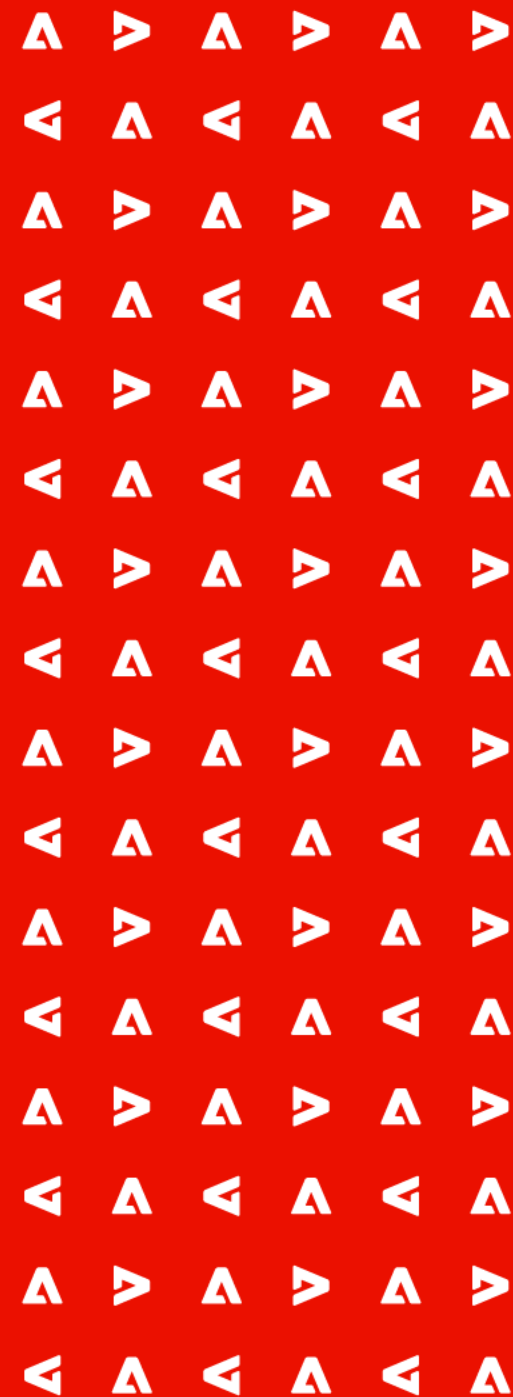




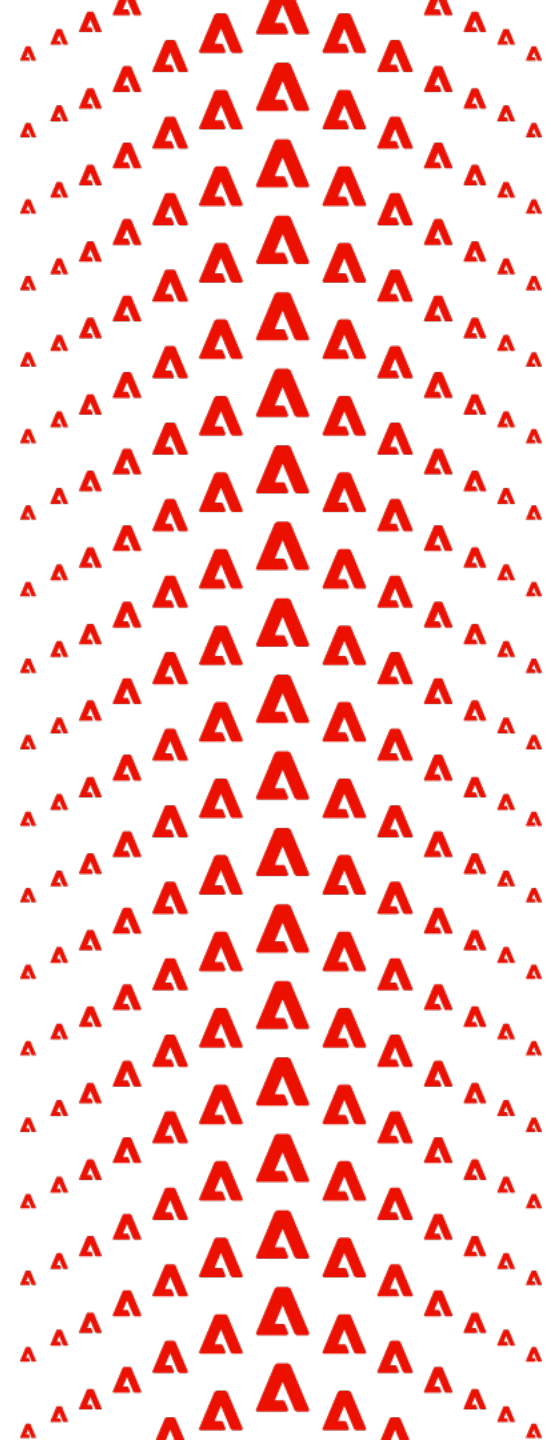
System Admin Essentials: Foundations of Operational Reporting

June 8, 2022

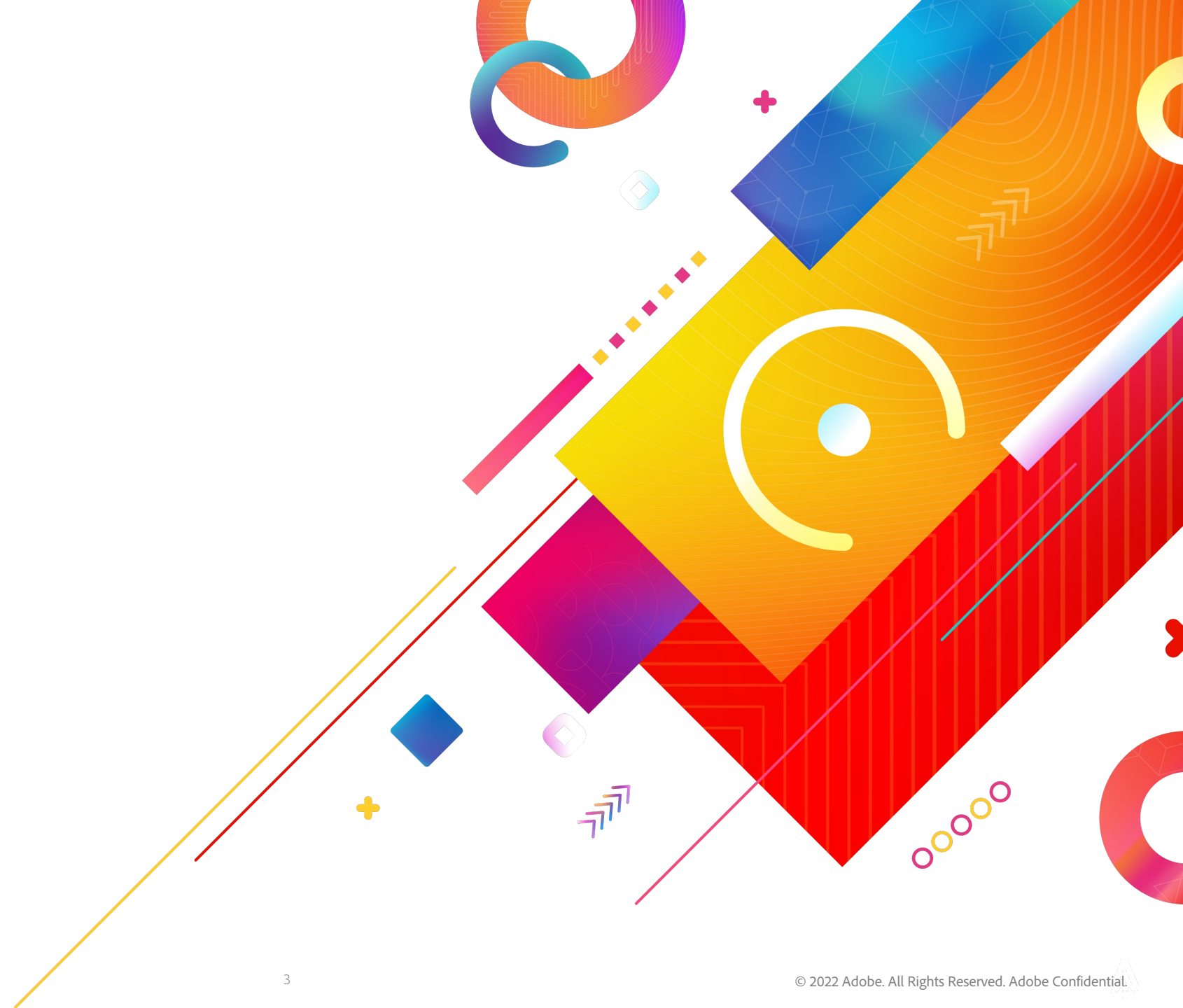


Agenda (Pacific)

