

Creating an Aprimo Workflow

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(technical writing sample for online portfolio)

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Creating an Aprimo Workflow

Aprimo is a project tracking system that allows you to manage your project workflows. Follow these three steps to create a workflow:

Step 1. Open the Job

Follow these five steps to open an Aprimo job:

1. Log into Aprimo. (Your login ID is your corporate ID.)

The **Main Window** opens. (See **Figure 1**.)

2. From the top-left of the **Main Window** screen, click **New > Job**.

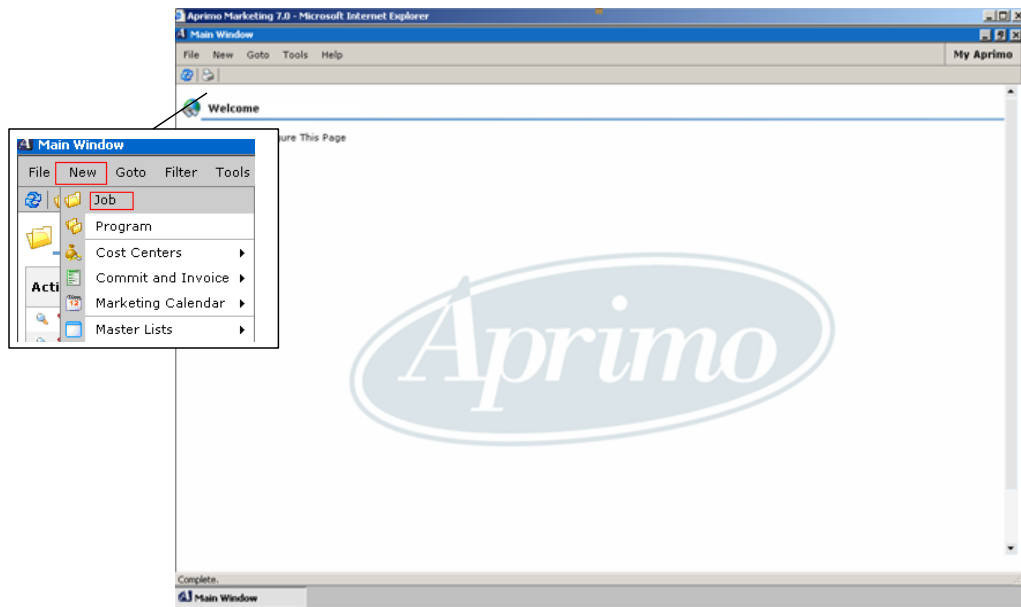


Figure 1: Aprimo Main Window Screen

The **Details** main window opens. (See **Figure 2** on **Page 4**.)

