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EXPERIENCE MAKERS
THE SKILL EXCHANGE

Ten Tips to WOW your Workfront

Monique Evans
Systems Operations Manager,
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Who am I?

- Monique Evans
    - Systems Operations Manager
    - Stanley Black & Decker
    - 7-Year Workfront Admin
    - Avid theme park lover




Wow Moment: Flew to Orlando visited all 4 Disney Parks and flew home in 1 Day!

Why are we here?

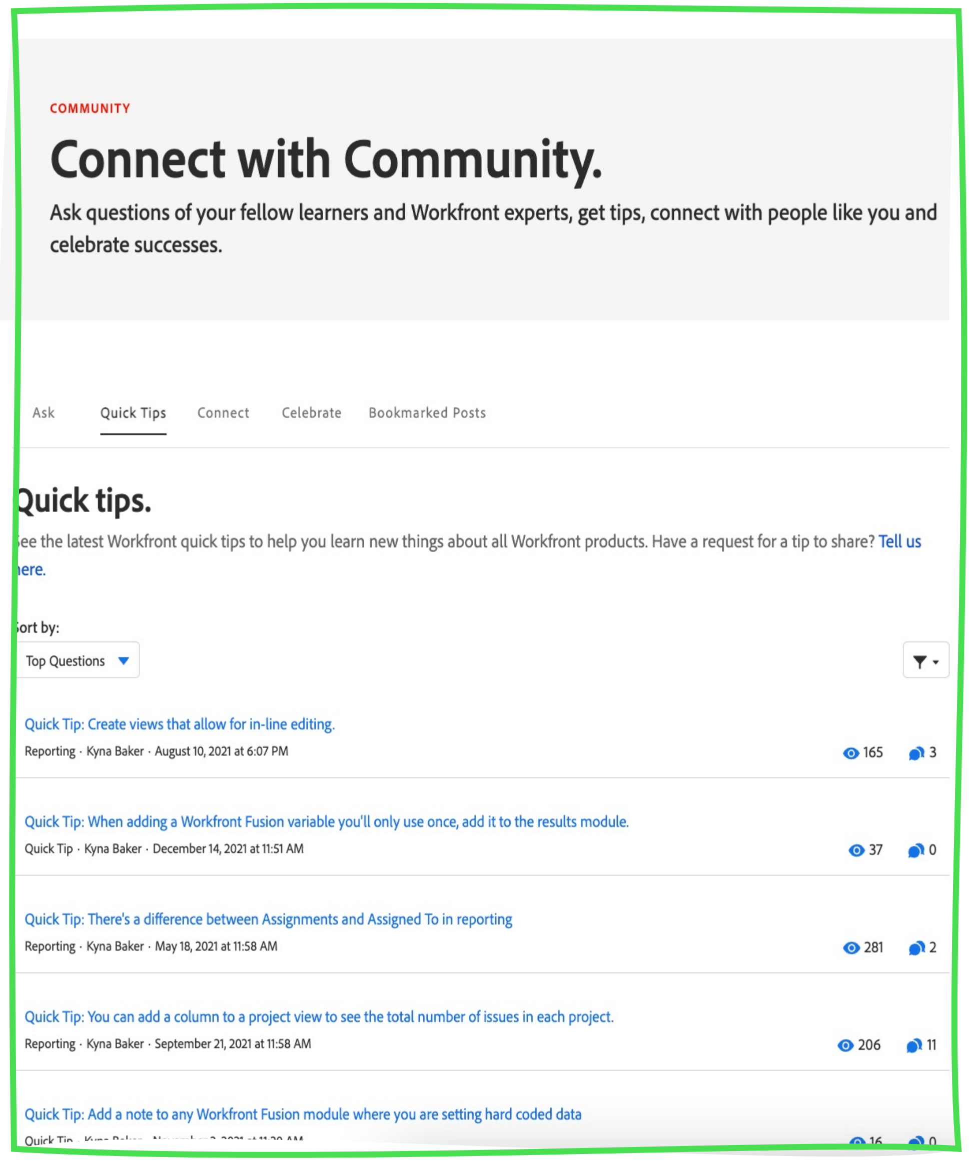
- There is always room for improvement
- Most of us learn from trial and error -- or other's trials and errors
- The question I get asked the most is "What do you wish you knew sooner than later?"