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



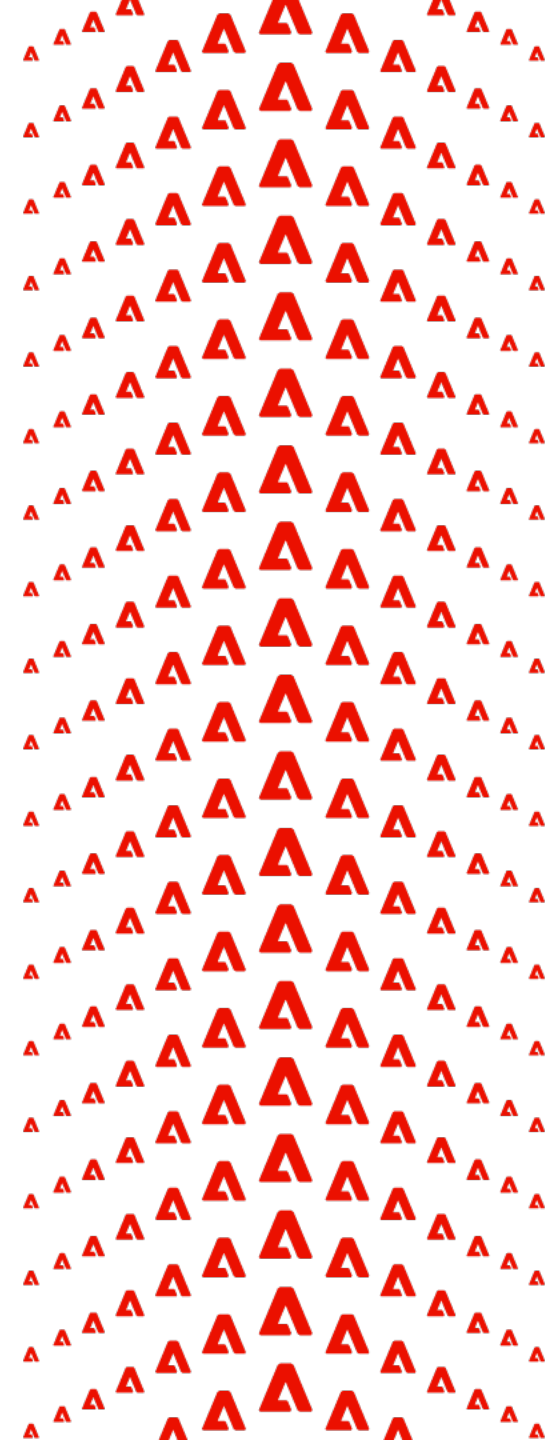
Introductions



Jen Desmond

Consultant, Workfront Customer Success Services

Adobe Workfront



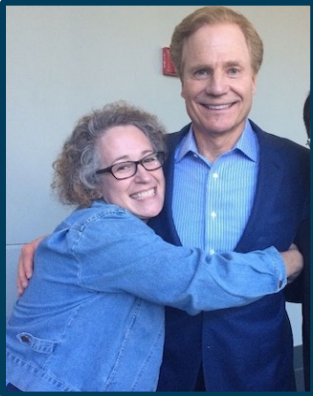
Hi! I'm Kelly Fones

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.



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

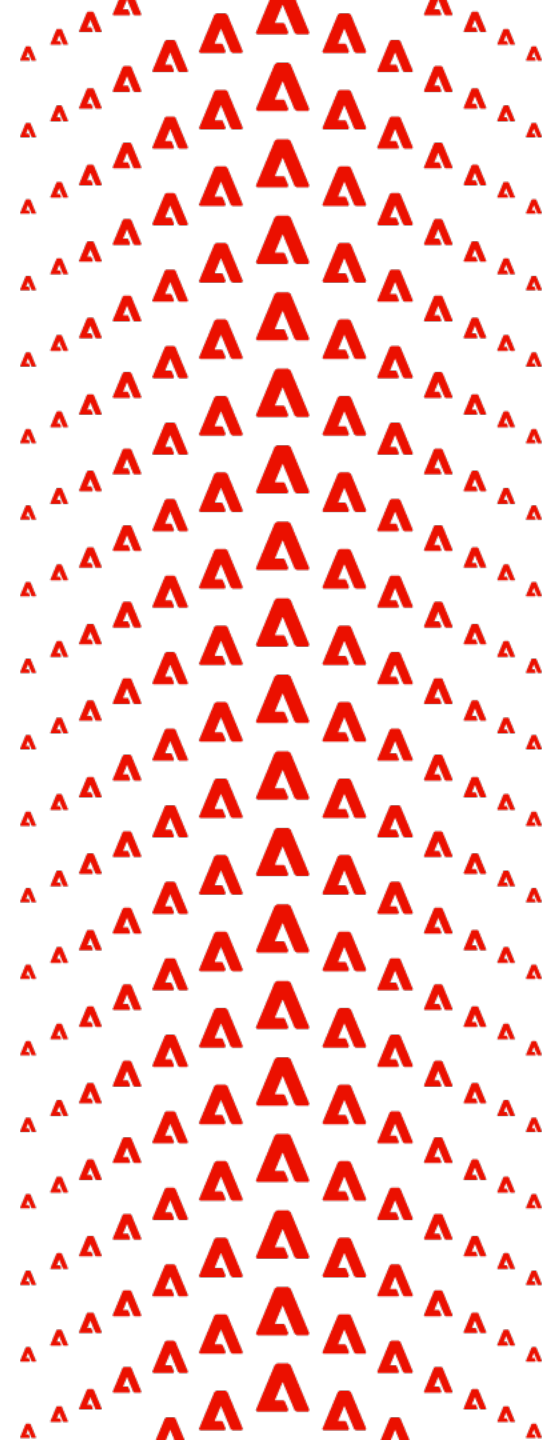
Take ownership of what everyone should be looking at

