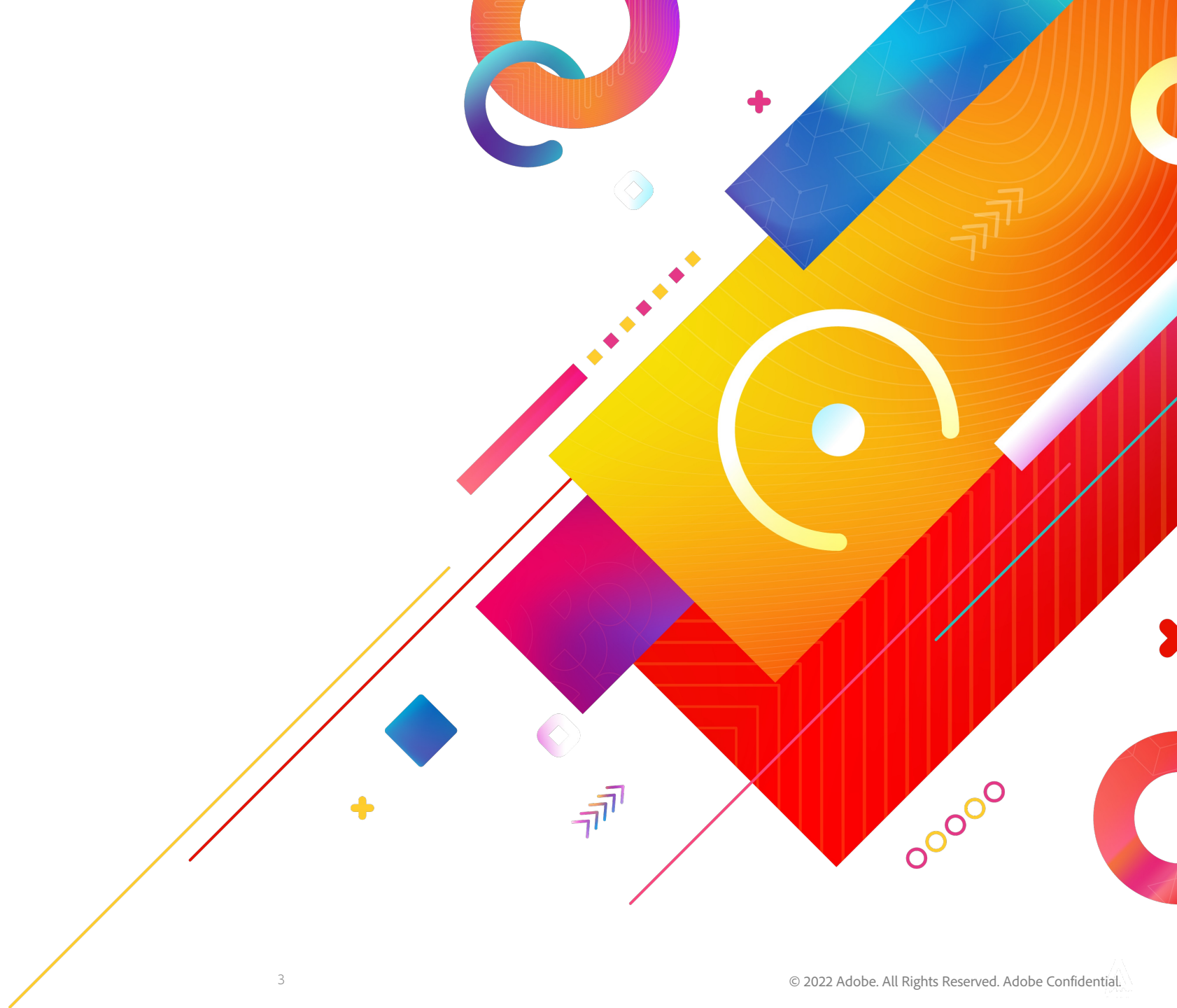
System Admin Essentials: Foundations of Operational Reporting

June 8, 2022

Agenda (Pacific)

Time	Topic
8:00 a.m.	Welcome and agenda
8:05 a.m.	What IS Operational Reporting? *Jen Desmond, Consultant, Workfront Customer Success Services, Adobe Workfront* *Kelly Fones, Workfront System Administrator, Capital One*
8:45 a.m.	Presenter Q&A
8:55 a.m.	Wrap-up and next steps

Introductions



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Jen Desmond

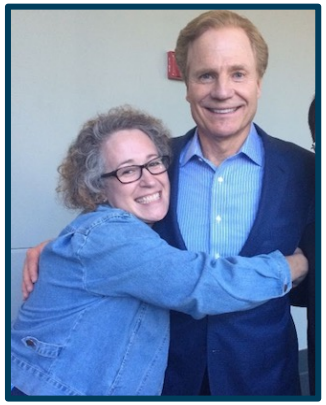
Consultant, Workfront Customer Success Services

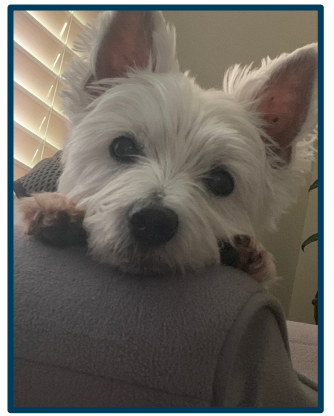
Adobe Workfront

Hi! I'm Kelly Fones
Capital One - Workfront System Administrator

Empty nester - Jane Austen fan - Gen Xer - Ambivert - Thriving with alopecia - Still a Goonie - Emotional support human to my dog - Greek food enthusiast

My love languages are organization and efficiency using spreadsheets and Workfront.





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The outline

The Definition
What is operational reporting?

The Foundation
Who should create reports?
Do you have standards for custom fields?
How is your data quality?

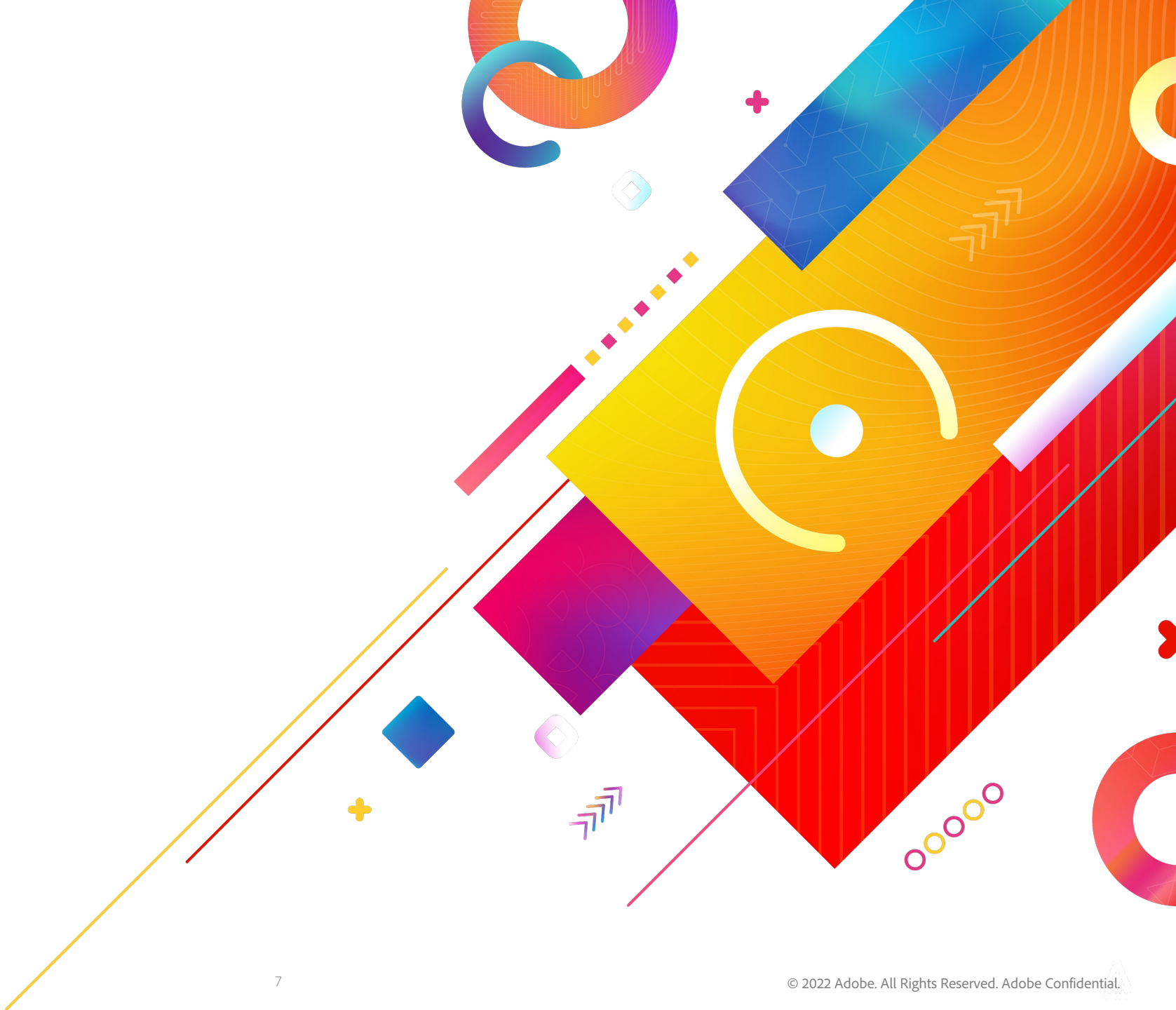
Standing Up
Take ownership of what everyone should be looking at
Setting up clear expectations

Wrapping up Best Practices

Before We Go...

Appendix

The Definition



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What is operational reporting?

Adobe Best Practices

What is operational reporting?

- Tracks the critical actions that keep the lights on
  - Focus on daily reporting in this webinar

What's the value?

- Clear visibility into the work underway each day
- Used for quick, frequent, decision-making and action

Now what?

- You've come to the right webinar!

Capital One Experience

What "mountain is the user climbing each day?

