The Platinum Conversion

An Orientation to Workamajig Platinum

workama**pro**

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Overview

This guide has been developed for users of Workamajig Classic (Flash) who are preparing to make the transition to Workamajig Platinum. Keep in mind that this guide and review are based on two ideas. The first is that you have been live in Workamajig Classic and are therefore accustomed to its behavior. Second, we are presenting Platinum as you will first experience it – "out of the box." Take note that a custom user experience can be configured that may help provide a smoother transition between the two platforms, while also better aligning Workamajig with your own internal procedures and industry best practices.

Platinum is a fantastically beautiful beast and a vast improvement over Workamajig Classic. Users who are not familiar with Classic will have no problem diving right in and will find most of the tools and features quite intuitive. Those familiar with Classic will also find the Platinum environment easy to adapt to with enough practice and exposure to the interface.

It's apparent that Workamajig has devoted a lot of resources to its user interface. You're going to notice many rarely used fields, or fields whose values can default from another source have been directed away from standard viewing. This is great for keeping the user focused on relevant data, rather than getting lost in the minutiae.

Once we discuss the intuitive updates and conceptual changes in the system, you are then free to explore the system as you see fit! If you have used the Classic version of Workamajig you already know the basic system. Some items have been moved around and the interface has been updated, but it's still the same ole Workamajig you've come to love (or possibly hate).

We'll begin with the general features and behaviors before diving into some practical screens all users will need to access. Once you get the hang of these common screens and system concepts, you'll find they are very consistent and applicable for most screens in the system.

Log In Orientation

Overview

So, how do you log into Platinum? Simply add "/platinum" to your current Workamajig login URL like so:
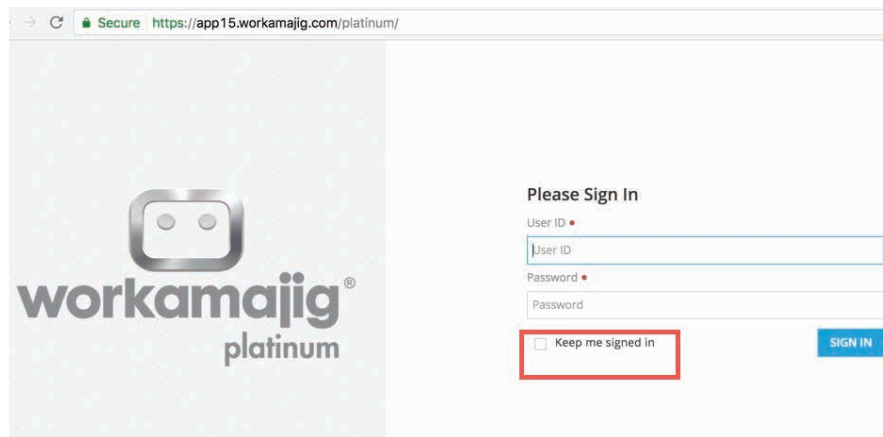
Note the "Keep me signed in" feature, and that you can operate in the Platinum environment utilizing multiple windows and/or tabs.

Where am I?

Once you are logged in, you may wonder where you have landed. When you log into Platinum, you are taken to what is referred to as an "app." Specifically, you are viewing the *today-creatives* page for the *creatives* app because it is the default page setting for all first-time users of Platinum (this setting can be customized).

What am I viewing?

Now that we know where we are, the next question is what are we viewing? Because the *today* menu is from the *creatives* app, most of the screen real estate resembles the Classic My Tasks widget. You'll note the *TASKS I NEED TO WORK ON* label (near the top-left of the screen). The majority of your current screen (*today - creatives*) is devoted to Tasks that have been assigned to you from Active Projects. The approach is similar to Classic in that you are essentially viewing a Classic Desktop ... only this particular view is based on the app in which you are working – and not your security specific group.

At this stage it is important to understand that your view is based on a combination of the Platinum interface menus System Settings and Display Options (more on both later). Your widget settings from Classic have not been migrated into this screen layout.

 We are going to explore the details of this and other menu screens in later sections of this guide. For now, we just want to get a feel for the home screen and its basic purpose.

Exercise: Give It a Try

Let's take a moment to explore this initial screen with a few, quick exercises that utilize the below screenshot. First, click on each of the icons called out in shot *a* below to view task details. Take your time and allow yourself to absorb the similarities and improvements from Classic.

Next, toggle your view of tasks from *Tile* to *List* views (b). Note how the list view more resembles the Classic My Task view. Think about the advantages of both views and how each type of user in your system may prefer one over the other. Note that a third view is currently in development that will rock your world (sorry to be a tease).

Finally, click on the link to your timesheet (c), because, hey, it's always nice to know how to access your timesheet, right?

Now that we have a basic understanding of your initial screen/menu in Platinum, let's take a breather and talk about the changes from Classic to Platinum with respect to items we know you'll be looking for (from Classic) and the items that are mainstays in Platinum.

The Platinum and Classic Mainstays

Overview

In this section, we will cover the Platinum items that are always on screen. We will do this with respect to the same items found in Classic (we know you're wondering where they are). Finally, we'll reference Classic items no longer utilized in Platinum. Please refer to the screenshot below throughout this entire section. The items called out in red will be present on every Platinum screen and tie back to familiar menu options and characteristics from Workamajig Classic.

Main Menu

Not much has changed here. See the WMJ logo? Click on it! By the way, the words "WORKAMAJIG" can be customized or branded to say anything you like!
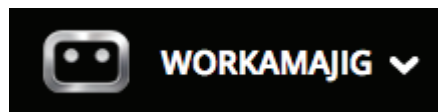
The first items you see, by default, are referred to as "*apps*." *apps* are predetermined bundles of menu items based on your staff's role within the company. They essentially replace the former menu options which were based more on modules of the system. The *apps* and options that can be viewed by a specific user are controlled by the security rights of that user in *system setup*. The user experience can be further customized from a Platinum-specific option within *system setup* entitled Custom Menu (under Account Information - System Options).

