






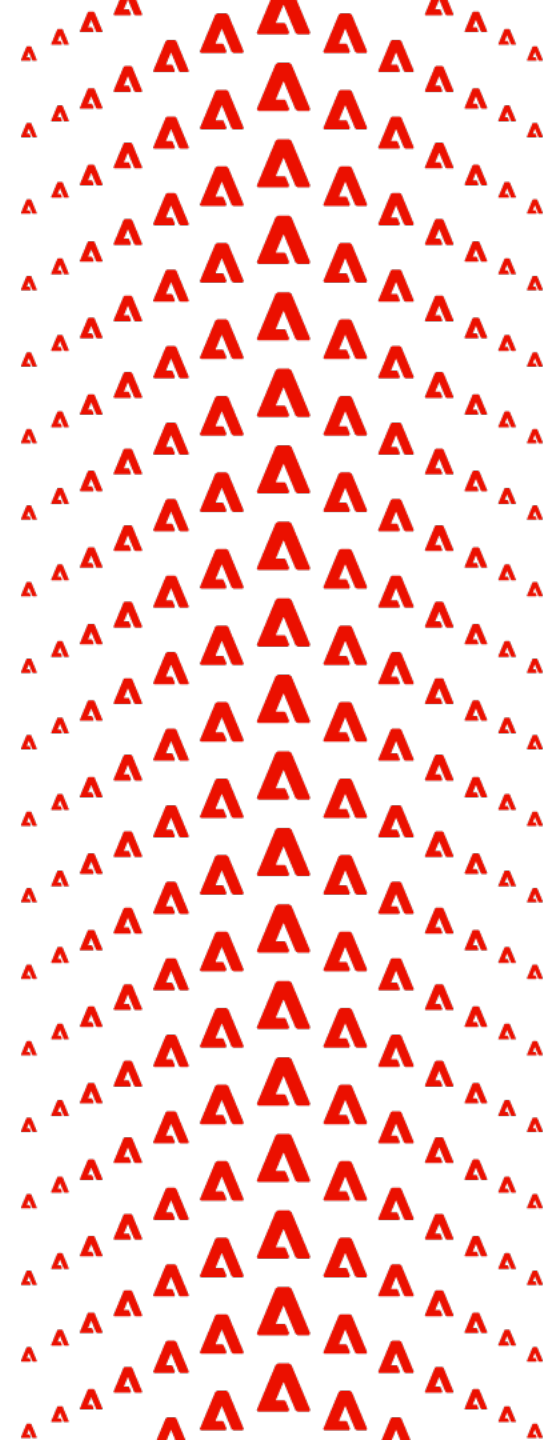
System Admin Essentials: Communicating with End Users