Ten Tips to WOW your Workfront

Training Tips

#1: Use all available resources

- Even if you're the sole admin, you still have a team
- You don't have to know all the answers
- Workfront One has it all
  - Documentation
  - Community
  - Innovation Lab
  - Training Links & Videos
- **Other resources:**
  - Sessions like this!
  - Account Manager / Success Manager
  - Adobe Experience Cloud Feedback Panel (Product Team)



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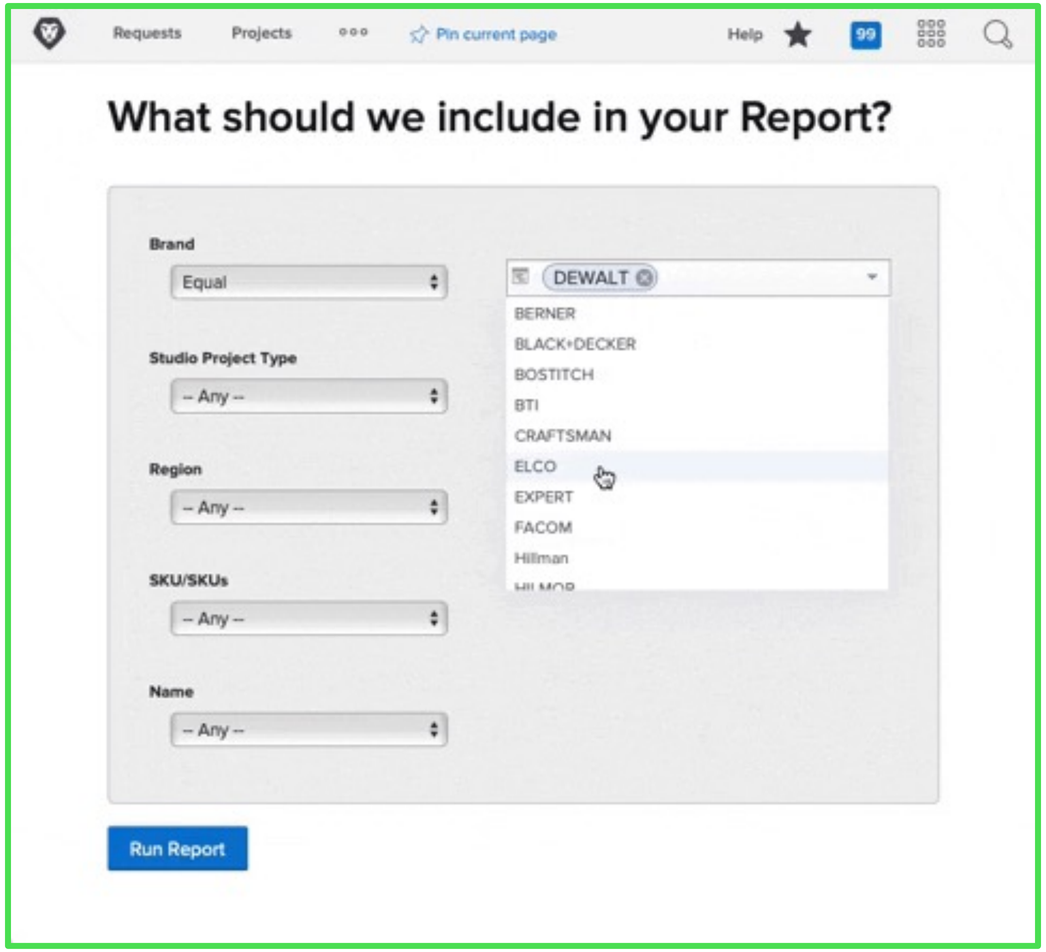
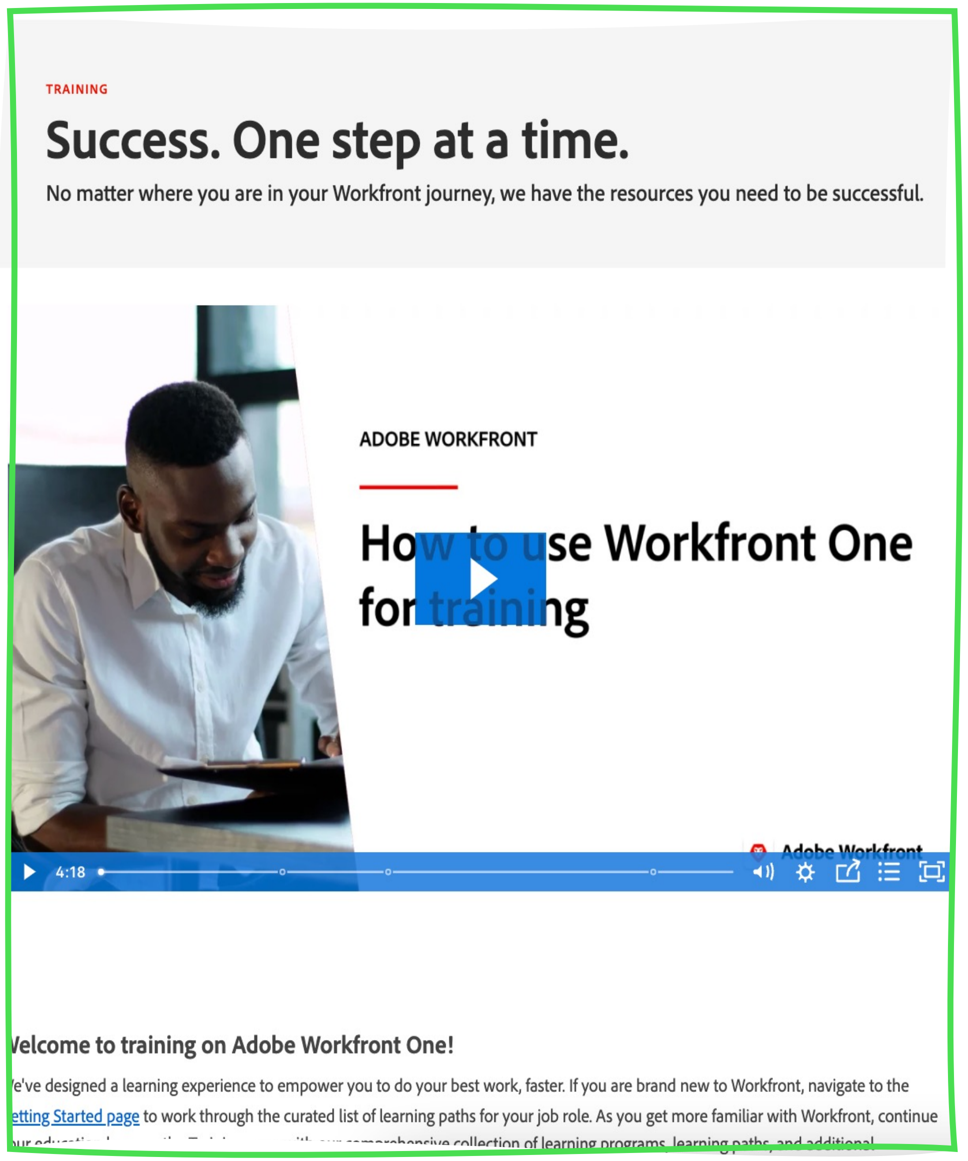
#2: Screen Record EVERYTHING