The concept behind *apps* is to group parts of the system by user type, which makes it very straightforward for basic staff usage. If you are a manager and require access across the system, it may be somewhat confusing getting started. However, we think Workamajig's approach is sound. Further, we think it's great that Workamajig made it easiest for the creative-based roles to use their system. Their user adoption is key to capturing reliable data in your system. We *should* be making it as easy as possible for them to access the information they need in order to produce fantastic work for your company. The system administrators who designed your system can customize a user experience that meets their own unique needs. Don't forget: the menu and *app* navigation is 100% customizable by security group.

Notifications

The Notifications bell has replaced the Classic Menu/Widget option for Approvals/My Items to Approve. Why have a "My Items to Approve Widget" that may or may not be populated for parts of the day? Now you'll see any type of approval clearly alerted by the notification "bell" icon at the top of your screen.

Global Search

This one is pretty easy to find and is intuitive – simply click on the magnifying glass icon at the top-right of your screen. Note the on-screen usage tips called out in the braces in the image below:

Recent Items

 This former menu item now lives as a static icon at the top-right of your screen. Not much has changed here. Simply click on the icon and slide-out menu will appear, listing the last 15 items that you have accessed.

[yourname] = My Settings

 My Settings now has a static location at the top-right of your screen and is represented by your name and an optional logo or picture. We think this is an improvement from Classic, where the option to modify your settings was buried within the menu item options. Now, you can easily manage your Default "home" page (the first screen you see after you log in) and your contact information.
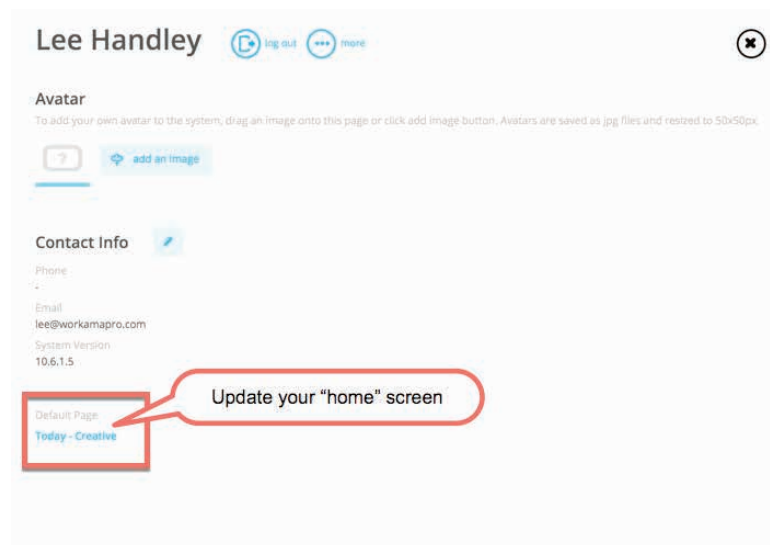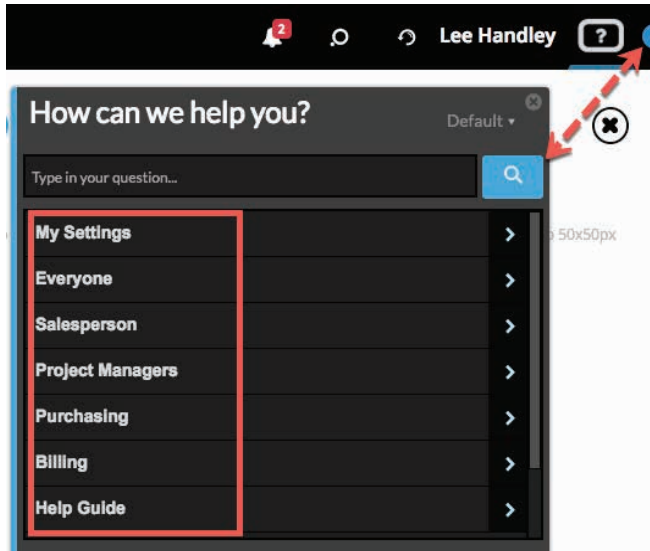

There is an option within your settings to click "...more" (we'll expand on this in a later section) to reveal the *Help Guide* and a few other, lesser-used objects. Check them out!

The Blue "i"

 The Blue "i" is your new friend. Acting as an intuitive and interactive help guide for the Platinum interface, it also provides a direct link to the expanded Workamajig Help Guide.

So Long, Old Friends

It's time to say goodbye to the Speed/Jiggy Bar, Status Bar, and the font increase/decrease buttons from Workamajig Classic.   Let's discuss how to adapt to these updates and changes.

You can still utilize some of the advantages the speed bar afforded the user. Keep in mind that your Menu/app navigation can be customized at an administrator level to help customize your user experience while helping to cultivate your own agency-specific processes and workflow.

Windows are omnipresent in Platinum. We no longer minimize or maximize windows to a dedicated spot in the Status Bar from Classic. Instead, slide-out windows shuffle into view from right to left and are easily dismissed when you need to close them out. One reason this is an improvement is that this type of navigation automatically leaves a trail of previously visited views so that you can retrace your steps if you have edited particular transactions you need to return to. Note that you can also work in multiple web browser windows/tabs if you need dedicated screens open at any time.

For those who relied upon the font increase/decrease tool to view the details on a screen, simply use your browser's native tool (View > Zoom In when using Chrome).

Standard Navigation

Overview

Workamajig Classic presented you with Menu/options, Desktops, Widgets, and Listings. Those items have been replaced by *Menu/apps*, *today*, *dashboard*, *"Home"* screens, and *Views*. The changes are pretty straightforward, but it is a good idea to get acclimated to them in the new and improved Platinum environment.

The Platinum interface is easier to understand once you realize that you are always in one of these places: *Menu/apps*, *today*, *dashboard*, *"Home" Screens*, and *Views*. We believe that each of these items has its own feel and rhythm. Ultimately, experience in the system will be your best teacher. However, a thorough understanding of each of these objects should help answer the question "where do I go if I need to _____?". So let's discuss each one in detail.

apps

Platinum *apps* are collections of menu options that are organized by roles or user types. Simply put, they are a better way to organize the Main Menu items found in Classic. Menu options are organized by the *app* name, which is essentially based on user types or roles.