July 26, 2023

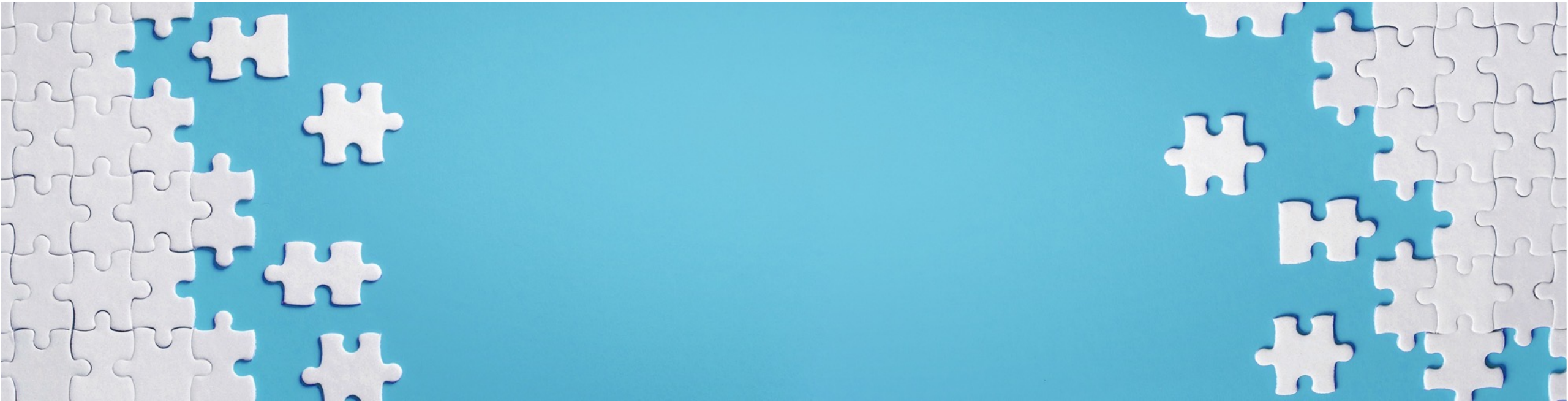


Agenda

Time (PST)	Topic
8:00 a.m.	Welcome and agenda
8:05 a.m.	Communicating with End Users
	 Lyndsy Denk Marketing Training and Enablement Manager IDEXX
	 Rachelle Dilley Enterprise Group Administrator Adobe Workfront
	 Cynthia Boon Customer Success Manager Adobe Workfront
8:45 a.m.	Ask the Experts! Audience Q&A
8:55 a.m.	Wrap-up and next steps



Tell us about yourself and how your organization uses Workfront.



Lyndsy Denk

Marketing Training and Enablement Manager

- + Westbrook, Maine
- + Joined [IDEXX](#) September 2012
- + Sole part-time system admin since November 2020
- + New hire onboarding, internal communications, tools enablement, process improvement
- + Involved in competitive speech and debate since 2003 (most recently secretary and district chair)
- + Connect with me: [Lyndsy Denk | LinkedIn](#)



How We Use Workfront at IDEXX

- + Creative and digital marketing project management:
 - + Request intake
 - + Project workflow management
 - + Creative collaboration
 - + Deliverable review and approval
- + Evolving:
 - + Resource management
 - + Event prioritization and management
 - + Research and analytics project management

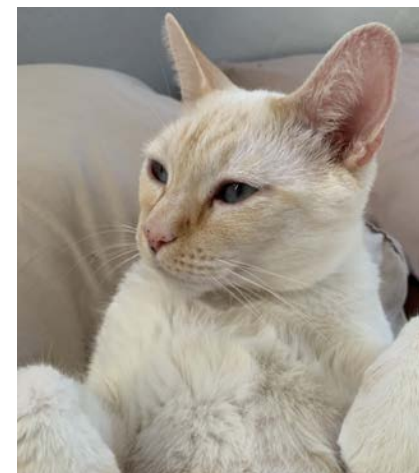
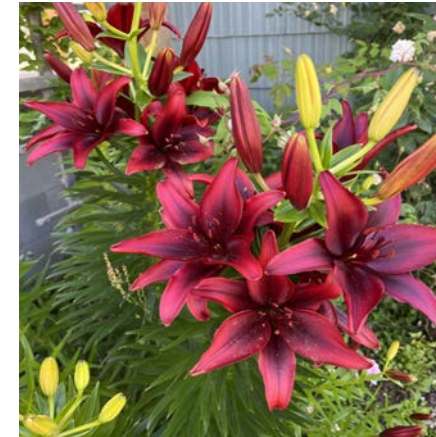
Rachelle Dilley

Enterprise Group Administrator
Adobe Workfront

- Works remotely from Astoria, Oregon (home of The Goonies)
- Customer for 3 years; Joined Adobe Workfront in April 2022
- Supports all marketing teams at Adobe who utilize Workfront from implementation through to user adoption and instance maturation (~3000 users currently)
- Spent last 7 years focused on project management and system administration for Adobe Workfront users
- Loves spending time with wife and fur babies, gardening, travelling, camping and anything outside

Connect with me:

<https://www.linkedin.com/in/rachelle-dilley-28339634>



How Adobe Uses Workfront at Adobe

- **Creative Project Management**

- Request intake
- Project workflow management
- Creative collaboration
- Deliverable review and approval

- **Resource Management**

- Time-tracking
- Forecasting
- Workload balancing

- **Reporting**

- Individual and team level reports to drive work
- Executive level reports showcasing how and what teams are accomplishing

- **Evolving**

- Content Supply Chain

- **A million other use cases**

About Cynthia



Cynthia Boon

Customer Success Manager, Adobe Workfront

- Customer for 5 years, joined Workfront in January 2020
- Lived all over the country – currently in Fort Worth, Texas
- Twilite just turned 2 on Halloween
- Wild about nature
- Passion for all things nerdy
- Connect with me on LinkedIn
<https://www.linkedin.com/in/cynthiaboon/>

What are Admins communicating to End Users?