Setting up clear expectations

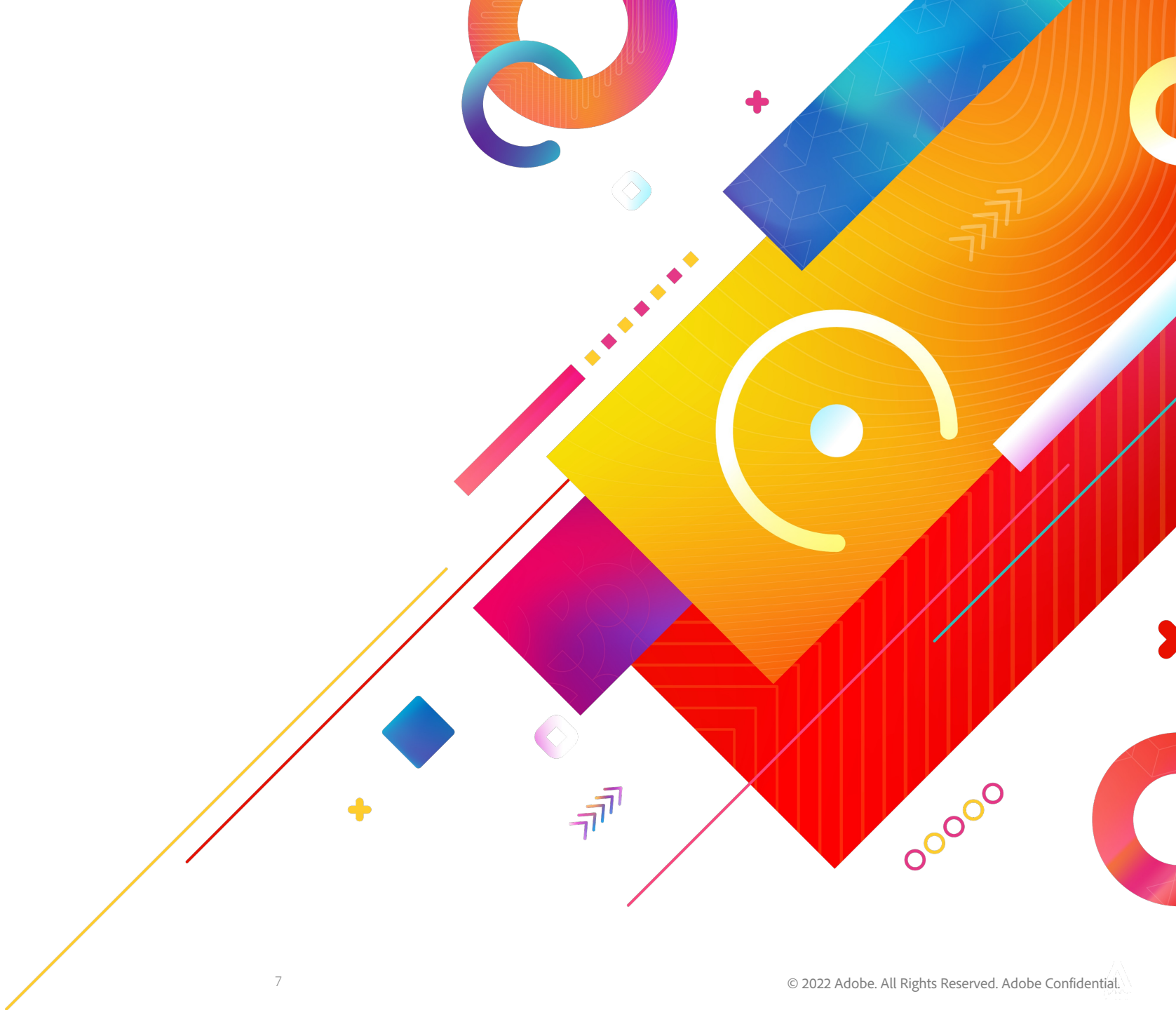
Wrapping up Best Practices

Before We Go...

Appendix



The Definition



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!

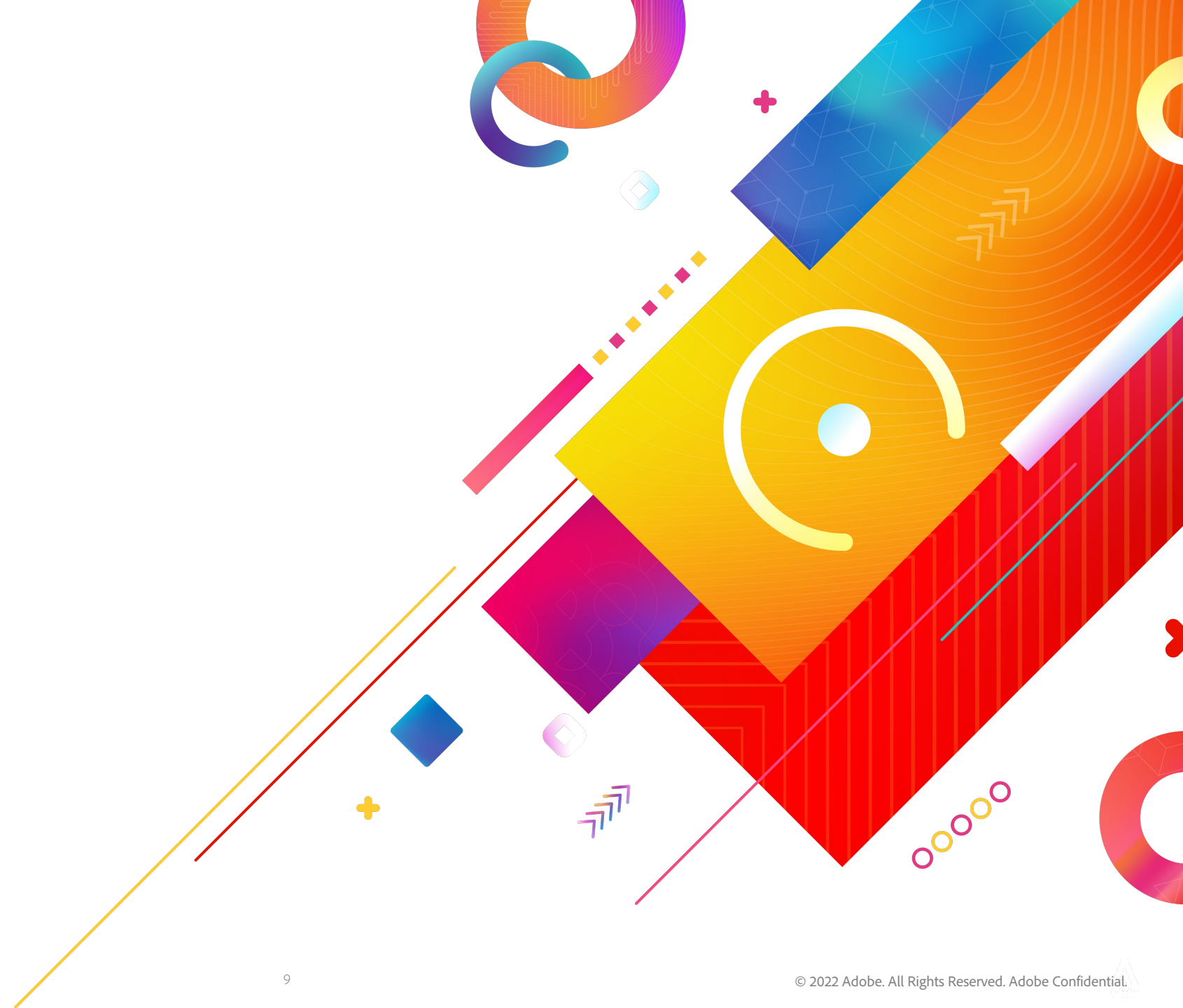
Capital One Experience

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

The Foundation



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

Access Levels ?

[+ New Access Level](#) [Edit](#) [Delete](#) [Copy](#) [Export](#)

Name ↑ Description

Collab Testing/Review License

External User

Group Admin 1

Planner ?

Requestor

Reviewer

System Administrator

Worker

Edit Access Level

Edit Report settings for Plan Access Levels

Projects

Tasks

Requests

Portfolios

Programs

Reports

Filters

Dashboards

Calendars

Views

Groupings

Documents

Users

Teams

Fine-tune your settings

- Create
- Delete
- View Built-In Reports
- Share
- Share Reports Publicly
- Share System-wide