Instead of seeing an array of options based on a subject or module, we now see those same options grouped or arranged in a manner that is more personal or role based. So, when you click on the main menu, you will see a series of apps based on your security settings and access points into the system.
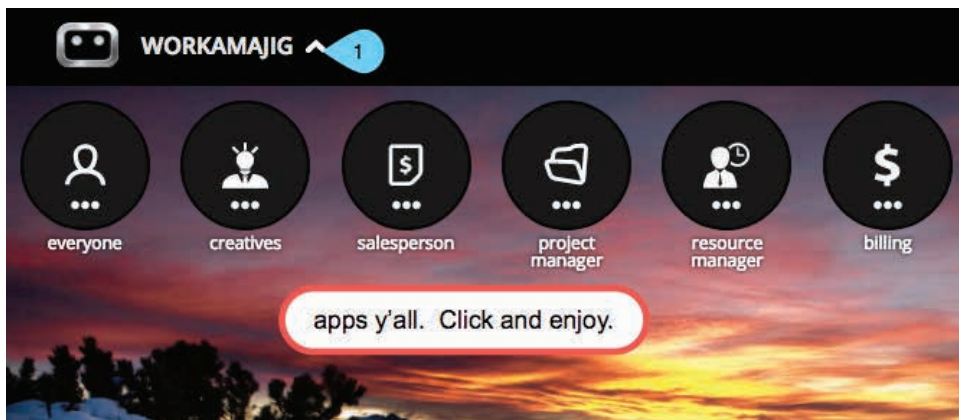
There is some overlap and change from the perspective of either system. For example, the *projects +* option is going to be listed under multiple *apps* in Platinum, where it is listed only once in the Classic menu navigation. Alternatively, there was no menu item in Classic that represented the "creatives" (how could that be!).

So, what does this mean? Basically, you will click on the menu and utilize items that *typically* pertain to the role or type of person who typically performs a type of function. Critics may argue this forces the user to take on multiple personalities (am I "Everyone" or am I a "Project Manager"?). However, I cannot say it enough: **Bear in mind the configuration of apps and menus can be fully customized and configured by security group**.

 Our experience, so far, is that most of the apps are intuitive enough to be understood immediately. In fact, we think the only noticeable difference in the Classic vs. Platinum menu approach is in the *everyone* and *creative* apps.

The *everyone app* in Platinum replaces the lower-half section of the menu in Classic. This is where you go to manually create or view generic functions, like the *timesheet*, *expense reports*, *calendar*, and *report center*. Approvals are now omnipresent as part of the main screen in Platinum (the notifications "bell" icon).

Click on the *everyone app* to view additional menu apps.
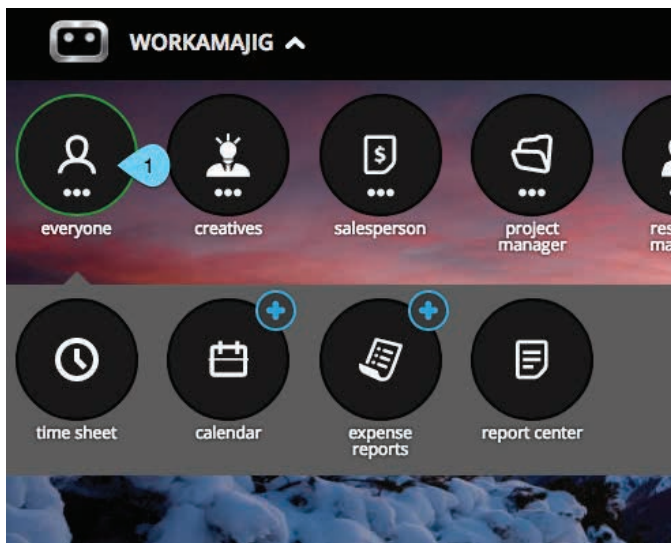
The *creatives app* in Platinum currently has only two menus: *today* and *projects +.* But then, it really doesn't need anything more, does it? *creatives* basically replaces the My Tasks concept and workflow. It has been designed with the Creative person in mind and she/he finally gets the respect due in this version of Workamajig. This app was among the first to be released in Platinum. Most people find it intuitive enough to use without any additional support!
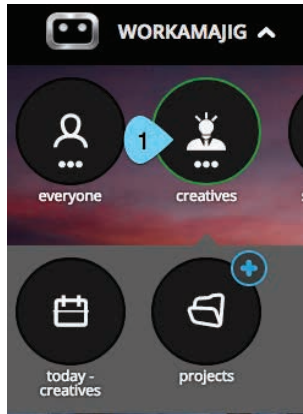
Even though *today* for Creatives lives in the *creatives app*, we believe that all users will want to access this menu often for time entry and task completion.

So, to summarize, the new Platinum *apps* essentially replace the main menu items of Classic. This time around, however, the subject groupings are intended to be more role-based. The best part about this approach is that the array of *apps* and menu options are fully customizable so you can set them up and configure them any way you like!

Today

The Platinum *today* screens are unique to each *app*. They are the logical extension of the security group-oriented desktops from Classic. Each *today* screen is designed to facilitate the expected workflows and action based on the *app*/person/role. This can become a little tricky, in that you may find yourself needing to cross roles and use the *today* menu for multiple apps. For example, you may be a Project Manager but LOVE using the Creatives version of *today* for time entry purposes.

Because the*Today* features are so rich and extremely useful, all the changes are far too detailed to be covered in this ebook. But fear not! Each change is well documented in your Workamajig Help Guide! For the purposes of this ebook, we'll keep the conversation limited to items and ideas that are new to Workamajig and the Platinum interface.

today - creatives: note the ability to "star" favorite items (see below) for quick accessibility at any time.