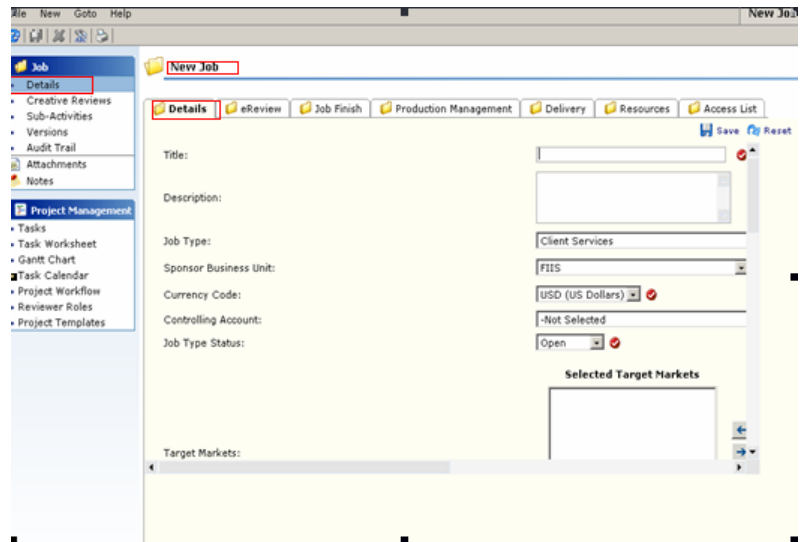


Figure 2: Details Main Window Screen

3. Complete the **Details** screen with the appropriate information, as follows.

- **Description:** Add a detailed description of the piece, including the publication date.
- **Job Type:** Client Services
- **Sponsor Business Unit:** Client Services
- **Currency Code:** USD (US Dollars)
- **Controlling Account:** T/A Shareholder Communications
- **Job Type Status:** Open
- **Target Markets:** NA
- **Audience:** NA
- **Product Associations:** NA

4. To view the next group of entries, scroll to the right of the **Details** screen. Complete the following:

- **Owner:** Your name
- **Administrator:** Your name
- **Time Zone:** Eastern Time
- **Begin Date:** Today's Date
- **End Date:** Publication Date
- **Project Anchor Date:** Today' Date
- **Programs:** NA
- **Literature Category-Component 4:** Choose the appropriate category. (For reference, see the applicable [workflows/project template titles](#) on page 11.)
- **Audience-Component 5:** Choose the appropriate audience. (For reference, see the applicable [workflows/project template titles](#) on page 11.)
- **Production Type – Print:** Choose the appropriate type. (For reference, see the applicable [workflows/project template titles](#) on page 11.)
- **Format:** Choose the appropriate format. (For reference, see the applicable [workflows/project template titles](#) on page 11.)
- **Previous Job Number:** (if applicable)
- **Print Quantity:** Enter the print quantity.
- **Previous File Format:** NA
- **G/L Code:** Client Services: 77850
- **Previous Item Code:** (if applicable)
- **Item Code:** (The Fulfillment “task owner” will enter this code.)
- **Budget:** NA
- **Remove from Job List:** NA

5. Click the Save icon .

Step 2. Assign a Project Template

Assigning a project template to your Aprimo job designates a workflow specifically designed for the Communication Team's projects. Follow these three steps to assign a project template to your Aprimo job.

(See **Figure 3** on **Page 6**, and **Figure 4** on **Page 7**.)