- In this WFH digital age, use screen recording to your advantage
- Instead of explaining how to do something or where it is, do the actions and record your screen
  - If feasible log in as a non-admin user so it looks exactly as the user will see on their screen
- **Helpful Tips:**
  - Speed up the recordings and save as gifs in emails, or send the recording as is
  - Start a how-to library. Now you have recordings the next time someone else needs the same tutorial
  - Record as you're doing the work, or when someone reaches out



#3: Train with Consistency

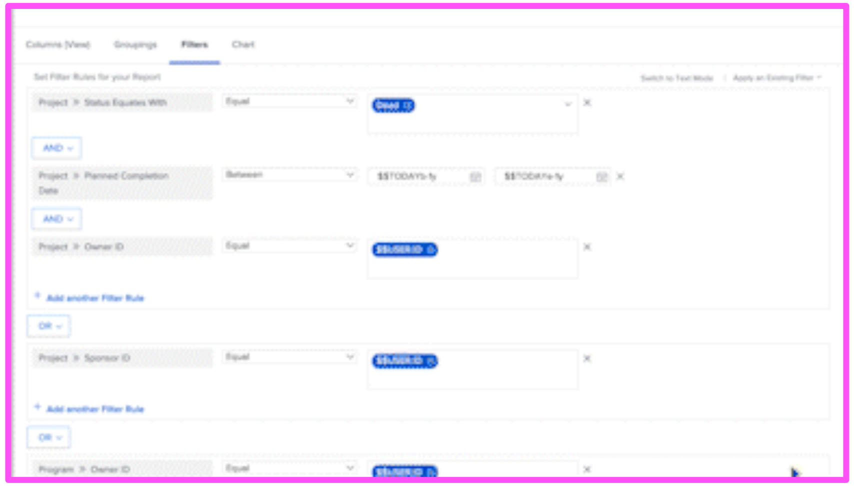
- Train one consistent way
- There are multiple ways to do most things in Workfront but for your organization, you want to repeatedly show one way and stick to that every time
- For Example – How to Log Time
  - Show how to log time using updates on the Task or in Home