Today - Creatives 📅 Wednesday, May 24, 2017 ••• more   🕐 Enter your time for today

TASKS I NEED TO WORK ON   FAVORITE TASKS (1)   ➕

🔍 Search

Friday, July 18, 2014

JNJ-0004 - New Promotional Campaign /
Johnson & Johnson   ⭐
Define
Revisions
                        ⌄
No New Updates   ✓ 🗐 🕐

Thursday, July 24, 2014

JNJ-0004 - New Promotional Campaign /
Johnson & Johnson   ☆
Define
Creative Brief
                        ⌄
No New Updates   ✓ 🗐 🕐

📅 Schedule   ☁ 68.1

➕ New Meeting

You do not currently
have any meetings or
time entries

Remember all of those features that were really useful but rarely used? You wanted them on your desktop, but they took up valuable screen space. Meet the "*…more*" button (top-center of your screen). Click this button to view helpful tools, navigational shortcuts, and customization options. All are conveniently off of your main workspace. Each app's *Today* menu will have different *…more* settings and options, and you'll see this feature in other menu options as well . This can take a while to get used to if you are an admin and bounce around a lot of different screens.

You'll also see a + sign to the left of *…more*. Click here for a quick way to add things to Workamajig (such as projects, contacts, etc.). The options listed here are also based upon the specific *today app* in which you are working. Note that the *today* app for Creatives does not have a + sign.

Also take note of the blue clock and link displaying how many hours of time have been entered into Workamajig for the particular day you are viewing (oh yeah, you can click on the calendar to change "Today" to any day!). Clicking this link provides quick and easy access to your timesheet.

 Finally, you'll see a section labelled "Schedule," which displays the weather (yea!) along with all of your scheduled meetings and time entered for the day. This essentially replaces the Today's Time widget feature from Classic that tracked your daily time entries.

Go ahead and pull up the *today - project manager* menu (Menu > project manager > today - pm) and try clicking the items called out in the image below.

Today - Project Manager

Wednesday, May 24, 2017

Open Items	
Unapproved Purchase Orders	1
Open Requests for Quote	1
Unapproved Project Requests	3
Approved Requests with no Projects	3

Items Needing Attention	
My Tasks	>
Projects with budget warnings	1
Assignments due but not done	6
Projects with schedule warnings	3
Open Activities	1
Daily Deliverable Status	2

conversations   daily feed

Gather Purpose/Business Rules

Schedule ⏱ 68.1

⊕ new meeting

You do not currently have any meetings or time entries

⊕ ⋯ more 🕐 Enter your time for today

So, in summary, *today* can be utilized, by role, basically to drive all activity in Workamajig throughout the day. It works best for non-managers because they will have less need to navigate away from this screen. The more cross-functional a staff member may be, the more requirements he/she will need to fulfil and thus navigate to many other screens.

Dashboard

The dashboard views are visual reporting tools unique to each *app*. In this sense, they replace the Workamajig Classic widgets and reports designed to provide managerial information. You will currently see the dashboard screen option in the salesperson, project manager, and billing apps. Let's take a moment briefly to explore each of the current dashboard menus.

The *project manager dashboard* (Dashboard) is equivalent to the Project Scoreboard report in Classic. It is robust and date driven. System Settings (see called out section below) can control settings and viewing options as a company default, and by Security Group (more on that in the next section). Note that each section also includes a "show description" link that helps explain each section and provides insights into its usage.
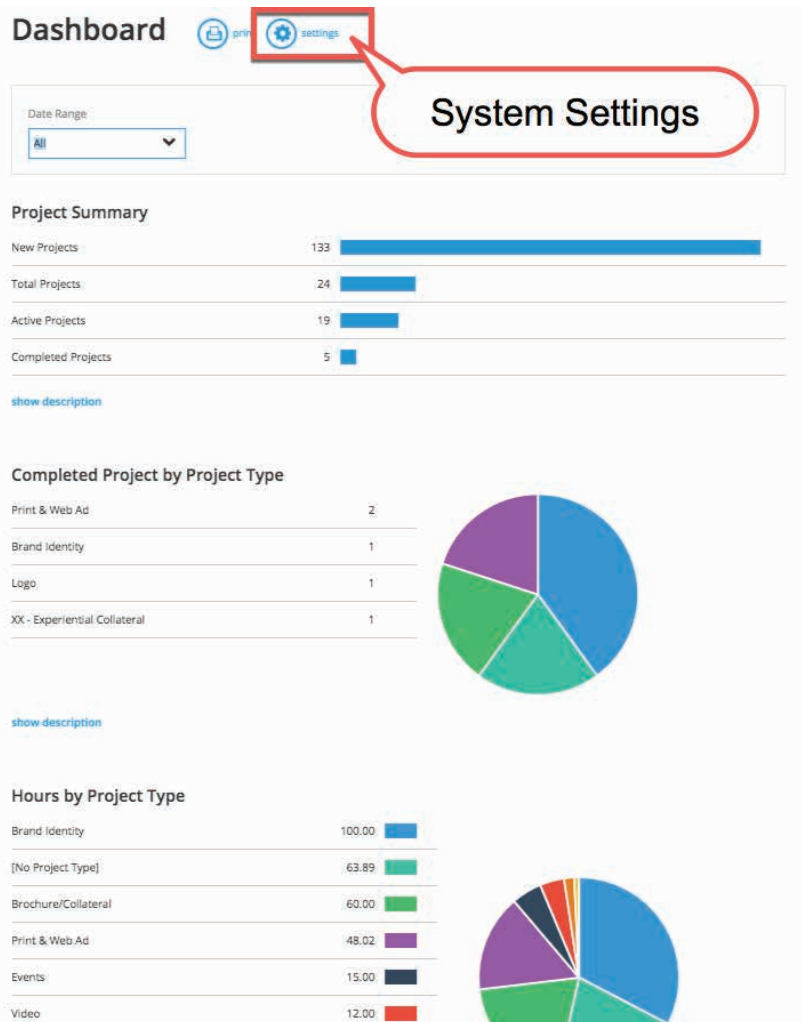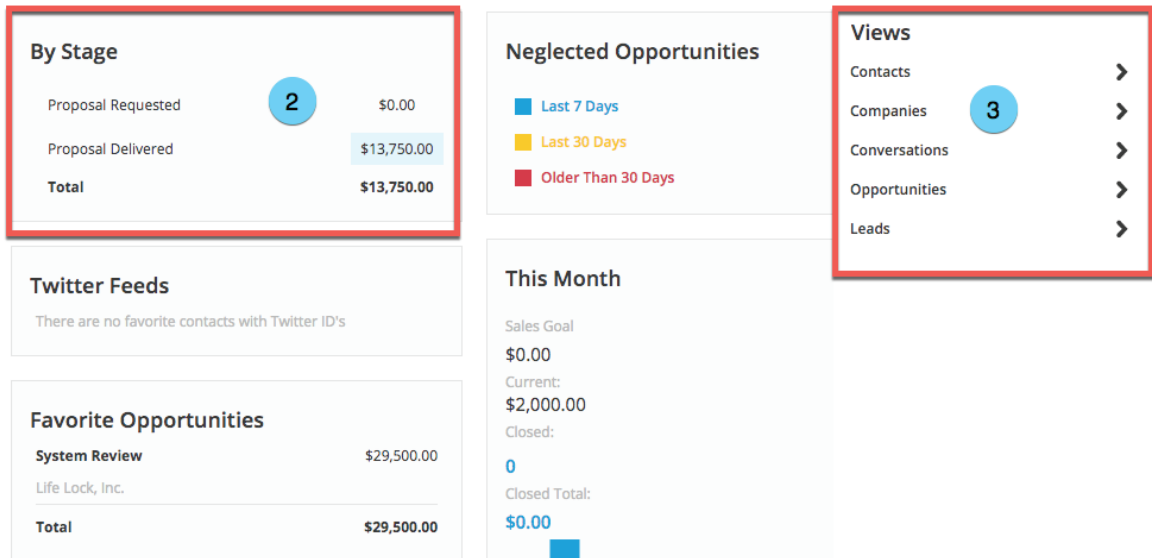
The Sales Dashboard is similar to the *project manager dashboard*, but also includes additional features. First, you'll see the *+ new* option (item 1 in the screenshot, next page), which is similar to the + option previously described in the *today* section of this ebook. This option provides convenient access to add sales-based data (leads, contacts, companies, etc.) to Workamajig without having to navigate away from the dashboard itself. Second, note that most of the items displayed in this dashboard are interactive. Simply click on a linked item to drill down and access the details (item 2 below) of the line you clicked. Finally, this dashboard provides access to all of the saleperson-based views (item 3 below). We will discuss *Views* (formerly "listings" in Classic) later in this section.