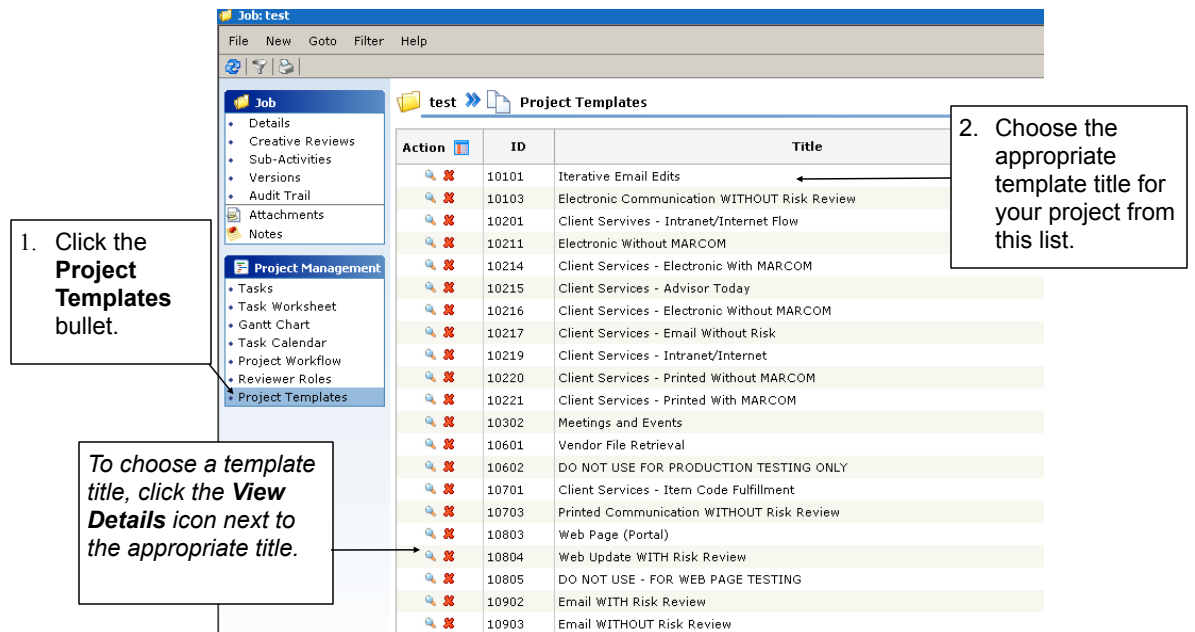


Figure 3: Project Templates Main Window Screen

Note: To avoid creating an incorrect workflow, ensure you choose the correct template title for your project.

➤ The template titles are as follows (**Note:** *These titles are also referred to as "workflows"*):

- **Client Services - Electronic With MARCOM**
- **Client Services - Electronic Without MARCOM**
- **Client Services - Printed Without MARCOM**
- **Client Services - Printed With MARCOM**

After you've chosen the appropriate template title, the **Project Templates Details** window opens. (See **Figure 4** on **Page 7**.)

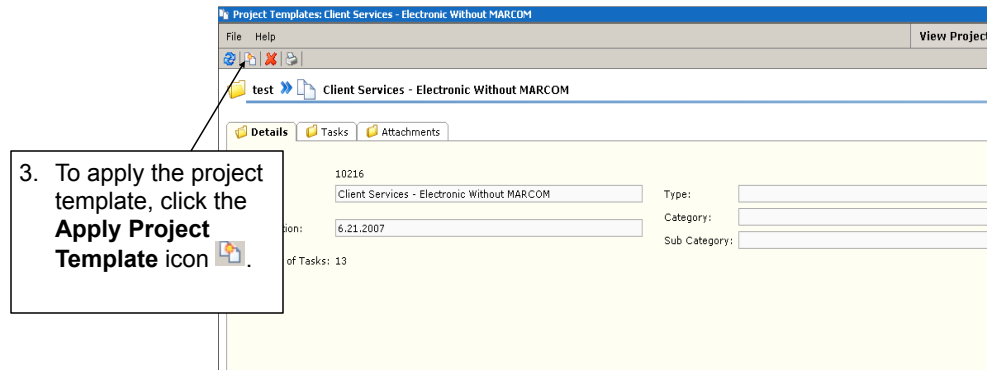


Figure 4: Project Templates Details Screen

The template is now assigned to your Aprimo job.

Step 3. **Assign Tasks**

Follow these five steps to assign tasks to individual task owners.

(See **Figure 5** on **Page 8**, and **Figure 6** on **Page 9**.)

