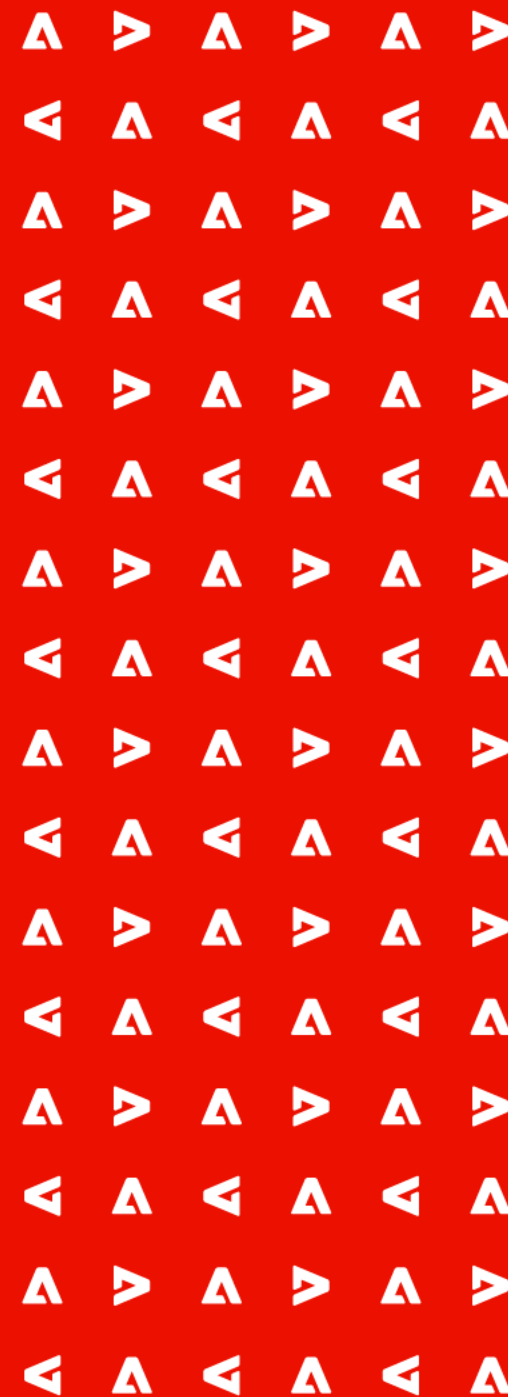







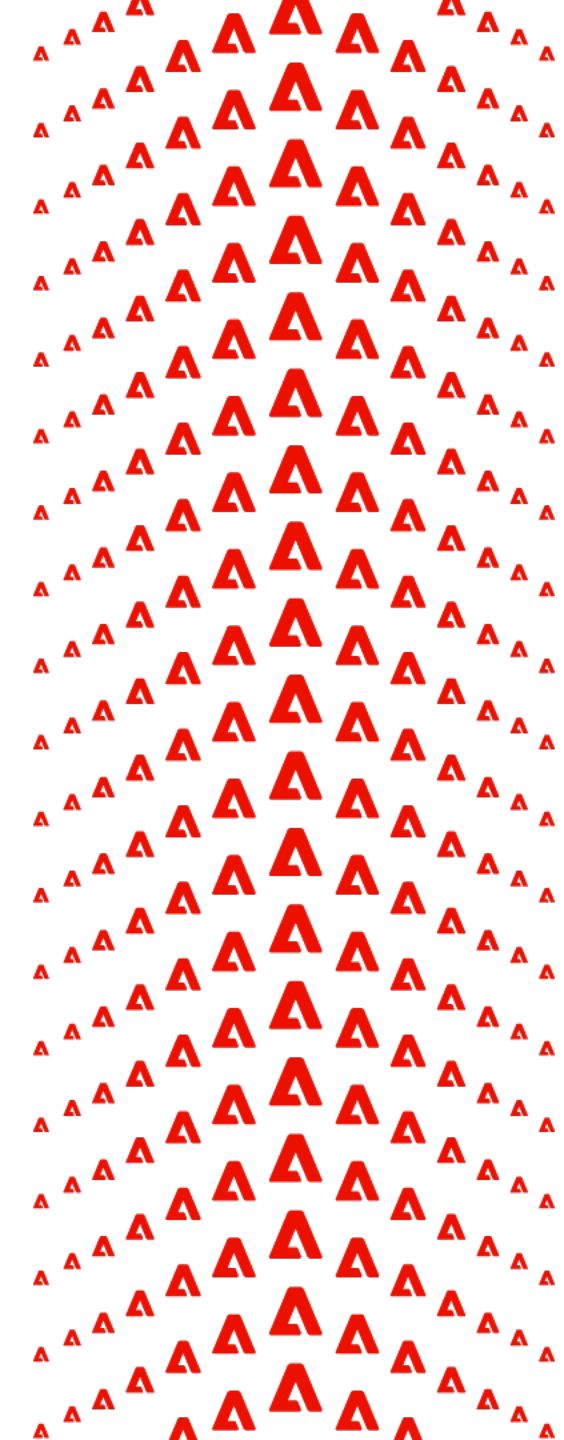
System Admin Essentials: All About Request Queues