(Role – license – layout)

- Project managers - planner - PM layout
- Leadership - reviewer - executive layout
- Creative directors - worker – creative director layout
- Creatives - worker - creative layout

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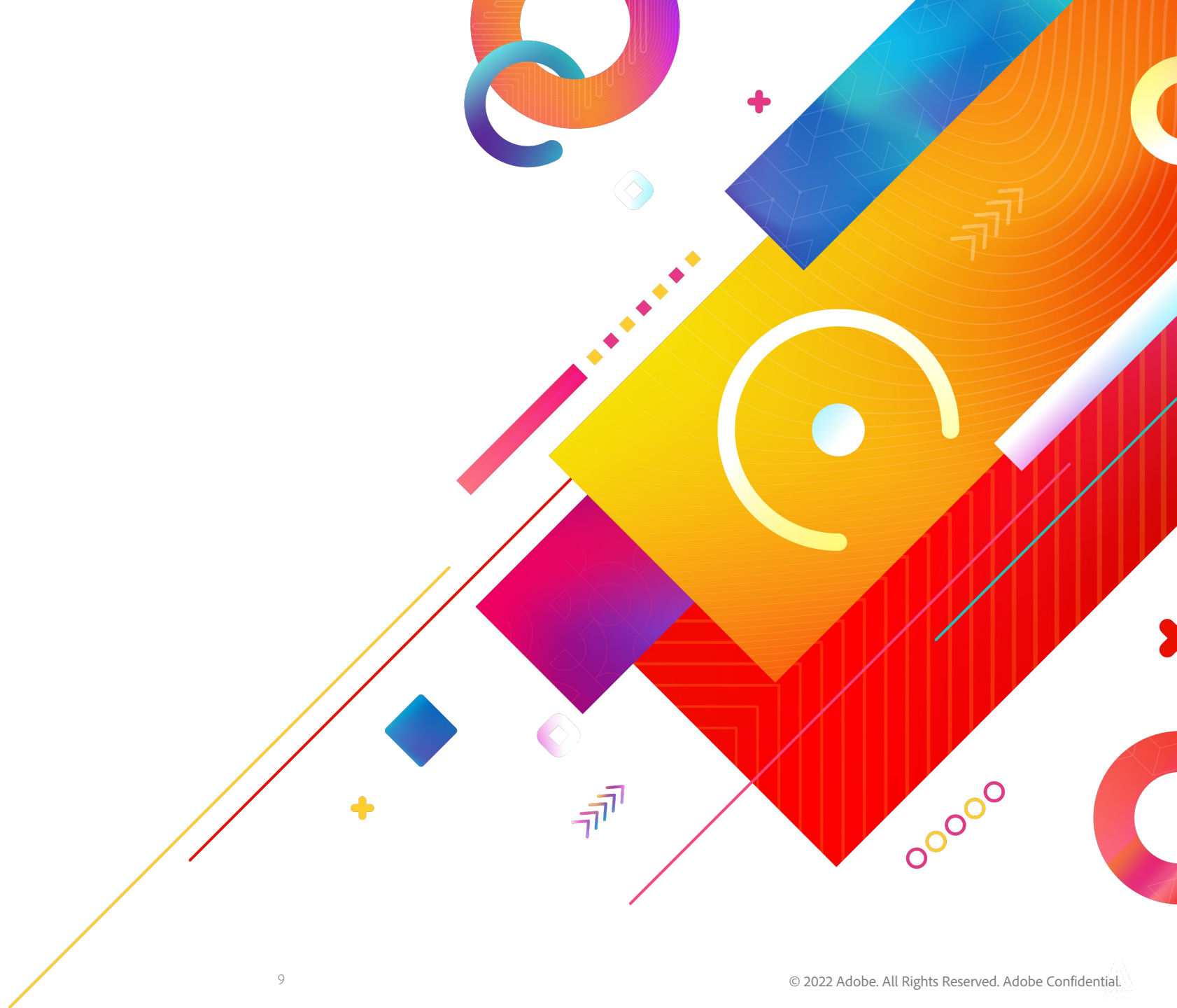
The Foundation



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Who should create reports?

Adobe Best Practices

Revisit your Access Levels tied to Plan licenses

- Don't give report creation rights to every Plan licensed user

What's the value?

- Prevents confusion caused by improperly filtered individual reports

Activate

- Edit Plan Access Levels
- If you decide to allow all Plan licensed users to create reports, educate them on how to correctly filter

Capital One Experience

Report creators must:

- Understand how data is entered, pulled and interpreted
- How to "teach" data interpretation
- Have healthy skepticism
- Be forward thinking
- Have dedicated time

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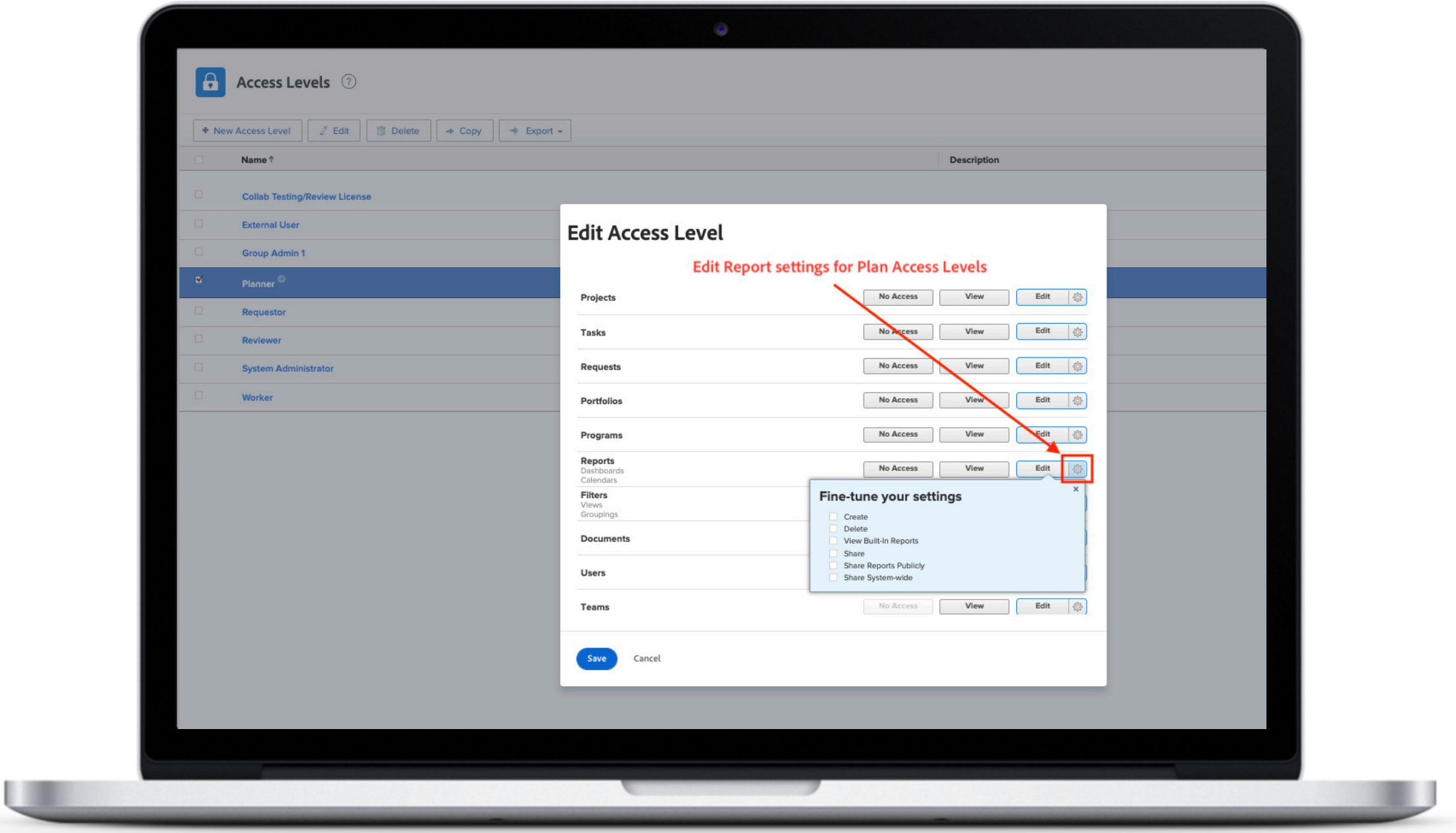

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Do you have standards for custom form fields?

Adobe Best Practices

You need standards

- As much as possible, field names should be standardized with the rest of your business, and within Workfront itself

What's the value?

- Enables data quality across systems and users inside and outside of Workfront will understand what should be in custom fields
- Fosters buy-in across your organization if custom fields are mirroring the rest of the business

Activate

- Control the creation of new fields by system admins and group admins to prevent duplicate fields for similar metadata
- Consider a custom field cleanup effort

Capital One Experience

Created documented standards for our language

- Blend of Workfront + Capital One vernacular
- Comprehensive
- Deliberately searchable
- Maniacally enforced

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Adobe Workfront + Capital One vernacular blend

Capital One Experience

Link to full Workfront glossary

Documentation used for consistent spelling, acronyms, and definitions for what the users in your instance need to see and know.

Approved term (and spelling)	Acronym	Approved definition
Link to the Workfront glossary		
accountable executive	AE	Person responsible for the intent
active	-	Any project currently in-flight without any impediments and with the project stat
Active task	-	An incomplete task in a current project that is not prevented from being worked
actual completion date	-	Date the project actually completed
Actual hours	-	In a project, task, or issue report, Actual Hours are the sum of all hours logged
actual start date	-	Date the project actually started
art director	AD	Job role
Assigned to	-	In a Task or Issue report, this field displays the Owner of the task or the issue,
Assignment	-	A user, job role, or team assigned to an issue or a task . Projects, portfolios, or
Backlog	BKL	Projects/ideas that may or may not become active projects.
Breadcrumbs	-	The area at the top of the page that shows the hierarchical location of where th
business as usual	BAU	business as usual
cancelled	-	A project that was prioritized, became active, work was completed, and then ca
Child task	-	A task that is a Subtask of a Parent Task
Commercial	CML	Commercial related
Completed	-	The project has no more active tasks, and is closed out.
Constraint type	-	The scheduling tendency of a Task.
copywriter	CW	Job role
cross project predecessors	-	A task of one project is dependent on a task from a different project. More here
Dependency	-	The link between two tasks that require one task to change status before the ot
Duration	-	The window of time allocated for completion of a task issue, or project (as dete
Gantt chart	-	A visual timeline of the project dates in a calendar view based on the planned c
grooming	Do not use	Use "refinement" instead of grooming
Group	-	A collection of users (possibly from the same department or business unit) that
hand off	HO	The date the project is planned to complete with creative resources