1

Features & Enhancements

Admins review Workfront release notes and determine what, if anything, should be shared with end users.

2

Internal Process Updates

Admins communicate business-specific processes with their end users such as new process flows, updated templates, etc. as-needed.

3

Operations & Enablement

How to documentation, tips and tricks, and ongoing enablement vary greatly depending on the scope of the Admin's role and responsibilities



What channels do you use to communicate with your end users? (email, intranet, etc.)

Using Workfront to Communicate with your Users

- Use Workfront objects to drive your messages
 - Announcement Center Messages ➔
 - Custom Form fields
 - So many Dashboards!
 - What's Important Today!
 - Calendar Views
 - FAQs & Quick Links
 - External options & Reviewer Licenses
 - Customized Objects
 - Scheduled Reports

DE CSM Events Requests ... Pin current page Help 292

Announcements

New Announcement | Inbox Favorites Sent Drafts Deleted Settings

Send to: Everyone
Start typing name...

Subject: Time to celebrate!

Twilite is turning 3 this Halloween!

Here are the reasons that this is awesome:

1. She is sassy.
2. She is floofy.
3. She is sweet.

Let's add more Twilite pics to our project!

[Link to Twilite's Project](#)

Attachments (less than 10 MB)

Twilite Halloween.png (215.2kb)

Send Cancel

Subscription Settings

Do not send me announcements about the following topics:

- Training
- New Releases
- Maintenance Notes
- Feature Highlights

Save Settings Cancel

Announcements

New Announcement | Inbox Favorites Sent Drafts Deleted Settings

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Start typing name...

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Send Cancel

Using Workfront to Communicate with your Users

- Custom Form Fields
 - Request Queue Examples

New request

Request Type

Change an Existing Marketing Project

Change an Existing Marketing Project

Change a Creative Services Project

Details

Subject *

Type request subject

Change Request Information Form

If there are any relevant documents or screenshots to support this request, please attach at the top of this request page in the document gallery.

Change Request Process Workflow

CHANGE REQUEST APPROVAL WORKFLOW

PLANNER

WORKER

DR

Governance Team Reviews the Request

Approved

PMs receive request, convert to a task, set project to Approved

TC receives project, assigns tasks, sets status to Planning

PMs receive project, schedules kick-off, sets to Current

PMs work with team to complete remaining Project Tasks

PMs set Project Status to Complete

Rejected

Project team receives tasks, completes work, routes assets for approval, if needed

No

Project Team marks tasks complete

New request

Details

Subject *

Type request subject

Description

Priority

Normal

PMO Project Brief

Project Initiation Process & Support Policy

CX Admin – Project Initiation and Support Documentation

Overview

Purpose

This document is designed to provide a detailed process for CX Administration Project Intake and support, and includes the following:

Submit Close

New request

0/2000

Urgency*

Extremely Urgent

ASAP

When You Get To It

It Can Wait

Twitte

Submit Close

Using Workfront to Communicate with your Users

- So many Dashboards!
 - What's Important Today!
 - Calendar Views
 - FAQs & Quick Links

REPORT What's Hot Today! Show Filters Report Actions As of Jul 18, 2023 7:54 pm Central Daylight Time

Details

[-] [+] [Gantt] [Report ...] [Report ...] [Nothing]

<input type="checkbox"/>	Name	Owner	Start On	Due On	% Complete	Priority Type ↑	Quick Notes
<input type="checkbox"/>	Amazing Idea	Roman Novak	11/28/22	1/31/23	9.37%	1. Panic Time	Yikes, we haven't touched this in a hot minute
<input type="checkbox"/>	Billboard	Rose Rampton	11/23/22	12/28/22	3.88%	2. Still Super Duper	This project is awesomely on time
<input type="checkbox"/>	Sales Conference	Rose Rampton	12/2/19	2/3/20	15.17%	3. Probably still gonna get asked about it this week	Ummm...No updates?
<input type="checkbox"/>	Telephone & Virtual Etiquette	Cecilia Zetticci	5/7/20	12/3/20	42.13%	4. Dark Horse	Keep an eye on this one
<input type="checkbox"/>	Cool Idea for a Project	Lili Kao	2/27/20	12/29/21	0.77%	5. Meh	Seriously thought this was the most important