July 27, 2022



Agenda (Pacific)

Time	Topic
8:00 a.m.	Welcome and agenda
8:05 a.m.	All About Request Queues
	 Tyler Holt <i>Consultant, Adobe Workfront Customer Success Services</i>
	 Megan Reilly <i>Senior Manager, Project Management Disney Yellow Shoes</i>
	 Nick Zappas <i>Senior Manager, Project Management Disney Yellow Shoes</i>
8:45 a.m.	Presenter Q&A
8:55 a.m.	Wrap-up and next steps



What I'll Be Discussing Today

What is an
"Issue"?

Anatomy of
a Request
Queue

A few "Did
You Know?"
Quick Tips

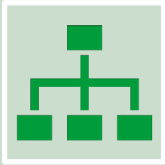
What exactly is an issue?

Traditionally, the "**Issue**" is unplanned work in Workfront.

Most importantly, Issues are one-to-many objects that can be added to Projects and Tasks.

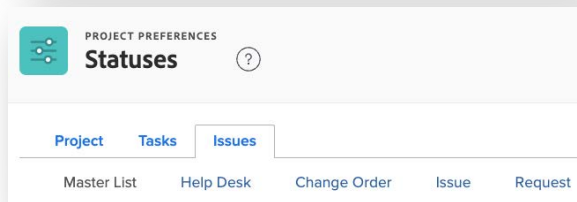
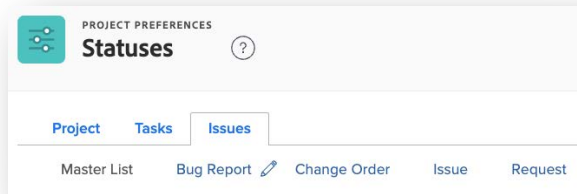
For the sake of this walk-through, **Issues are *synonymous* with Requests.**

What exactly is an issue?



Issues, unless customized by your System Administrator, can be designated as a:

- Bug Report
- Change Order
- Issue
- Request



In this case, "Bug Report" was changed to "Help Desk" for the sake of our Request Queue reporting.

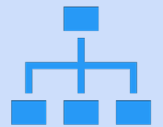
***One last admin setup tip
before we really dig in...***

If the term "issues" still just doesn't roll off the tongue, go to Layout Templates and change the terminology to Requests!

What exactly is an issue?



Issues can remain as Issues.



Issues can be converted to Projects.

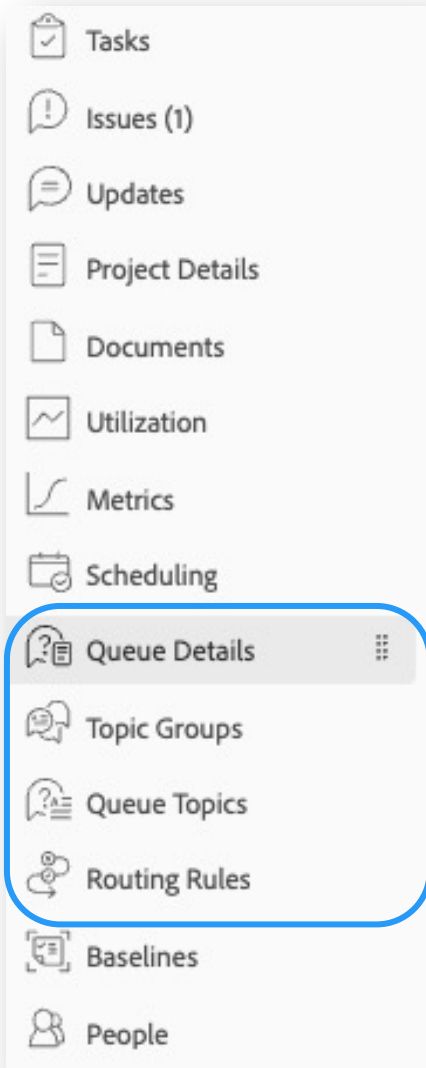


Issues can be converted to Tasks.