Sales Dashboard   ⊕ new   ⚙ system settings

1

By Stage

Proposal Requested	**2**	$0.00
Proposal Delivered		$13,750.00
Total		**$13,750.00**

Neglected Opportunities

🟦 **Last 7 Days**

🟨 **Last 30 Days**

🟥 **Older Than 30 Days**

Views

Contacts		›
Companies	**3**	›
Conversations		›
Opportunities		›
Leads		›

Twitter Feeds

There are no favorite contacts with Twitter ID's

This Month

Sales Goal
$0.00
Current:
$2,000.00
Closed:
0
Closed Total:
$0.00

Favorite Opportunities

System Review	**$29,500.00**
Life Lock, Inc.	
Total	**$29,500.00**

Finally, we have the Billing Dashboard, which is fairly straightforward. It shares the interactivity features of the Salesperson Dashboard, providing drill-down access to underlying detail of any particular item being reported. It does not provide access points to billing-based views, or the *+ new* feature.

Note that all dashboards have an option for *system settings*, that allow you to customize your user(s) experience.

‹ 📅 › Dashboard for May, 2017   📅 show ytd   ⚙ system settings

Aging

0-30	0.00 🟦	›
31-60	0.00 🟩	›
61-90	0.00 🟩	›
91+	298,926.89 🟪	›

Current Open Amounts

Others	1,214.45 🟥
ABC Test Client	80,500.00 🟩
Check Mix	59,756.63 🟩
Division Street	86,830.81 🟦
Hudson Toyota	30,125.00 ⬛
Microsoft	40,500.00 🟪
	298,926.89

Home Screens

The Platinum "Home" screen view (my name for it, not Workamajig's) is simply any landing page after selecting a menu option that is not *Today* or *Dashboard*. In Classic, a menu option sends you directly to a listing. The last listing visited becomes your Home. In Platinum, the concept of a

listing view is separated from this landing page concept (Home and Views). We'll discuss *Views* in the next section.

What's interesting in the Home screen is that they are as not consistent across all menu options, as they might have been in the Classic/listings approach. We've identified what we believe to be 3 distinct approaches to the Platinum Home screens, mostly based on the *app* from which they are derived (salesperson, project manager, traffic manager). However, note that some menu options are cross-functional and may be found under multiple app configurations. In any case, if you think about the basic function of a particular screen you can always tie it back to one of these three *app* behaviors.

project manager-based Home screens resemble the Widget-based analysis found in Classic. We see this approach applied to the projects and campaigns and to menu options. The screenshot below resembles the Active Projects widget from Classic. Its capabilities are almost an exact match to Classic, but notice that your settings from Classic have not been transferred into Platinum. Note the options for *+ new* project, and *… more*, the latter of which can allow you to configure both System Settings and Display Options (more on that later).