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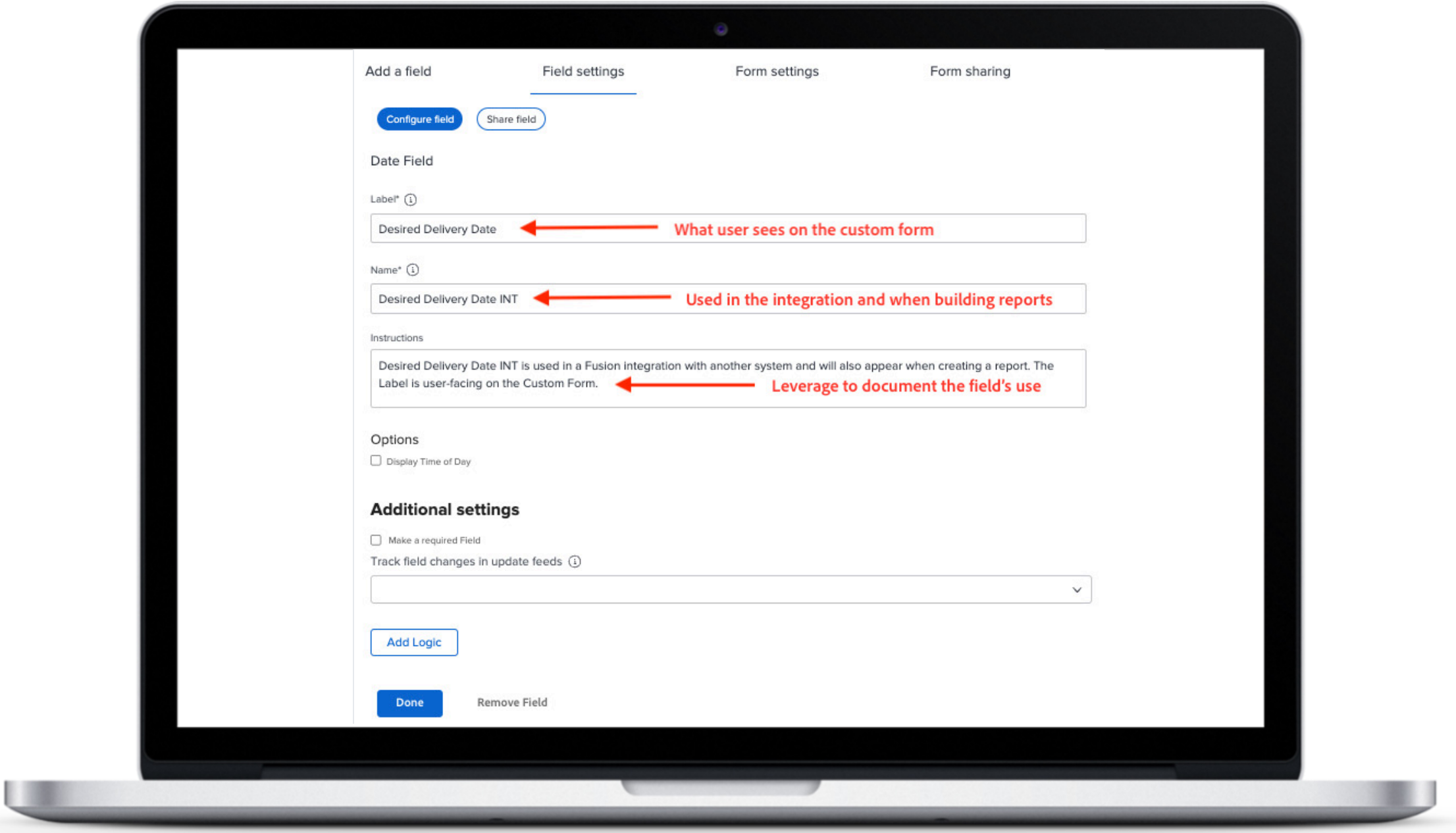

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How is your data quality?

Adobe Best Practices

What is data quality?

- Data quality is the level of accuracy and completeness within your instance

What's the value?

- Enables truth about the work happening and accurate reporting
- Without accurate data, you can't make decisions

Activate

- Give users permission to show reality
- Train users on both expectations and the how
- Communicate the value of users' efforts toward data quality
- Overwhelmed by improving data quality? Choose a focus and work with users to enable accuracy.
- Provide specific reports aimed at data quality

Capital One Experience

Data is not static

- Define and prioritize your top data points by layout
- Create snackable reports for missing data
- Train. Re-train.
- Follow up. Follow up again.

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Late Task Cleanup Report

REPORT

Incomplete Tasks in the Past

Show Filters Report Actions

Details Summary

Report Default Report Default Report Default

Project Name	Project Owner	Task Name	Assignments	Duration	Can Start	Start On	Due On	Actual Start Date	Actual Completion Date	% Complete	Project: Status	Last Note: Note Text
Planned Completion Date: Oct 3, 2021 (1)												
Main Website Updates for World Cup Sweepstakes	Joan Harris	Production	Mary Smith	5 Days	True	9/28/21	10/4/21			0%	Current	
Planned Completion Date: Oct 24, 2021 (2)												
Main Website Updates for World Cup Sweepstakes	Joan Harris	Schedule Go Live	Project Manager	0.12 Days	False	10/29/21	10/29/21			0%	Current	
Main Website Updates for World Cup Sweepstakes	Joan Harris	Final Review	Art Director Editor Management Vendor	2 Days	True	10/26/21	10/29/21			0%	Current	
Planned Completion Date: Oct 31, 2021 (1)												
Main Website Updates for World Cup Sweepstakes	Joan Harris	Launch Site	Web Developer	0.5 Days	False	10/29/21	11/1/21			0%	Current	
Project: Name: Summer Sale Direct Mailer (13)												

Showing All (188) tasks 1 - 188 of 188 tasks

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Health clean-up for project managers

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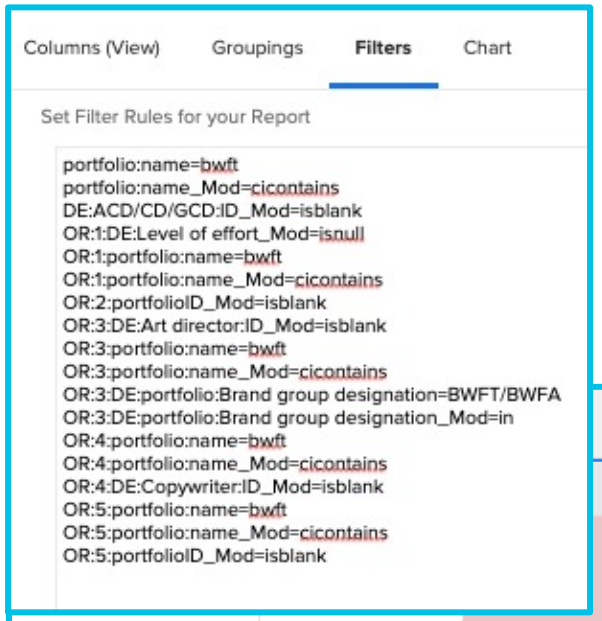

If a field is highlighted red, it is negatively impacting reporting

In-line editable – no need to open each project to update

			ACD/CD/GCD	AD	CW	LOE	Project category - select all that apply	Estimated number of deliverables	Custom Forms
			BWFT Devonte Thomas, CD	BWFT Sato Huang, AD		Level 1 consulting	Full PM support		BND BCR project - suite BWFT additional portfolios - project
BWFT Air Force	Project towel party 2	BWFT Air Force			BWFT Shanice Jackson, CW		MVP project	9	BND BCR project - suite BWFT additional portfolios - project
	Project towel party 3	BWFT Jane Gardner, external	BWFT Air Force	BWFT Sato Huang, AD		Level 1 consulting	No dedicated PM	14	BND BCR project - suite BWFT additional portfolios - project
BWFT Navy	Navy_Predecessor TrainingA		BWFT Navy			Level 5 biggest			BWFT request-special - project BND BCR project - suite

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Health clean-up for leadership, creative directors, and creatives

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Leadership	Creative directors	Creatives
Proofs I need to approve	My open tasks Proofs I need to approve	My open tasks Proofs I've uploaded needing approval

- Dashboards easily accessible with their daily operational reports
- Users can focus on the 1-3 things we have asked each group to be vigilant about updating
- In-line editable
- Feeds into all reporting

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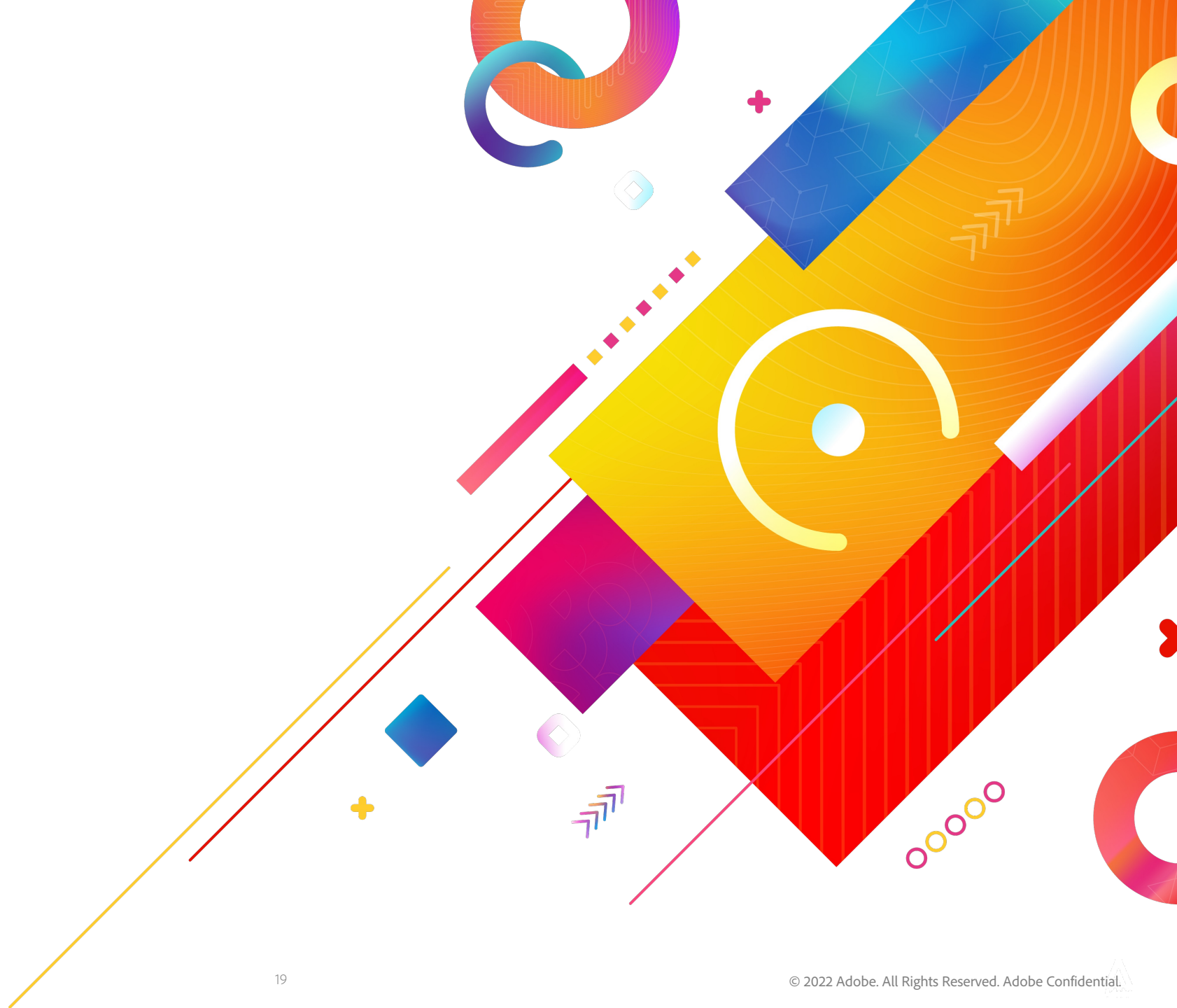
Standing Up



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Take ownership of what everyone should be looking at

Adobe Best Practices

Manage widely-distributed reports

- As a guardian of operational reporting, you have the broadest knowledge of the data structure in Workfront and how to leverage the reporting to tell the right story

What's the value?