Anatomy of a Request Queue



Requests



- A Request Queue is a *Project*.
- The Project must be in a Current status to appear in Requests.
- We recommend using a custom project status of "Queue" or "Request Queue" for reporting and filtering purposes.
- Requests will show up in Projects as *issues*, unless re-named in layout templates, ie, Requests.
- Request Queues are set up under Queue Details in the project's left navigation panel; we recommend these options are only available to admins and group admins.
- A Request Queue will not show up in "Requests" unless published.

Anatomy of a Request Queue

The screenshot shows the Adobe Project Queue interface. At the top, the project name 'Creative & Marketing Backlog - Request Queue' is displayed, along with the Project Owner 'Tyler Holt-Admin'. The Status is 'Request Queue', Percent Complete is '0%', Planned Completion Date is 'Jul 14, 2022', and This Resolves is 'N/A'. Below this, a 'Tasks' section shows a table with one task: 'Request Queue Only - Do Not Add Tasks'. The table has columns for #, Task Name, Assignments, Duration, Pln Hrs, Predecessors, Start On, Due On, and % Complete. The task is listed with # 1, Duration 0 Days, Pln Hrs 0 Hours, Start On 7/14/22, Due On 7/14/22, and % Complete 0%. A '+ Add More Tasks' button is visible below the table. On the left sidebar, 'Issues (1)' is highlighted, and 'Queue Details' is also visible.

#	Task Name	Assignments	Duration	Pln Hrs	Predecessors	Start On	Due On	% Complete
1	Request Queue Only - Do Not Add Tasks		0 Days	0 Hours		7/14/22	7/14/22	0%

Queue Type

Publish as Help Request Queue

Who can add requests to this queue?

- Anyone
- People with view access to this project
- People in this project's company
- People in this project's group (Finance)

To have the best success setting up your queue, map it out using the next three slides *prior* to building or optimizing it.

Queue Details

Topic Groups

Queue Topics

Routing Rules

Anatomy of a Request Queue

Queue Type

- Publish as Help Request Queue

Who can add requests to this queue?

- Anyone
- People with view access to this project
- People in this project's company
- People in this project's group (Finance)

Share with these links

Direct Access URL

`https://tylerhoit.my.workfront.com/requests/new?activeTab=tab-new-helpReq`

Embed Code

`<iframe src="https://tylerhoit.my.workfront.com/requests/newRequestEmbedd`

Queue Properties

Request Types

- Change Order
- Help Desk
- Issue
- Request

Default Duration

1 Day

People from the same company will inherit the same permissions for all requests.

When someone makes a request, automatically grant...

[View Access](#)

Default Approval

N/A

Default Route

N/A

New Issue Fields

Show the following selected fields to all users

- Description
- Status
- Primary Contact
- Planned Hours
- URL
- Priority
- Planned Start Date
- Job Role
- Assigned To
- Severity
- Planned Completion Date
- Team