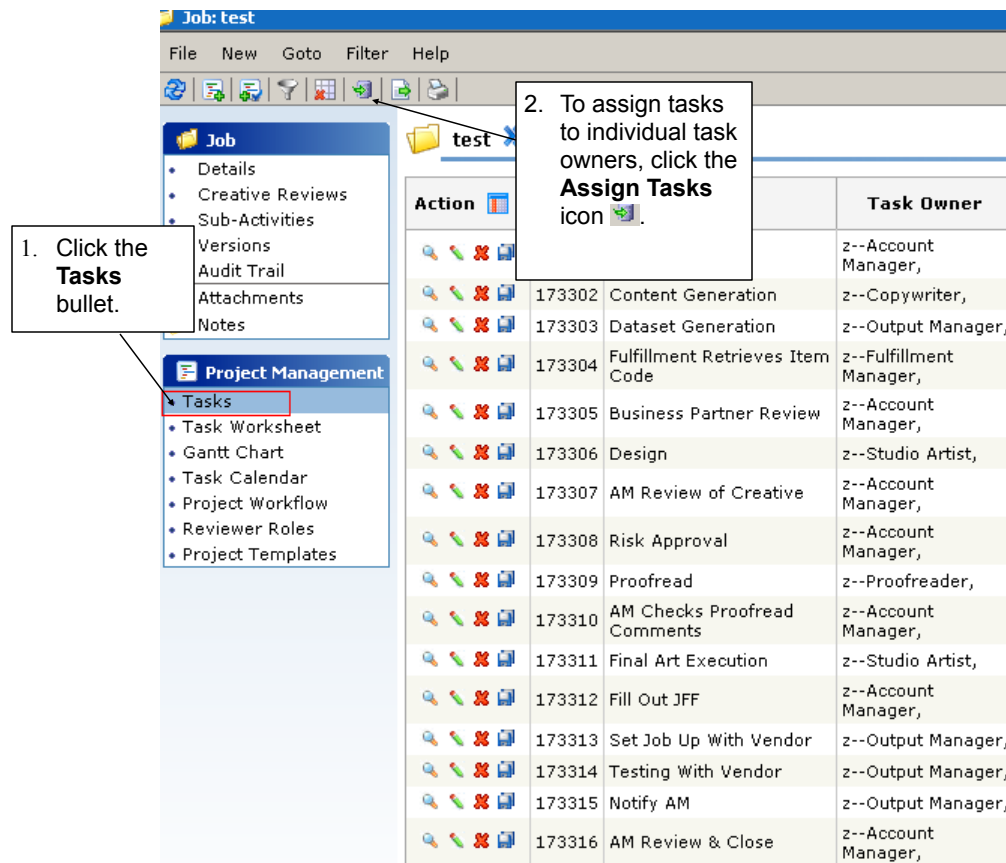


Figure 5: Tasks Main Window Screen

Note: To access the list of task owners, per workflow, see the applicable [workflows/project template titles](#) on page 11.

The **Reassign Tasks** window opens. (See **Figure 6** on **Page 9**.)

test

Rea

Task Assignees

Task Owners

Save

Reset

Cancel

Current Owner	New Owner
z--Account Manager,	z--Account Manager
z--Copywriter,	z--Copywriter
z--Studio Artist,	z--Studio Artist
z--Proofreader,	z--Proofreader
z--Fulfillment Manager,	z--Fulfillment Manager
z--Output Manager,	z--Output Manager

To view the names of the persons who perform these tasks, click the down-arrows.

Review Task Reviewers

Current Reviewer	New Reviewer

Reassign Options

☒ Exclude Closed Tasks

Figure 6: Reassign Tasks Screen

The **Project Workflow** main window opens. (See **Figure 7** on **Page 10**.)