Showing 5 projects

DASHBOARD Social Media Calendar

Social Media

- Facebook Posts
- IG Posts
- Twitter Posts

Monday	Tuesday	Wednesday	Thursday	Friday
		2022 Copywriting Reviews	2022 Copywriting Reviews	2022 Copywriting Reviews
Oct 3 Best Project Idea	4 Best Project Idea	5 Best Project Idea	6 Fall Back Comms	7
10	11	Jazz Hands! Billboard	Jazz Hands!	Jazz Hands! Fall Back Comms
17 Billboard	18 Newsletter Comms Billboard	19 Billboard Newsletter Comms	20 Newsletter Comms	21 Fall Back Comms
24	25	26	27	28

Using Workfront to Communicate with your Users

- More Fave Tips!
 - External options & Reviewer Licenses
 - Customized Objects
 - Scheduled Reports

Currently logged in as Anthony Creer [Logout](#)

Tony! Ask for Stuff LOG TIME Coming Soon! Unpin current page

MRK - All Requests by Status & Request Form

Details Summary

Name	Assignments	Urgency	Status	Entry	Conv Project
Status: Awaiting Feedback (1)					
Request Form: No Value (1)					
<input type="checkbox"/> Sample Issue	Admin User		Awaiting Feedback	4/29/21	Not Com
Status: New (3)					
Request Form: Creative Marketing Request (1)					
<input type="checkbox"/> Test PDF	MRK - Project Management & Traffic Team		New	8/4/22	Not Converted Leslie Spier Creative Marketing Request

REPORT Test Approval Process Report

Send Now Repeating Deliveries

Send to
Add people, teams, roles, or any email address...

Email Subject
Test Approval Process Report

Email Message

Deliver this report with the Access Rights of:
Admin User

Format
HTML

Report Access

DE Custom Form Fields

<https://cynthiaboon.my.workfr>

Public Anyone with a link ca

- Remove public access. Anyone with a public link can see it.
- Make this visible system-wide so that everyone in Workfront can see it.