Documents

Display the Documents area to allow users to upload files

- After custom forms
- Before custom forms

Show all selected and unselected fields to

No Users

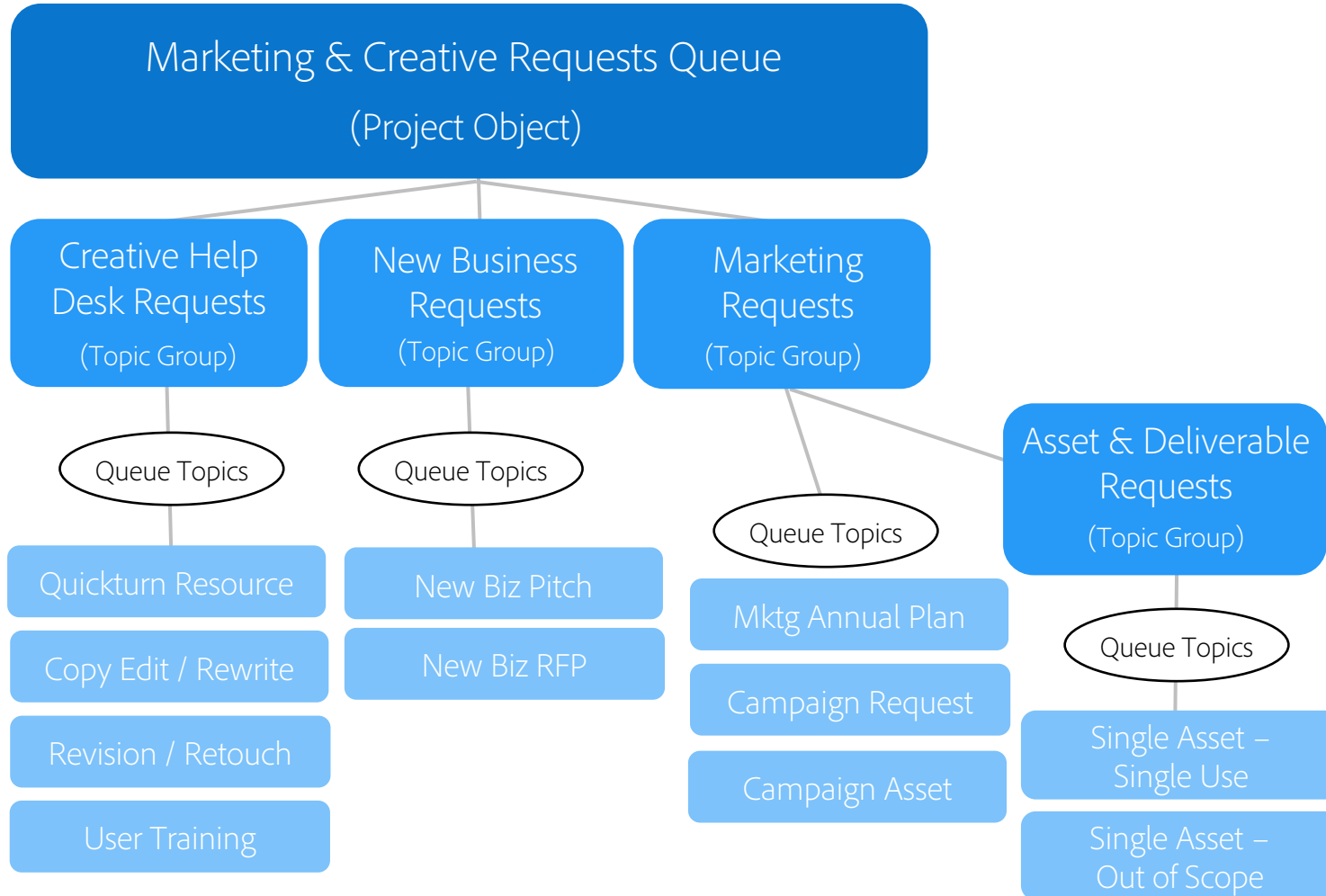
Custom Forms - Add multiple forms. Arrange them in the order that you would like them to appear.

-- Add Forms --

Let's review the **key settings** for any request queue.

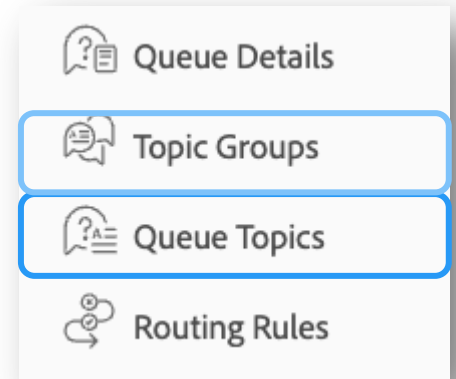
- Queue Details
- Topic Groups
- Queue Topics
- Routing Rules

Topic Groups & Queue Topics: keeping your queue(s) organized



- Help requesters navigate more easily
- One queue to organize: different recipients, different custom forms
- One reportable source of truth
- Group requests by Topic Group and Queue Topic in reporting

Queue Topics designate routing rule, custom form, duration & approval



Queue Topics: details & flexibility in one queue

[Edit Queue Topic](#)

Name
New Business RFP

Description

Add to Topic Group ?
New Business Requests

Custom Forms - Add multiple forms. Arrange them in the order that you would like them to appear.
-- Add Forms --

Reorder Forms
Drag and drop the forms in the order you would like them to appear.