- Ensures a source of truth
- Connects personas to the right data set

Activate

- Work with leadership and managers to determine a set of reports that are developed, distributed, and managed by system admins, group admins, or specified Planners
- Add prompts, wildcards, and allow users to utilize filters, views, and groupings

Capital One Experience

How we survived

- Limited who could create and share
- Mercilessly cleaned out what we had
- Created what we wanted our users to see and use

How we thrived

- One-stop shop
- Meaningful self-serve options
- Less time spent in maintenance (sys admin)

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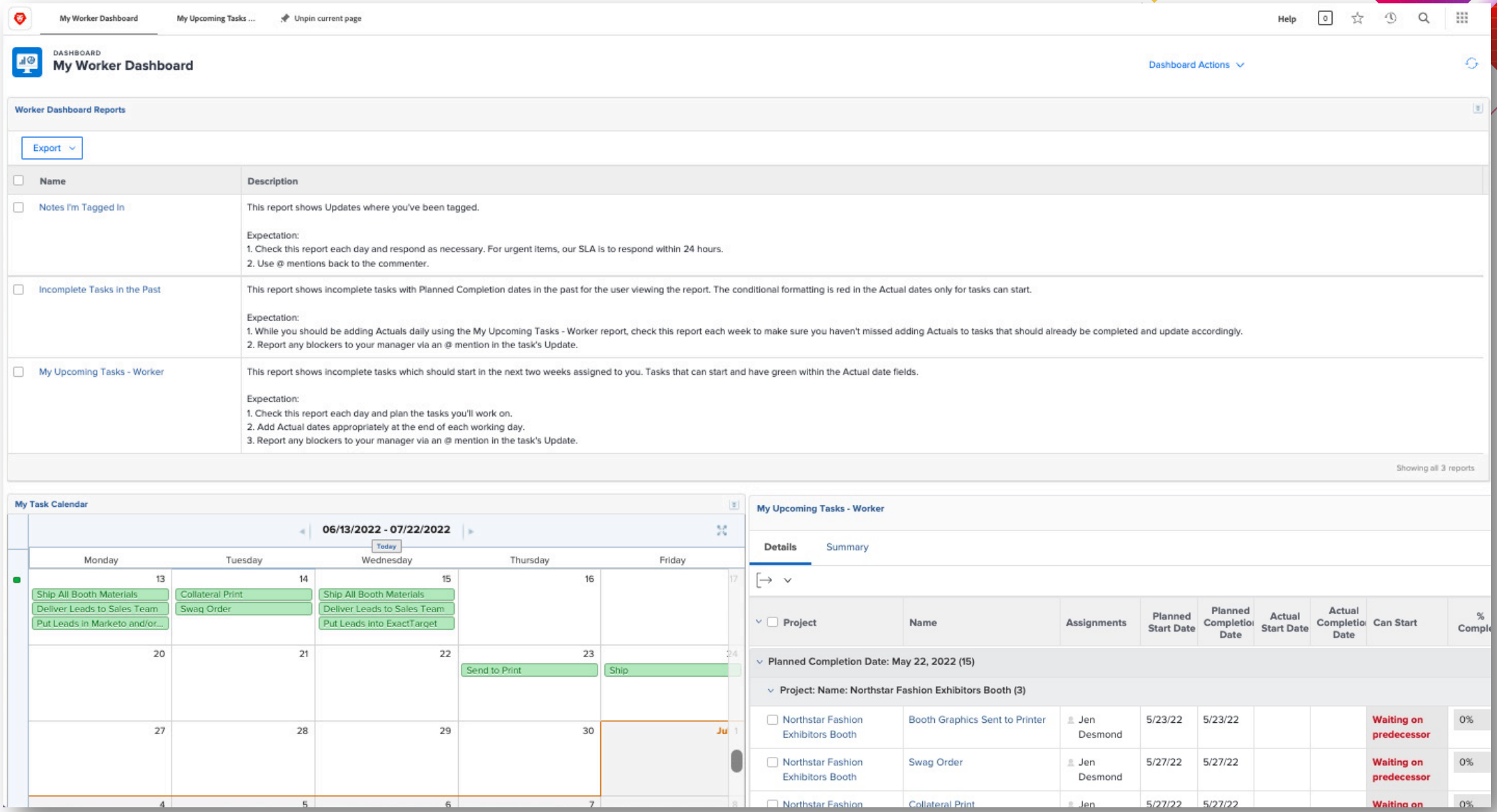
Dashboard Example: Worker



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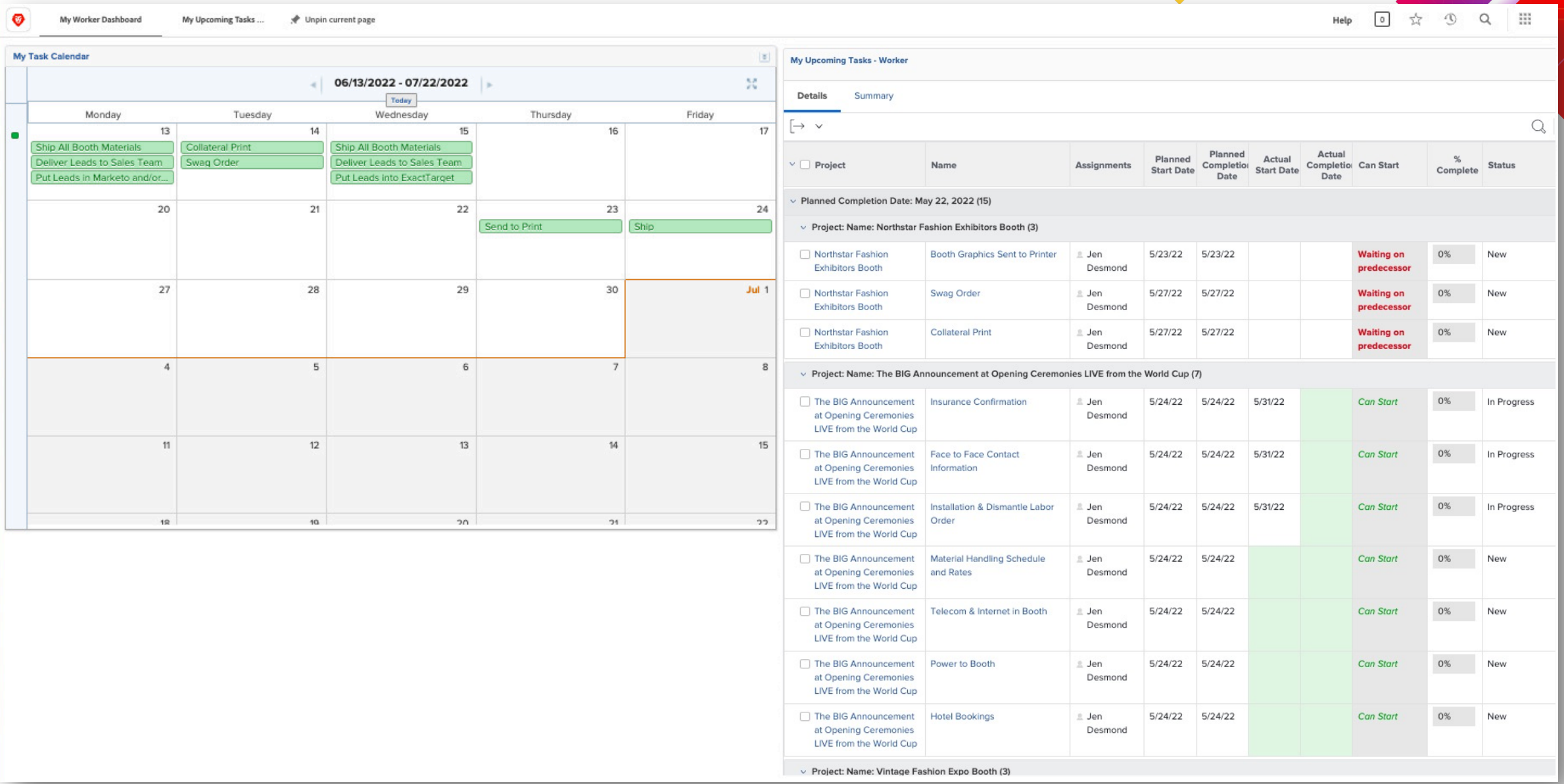
Dashboard Example: Worker



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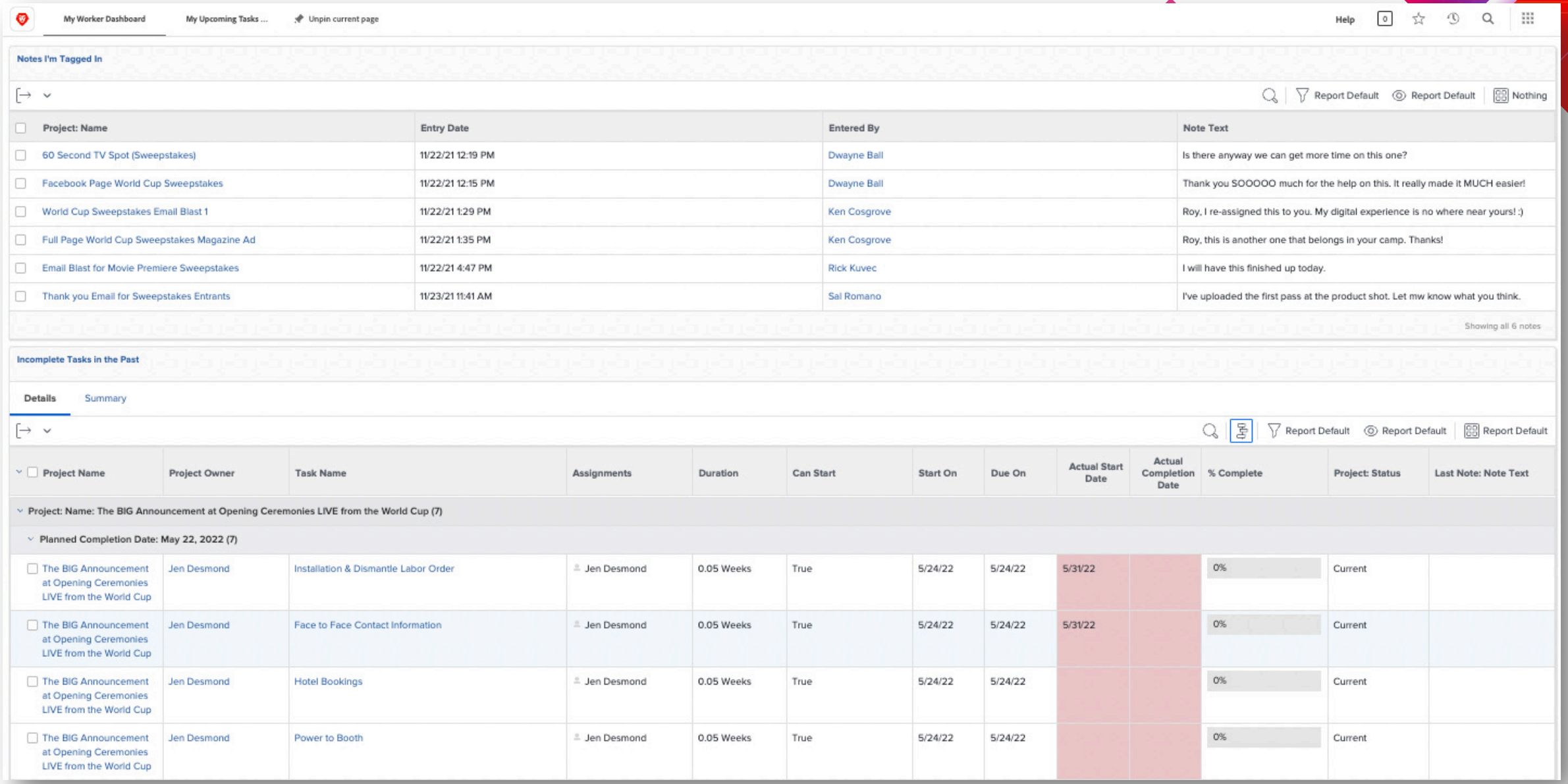
Dashboard Example: Worker