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

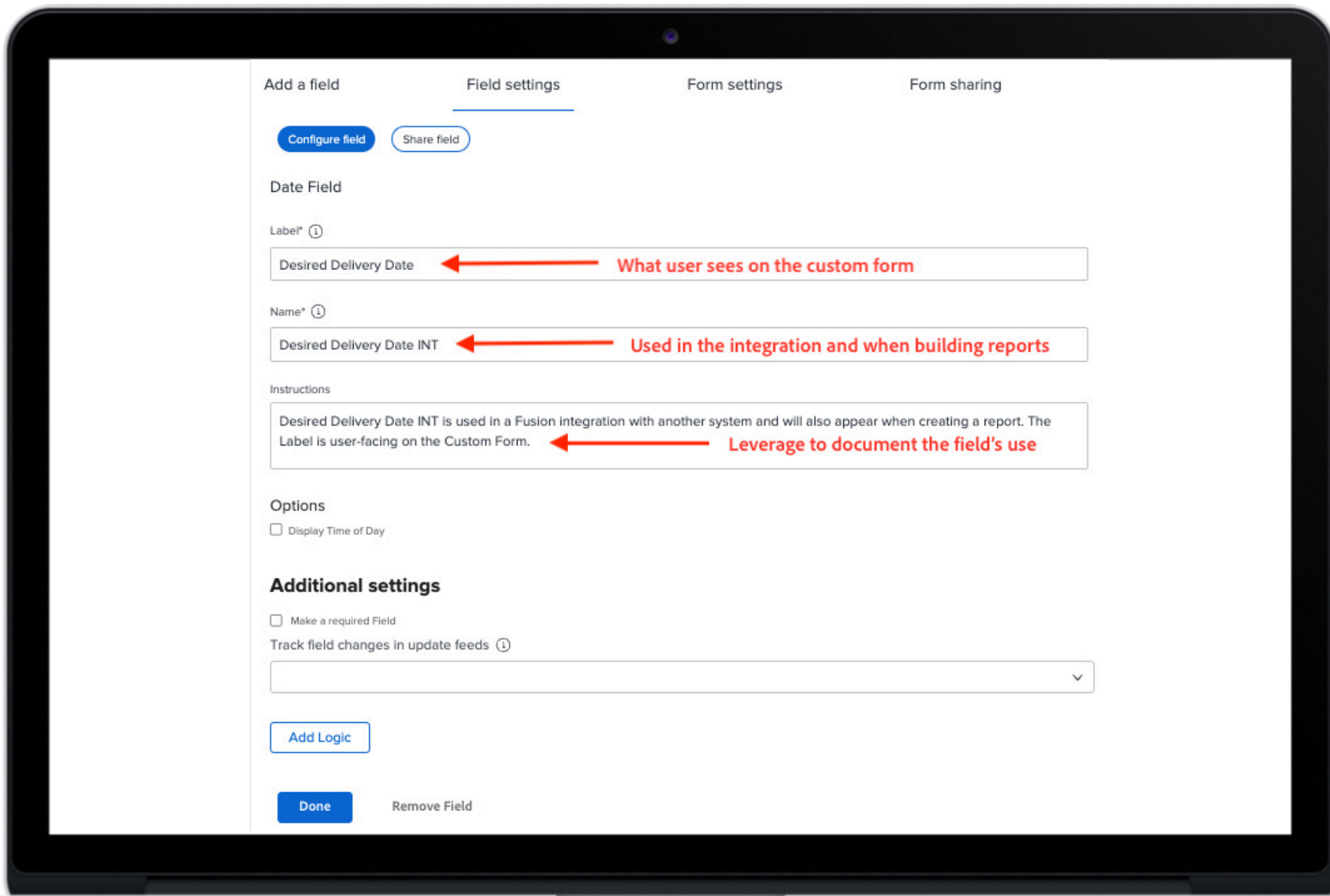
- Blend of Workfront + Capital One vernacular
- Comprehensive
- Deliberately searchable
- Maniacally enforced

Adobe Workfront + Capital One vernacular blend

[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 status set to active
Active task	-	An incomplete task in a current project that is not prevented from being worked on
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 on the project
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, or the user assigned to the task or issue
Assignment	-	A user, job role, or team assigned to an issue or a task. Projects, portfolios, or programs are not assigned to.
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 the user is in the system
business as usual	BAU	business as usual
cancelled	-	A project that was prioritized, became active, work was completed, and then cancelled
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 other can be completed
Duration	-	The window of time allocated for completion of a task issue, or project (as determined by the start and end dates)
Gantt chart	-	A visual timeline of the project dates in a calendar view based on the planned completion dates
grooming	Do not use	Use "refinement" instead of grooming
Group	-	A collection of users (possibly from the same department or business unit) that are assigned to a task or issue
hand off	HO	The date the project is planned to complete with creative resources



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

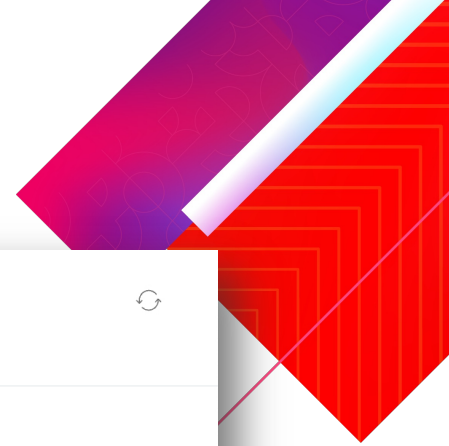
- Give users permission to show reality
- Train users on both expectations and the how
- Communicate the value of users' efforts toward data quality
- Overwhelmed by improving data quality? Choose a focus and work with users to enable accuracy.
- Provide specific reports aimed at data quality

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.

Late Task Cleanup Report



REPORT **Incomplete Tasks in the Past** Show Filters Report Actions Refresh

Details Summary

[-] [v] Search Sort Filter Report Default Report Default Report Default

<input type="checkbox"/> 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)												
<input type="checkbox"/> 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)												
<input type="checkbox"/> 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	
<input type="checkbox"/> 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)												
<input type="checkbox"/> 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



Health clean-up for project managers

Columns (View) Groupings **Filters** Chart

Set Filter Rules for your Report

```

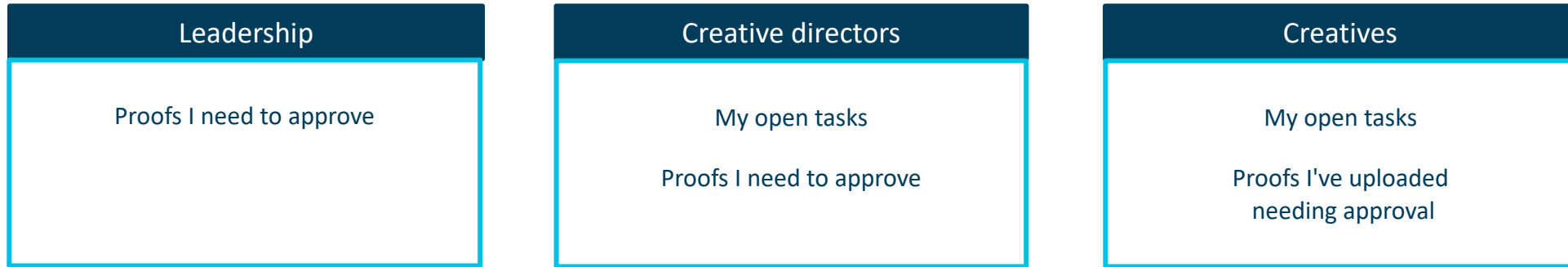
portfolio:name=bwft
portfolio:name_Mod=cicontains
DE:ACD/CD/GCD:ID_Mod=isblank
OR:1:DE:Level of effort_Mod=isnull
OR:1:portfolio:name=bwft
OR:1:portfolio:name_Mod=cicontains
OR:2:portfolioID_Mod=isblank
OR:3:DE:Art director:ID_Mod=isblank
OR:3:portfolio:name=bwft
OR:3:portfolio:name_Mod=cicontains
OR:3:DE:portfolio:Brand group designation=BWFT/BWFA
OR:3:DE:portfolio:Brand group designation_Mod=in
OR:4:portfolio:name=bwft
OR:4:portfolio:name_Mod=cicontains
OR:4:DE:Copywriter:ID_Mod=isblank
OR:5:portfolio:name=bwft
OR:5:portfolio:name_Mod=cicontains
OR:5:portfolioID_Mod=isblank
    
```