New Business Development Form

Default Approval
N/A

Default Duration

Default Route
Business Development Intake Team

Request Types
 Help Desk
 Request

Name
Creative Help Desk - Quickturn Resource

Description
+Add

Add to Topic Group
Creative Help Desk Requests

Custom Forms
Creative Help Desk Form

Default Approval
+Add

Default Duration
2 Days

Default Route
Creative Help Desk Intake Team

Request Types
Help Desk

Name
Marketing Annual Plan

Description
+Add

Add to Topic Group
Marketing Requests

Custom Forms
Marketing Planning Request

Default Approval
Budget Approval

Default Duration
+Add

Default Route
Marketing Planning Intake Team

Request Types
Request

- Queue Details
- Topic Groups
- Queue Topics**
- Routing Rules

Routing Rules

Routing Rule	Queue Topic	Default Team	Default Project	Custom Form
Creative Agile Intake Team	Creative Asset – Single Use	Creative Agile Intake Team		Creative Asset Request – Non-Campaign
Creative Agile Intake Team	Creative Asset – Out of Scope	Creative Agile Intake Team		Creative Asset Request – Non-Campaign
Creative Help Desk Intake Team	Quickturn Resource	Creative Help Desk Intake Team	Creative Help Desk Project	Creative Help Desk Request
Creative Help Desk Intake Team	Creative Help – Retouch / Revise	Creative Help Desk Intake Team	Creative Help Desk Project	Creative Help Desk Request
Marketing Planning Intake Team	Marketing Annual Plan	Marketing Planning Intake Team		Marketing Planning Request
Marketing Planning Intake Team	Campaign Strategy Deck	Marketing Planning Intake Team		Marketing Campaign Request
Business Development Team	New Business Pitch Deck	Business Development Team		New Business Development Form

Sample Queue


↑
Topic Groups

Helpful Tip: To further help your users navigate, add helpful pop-up descriptions.

Topic Groups are *optional*; they help organize queue topics when the queue is multi-purpose, multi-topical

- Queue Details
- Topic Groups**
- Queue Topics
- Routing Rules

Sample Queue

 **New request**

Request Type

Creative & Marketing Backlog - Request Queue

Creative & Marketing Backlog - Request Queue

Marketing Requests

Marketing Requests ⓘ

Asset & Deliverable Requests

Campaign Strategy Deck

Marketing Annual Plan

Marketing Campaign

Request Queue

Topic Group

Queue Topics

- **Topic groups** populate queue topics.
- **Queue topics** will direct requesters to the correct request form, intake team and any relevant approvals and SLAs.

 Queue Details

 Topic Groups

 Queue Topics

 Routing Rules

Sample Request Process

New Request

The 'New request' form includes the following fields and options:

- Request Type:** Creative & Marketing Backlog - Request Queue
- Queue:** Creative & Marketing Backlog - Request Queue
- Category:** Marketing Requests
- Sub-category:** Marketing Annual Plan
- Subject:** Type request subject (with a red border and a note: 'This field is required.')
- Marketing Planning Request:** Radio buttons for Annual, Quarterly, and Strategy-Concept.
- 3-Sentence Description:** A text area with a character count of 0/2000.
- Annual Planning Period:** A dropdown menu currently set to FY23.
- Quarterly Planning Date:** A date field.
- Buttons:** Submit and Close.

Request Received

The 'Request Received' view shows the following details:

- Project:** Creative & Marketing Backlog - Request Queue
- Issue:** FY2023 ClientZ Marketing Campaign Plan
- Issue Details:** FY2023 ClientZ Mar... (0% complete, Marketing Planning Intake... Start issue, Planned Completion: Jul 26, 2022, Status: New)
- Overview:** Marketing Planning Request
- 3-Sentence Description:** ClientZ will have four primary campaigns that will coincide with quarterly holidays and competitor events. This is a rough sketch for budget approval.
- Annual Planning Period:** FY23
- Quarterly Planning Date:** Q1
- Frequency of Work Requested:** Recurring
- Due Date Type:** Hard Deadline
- Reason for Fixed Deadline:** Internal Event
- Proposed Start Date:** Sep 30, 2022
- Proposed Completion Date:** Oct 31, 2022

Convert to Project

The 'Convert to Project' menu is open, showing the following options:

- Edit
- Subscribe (0)
- Copy to...
- Move to...
- Delete Issue
- Sharing
- Convert to task
- Recalculate Expressions
- Convert to a blank project
- Convert to project from template
- Favorite templates** (expanded):
 - ★ Annual Budget Planning Template** (highlighted)
 - Contracted Services Delivery Plan
 - Finance End-of-Month Operational CL...
 - General Internal Strategic Initiative

"Did You Know" Quick Tips

Requests can be "un-published"