Admin User
Report Owner
Admin

Inherited Permissions

Summary
Every Day

Repeats
Daily

Repeats Every
1 Days

Time
9:00 AM

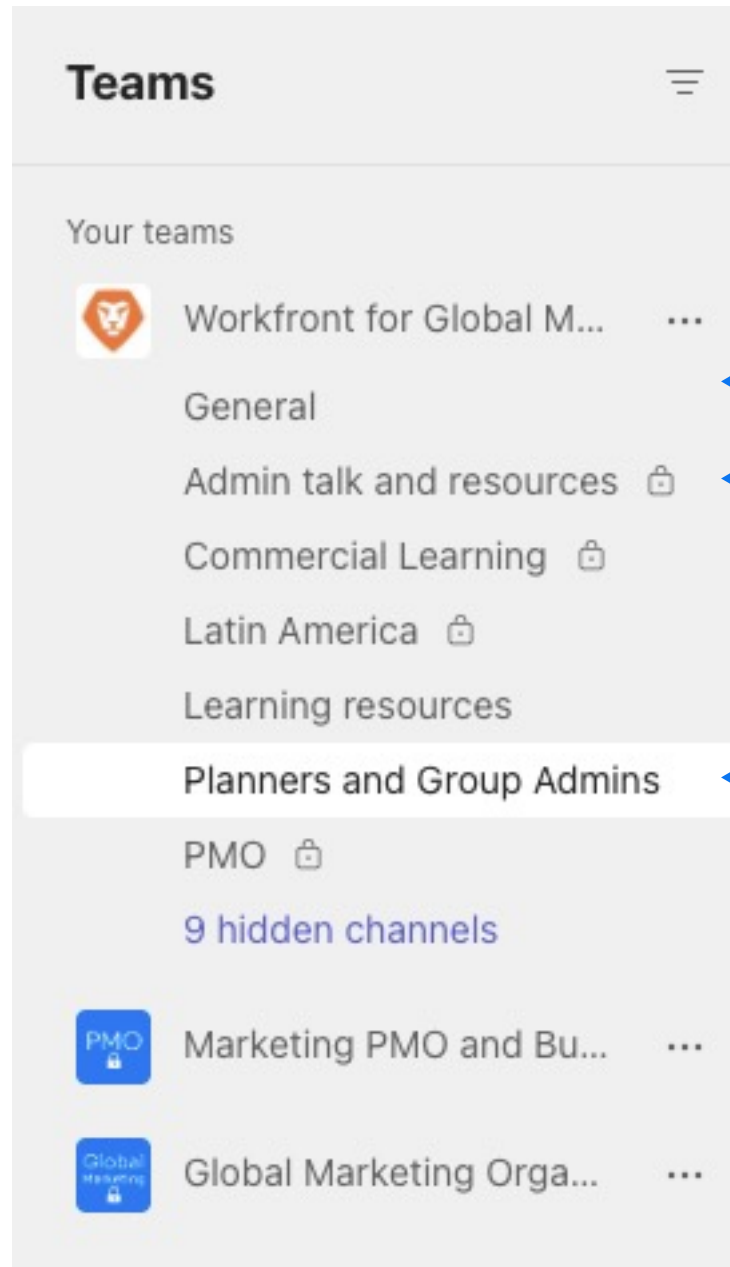
Starts On
Jul 18, 2023

Ends On
 Jul 18, 2023
 Never

Save

Microsoft Teams

- + Community engagement
- + Quick alerts or teasers



▶ **General** channel for universal messaging

▶ Private **admin-only** channel

- Governance
- Chatter about all things system admin

▶ **Public** channels by user type

- Focused tips and chatter
- Encourage community conversations

Private channels by functional group

- Training hub
- Safe place to ask newb questions
- Isolates noise related to specific audience

Microsoft Teams

The screenshot shows the Microsoft Teams interface for a channel named 'Learning resources'. The left sidebar lists various teams, with 'Learning resources' selected. The main content area shows a series of posts and tabs. At the top, there are tabs for 'Posts', 'Files', 'Tips and Resources', and '2 more'. Below the tabs, there are three main posts:

- A post from 'Denk, Lyndsy' dated 12/16/22 3:35 PM with the text: 'This YOUR time to start the year right. Pop in, drop in, or stay the whole time to:' followed by a bulleted list: 'Manage new and old Campaigns.', 'Kickstart new and clean up old work.', and 'Ask questions, gather advice, or use the time for heads down work.' Below this is a 'See more' link and a blue banner for 'Workfront Office Hours' on Monday, January 16, 2023 @ 4:00 PM.
- A post from 'Denk, Lyndsy via Power Automate' dated 1/25 9:07 AM with the text: 'Submit Your Request in MS Teams' and a 'Read more' button.

← Tabs to audience-specific resources.

← Open events for Team members to join.

← Teasers to SharePoint News articles.

SharePoint site

+ Long-term information

Help desk **!?**

Archived tips and release notes

News:

- Tips
- Product release notes

Workfront for Global Marketing

Public group ★ Following 144 members

Open events

Published 6/20/2023 Edit

Home + New Page details Analytics

Getting Started in Workfr...
Submit a support ticket
Join the Teams community
Tips and Resources
Release Notes Library
Recycle bin
Edit

Adobe Workfront is Global Marketing's choice tool for project management. This site is a central resource for communications, training, and governance.

Join an event!
In the Upcoming events list, click a title and look for the option to **Add the event to your calendar.**

Upcoming events

Upcoming	Past	Sync calendar
JUL 11	Workfront Office Hours Tue 3:30 PM to 4:30 PM Location: Teams meeting & Microsoft Teams Meeting	Join
JUL 28	Workfront Office Hours Fri 10:15 AM to 11:00 AM Location: Teams meeting & Microsoft Teams Meeting	Join
AUG 8	Workfront Office Hours Tue 3:30 PM to 4:30 PM Location: Teams meeting & Microsoft Teams Meeting	Join

Previous Next

!? Help desk

Content library

Tips and Resources



Denk, Lyndsy
Marketing Training & Enablement Manager

Below are resources and best practices to help you in your day-to-day work in Workfront.

[Suggest or submit a resource](#)

Dropdown sections for users to browse categories

Workflow for all users

Submitting requests

Work assigned to you

Proof review and management

Managing projects

Pages automatically populate a category when tagged accordingly



Workfront for Global Marketing
Predecessor Types Quick Reference



Workfront for Global Marketing
Create predecessors across projects



Workfront for Global Marketing
How to Attach a Request to an Existing Project

#marketingworkfrontcommunity Slack channel

"You talking to me?"

Ever wonder why there are updates on your Workfront project and you didn't know about it? It's your notifications. We suggest setting everything to instant when you are communicating within Workfront. This way, you get notified via email straight away. Here's how:

1. In the main menu (aka "waffle" menu), click on your name.
2. Click the three dots, then click "Edit."
3. Scroll down to Notifications & turn on all instant options under "Communication."