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Daily operations flash dashboards "one-stop shop"

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Layouts

Project managers	Leadership	Creative directors	Creatives
Request report	My open tasks	Proofs I need to approve	My active projects
Requests I've submitted	Proofs I need to approve	My open tasks	My open tasks
My open tasks	Proofs I'm on	Proofs I'm on	Proofs I've uploaded needing approval
Proofs I'm on		My active projects	Proofs I'm on
Proofs I need to approve			
Proofs I've uploaded needing approval			

Dashboards with wild card based reports specific to the user

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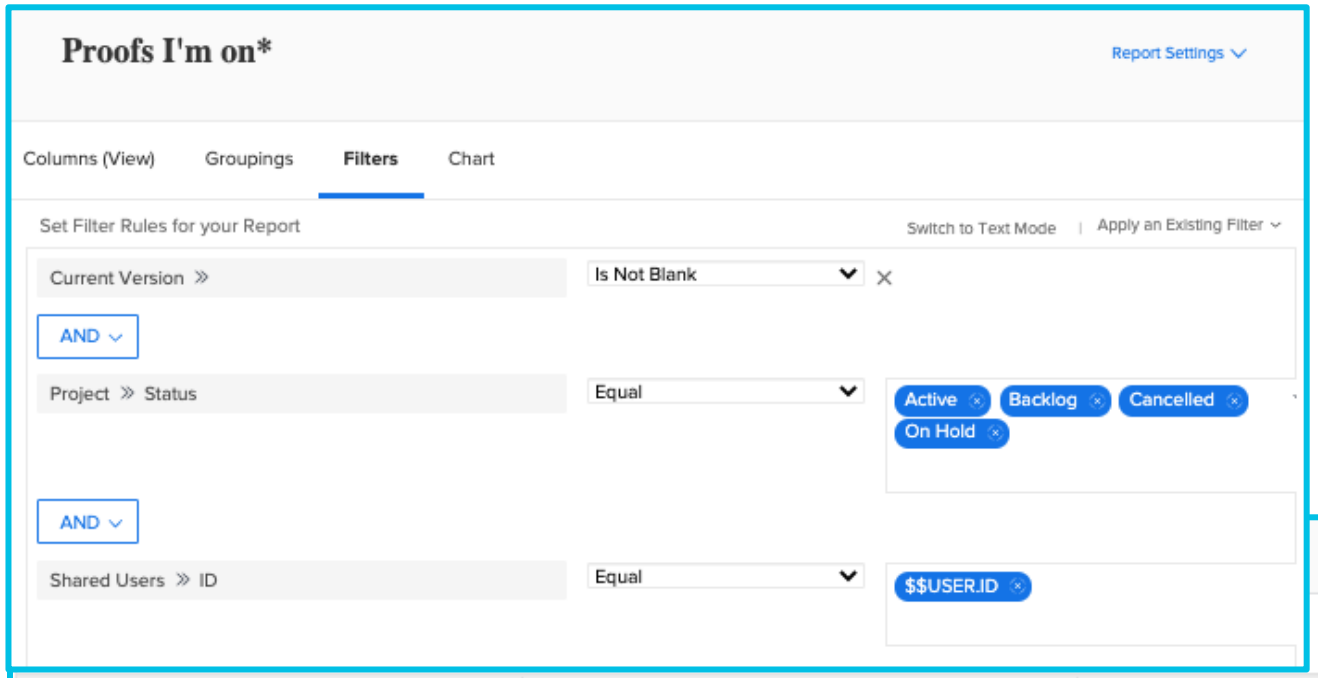
Flash dashboard: Proofs I'm on report

Capital One Experience



1 report currently used on 11 dashboards

863 views between 1/1/22 - 6/2/22

Wild card based

Consistent columns

Project: Name	Proof Name	Owner	Version	Proof Deadline ↑	Project progress
Project name Tango	Marines logo	Kelly Fones	1	5/25/22	Late
Project name Foxtrot	Army logo	Kelly Fones	1	5/27/22	Late
Project name Kilo	Navy logo	Kelly Fones	2	6/8/22	On Time
Project name X-Ray	Air Force logo	Kelly Fones	1	6/10/22	On Time

Showing all 4 documents

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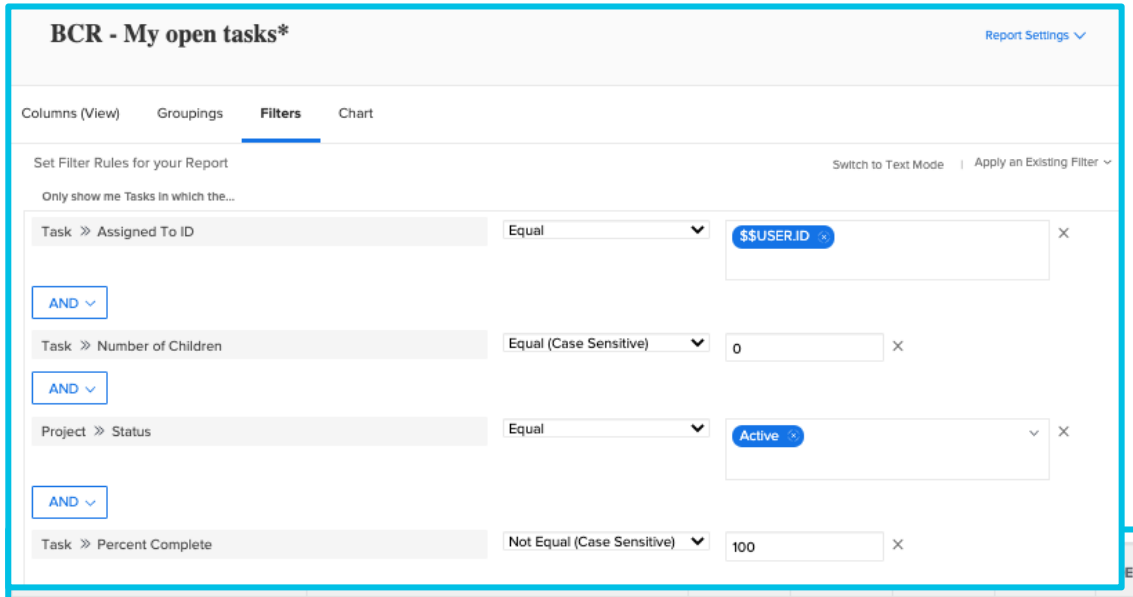
Flash dashboard: My open tasks

Capital One Experience



							Status	Progress	% complete	Task notes
Project: Name: Project name Charlie (2)										
Project name Charlie	Copy development	4/22/22	4/22/22	6/9/22		Level 4 large	In Progress	Behind	54%	
Project name Charlie	Hand off	6/13/22		6/14/22		Level 4 large	New	Behind	0%	
Project: Name: Project name Tango (1)										
Project name Tango	Kick off	5/26/22	5/26/22	5/27/22		Level 4 large	In Progress	Late	0%	You can add task notes here.
Project: Name: Project name Kilo (2)										
Project name Kilo	Review with intent owner	5/27/22		5/31/22		Level 4 large	New	On Time	0%	I can even add a link!
Project name Kilo	Send to intent owner for review before partner review	6/1/22		6/2/22		Level 4 large	New	On Time	0%	

1 report currently used on 11 dashboards

133 views between 1/1/22 - 6/2/22

Wild card based

Consistent columns

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Setting clear expectations

Adobe Best Practices

Do you have clear expectations for action?

- It isn't enough to provide reporting if users only glance at it and navigate away

What's the value?

- Clear expectations drive interaction and action

Activate

- Get alignment from the managers of each persona on what users' action items are for each operational report
- Document those expectations in each report description
- Add applicable reports/dashboards to layout templates for easy navigation

Capital One Experience

If I could turn back time...