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

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

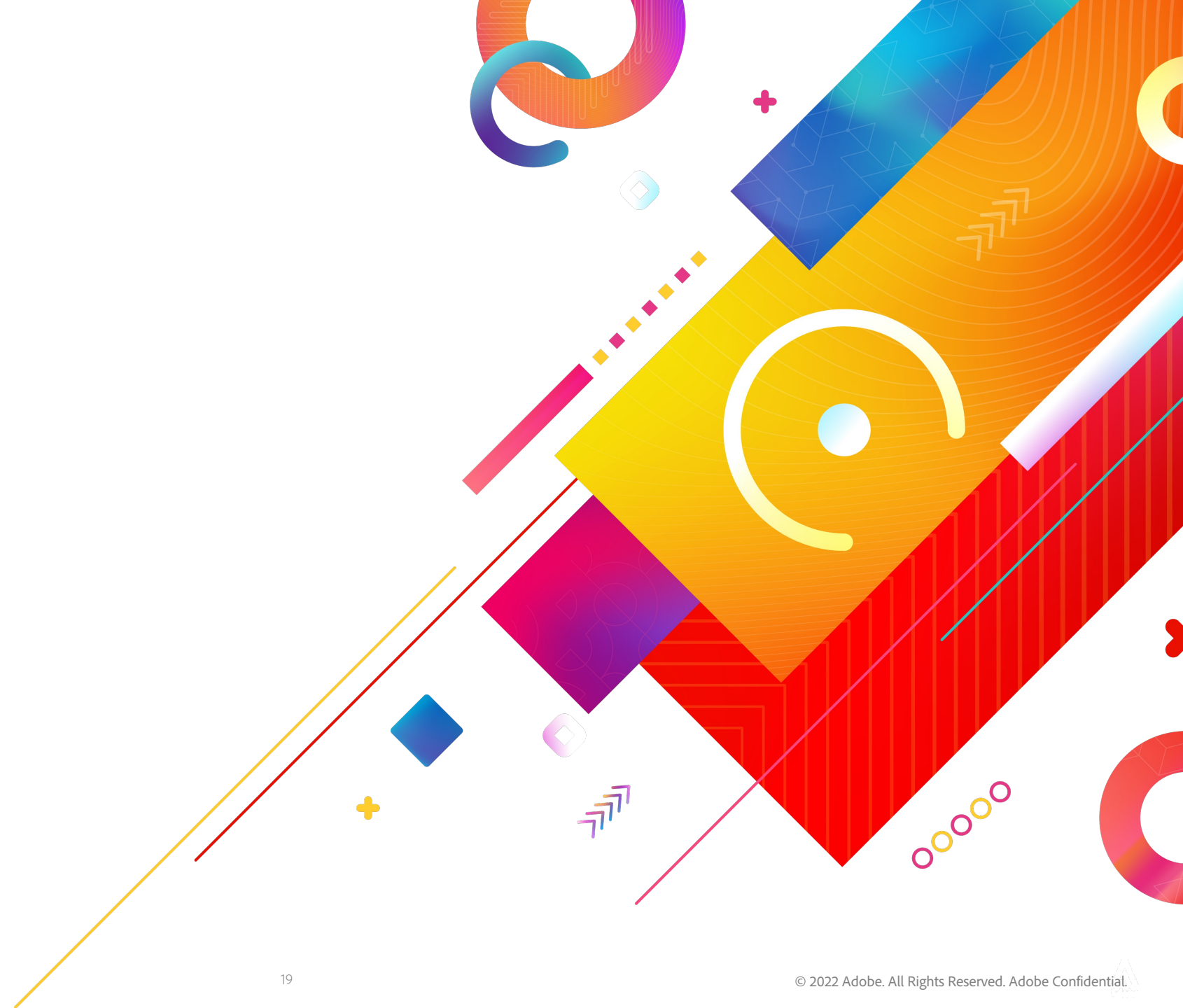
		ACD/CD/GCD	AD	CW	LOE	Project category - select all that apply	Estimated number of deliverables	Custom Forms	
<input type="checkbox"/>	BWFT Air Force	Project towel party 2	BWFT Air Force	BWFT Devonte Thomas, CD	BWFT Sato Huang, AD	Level 1 consulting	Full PM support	BND BCR project - suite BWFT additional portfolios - project	
<input type="checkbox"/>	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	
<input type="checkbox"/>		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
<input type="checkbox"/>	BWFT Navy	Navy_Predecessor TrainingA	BWFT Navy			Level 5 biggest		BWFT request-special - project BND BCR project - suite	

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



- 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

Standing Up



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)

Dashboard Example: Worker

My Worker Dashboard
My Upcoming Tasks ...
Unpin current page
Help
0
☆
🕒
🔍
☰

DASHBOARD
My Worker Dashboard
Dashboard Actions ▾
🔄

Worker Dashboard Reports

Export ▾

<input type="checkbox"/> Name	Description
<input type="checkbox"/> Notes I'm Tagged In	This report shows Updates where you've been tagged. Expectation: 1. Check this report each day and respond as necessary. For urgent Items, our SLA is to respond within 24 hours. 2. Use @ mentions back to the commenter.
<input type="checkbox"/> Incomplete Tasks in the Past	This report shows incomplete tasks with Planned Completion dates in the past for the user viewing the report. The conditional formatting is red in the Actual dates only for tasks can start. Expectation: 1. While you should be adding Actuals daily using the My Upcoming Tasks - Worker report, check this report each week to make sure you haven't missed adding Actuals to tasks that should already be completed and update accordingly. 2. Report any blockers to your manager via an @ mention in the task's Update.
<input type="checkbox"/> My Upcoming Tasks - Worker	This report shows incomplete tasks which should start in the next two weeks assigned to you. Tasks that can start and have green within the Actual date fields. Expectation: 1. Check this report each day and plan the tasks you'll work on. 2. Add Actual dates appropriately at the end of each working day. 3. Report any blockers to your manager via an @ mention in the task's Update.

Showing all 3 reports

My Task Calendar

◀ 06/13/2022 - 07/22/2022 ▶

Monday	Tuesday	Wednesday	Thursday	Friday
13 Ship All Booth Materials Deliver Leads to Sales Team Put Leads in Marketo and/or...	14 Collateral Print Swag Order	15 Ship All Booth Materials Deliver Leads to Sales Team Put Leads into ExactTarget	16	17
20	21	22	23 Send to Print	24 Ship
27	28	29	30	Jul 1
4	5	6	7	8

My Upcoming Tasks - Worker

Details Summary

[-> ▾]

<input type="checkbox"/> Project	Name	Assignments	Planned Start Date	Planned Completion Date	Actual Start Date	Actual Completion Date	Can Start	% Complete
Planned Completion Date: May 22, 2022 (15)								
Project: Name: Northstar Fashion Exhibitors Booth (3)								
<input type="checkbox"/>	Northstar Fashion Exhibitors Booth	Jen Desmond	5/23/22	5/23/22			Waiting on predecessor	0%
<input type="checkbox"/>	Northstar Fashion Exhibitors Booth	Jen Desmond	5/27/22	5/27/22			Waiting on predecessor	0%
<input type="checkbox"/>	Northstar Fashion Exhibitors Booth	Jen Desmond	5/27/22	5/27/22			Waiting on predecessor	0%

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Dashboard Example: Worker

My Worker Dashboard
My Upcoming Tasks ...
Unpin current page
Help

My Task Calendar

06/13/2022 - 07/22/2022

Monday	Tuesday	Wednesday	Thursday	Friday
13 Ship All Booth Materials Deliver Leads to Sales Team Put Leads in Marketo and/or...	14 Collateral Print Swag Order	15 Ship All Booth Materials Deliver Leads to Sales Team Put Leads into ExactTarget	16	17
20	21	22	23 Send to Print	24 Ship
27	28	29	30	Jul 1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22