Route requests to an Agile backlog

Quick-turn work request tips

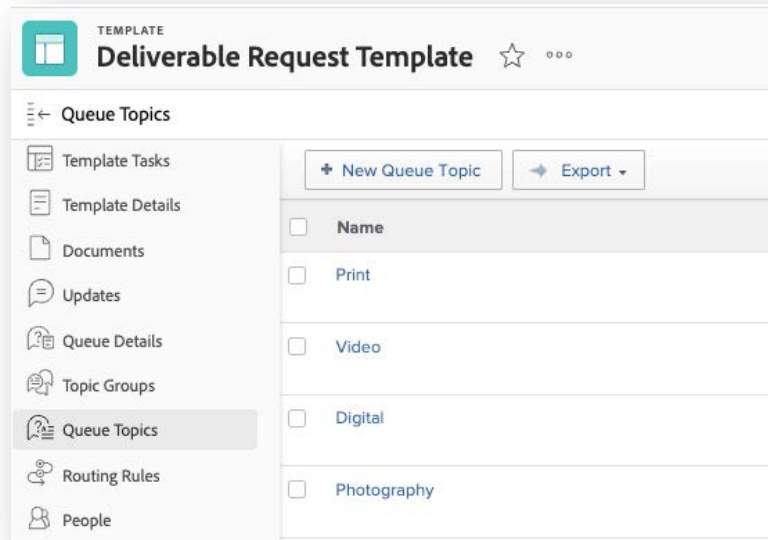
When to not convert

When to convert as tasks

When to convert to projects

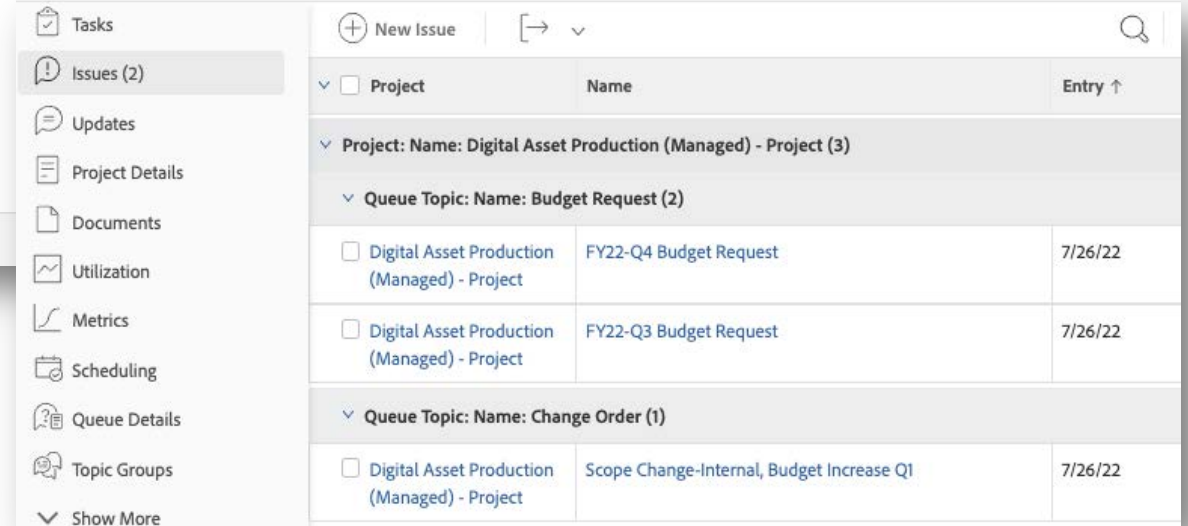
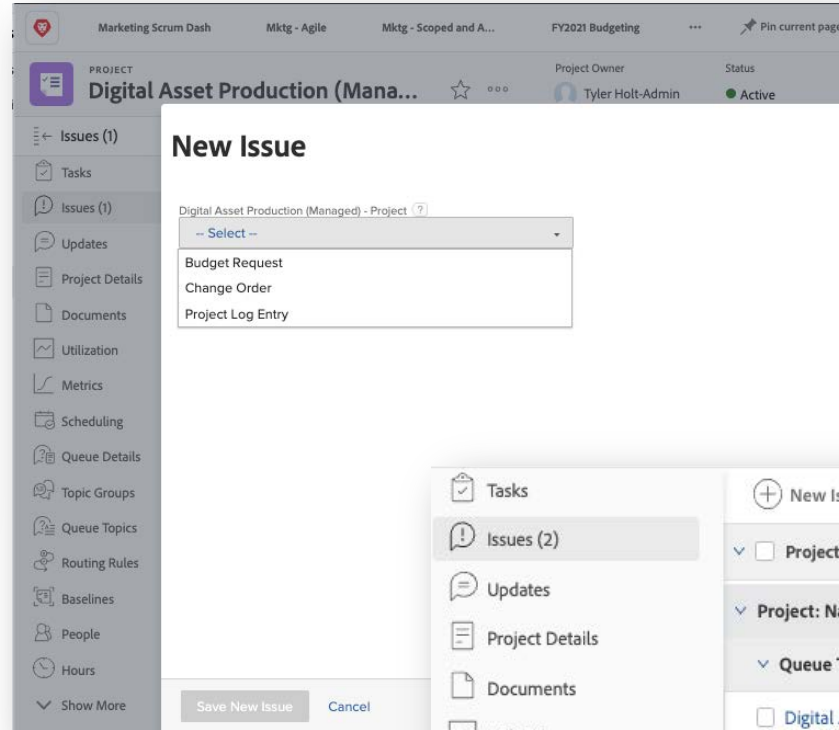
Various Request Queue examples