- Initially relied on our users to stay engaged
  - No deadline = no engagement
  - Created reporting black holes
- Moving to a prescriptive phase based on report type and user role
  - Daily
  - Weekly
  - Monthly
  - Quarterly
  - Yearly

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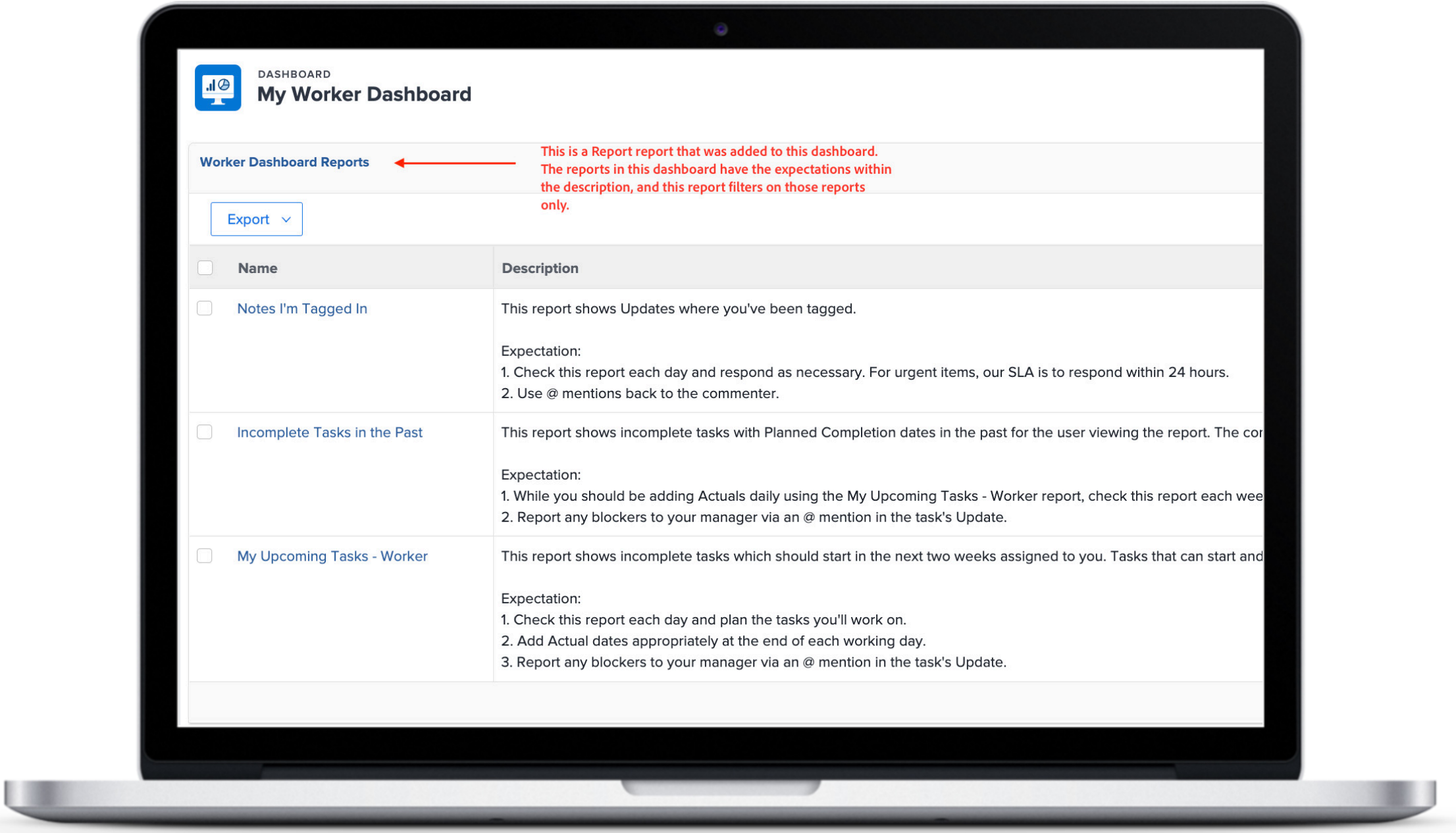

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Wrapping up best practices

Report creation

Rethink report creation rights

Not every Plan licensed user should or needs to create reports.

Custom field standards

Standardize custom field names where you can

Speak your organization's language inside Workfront. Make sure you don't have two similarly named fields for the same data.

Data quality

Let users tell the truth

Agree in your organization that it's more important to see reality through data instead of striving for everything to look green. From reality, you're able to identify trouble spots and improve.

Manage widely-distributed reports

Write the story with data

You're the steward of your instance, so empower yourself to provide the data users need to focus on.

Clear expectations

Tell the audience what to do with a report

Without an action plan tied to it, a report is just something to look at.

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Before we go...

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Start somewhere and don't do too much all at once.

Enlist help from leadership to communicate expectations.

Ask users what they need!

Prioritize a place to start, and pace yourself.

Communicate leadership expectations to your users.

Ask users what they need!

Capital One

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Reporting Canvas

Next generation of report building allows you to easily gain visibility into all the work that is happening in your organization giving you the power to tell your story, maximize efficiency, achieve data democratization, and increase visibility

Investment Theme	Operations Management
Core Capability Pillar	Reporting
Availability	Beta 22.2 (AWS)

Tell Your Story

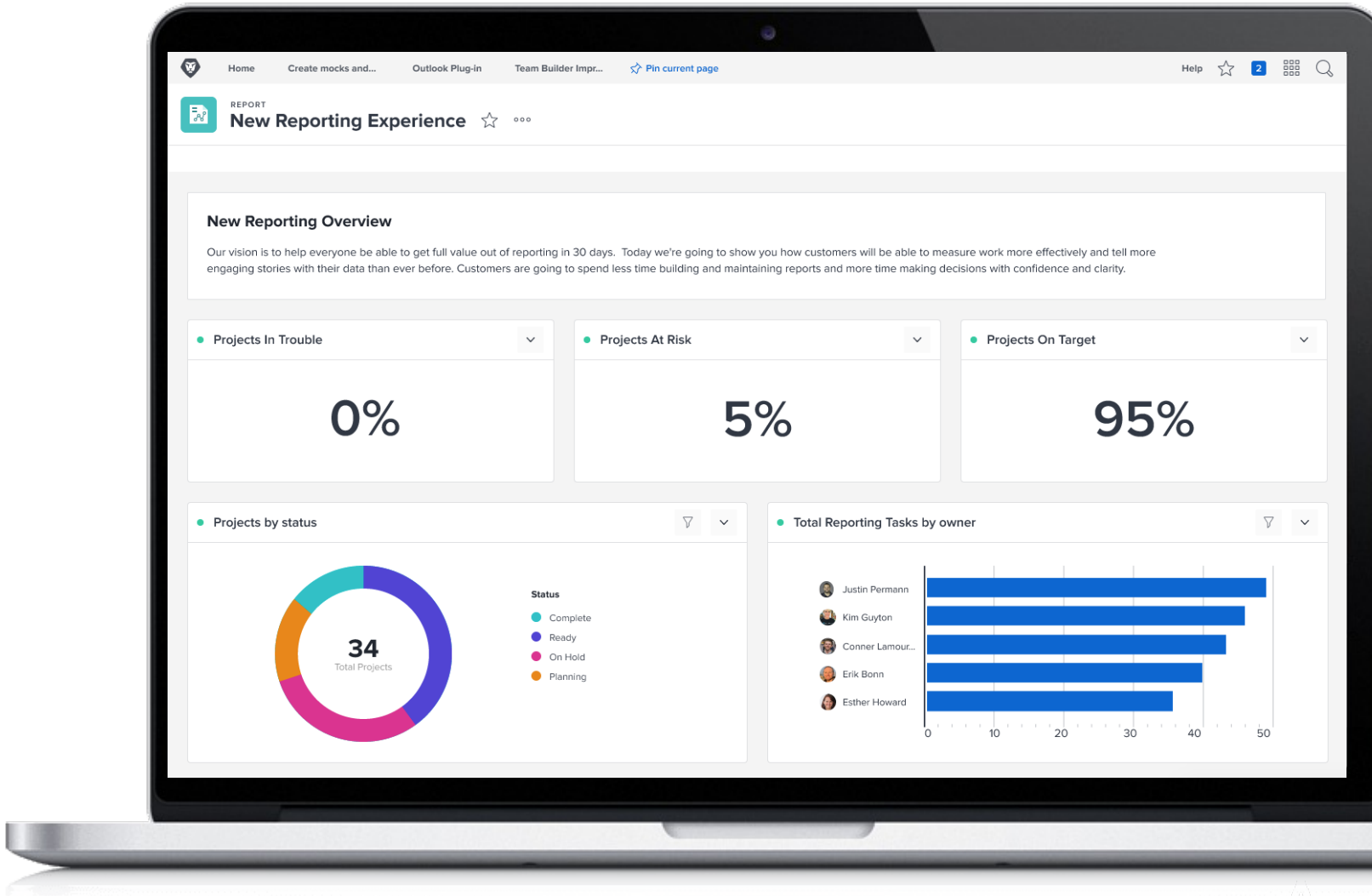
- Additional visualizations
- Limitless reporting canvas
- Not confined by object-based reports

Maximize Efficiency and Achieve Data Democratization

- Simple drag and drop building
- No steep learning curve

Increase Visibility

- Share data rich and aesthetically pleasing reports



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Questions?

Upcoming Events

Product Releases

- June 23: What's new in the 22.3 Release
- June 28 & 30: Small Group Workshop: 22.3 Release Feature Optimization

System Admin Essentials Webinars

- July 27: Work Intake / Queue Management
- *Coming soon!* Leveraging Built-in Integrations

Ask the Expert Office Hours + Small Group Workshops

- June 14: Ask the Expert: Operational Reporting Webinar Follow-up (with Jen Desmond!)
- June 21: Small Group Workshop: User Management
- *Check in regularly as topics are added weekly!*

Register at one.workfront.com/events

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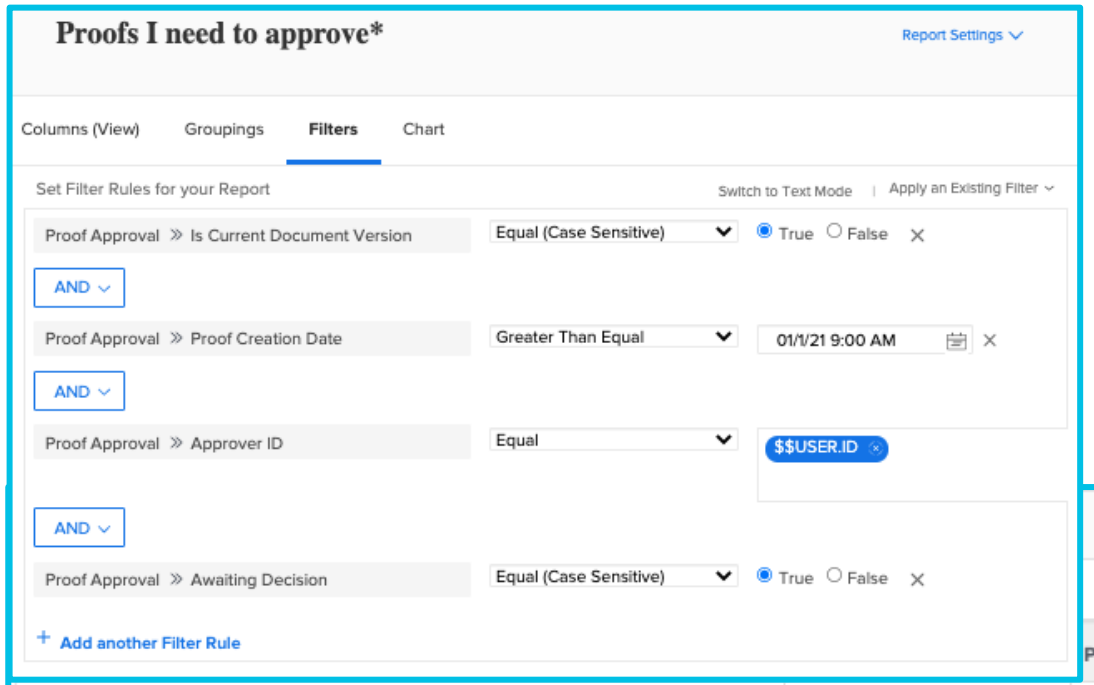
Thank you!