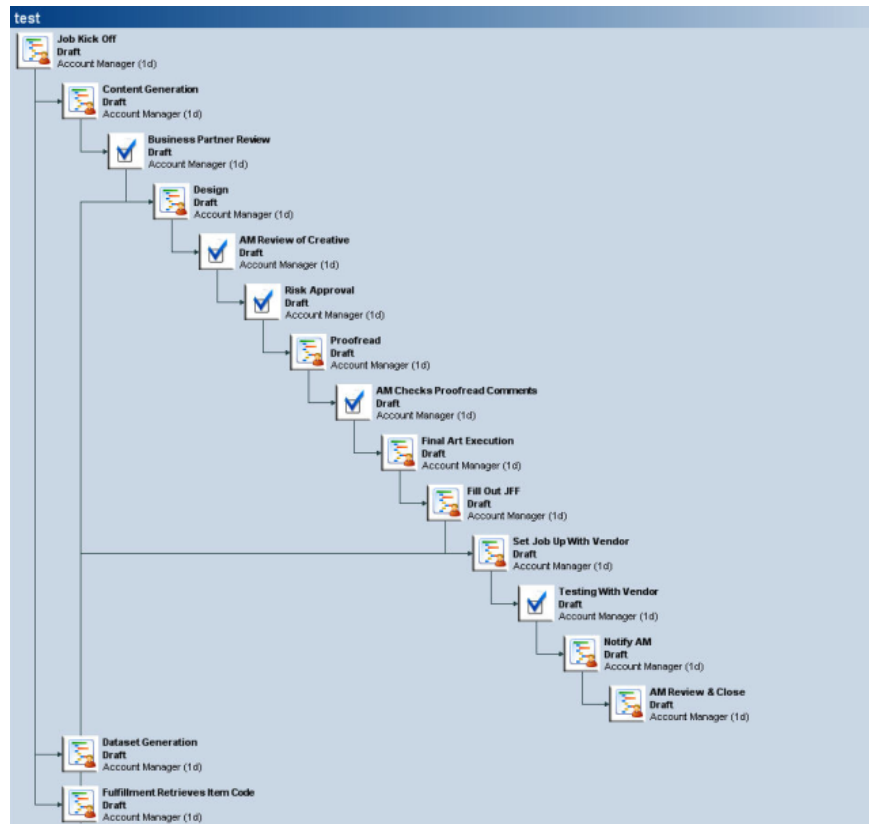


Figure 7: Project Workflow Main Window Screen

4. All of your tasks are in draft status (i.e., inactive status). To activate the tasks, click **File > Utilities > Change Draft to Pending**: (See **Figure 8** on **Page 11**.)

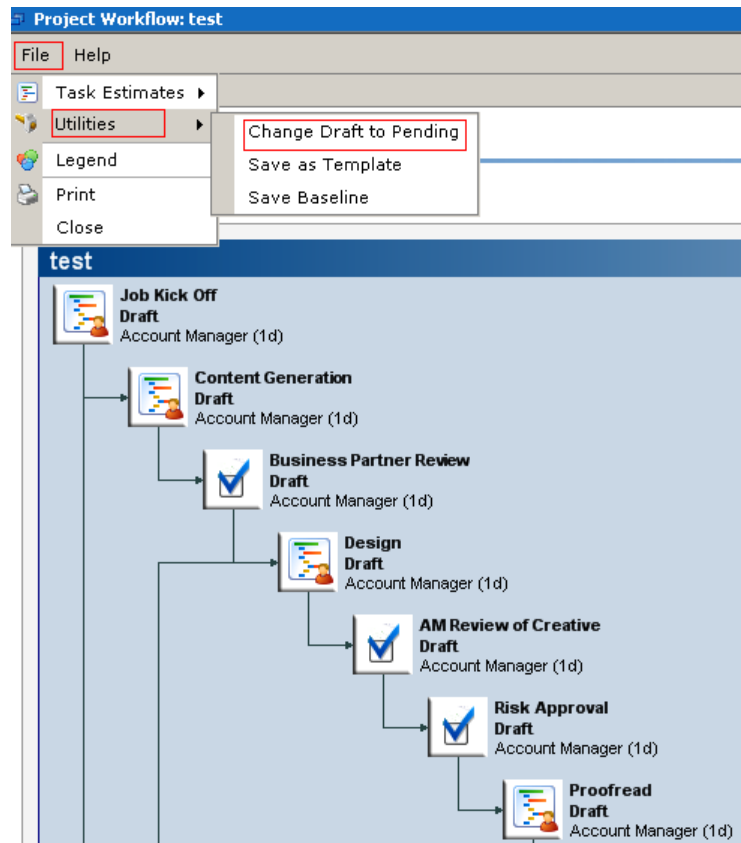


Figure 8: Project Workflow Menu

Your Aprimo workflow is now complete!

All of the task owners will receive emails alerting them to their new tasks.

Choose one of the applicable workflows/project template titles for additional steps:

External links to intranet
(disabled)

- [Client Services - Electronic With MARCOM](#)
- [Client Services - Electronic Without MARCOM](#)
- [Client Services - Printed Without MARCOM](#)
- [Client Services - Printed With MARCOM](#)

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