Screenshot 2023-04-25 at 12.26.27 PM.png ▾



No Summertime Sadness here Lana!

We have had our fave summer songs on repeat to keep us inspired as we get closer to summer break. Are you taking extra time to make the most of the time off? If so, let your 🇺🇸 fam know! It's easy!

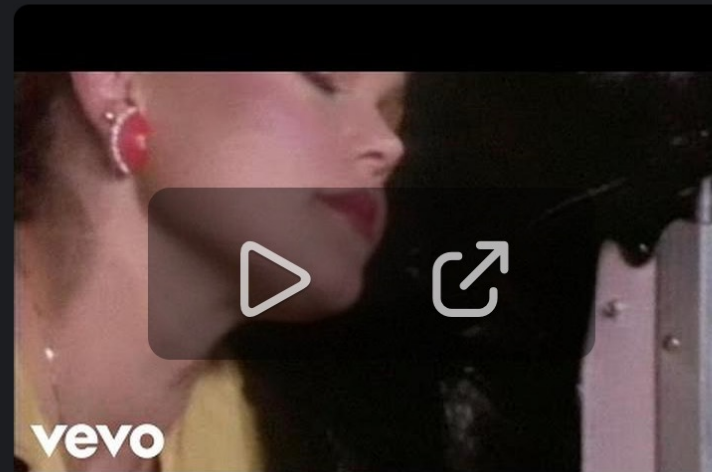
1. Go to your picture on the top right.
2. Select your picture.
3. Scroll to the bottom and select Workfront Profile(that takes you to your personal page.)
4. Edit your time off calendar.
5. Be. cool for the summer (break)! 🌴🕶️

Until then, we have this summer fave on repeat. What else should we add to our summer playlist?

<https://www.youtube.com/watch?v=2RHTiXvELNg> (edited)

YouTube | TheGoGosVEVO

The Go-Go's - Vacation ▾



How do you recommend creating
a communications strategy?
Can you crawl-walk-run?