Projects   ⊕ new project   ⋯ more

Project Full Name	Financial Status	Project Task Status	Project Status	% Complete	Open As
⌄ **ABC - ABC Test Client**					
12-ABC-005 - TEST PROJECT - DELETE LATER	!	📅	Production	0%	
ABC-0010 - testing constraints	!	📅	Production	0%	
⌄ **DEL-MILK - Check Mix**					
12-DEL-MILK-0008 - Test for Demo - Stage 2	!	📅	Production	96%	
12-DEL-MILK-0009 - Test for Demo - Stage 3	!	📅	Production	55%	
⌄ **DVST - Division Street**					
DVST-0017 - Test	!	📅	Production	0%	

show gantt

salesperson-based Home screens differ from the *project manager-based* Home screens in that they are basically data repositories. They provide a means of adding new data records. Their key features are search for records (see 1 below), a recent section (2), and access to the views (3) for that particular menu option. We see this type of Home screen in *leads, contact, companies, marketing groups, clients,* and *vendors*. Note the latter two options are in the *billing and purchasing apps*, respectively (cross-functional use). Also note that the *opportunities* menu option Home screen uses a different approach. More on that later.

We characterize the *traffic manager*-based *Home* screens as "working screens." They are utilized on the *staff schedule*, *traffic calendar*, and *assignment management* menu options. All of these options are accessed from the *traffic manager app* (see the screenshot on the next page).

The Home screen for the *opportunities* menu option stands alone in that it's approach appears very similar to the *today - creatives* screen. It's really cool. Users can drag and drop *opportunities* to update their Opportunity Stage (see below).

Opportunities ⊕ new opportunity

| 🔍 Search in the Company Name, Opportunity Name fields. | SEARCH | show summary by person |

Initial Contact	Interest Confirmed	Proposal Requested	Pro
$140,000.00	$0.00	$53,000.00	

ABC Test Client	☆	Hudson Toyota	☆	Johnson & Johnson	☆
testing		Socialize Web page		Web Redesign	
Lee Handley $75,000.00		Damian Sian $0.00		4/1/2013	
				Lee Handley $53,000.00	

Tesla Motorcars	☆
New Website	
Lee Handley $55,000.00	

General Mills	☆
New Agency of Record	
Lee Handley $10,000.00	

Blue Cross Blue Shield - North Carolina

Drag and drop Opportunity tiles to update Opportunity Stage

It is unclear to us if Workamajig is waiting to create additional menu options or if some of those features will be simply incorporated into other *Home*, *Today*, *Dashboard*, or *Views*. We will try to get a report on this. However, we do believe that the *Home* screens you experience will resemble the options we have discussed. We would anticipate that as Workamajig develops the Platinum Platform, there will be more consistency across all types of Home screens in terms of access to items such as Views, *+ new*, and *...more*.

Views

Ah yes, Views. Finally. Views! Views are simply your old Listings from Workamajig Classic. You may have simply referred to them as lists or screens. Views are the only viewing component from Classic whose settings and configurations were migrated directly into Platinum. Views and the Report Center are really the only items we have found that are more or less identical in both systems.

Project Views (formerly listings in Classic) in Platinum:
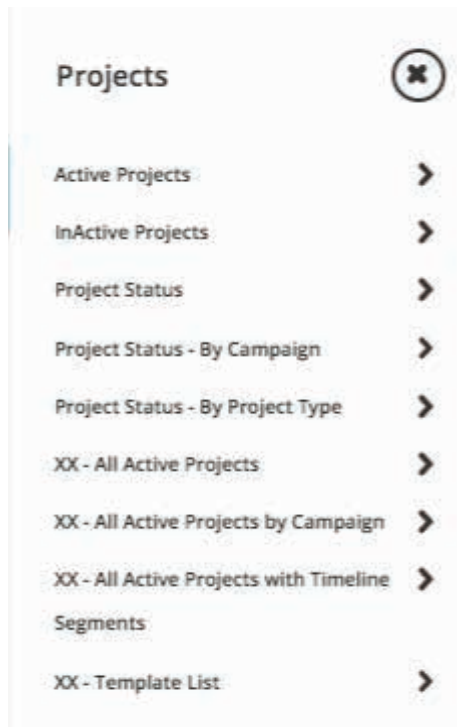
Listing views in Classic:

Screens accessed via the *Views* option (see the *Active Projects View*, item 2, in the shot on the next page) behave somewhat differently from *Today*, *Dashboard*, and *Home* screens. They appear from the right side of your screen in a slide-out window, covering most (but not all) of whichever screen is currently being utilized (item 1). They can easily be dismissed by clicking a small "x" (item 3) in the top-right of the *View* screen.

From here, the *View* screen has the same functionality as your *Listings* did in Classic. They now have the benefit of being more intuitive and easy to use. See below for options to select records (1), and update multiple records (2). Note the improved design and user interface for printing and modifying each view (3).

So where do we find and/or access Views? They are going to be accessible in a multitude of places. The best place to look is within any particular home screen for a module of data you are trying to access. Additionally, some Views, but not all, will be available from the *today* and/or *dashboard* views of a particular *app*.

The *everyone app* does not contain any Views.

The *creative app* contains no *Views*. Big frown – or maybe not. Creatives, did you really want that feature to look up that information anyway?

The s*alesperson app* has access to *Views* on every home menu screen. The *today* and *dashboard* screens provide *Views* across all menu items within the *app*. From *today*, you'll have to click on *...more* to access *Views*.

Views is integrated within the *salesperson dashboard*.

Important: if you want to access your *Activities Listings/Views* (*Conversations* in Platinum), it's a little tricky. For some reason, we don't have a home screen for activities. You can only access them via the *Today* and *Dashboard* screens.

The *project manager app* has Views enabled on the *campaigns* Home screen. You will have to click *...more* from the *projects* Home screen to access Views. Views are a part of the *today* screen, and are cross-functional for items related to both *project* and *traffic management apps*. However, Views are not accessible at all from the *dashboard*. This is somewhat confusing and inconsistent when compared to the behaviors of the Views as utilized in the *salesperson app*.

Views accessible from the left panel of a Today - Project Manager Menu screen:

The *resource manager app* currently does not have any Views. **If you need to visit any of the Traffic Assignment Views from Classic, you'll have to access them from the *today* menu of the *project manager app*.**

The *billing and purchasing apps* have Views enabled from their respective *today* menus and it appears the Views options will include all billing and purchase-based menu options. You will additionally find Views within the Home screens of *clients* and *vendors*, respectively.