My Upcoming Tasks - Worker

Details Summary

Project	Name	Assignments	Planned Start Date	Planned Completion Date	Actual Start Date	Actual Completion Date	Can Start	% Complete	Status	
Planned Completion Date: May 22, 2022 (15)										
Project: Name: Northstar Fashion Exhibitors Booth (3)										
<input type="checkbox"/>	Northstar Fashion Exhibitors Booth	Booth Graphics Sent to Printer	Jen Desmond	5/23/22	5/23/22			Waiting on predecessor	0%	New
<input type="checkbox"/>	Northstar Fashion Exhibitors Booth	Swag Order	Jen Desmond	5/27/22	5/27/22			Waiting on predecessor	0%	New
<input type="checkbox"/>	Northstar Fashion Exhibitors Booth	Collateral Print	Jen Desmond	5/27/22	5/27/22			Waiting on predecessor	0%	New
Project: Name: The BIG Announcement at Opening Ceremonies LIVE from the World Cup (7)										
<input type="checkbox"/>	The BIG Announcement at Opening Ceremonies LIVE from the World Cup	Insurance Confirmation	Jen Desmond	5/24/22	5/24/22	5/31/22		Can Start	0%	In Progress
<input type="checkbox"/>	The BIG Announcement at Opening Ceremonies LIVE from the World Cup	Face to Face Contact Information	Jen Desmond	5/24/22	5/24/22	5/31/22		Can Start	0%	In Progress
<input type="checkbox"/>	The BIG Announcement at Opening Ceremonies LIVE from the World Cup	Installation & Dismantle Labor Order	Jen Desmond	5/24/22	5/24/22	5/31/22		Can Start	0%	In Progress
<input type="checkbox"/>	The BIG Announcement at Opening Ceremonies LIVE from the World Cup	Material Handling Schedule and Rates	Jen Desmond	5/24/22	5/24/22			Can Start	0%	New
<input type="checkbox"/>	The BIG Announcement at Opening Ceremonies LIVE from the World Cup	Telecom & Internet in Booth	Jen Desmond	5/24/22	5/24/22			Can Start	0%	New
<input type="checkbox"/>	The BIG Announcement at Opening Ceremonies LIVE from the World Cup	Power to Booth	Jen Desmond	5/24/22	5/24/22			Can Start	0%	New
<input type="checkbox"/>	The BIG Announcement at Opening Ceremonies LIVE from the World Cup	Hotel Bookings	Jen Desmond	5/24/22	5/24/22			Can Start	0%	New
Project: Name: Vintage Fashion Expo Booth (3)										

Dashboard Example: Worker

My Worker Dashboard My Upcoming Tasks ... Unpin current page Help 0 ☆ ⌚ 🔍 ☰

Notes I'm Tagged In

↳ ▾ 🔍 Report Default Report Default Nothing

<input type="checkbox"/> Project: Name	Entry Date	Entered By	Note Text
<input type="checkbox"/> 60 Second TV Spot (Sweepstakes)	11/22/21 12:19 PM	Dwayne Ball	Is there anyway we can get more time on this one?
<input type="checkbox"/> Facebook Page World Cup Sweepstakes	11/22/21 12:15 PM	Dwayne Ball	Thank you SOOOOO much for the help on this. It really made it MUCH easier!
<input type="checkbox"/> World Cup Sweepstakes Email Blast 1	11/22/21 1:29 PM	Ken Cosgrove	Roy, I re-assigned this to you. My digital experience is no where near yours! :)
<input type="checkbox"/> Full Page World Cup Sweepstakes Magazine Ad	11/22/21 1:35 PM	Ken Cosgrove	Roy, this is another one that belongs in your camp. Thanks!
<input type="checkbox"/> Email Blast for Movie Premiere Sweepstakes	11/22/21 4:47 PM	Rick Kuvec	I will have this finished up today.
<input type="checkbox"/> Thank you Email for Sweepstakes Entrants	11/23/21 11:41 AM	Sal Romano	I've uploaded the first pass at the product shot. Let mw know what you think.

Showing all 6 notes

Incomplete Tasks in the Past

Details Summary

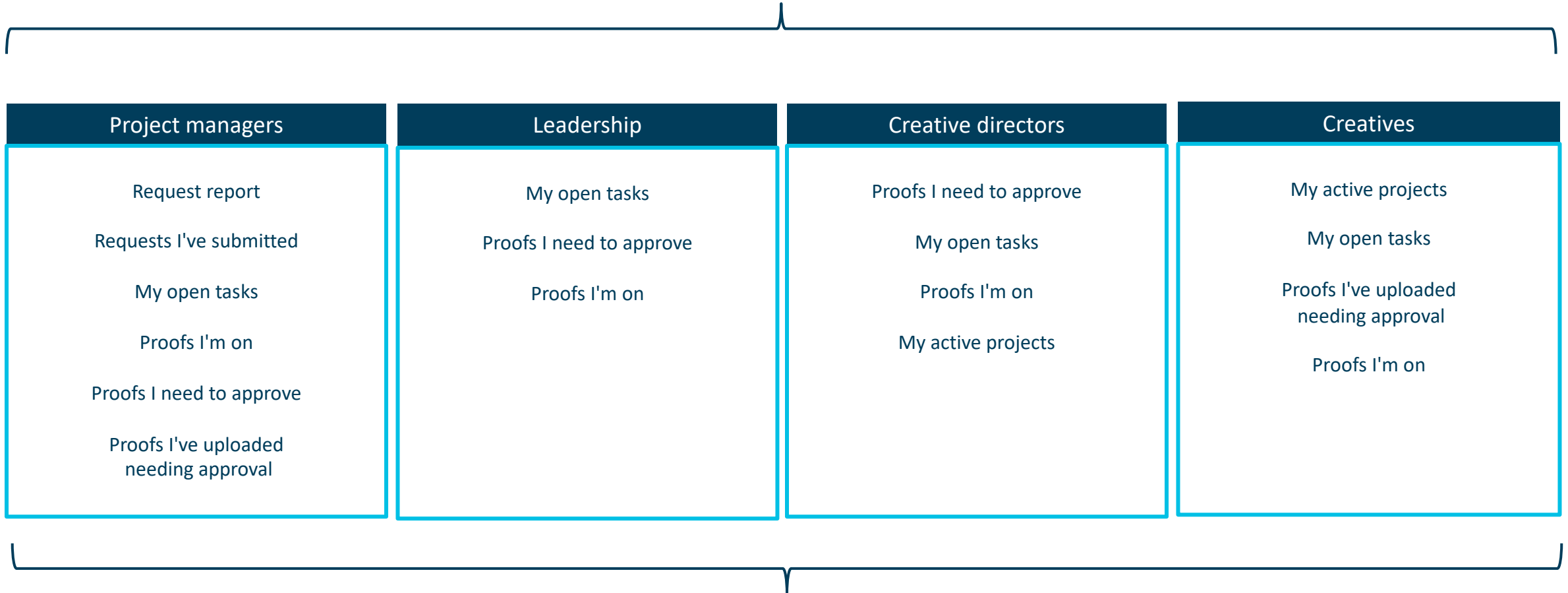
↳ ▾ 🔍 [Type] Report Default Report Default Report Default

<input type="checkbox"/> 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
Project: Name: The BIG Announcement at Opening Ceremonies LIVE from the World Cup (7)												
Planned Completion Date: May 22, 2022 (7)												
<input type="checkbox"/> The BIG Announcement at Opening Ceremonies LIVE from the World Cup	Jen Desmond	Installation & Dismantle Labor Order	Jen Desmond	0.05 Weeks	True	5/24/22	5/24/22	5/31/22		0%	Current	
<input type="checkbox"/> The BIG Announcement at Opening Ceremonies LIVE from the World Cup	Jen Desmond	Face to Face Contact Information	Jen Desmond	0.05 Weeks	True	5/24/22	5/24/22	5/31/22		0%	Current	
<input type="checkbox"/> The BIG Announcement at Opening Ceremonies LIVE from the World Cup	Jen Desmond	Hotel Bookings	Jen Desmond	0.05 Weeks	True	5/24/22	5/24/22			0%	Current	
<input type="checkbox"/> The BIG Announcement at Opening Ceremonies LIVE from the World Cup	Jen Desmond	Power to Booth	Jen Desmond	0.05 Weeks	True	5/24/22	5/24/22			0%	Current	

Daily operations flash dashboards

"one-stop shop"

Layouts



Dashboards with wild card based reports specific to the user

Flash dashboard: Proofs I'm on report

Proofs I'm on* Report Settings

Columns (View) Groupings **Filters** Chart

Set Filter Rules for your Report Switch to Text Mode Apply an Existing Filter

Current Version >> Is Not Blank

AND

Project >> Status Equal

Active Backlog Cancelled
On Hold

AND

Shared Users >> ID Equal

\$\$USER.ID

1 report currently used on 11 dashboards

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

Wild card based

Consistent columns

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

Showing all 4 documents

Flash dashboard: My open tasks

BCR - My open tasks*

Report Settings

Columns (View) Groupings **Filters** Chart

Set Filter Rules for your Report Switch to Text Mode Apply an Existing Filter

Only show me Tasks in which the...