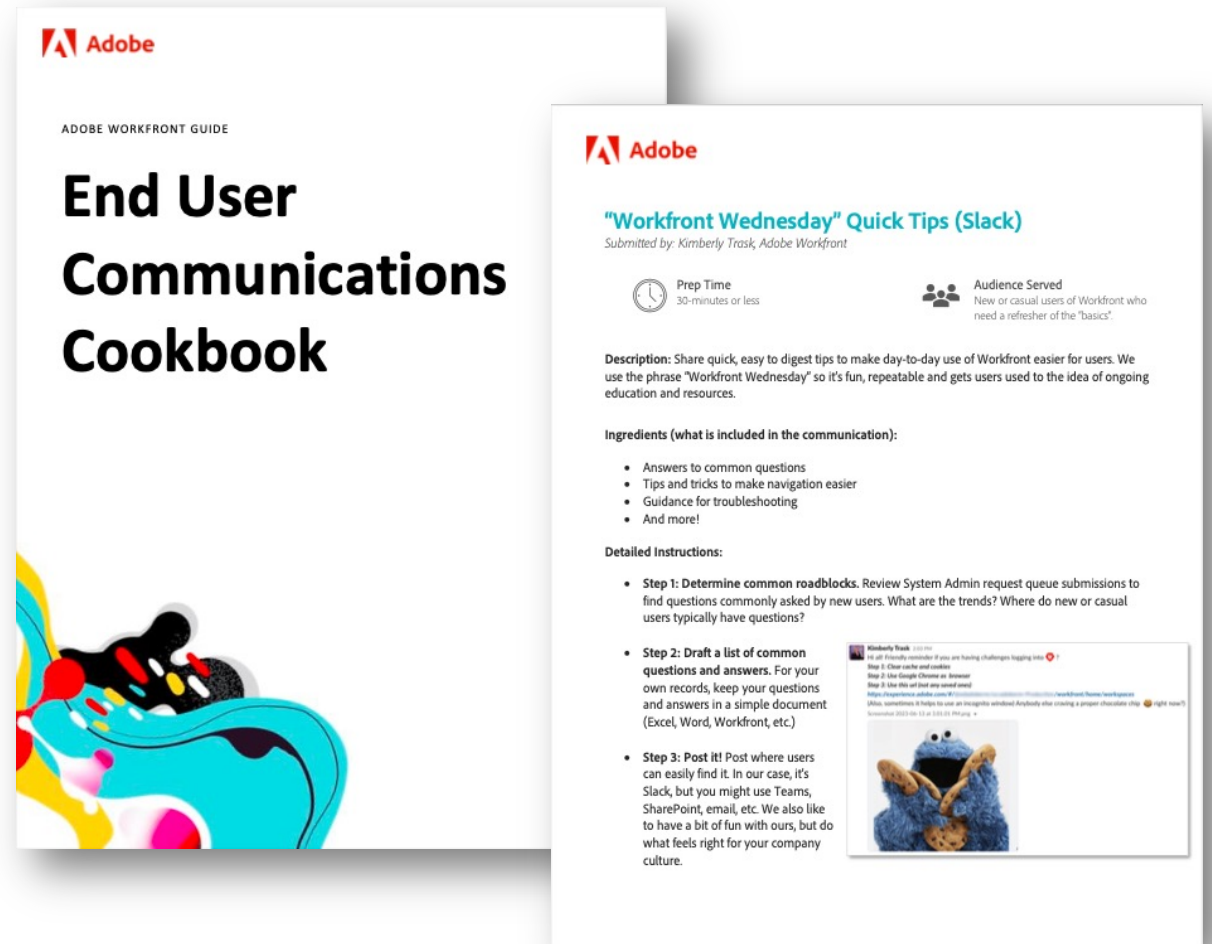


What are the top 3
things all Admins
should be
communicating
to end users?



Introducing the Customer Communications Cookbook!

- Real examples of how, when, and why your peers are communicating with users
- Create your own unique communications “recipes” without having to start from scratch.
- 10 communications examples to explore – from how to share new features and enhancements with users, to enablement on basic processes, and more.
- **Download now!**



Sweet Tip: If it feels like requests come from all directions, we recommend setting up a [System Admin request queue](#) ASAP. This allows you to easily track the volume, source, and type of requests right in Workfront!

Questions?



Upcoming Events



Events

- Aug 16: The Skill Exchange for Workfront

Product Releases

- On-Demand: 23.3 Workfront Release (June 2023)

System Admin Essentials Webinars - *September sessions coming soon!*

Ask-Learn-Connect: Free Weekly Meetups

- Jul 31: [Connect] Q&A Coffee Break on Custom Forms
- ★ Aug 2: [Ask]: Ask the Experts – Communicating with End Users Follow-up
- Aug 8: [Ask]: Ask the Expert – Canvas Dashboards (w/ WF Product Management!)



Register at <https://experienceleague.adobe.com/events>

Adobe Workfront Skill Exchange Agenda

EXPERIENCE MAKERS
THE SKILL EXCHANGE

Adobe Workfront Skill Exchange Agenda

Wednesday, August 16, 2023

	LEARN Beginner Host: Dawn Henderson	GROW Intermediate/Advanced Host: Kristin Farwell
Pacific 9:00 - 9:15 a.m.	Welcome Keynote Richard Whitehead, Director, Workfront Product Marketing	
9:15 - 9:55 a.m.	Beginner's Guide to Native Integrations Shannon McDonnell & Jeff Herrington, Adobe	Maturing Workfront Across the Enterprise Dale Whitchurch, IPG Health
9:55 - 10:35 a.m.	Your Resource Management Starter Kit Corrina Jevons, Adobe	Tackle Burnout with Resource Management Tia Calvert & Erin Kuchera, Mayo Clinic
10:35 - 11:15 a.m.	Instant Productivity: An Introduction to Boards Cynthia Boon, Adobe	Automations for a More Efficient Workflow Jennafer Higgs, Jonathan Cabre & Malcom Benites, Zimmerman Advertising
11:15 - 11:55 a.m.	Experience Makers Spotlight: Onboarding & Adoption <ul style="list-style-type: none">• Steven Enos, Liberty Mutual• Amy Franz, Fidelity• Monique Evans, Stanley Black & Decker	Experience Makers Spotlight: Growing & Scaling Your Instance <ul style="list-style-type: none">• Cathy Glenn, Thermo Fisher Scientific• Trinite Bryant, Amazon Web Services (AWS)• Tim Brooks, Deloitte
11:55 - 12:00 p.m.	Closing & Gold Nugget Takeaway	Closing & Gold Nugget Takeaway

Thank you!