Finally, the *admin/manager* app will contain listing Views in the *today-managers* screen. Interestingly, Views from this menu option touch features across the entire system that are difficult or impossible to access elsewhere. Here, you will find access to all user Timesheets and Expense Reports, as well as To Dos, Projects, and Assignments.

Display Options and System Settings

Overview

Display Options and System Settings are two new options we will see for controlling the layout and viewing experience in Platinum. The System Settings will allow the administrator of your instance of Workamajig to insure a consistent user experience across all user groups and modules. Display Options will allow individual users of your system to customize their own user experience without affecting the experience of other users.

System Settings

System Settings are accessible in virtually every *today*, *dashboard*, and Hom*e* screen in Platinum. Now, your system administrator can easily customize the Company Default settings for the screen and the particular app where this option is available. The Company Defaults can then be overridden and customized by security group. Note that access to specific views and screens is controlled through your Security Settings. So, for example, don't spend too much time customizing the "Creatives" view of the *today-managers* menu. It's not likely that anyone belonging such a Security Group will have rights to any features available in the *admin-manager* apps anyway. Access the System Settings for any screen by clicking on the *...more* button.

Note: in cases where there is only one additional option on screen, you will not see *…*more. In this case you would only see System Settings as an option.
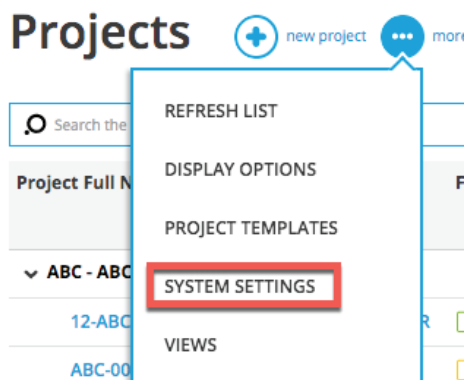
Once you've selected the option for System Settings, you'll see additional options for configuration and customization. These options will control what users initially see on the particular screen from which you are editing. Note the Groups section of the screen indicates which group you are currently editing.

Though Company Defaults should take care of most, if not all use cases, you can see there are options to further define the user experience for other (by Security Group) user groups. This is a fantastic feature (see options on the next page).

Notice that within your System Settings you will also be able to establish the default, initial

Display Options. This should not be confused with the Display Options that each user is able to edit once in a particular screen view. These are not the same "Display Options" discussed in the next section.

System Settings from the Projects Home menu (1 of 2 - System Settings):

My Projects Settings ⊗

Groups

| Company Defaults |
| Account Managers |
| Accounting |
| Administrator/IT |
| Clients |
| Creative/Production |
| Executive/Owner |
| Traffic/Project Manager |
| Vendors/Freelancers |

My Projects Options

☐ Projects With My Open Assignments Only

☒ Only Projects I am On The Team

Project Status
All Active ⌄

Billing Status
All ⌄

GL Company
All ⌄

Budget Warning
80.00

Display Options section within the initial System Settings (2 of 2 - Display Options):

| Company Defaults |
| Account Managers |
| Accounting |
| Administrator/IT |
| Clients |
| Creative/Production |
| Executive/Owner |
| Traffic/Project Manager |
| Vendors/Freelancers |
| XX - Clients Full Access |

Display Options

Group By
Client

Group Sort Order
ASC

Sort By
Project Number

Sort Order
ASC

Columns
Project Full Name, Financial Status, Project T
Status, Project Status, % Complete, Open
Assignments
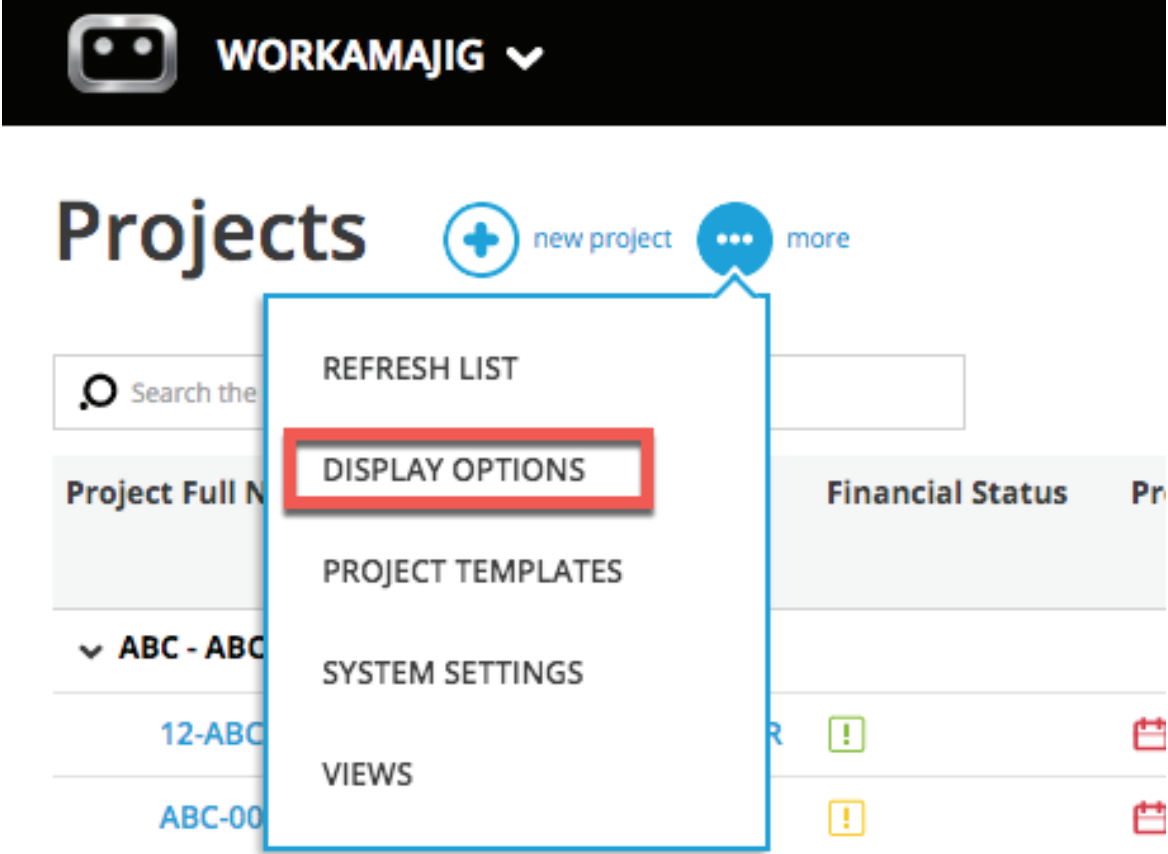**edit columns**

