New Request Submission

The workflow sequence begins when a new request is submitted via the Intranet. Once the request has been submitted, the client will be taken to a page where a colored box appears above the just-submitted request. This box provides information and links for uploading documents to the Museum's SharePoint *Communications Requests* document library.

> Tip: Make note of the ***request number***, as you will need it later.

1. Go to: https://uflorida.sharepoint.com/sites/flmnh-graphics or click on the link provided in the initial request email.
2. Enter your username as *gatorlink*@ufl.edu and click Next.
3. Log in with your Gatorlink credentials when prompted.
4. On the left-hand menu, under Libraries, click on **Communications Requests**.
5. Click **New > Folder** and create a new folder; name it to match the request ticket number. Example: "12539"
6. Click on your new folder to open it.
7. Click Upload and choose your document(s).
8. Select your uploaded document, click the […] menu, and select **Check In**.
9. Once your content has been uploaded, return to your ticket on the Intranet and change the status from *New Request* to *All Final Content Uploaded*. Work will not begin on your request until this status is changed.

> Tip: Changing the status of your request will result in email messages being sent to a relevant list of parties (Marketing, Graphics, yourself, etc.), related to each status specifically. Client action is not required for all status changes.

> Tip: Watch an OMT-TV video on this part of the process at: https://www.floridamuseum.ufl.edu/omt/tutorials/collaboration/graphics-work-orders/

Reviewing Documents

You will receive email notifications as your ticket request status moves from Marketing (*Under Review by Marketing*) to Graphics (*Graphic Design in Progress*). When Marketing finishes reviewing the first draft of your work order, they will set the status to *Under Review By Client*. It is now your responsibility to download the document, mark any changes (using track changes or sticky notes) and then uploading the revised document to the SharePoint document library so Marketing and Graphics can take further action.

Downloading a Document for Review

1. When you receive an email message notifying you that the ticket status has been updated to *Under Review by Client, c*lick on the link in the email to take you to the Museum's SharePoint site or go directly to https://uflorida.sharepoint.com/sites/flmnh-graphics.
2. Enter your username as *gatorlink*@ufl.edu and click Next.
3. Log in with your Gatorlink credentials when prompted.
4. On the left-hand menu, under Libraries, click on **Communications Requests**.
5. Click on the folder that corresponds with your ticket number.
6. Select the desired document and then on the […] menu, select **Check Out**.
7. With your document still selected, click **Download** and save a copy to you Downloads folder.

Checked Out Documents

Only one person may check out a document at a time. This ensures that there is only one document being edited and not multiple versions. When you save your changes, **USE THE SAME FILE NAME** as the original copy. *DO NOT* add initials, dates, or any other changes to the file name. The document library will keep a record of every version and track who checked out the document for you. (Altering the file name will break this helpful "chain of custody" tracking.) You must upload the document and check it back in before the next person can download it.

Uploading a Document When You Are Finished Reviewing It

1. When you are ready to upload a document, log in to the SharePoint site at https://uflorida.sharepoint.com/sites/flmnh-graphics.
2. On the left-hand menu, under Libraries, click on **Communications Requests**.
3. Click on the folder that corresponds with your ticket number.
4. Make sure that no documents are selected, and click **Upload**.
5. Find and your revised file (again, please do not change the file name). When prompted, click **Replace**.
6. Select your uploaded document, click the […] menu, and select **Check In**.

   Tip: Make your version comments meaningful so they will make sense to the next person who checks out the document. It might also come in handy if you have to go back a few versions to find out when certain changes were made.

7. Return to the Intranet work order page for your ticket and update the status to *Client Review Complete*. Further work by Graphics and Marketing will now proceed on your request.

   Tip: A link to the Intranet work order request page is in the email message in the line immediately below the link to the SharePoint site.

   Tip: Watch an OMT-TV video on this part of the process at: https://www.floridamuseum.ufl.edu/omt/tutorials/collaboration/graphics-work-orders/

Moving Towards Production

After you change the ticket status to *Client Review Complete*, Marketing will be alerted to review the changes and then Graphics will make the revisions. You will receive email notifications as your project moves through this process. No action is necessary until you receive an email when the *Under Review by Client* status is selected by Marketing or Graphics when your feedback is requested.

Follow the directions for reviewing documents as many times as necessary until the document(s) are complete. When you indicate that there are no further revisions necessary, Graphics will set the status to *Ready for Production* and the file will be prepped for final print or email/web processing. After the final document is emailed or sent to print, Graphics will change the ticket status to *Completed*.

A ticket may be set to *Project on Hold* if work needs to be temporarily suspended.