Requests can be "un-published"



Set up queue functionality on **templates** for frequently requested items, such as deliverables, team requests, and project log items, such as:

- Change Orders
- Deliverables
- Issues
- Risks



Quick Tips for routing and converting

- Backlog: Route to Agile / Kanban Team
- Keeping as Requests / Not Converting (a): Work that will be done with no hand-offs in less than one week
- Keeping as Requests / Not Converting (b): If queue is complex as sample shown in this walkthrough, route to dedicated project
- Converting to Tasks (a): If a project already exists where work is to be done
- Converting to Tasks (b): If routing to a dedicated project, but it there will be multiple steps, assignments, handoffs needed to complete
- Converting to Project (most common scenario): When request is associated with a repeatable workflow to execute what the stakeholder needs

Examples of Request Queues

Published or not...

- **Workfront Admin Queue:** User Management (Profile Changes), Troubleshooting and Feedback Submission (great for adoption!)
- **Administration-Governance Queue:** Log and approve system and process changes; add compliance and documentation in one centralized place (published only to system and group admins)
- **Project Log:** Toss outdated risk registers and RAID logs out! Keep them up to date real-time and copy them from project to project using templates and the project copy function.
- **Subject Matter Expert Queue:** Ease some of the burden off admins and form a team of subject-matter experts. Field requests to super users who can help you with training, onboarding, reporting, project questions, and other non-admin critical areas that will save you time.

Yellow Shoes Presenters



Megan Reilly
Sr. Manager, Project & Traffic Management



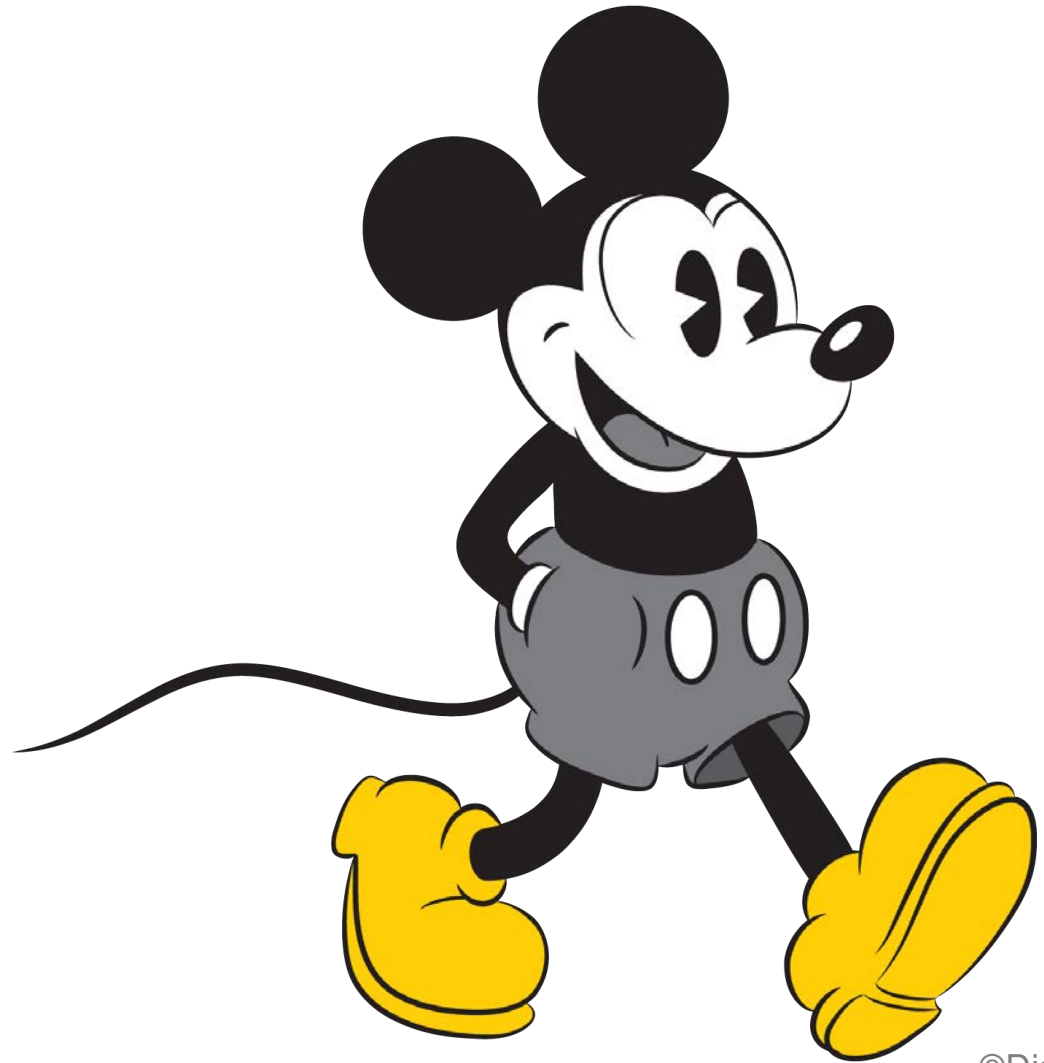
Nick Zappas
Sr. Manager, Project & Traffic Management