Appendix

Flash dashboard: Proofs I need to approve

Capital One Experience



			Proof creation date	Version deadline ↑	Version	Proof approval status	Active proof stage
☐	Marines logo	Kelly Fones	5/25/22	5/25/22	1	Pending	
☐	Army logo	Kelly Fones	5/25/22	5/27/22	1	Pending	Stage 1
☐	Navy logo	Kelly Fones	5/25/22	6/8/22	2	Pending	Stage 1
☐	Air Force logo	Kelly Fones	5/25/22	6/10/22	1	Pending	

1 report currently used on 9 dashboards

Wild card based

1074 views between 1/1/22 - 6/2/22

Consistent columns

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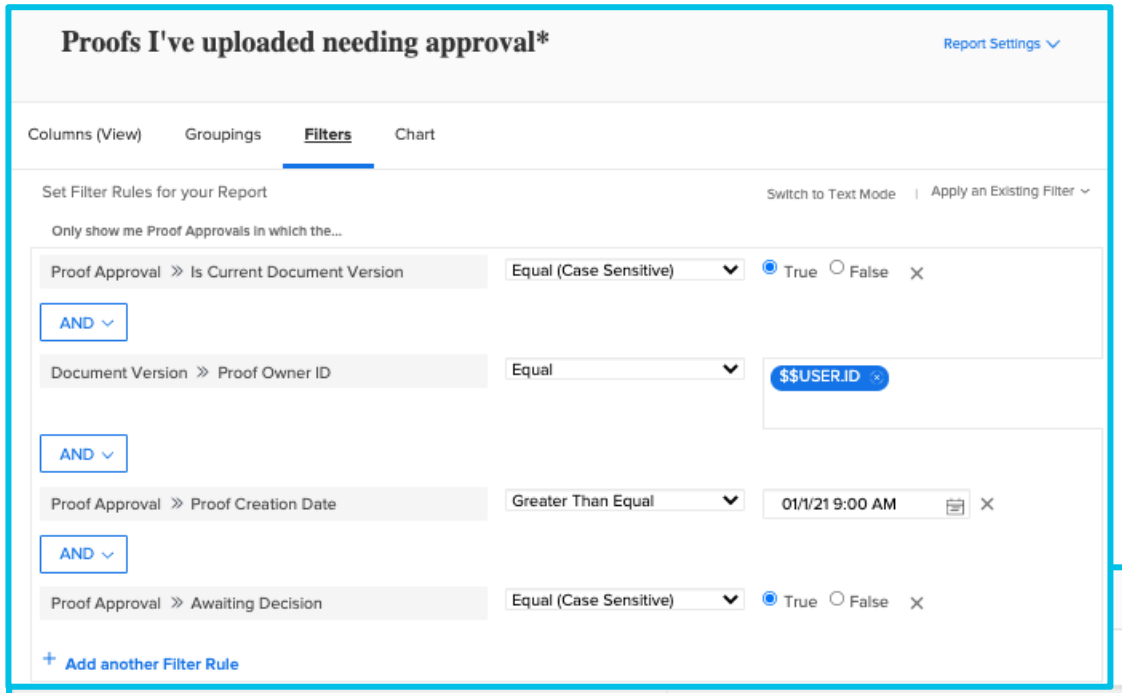
Flash dashboard: Proofs I've uploaded needing approval

Capital One Experience



1 report currently used on 6 dashboards

Wild card based

592 views between 1/1/22 - 6/2/22

Consistent columns

Proof name	Approver	Proof approval status	Proof creation date	Version	Deadline ↑
Marines logo	BWFT Jung Yoo, IO	Pending	5/25/22	1	5/25/22
Marines logo	BWFT Devonte Thomas, CD	Pending	5/25/22	1	5/25/22
Army logo	BWFT Devonte Thomas, CD	Pending	5/25/22	1	5/27/22
Army logo	BWFT Jung Yoo, IO	Pending	5/25/22	1	5/27/22
Navy logo	BWFT Sato Huang, AD	Pending	5/25/22	2	6/8/22
Navy logo	BWFT Advika Mehta, PM	Pending	5/25/22	2	6/8/22

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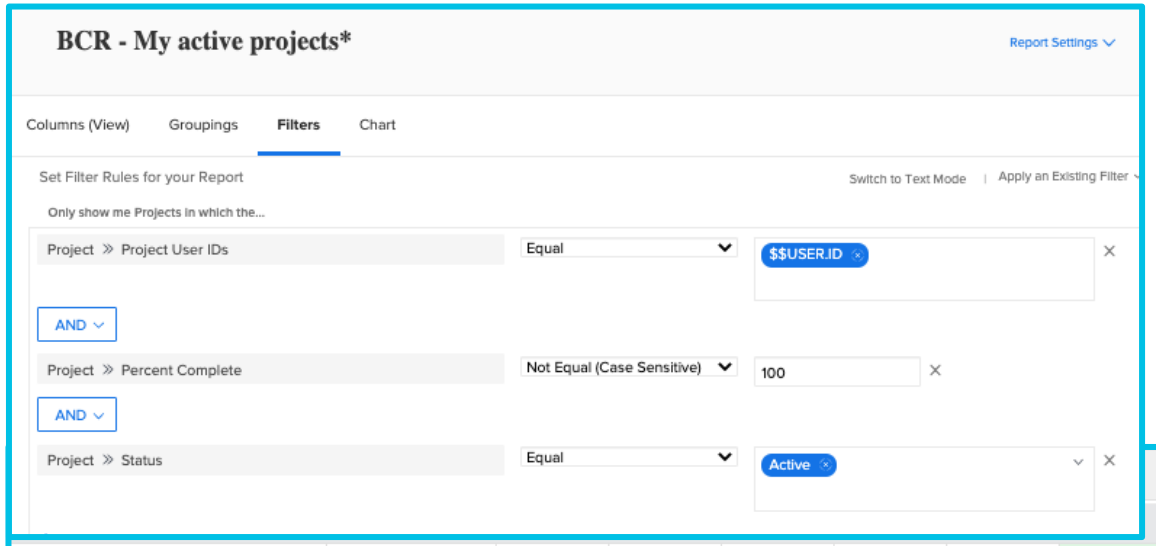
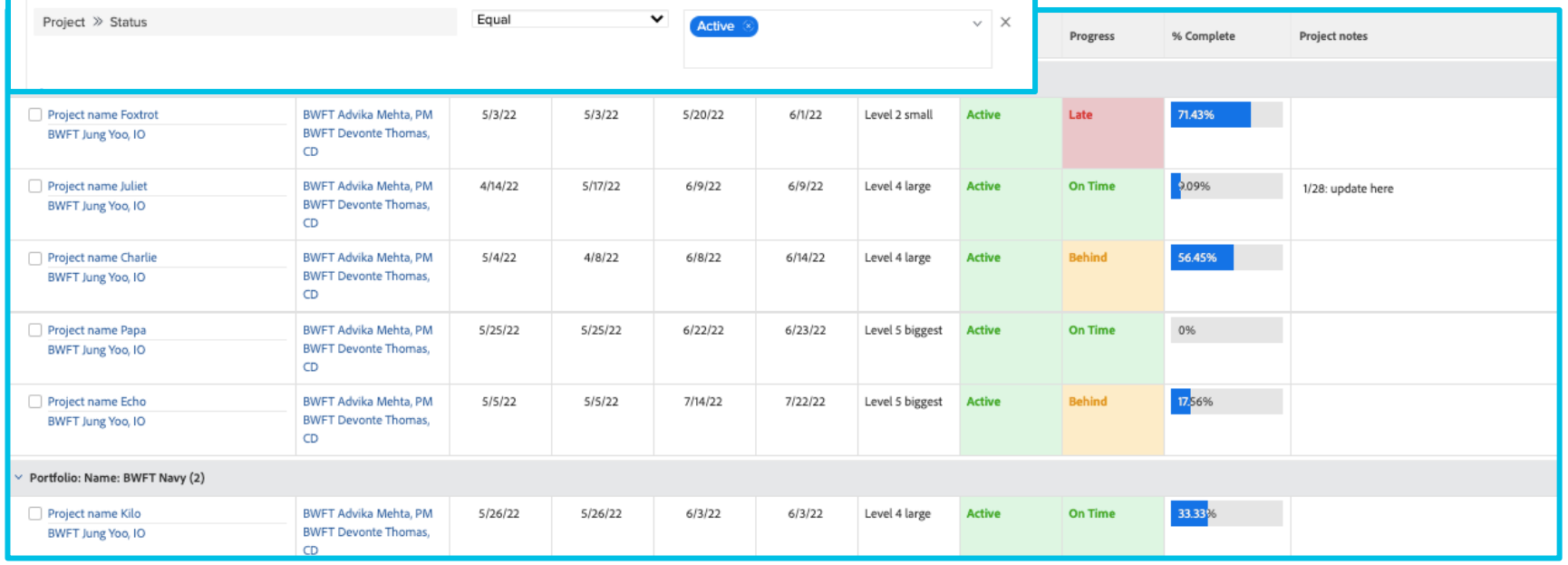
Flash dashboard: My active projects

Capital One Experience





								Progress	% Complete	Project notes	
Project name Foxtrot BWFT Jung Yoo, IO	BWFT Advika Mehta, PM BWFT Devonte Thomas, CD	5/3/22	5/3/22	5/20/22	6/1/22	Level 2 small	Active	Late	71.43%		
Project name Juliet BWFT Jung Yoo, IO	BWFT Advika Mehta, PM BWFT Devonte Thomas, CD	4/14/22	5/17/22	6/9/22	6/9/22	Level 4 large	Active	On Time	9.09%	1/28: update here	
Project name Charlie BWFT Jung Yoo, IO	BWFT Advika Mehta, PM BWFT Devonte Thomas, CD	5/4/22	4/8/22	6/8/22	6/14/22	Level 4 large	Active	Behind	56.45%		
Project name Papa BWFT Jung Yoo, IO	BWFT Advika Mehta, PM BWFT Devonte Thomas, CD	5/25/22	5/25/22	6/22/22	6/23/22	Level 5 biggest	Active	On Time	0%		
Project name Echo BWFT Jung Yoo, IO	BWFT Advika Mehta, PM BWFT Devonte Thomas, CD	5/5/22	5/5/22	7/14/22	7/22/22	Level 5 biggest	Active	Behind	17.56%		
Portfolio: Name: BWFT Navy (2)											
Project name Kilo BWFT Jung Yoo, IO	BWFT Advika Mehta, PM BWFT Devonte Thomas, CD	5/26/22	5/26/22	6/3/22	6/3/22	Level 4 large	Active	On Time	33.33%		