- Task » Assigned To ID Equal **\$\$USER.ID**
- AND
- Task » Number of Children Equal (Case Sensitive) 0
- AND
- Project » Status Equal **Active**
- AND
- Task » Percent Complete Not Equal (Case Sensitive) 100

							Status	Progress	% complete	Task notes
Project: Name: Project name Charlie (2)										
<input type="checkbox"/>	Project name Charlie	Copy development	4/22/22	4/22/22	6/9/22	Level 4 large	In Progress	Behind	54%	
<input type="checkbox"/>	Project name Charlie	Hand off	6/13/22		6/14/22	Level 4 large	New	Behind	0%	
Project: Name: Project name Tango (1)										
<input type="checkbox"/>	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)										
<input type="checkbox"/>	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!
<input type="checkbox"/>	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

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



DASHBOARD

My Worker Dashboard

Worker Dashboard Reports

This is a Report report that was added to this dashboard. The reports in this dashboard have the expectations within the description, and this report filters on those reports only.

Export ▾

<input type="checkbox"/> Name	Description
<input type="checkbox"/> Notes I'm Tagged In	<p>This report shows Updates where you've been tagged.</p> <p>Expectation:</p> <ol style="list-style-type: none">1. Check this report each day and respond as necessary. For urgent items, our SLA is to respond within 24 hours.2. Use @ mentions back to the commenter.
<input type="checkbox"/> Incomplete Tasks in the Past	<p>This report shows incomplete tasks with Planned Completion dates in the past for the user viewing the report. The cor</p> <p>Expectation:</p> <ol style="list-style-type: none">1. While you should be adding Actuals daily using the My Upcoming Tasks - Worker report, check this report each wee2. Report any blockers to your manager via an @ mention in the task's Update.
<input type="checkbox"/> My Upcoming Tasks - Worker	<p>This report shows incomplete tasks which should start in the next two weeks assigned to you. Tasks that can start and</p> <p>Expectation:</p> <ol style="list-style-type: none">1. Check this report each day and plan the tasks you'll work on.2. Add Actual dates appropriately at the end of each working day.3. Report any blockers to your manager via an @ mention in the task's Update.

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

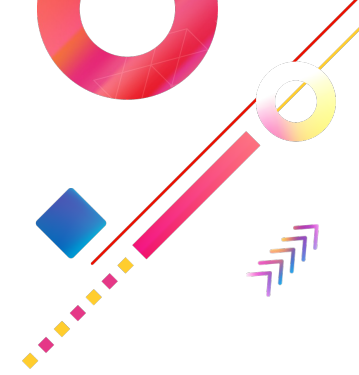

You're the steward of your instance, so empower yourself to provide the data users need to focus on.



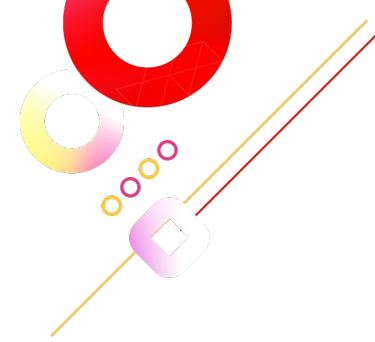
Clear expectations

Tell the audience what to do with a report

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



Before we go...



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

Prioritize a place to start, and pace yourself.

Enlist help from leadership to communicate expectations.

Communicate leadership expectations to your users.

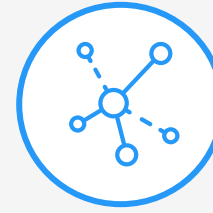
Ask users what they need!

Ask users what they need!



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

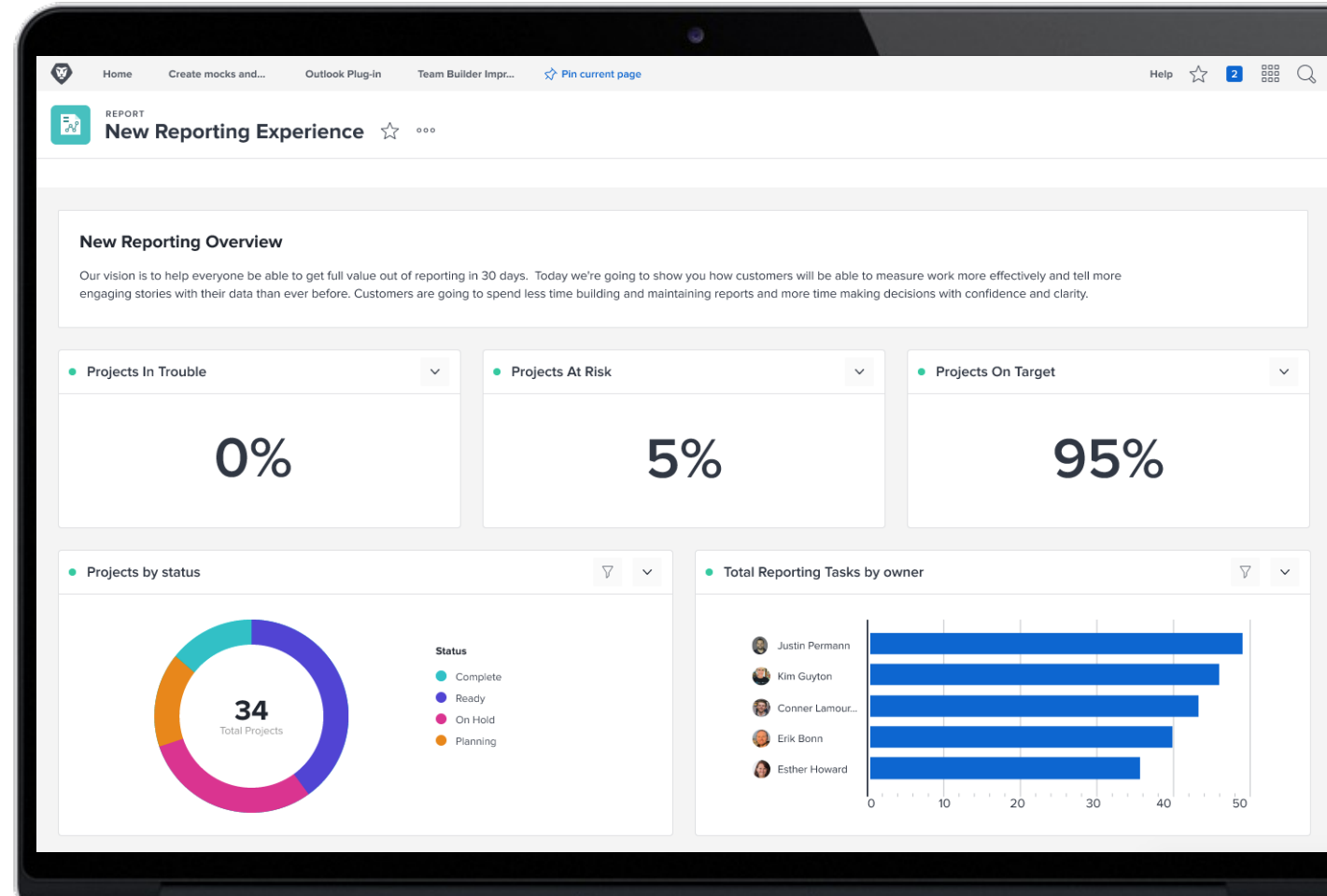
- Additional visualizations
- Limitless reporting canvas
- Not confined by object-based reports