A CREATIVE GROUP

WHAT IS YELLOW SHOES?

- Disney Internal Creative Group
- 250+ Cast Members
- Video, Audio, Print, Digital, Experiential
- Broadcast and Synergy Programs
- Marketing Content for Disney Parks, Experiences & Products



©Disney



A CHARACTER

ROZ

- Yellow Shoes was challenged to choose the right character to embody Adobe Workfront.
- Introducing ROZ, our Realtime Organization Zone



ORGANIZATIONAL STRUCTURE

A SHARED TOY BOX

- Instance shared with media planning and marketing analytics teams
- Requires alignment of hierarchy to properly function
- Media planning opens projects
- Marketing analytics requests specific analytic needs (platform, taxonomy, paid search, adhoc)



©Disney/Pixar





**How does one Disney group
use Request Queues?**





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Out of the Galaxy: Yellow Shoes Request Queues





CURRENT QUEUES

SYSTEMIC REQUESTS

- New users, Edit users, Deactivate users, 3rd party profiles
- New Dashboards and reports
- Digital Dev (Live Canvas + Flash Talking)
- CapabilitySource requests (system vendor consulting)

HIERARCHY NEEDS

- Add or delete brands and campaigns



CURRENT QUEUES

YS RESOURCE REQUESTS

- Photography, Proofreading, Finance/WBS

OTHER USES

- Disney Vacation Club direct reprint
- Disney Vacation Club compliance
- DAM requests (help finding assets)





FUTURE USE

WISHFUL REQUESTS

- Business Affairs & Legal
- Retouching
- Routing
- Yellow Shoes Consulting
- Quick turn projects
- One-off requests



Questions?



Upcoming Events

System Admin Essentials Webinars

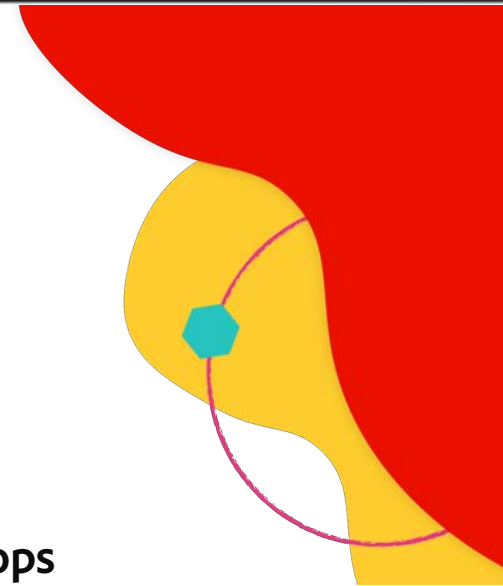
- Aug 24: System Maintenance & Cleanup
- *Coming soon! Sep 21: Resource Management*
- *Coming soon! Oct: Taking Over an Existing Instance*

“Ask the Expert” Office Hours + Small Group Workshops

- ★ Aug 2: Ask the Expert – Request Queues (w/ Tyler Holt!)
- Aug 5 & Sep 2: Admin Chat – Marketing & Creative
- Various Dates – “Drive Adoption with Dashboards” Workshop Series



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



Thank you!