  - You can still mention timesheets as that's a great way to double-check before submitting
  - Don't also highlight the Hours tab as a third way to log time; this will only confuse everyone

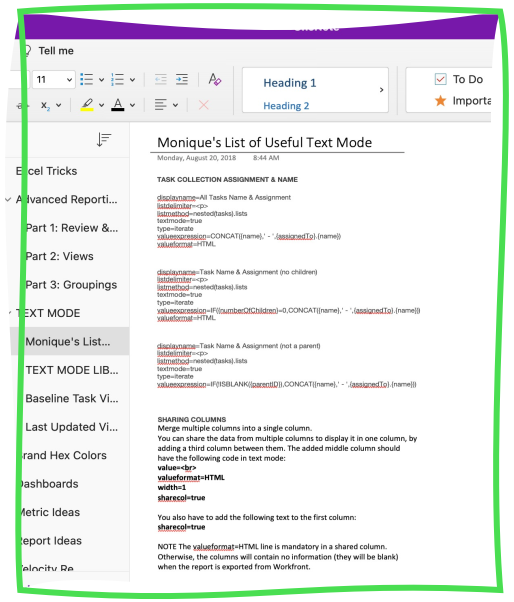


Reporting & Data Tips

#4: Use Text Mode for OR Statements

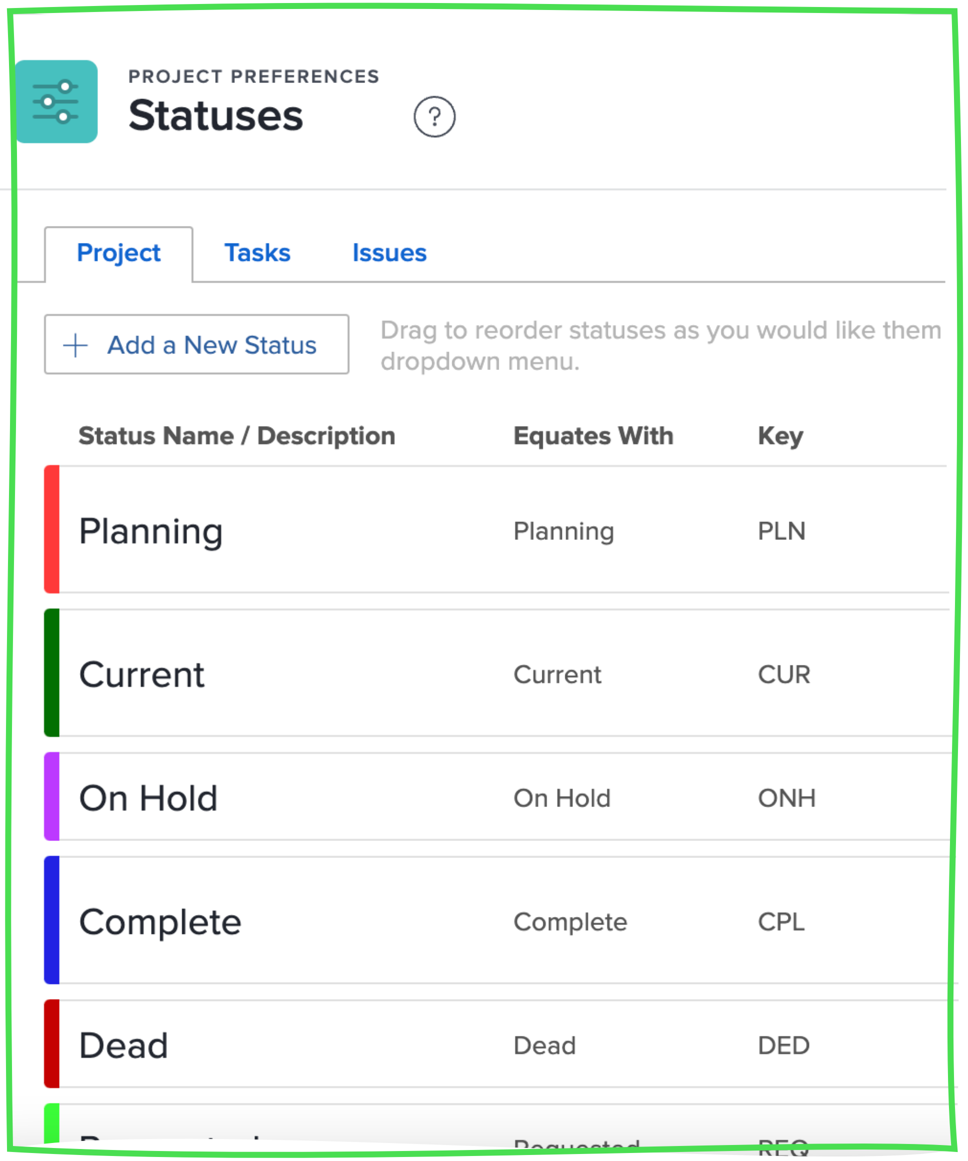
- When creating filters with OR statements build the first statement fully and then the additional or variables. Switch to text mode copy the OR constants for each statement and add the prefix **OR:1:**, **OR:2:**, etc. Switch back to standard mode
  - This saves lots of time and ensures you don't forget part of your filter
- **General tip:** Whenever doing text mode reporting, build as much as you can in standard mode – let Workfront do the heavy lifting
- **Bonus tip:** Save complex text mode code in a library
  - I use OneNote