1 report currently used on 6 dashboards

Wild card based

978 views between 1/1/22 - 6/2/22

Consistent columns

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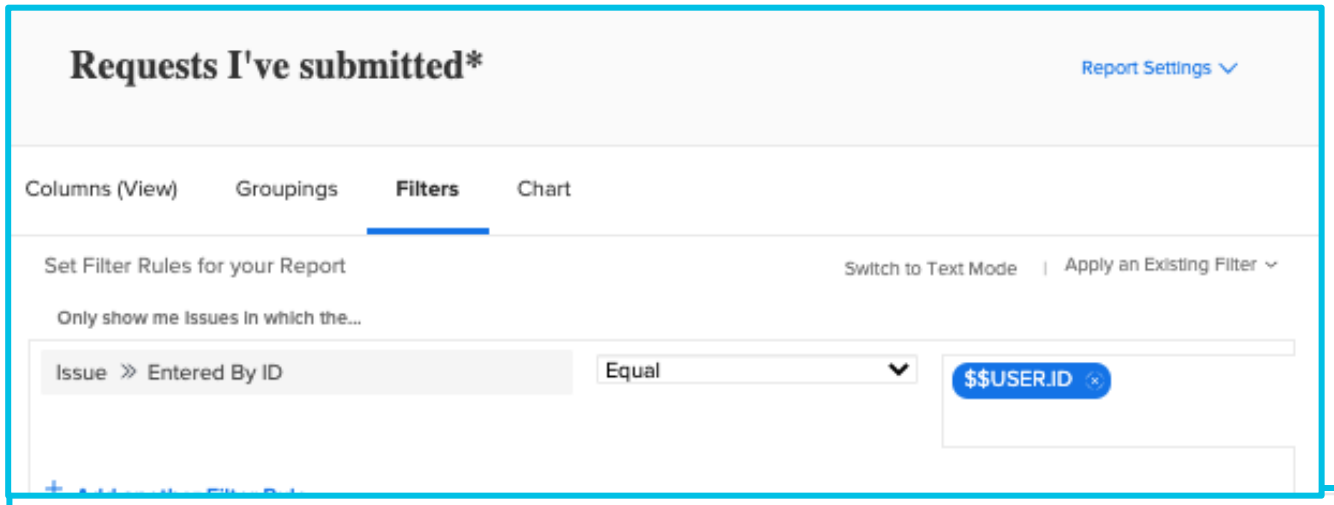
Flash dashboard: Requests I've submitted

Capital One Experience



Name	Request date	Assignments	Issue notes	Resolving project	Projected stop	Project status
Army logo	5/26/22	BWFT Advika Mehta, PM	User can add notes in there!	Army logo - make it bigger	6/28/22	Active
Be all you can be	5/26/22	BWFT Devonte Thomas, CD				

1 report currently used on 8 dashboards

Wild card based

941 views between 1/1/22 - 6/2/22

Consistent columns

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BONUS: System Administrator health reports

Capital One Experience

As a system administrator, you should also create reports/dashboards to ensure you're also keeping on top of what is in your instance.
Here are a few that I use. Please feel free to copy/paste the text mode into your filters and adjust as needed.

Project forms not used in past year
EXISTS:A:$$EXISTSMOD=NOTEXISTS
EXISTS:A:$$OBJCODE=PROJ
EXISTS:A:entryDate=$$TODAY-1y
EXISTS:A:entryDate_Mod=gt
EXISTS:A:objectCategories:categoryID=FIELD:ID
EXISTS:A:objectCategories:categoryID_Mod=cicontains
EXISTS:B:$$EXISTSMOD=NOTEXISTS
EXISTS:B:$$OBJCODE=TMPL
EXISTS:B:objectCategories:categoryID=FIELD:ID
EXISTS:B:objectCategories:categoryID_Mod=cicontains
catObjCode=PROJ
catObjCode_Mod=in

Search custom fields for keywords

Create a parameter report with these filters:
Parameter >>ID equals/contains - your keyword

Users who have not logged in for 30 days
lastLoginDate=$$TODAY-30d
lastLoginDate_Mod=lt
homeGroupID=***add the group ID you want to see***
homeGroupID_Mod=in
isActive=true
isActive_Mod=eq

Task forms not used in the past year
EXISTS:A:$$EXISTSMOD=NOTEXISTS
EXISTS:A:$$OBJCODE=TASK
EXISTS:A:entryDate=$$TODAY-1y
EXISTS:A:entryDate_Mod=gt
EXISTS:A:objectCategories:categoryID=FIELD:ID
EXISTS:A:objectCategories:categoryID_Mod=cicontains
EXISTS:B:$$EXISTSMOD=NOTEXISTS
EXISTS:B:$$OBJCODE=TTSK
EXISTS:B:objectCategories:categoryID=FIELD:ID
EXISTS:B:objectCategories:categoryID_Mod=cicontains
catObjCode=TASK
catObjCode_Mod=in

Create reports for distribution lists

Create a user report that shows the paid licenses, the role, the home group, other groups, home team and other teams.

These can be quickly used for budget planning purposes, or newsletter distribution lists that automatically update with new users.

MOST IMPORTANT THING TO DO EVERY DAY

You're using a top-notch project management application.

HAVE FUN!

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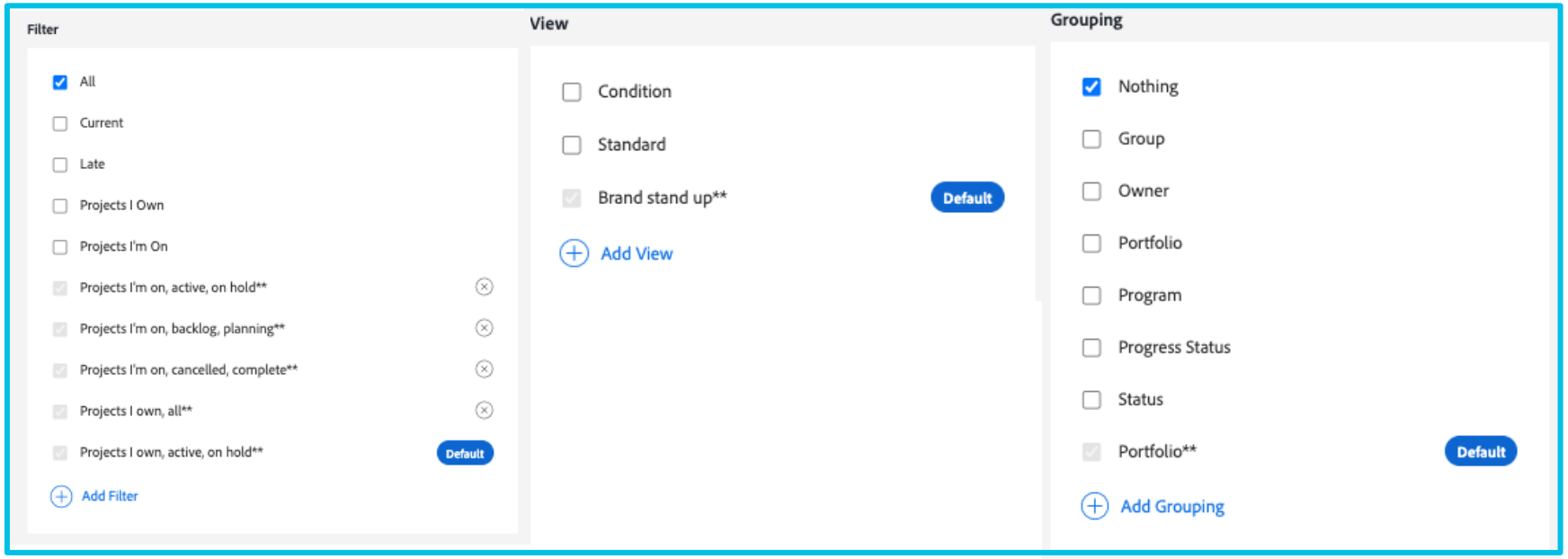
Project FVGs

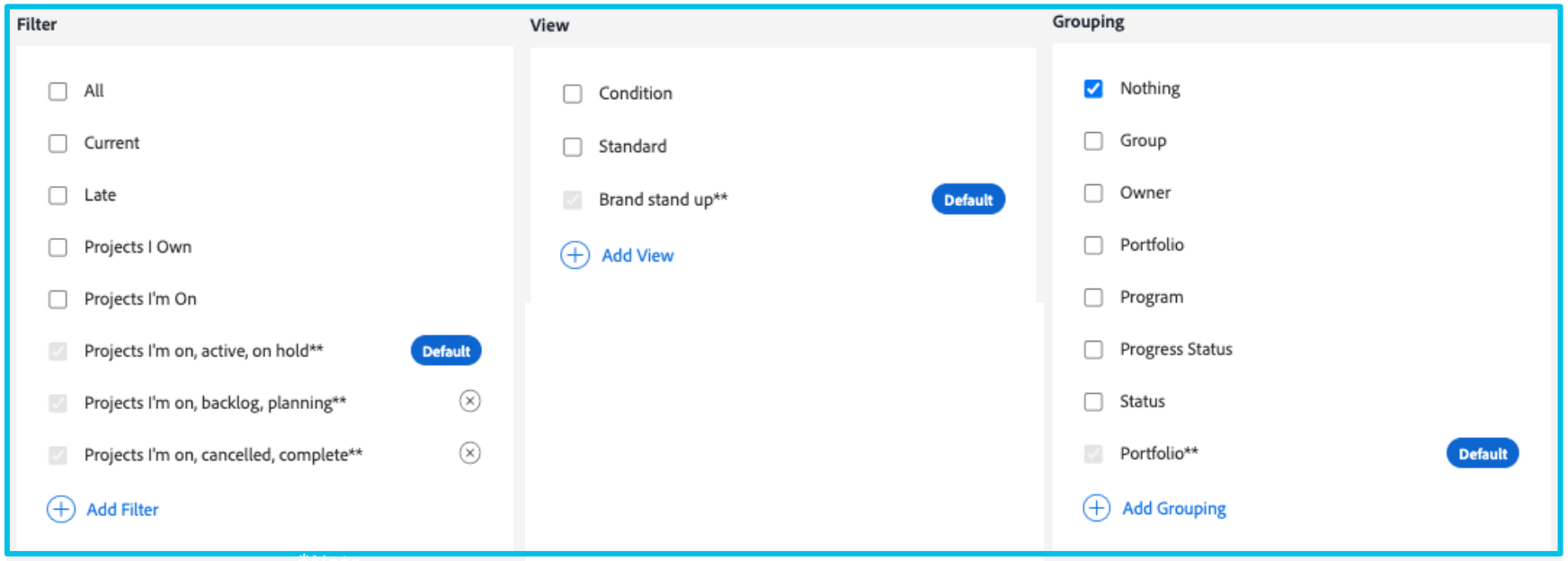
Project manager



Leadership

Creative director

Creatives



**Note – we set our project filters to active/on hold, backlog/planning, and cancelled/complete, which mirrors how we set up all our throughput reporting. Users do not have to learn two different ways of reading the same reporting.*

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