Display Options

Display Options can be accessed from the *...more* button/control, mostly on *today* menus and Home screens. The Display Options (described as Display Settings in the Platinum Guide) allow the user to modify what they see on screen without affecting what other viewers see on that same screen.

To view Display Options, click *...more*:

Then edit options:

Options ⊗

☐ Projects With My Open Assignments
　　Only

☑ Only Projects I am On The Team

Group By

| Client | ⌄ |

Order

◉ Ascending

◯ Descending

Sort By

| Project Number | ⌄ |

Order

◉ Ascending

◯ Descending

Project Status

| All Active | ⌄ |

💾 SAVE　　CANCEL

What does this even mean? Well, in Workamajig Classic, it wasn't really clear which items were controlled system-wide versus on a per-user basis. That distinction is made much more clear in Platinum. Now you can decide at an administrator level which fields are important for the company (or a particular security group) to view for, say, the project budget. You no longer have to customize each user's view for each screen. Conversely, there is also the ability to control the view without disrupting the viewing preferences of other users.

So Now What? Next Steps...

Overview

You are now on your way to being fully acclimated in your Platinum environment. It's time to begin preparing your group for the switchover to Platinum. Your Core Implementation Team should begin developing a strategy to get ready for the transition.

Prepare for the Transition

It's time to reassemble or re-establish that Core Implementation Team (if you haven't already). All Workamajig functions are now represented in Platinum as either a Lab or BETA item. And all of the modules and apps look REALLY good. Your next step should be getting your team switched over. Review each app to determine which ones are relevant to your instance of Workamajig.

Phased or Full Implementation?

Once you've identified which apps are relevant to your instance of Workamajig, you can determine when you want to deploy each of the apps. Note that you do not have to switch everyone over at the exact same time – this is what is referred to as a full implementation. We believed that a phased implementation is appropriate for Platinum, considering that you are already in the Workamajig environment and are not actually changing your system – just the operating environment. Workamajig makes this really easy – just click on your Platinum main menu. We find it serendipitous that you'll see creatives > salesperson > project manager ... this is the order we would suggest that you deploy for each *app*. Set target dates to go live in each of these sections, making sure to take a two-week break between each *app* go live date. The idea is to take the easy wins and build your user adoption rates.

We know creatives will LOVE the new environment. This will encourage the sales/CRM users and, well, you get the drift. Build on your successes. Then, if you find that you could potentially deploy *apps* in less time, or even combine their individual release, go for it! Conversely, if a particular *app's* implementation takes longer than planned, then regroup and find out why. There could be good reasons to expand your deployment schedule. Just remember to make user adoption your number one priority. Expedited implementation timelines are worthless when a system isn't used correctly (or at all).

Training and Documentation

Once you have set an implementation timeline for each app, document the basic steps, or things you expect your users to do in the system. This doesn't have to be complicated (though it certainly can be). Let your core team try to execute items from this list in Platinum as if they were an *app* user (a Creative for example). Document any questions or concerns you have and contact Workamajig Support to alleviate them. Review your Workamajig Help Guide and create your own documentation, where needed. This is always a good exercise.

In general, we believe you can go a long way simply by using Workamajig's guide. The new environment is intuitive enough that your team will not need much additional training. They'll always have you (the system administrator), and we can presume you will have documented the pain points for them well in advance. Once you have a training plan in place, practice it and test it out on a user. Make adjustments as needed until you are comfortable training each respective group.

Clean Up Your Data

A day in the life of a creative group is predictably unpredictable. There are only so many things you can control. Out of date information is one of them. It is a good idea to clean up your data before making the switch for any particular app.

Make sure everyone's timesheets are up to date (entered, submitted, and approved). Close out and de-activate projects that are no longer a going concern (i.e., active). Make sure Workamajig knows which Tasks are complete and which ones are still being worked on. Make sure that have been assigned to your staff are reflected as such in your system. We want to eliminate as many potential problems or questions as possible prior to switching platforms.

How do I … ? Where is my …?

Create a support channel to manage your ongoing needs in this system. No need to re-communicate the same support information over and over again. Document questions that arise and produce answers that are available to everyone.

Closing Thoughts

I've been in the Creative Management sphere since 2003, and I couldn't be more excited about the release of Platinum. The system is as streamlined and user friendly as it has ever been. But, managing your system is a never-ending process. Keep your Core Team together and meet periodically to stay atop of your current processes and system changes in Workamajig.

You will change. Your company will change. Workamajig will change. And with proper management, all of this change is for the better.

About the Author

Workamajig Consultant Lee Handley has been a part of the Workamajig Creative Management ecosystem since 2003. He began working with Creative Manager software as he lead its implementations in his capacity as the CFO for multiple agencies. The software became his primary tool for rehabilitating the financial strength of the agencies he served, helping to lead them from being "in the red" to being "in the black". In 2008, he decided to go 'pro, and formed Workamapro, Inc. to help companies using Workamajig. Since then, he created the first blog about Workamajig, and the first job board devoted to Workamajig-based companies. Lee has served over 150 clients (and counting) all over the United States, including both Fortune 500 and Global 250 companies. Today, Lee resides in Birmingham, Alabama, where he owns a local brewery. He spends as much time as he can in the great outdoors, cooking anything imaginable, and playing all of his musical instruments.