Test for Platinum Guide

Approve or reject the request.

Attachments

Approval Process

Request Details

WORKAMAJIG

Carolyn McConnell

Project Requests

ID	Client
NPR_PHIL-9	PAMF
NPR_PHIL-10	PAMF
NPR_PHIL-11	PAMF
NPR_OU-27	Alta Bates Summit Medical Center

NPR_OU-27

Operating Units

Test for Platinum Guide

Click Save. If rejecting, add comments to explain.

Approval Comments

WORKAMAJIG

Carolyn McConnell

Project Requests

ID	Client
NPR_PHIL-9	PAMF
NPR_PHIL-10	PAMF
NPR_PHIL-11	PAMF

NPR_OU-27

Operating Units

Test for Platinum Guide

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

Attachments


Approval Process


Request Details

How do I create a new project?

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

Add a Project

 system settings



Project Info

Client

SMF-Sutter Medical Foundation **1**

Primary Contact

Carolyn McConnell **2**

Project Name •

Test for Platinum Guide **3**

Copy From

Template **4**

Template to Copy

T-OU **5**

GL Company •

VA2-Valley Area 2 **6**

Project Type •

Brochure_BRO **7**

Description

Test for Platinum Guide **8**

Start Date

6/19/2017 **9**

Due Date

7/10/2017 **10**

Office

SMF-Sutter Medical Foundation **11**

Team

12

Project Status

PROD-Production **13**

Campaign

14

[show less](#)

- 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

Custom Fields

Requester Name

Carolyn McConnell

Title

Test

15

Department/Service Line

Test

Phone Number

Test

Is this New or an Update to Existing?

☒ New Job

☐ Existing Job / no changes

☐ Existing Job with changes

16

Previous Project Number

17

Type of Project

☐ Banner

☐ Brochure

☐ Communications Material

☐ Event Invitations/Materials

☐ Flyer

☐ Giveaway Item

☐ Marketing Campaign or Event Promotion-Please fill out Intake Meeting Project Request on next screen

☐ Notecard

☐ Other-Please explain in Description area

☐ Postcard

☐ Poster

☐ Print Ad

18

Web/ADA Required

☒ Yes

☐ No

19

Project Objective

20

Audience (age, gender, ethnicity, lifestyle, activity, location)

Test for Platinum Guide

21

Age, gender, ethnicity, lifestyle, activity, location

What's the Main Message?

Test for Platinum Guide

22

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 **25**

☐ No

Delivery Name

Test for Platinum Guide **26**

Delivery Address

Test for Platinum Guide **27**

Logo

Test for Platinum Guide **28**


Image (Brand Center/Stock#; 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 **32**

☐ No

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.

Event Information

Event Date



35

Event Time

Event Place

SAVE

CANCEL

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.

The screenshot displays the WORKAMAJIG mobile application interface. At the top, a black header bar contains the 'WORKAMAJIG' logo and a chevron icon. Below the header, a grid of circular icons represents different app functions. Three red boxes with white numbers and arrows highlight specific elements: Box 1 points to the 'WORKAMAJIG' header; Box 2 points to the 'project manager' icon (a folder with a person); Box 3 points to the 'projects' icon (a folder with a plus sign). The icons are arranged in two rows: the top row includes 'everyone', 'creatives', 'salesperson', 'project manager', 'resource manager', 'billing', 'purchasing', and 'admin / manager'; the bottom row includes 'today - pm', 'dashboard', 'projects', 'campaigns', and 'to do board'.

WORKAMAJIG

Projects

new project

more

Search the project number and name and client name

Project Full Name	Project Task Status	Project Status	% Complete	Open Assignments	Financial Status
17-SHSO-0009234 - Sutter Coast Community_DM		Out for Client Approval	<div><div>00%</div></div>	11	
17-SDH-0009024 - EMER_Healing After Loss_BOLT		Out for Client Approval	<div><div>12%</div></div>	3	
17-SHSO-0008477 - **IMPORTANT**_WMJ Updates_OTHER		Production	<div><div>0%</div></div>	1	
17-STCH-0009157 - MARCOM_Lathrop and Mountain House_DM		Production	<div><div>3%</div></div>	1	
17-SMF-0009322 - One_Kim_Elizabeth_P8DF		Sent to the printer	<div><div>50%</div></div>	1	
17-SMCS-0009313 - WC_Sutter Twin Programs_FLY		Sent to the printer	<div><div>75%</div></div>	1	
17-SRMC-0009159 - CHAP_Lost Loved One_BRD		Sent to the printer	<div><div>25%</div></div>	1	
17-SDH-0009066 - ADM_Badge_NC		Sent to the printer	<div><div>100%</div></div>	2	
▼ Tracy MOB Opening					
17-SGMF-0009181 - MARCOM_MOB OPENING_MULT1		Production	<div><div>0%</div></div>	1	
▼ Medicare Advantage Seminars					
17-BM-0008863 - MEDI_Medicare Advantage Seminars_General_FLY		On Hold	<div><div>40%</div></div>	1	
17-BM-0008555 - MEDI_Medicare Advantage Seminars_BRD		Out for Client Approval	<div><div>100%</div></div>	1	
17-BM-0009239 - MEDI_Medicare Advantage Seminars_Sacramento_July_FLY		Out for Client Approval	<div><div>0%</div></div>	3	
17-BM-0009240 - MEDI_Medicare Advantage Seminars_Roseville_July_FLY		Production	<div><div>0%</div></div>	3	
17-BM-0008444 - MEDI_Medicare Advantage Seminars_MHO		Production	<div><div>0%</div></div>	1	
17-BM-0008557 - MEDI_Medicare Advantage Seminars_SIGN		Production	<div><div>0%</div></div>	1	
17-BM-0009333 - MEDI_Medicare Advantage Seminars_Roseville_July_EMAIL		Production	<div><div>0%</div></div>	2	
17-BM-0008446 - MEDI_Medicare Advantage Seminars_Sacramento_Y1B1		Production	<div><div>100%</div></div>	1	
17-BM-0009180 - MEDI_Medicare Advantage Seminars_Infographic_GRA		Production	<div><div>0%</div></div>	1	

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Add a Project

Project Info

Client

Primary Contact

Project Name

Copy From

Template

Template to Copy

GL Company

Project Type

Description

Start Date

Due Date

Office

Team

Project Status

PROD-Production

SAVE

CANCEL

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.