Maximize Efficiency and Achieve Data Democratization

- Simple drag and drop building
- No steep learning curve

Increase Visibility

- Share data rich and aesthetically pleasing reports



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

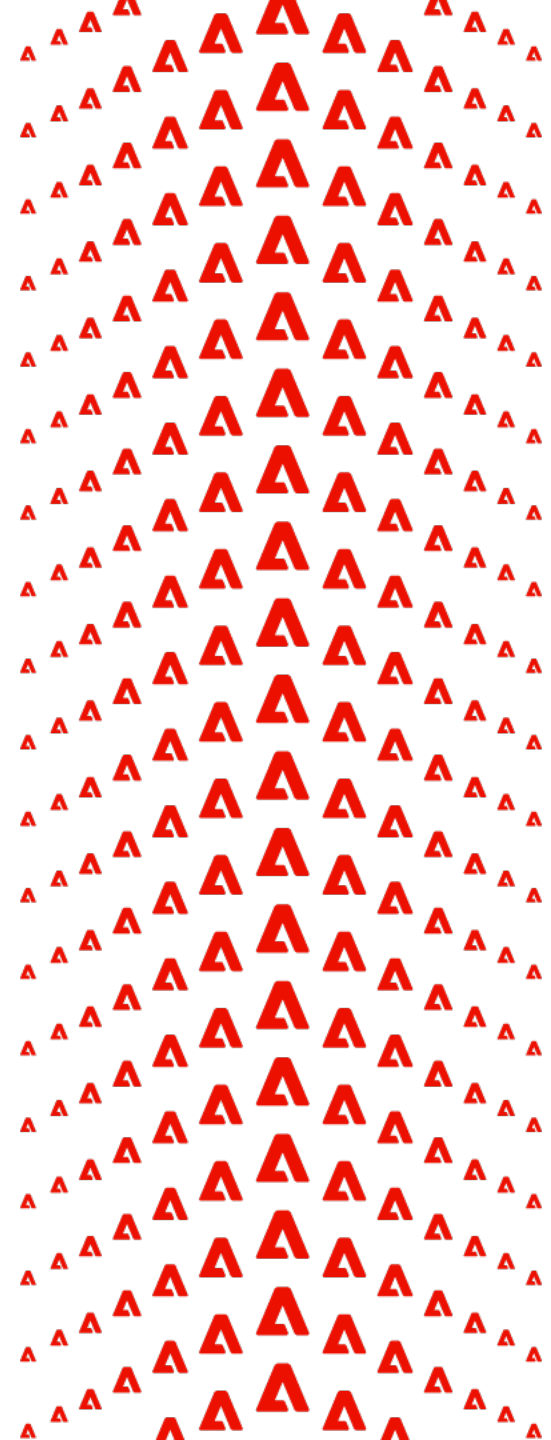
Ask the Expert Office Hours + Small Group Workshops

- ★ 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

Thank you!



Appendix



Flash dashboard: Proofs I need to approve

Proofs I need to approve*

Report Settings ▾

Columns (View) Groupings **Filters** Chart

Set Filter Rules for your Report Switch to Text Mode | Apply an Existing Filter ▾

Proof Approval » Is Current Document Version Equal (Case Sensitive) ▾ True False ✕

AND ▾

Proof Approval » Proof Creation Date Greater Than Equal ▾ 01/1/21 9:00 AM 📅 ✕

AND ▾

Proof Approval » Approver ID Equal ▾ **\$\$USER.ID** ✕

AND ▾

Proof Approval » Awaiting Decision Equal (Case Sensitive) ▾ True False ✕

+ Add another Filter Rule

	Proof creation date	Version deadline ↑	Version	Proof approval status	Active proof stage	
<input type="checkbox"/> Marines logo	Kelly Fones	5/25/22	5/25/22	1	Pending	
<input type="checkbox"/> Army logo	Kelly Fones	5/25/22	5/27/22	1	Pending	Stage 1
<input type="checkbox"/> Navy logo	Kelly Fones	5/25/22	6/8/22	2	Pending	Stage 1
<input type="checkbox"/> 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

Flash dashboard: Proofs I've uploaded needing approval

Proofs I've uploaded needing approval* Report Settings

Columns (View) Groupings **Filters** Chart

Set Filter Rules for your Report Switch to Text Mode | Apply an Existing Filter

Only show me Proof Approvals in which the...

Proof Approval >> Is Current Document Version Equal (Case Sensitive) True False X

AND

Document Version >> Proof Owner ID Equal \$\$USER.ID

AND

Proof Approval >> Proof Creation Date Greater Than Equal 01/1/21 9:00 AM X

AND

Proof Approval >> Awaiting Decision Equal (Case Sensitive) True False X

+ Add another Filter Rule

1 report currently used on 6 dashboards

Wild card based

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

Consistent columns

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

Flash dashboard: My active projects

BCR - My active projects*

Report Settings

Columns (View) Groupings **Filters** Chart

Set Filter Rules for your Report Switch to Text Mode | Apply an Existing Filter

Only show me Projects in which the...

- Project >> Project User IDs Equal **\$\$USER.ID**
- AND
- Project >> Percent Complete Not Equal (Case Sensitive) 100
- AND
- Project >> Status Equal **Active**

Progress	% Complete	Project notes									
<input type="checkbox"/>	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%	
<input type="checkbox"/>	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	0.09%	1/28: update here
<input type="checkbox"/>	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%	
<input type="checkbox"/>	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%	
<input type="checkbox"/>	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)											
<input type="checkbox"/>	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

Flash dashboard: Requests I've submitted

Requests I've submitted*

Report Settings ▾

Columns (View) Groupings **Filters** Chart

Set Filter Rules for your Report Switch to Text Mode | Apply an Existing Filter ▾

Only show me Issues in which the...

Issue >> Entered By ID Equal ▾ \$\$USER.ID ✕

1 report currently used on 8 dashboards

Wild card based

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

Consistent columns

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

BONUS: System Administrator health reports

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!

Project FVGs

Project manager

The screenshot shows the configuration for the 'Project manager' role. It is divided into three columns: Filter, View, and Grouping.

- Filter:** Includes 'All' (checked), 'Current', 'Late', 'Projects I Own', 'Projects I'm On', 'Projects I'm on, active, on hold**' (checked), 'Projects I'm on, backlog, planning**' (checked), 'Projects I'm on, cancelled, complete**' (checked), 'Projects I own, all**' (checked), and 'Projects I own, active, on hold**' (checked). There are 'x' icons next to the last three filters and a 'Default' button at the bottom right. An 'Add Filter' button is at the bottom left.
- View:** Includes 'Condition', 'Standard', and 'Brand stand up**' (checked). There is a 'Default' button at the bottom right and an 'Add View' button at the bottom left.
- Grouping:** Includes 'Nothing' (checked), 'Group', 'Owner', 'Portfolio', 'Program', 'Progress Status', 'Status', and 'Portfolio**' (checked). There is a 'Default' button at the bottom right and an 'Add Grouping' button at the bottom left.

Leadership

Creative director

Creatives

The screenshot shows the configuration for the 'Leadership', 'Creative director', and 'Creatives' roles. It is divided into three columns: Filter, View, and Grouping.

- Filter:** Includes 'All', 'Current', 'Late', 'Projects I Own', 'Projects I'm On', 'Projects I'm on, active, on hold**' (checked), 'Projects I'm on, backlog, planning**' (checked), and 'Projects I'm on, cancelled, complete**' (checked). There is a 'Default' button next to the first checked filter and 'x' icons next to the last two. An 'Add Filter' button is at the bottom left.
- View:** Includes 'Condition', 'Standard', and 'Brand stand up**' (checked). There is a 'Default' button at the bottom right and an 'Add View' button at the bottom left.
- Grouping:** Includes 'Nothing' (checked), 'Group', 'Owner', 'Portfolio', 'Program', 'Progress Status', 'Status', and 'Portfolio**' (checked). There is a 'Default' button at the bottom right and an 'Add Grouping' button at the bottom left.