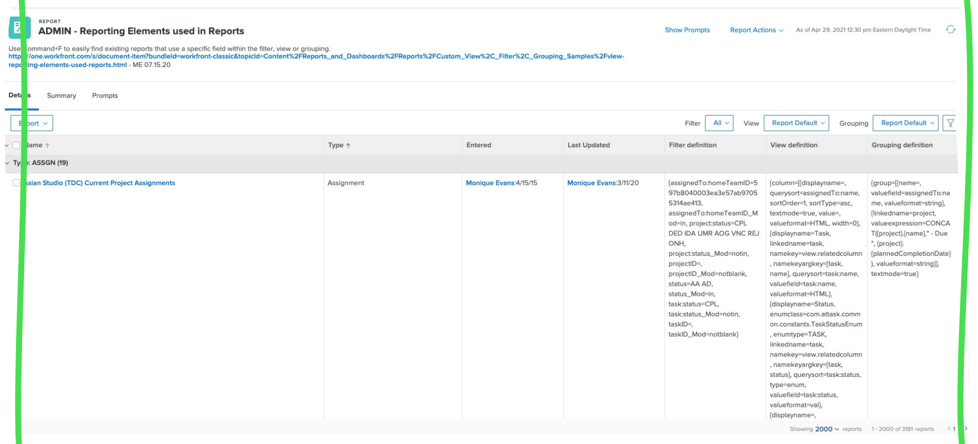
#5: Select “Status Equates To”

- Have you ever run a report and wondered why projects were missing only to remember 2 months ago you added the new In Progress status and never updated the reports?
- Change your report filter to “Status Equates To” instead of “Status”
    - Now you *never* have to touch the report again
    - This is a lesson in future-proofing
- **Monique Recommendations**
    - Avoid global custom statuses unless absolutely necessary
    - Do not use Project Statuses to replace Tasks



#6: Create a Reporting Elements Report

- My favorite report report shows the reporting elements (filter/view/grouping) in full detail
- **Use Cases:**
  - Identify reports that are adding rogue forms to objects
  - Identify reports affected by a custom field update
    - Field has an option as the report filter
    - Grouping in the report by the field
    - Report view has conditional formatting with that field
  - Help you understand the connections and remind you to edit the reports after altering the field



TEXT MODE FOR THE REPORT VIEW COLUMNS

Filter

displayname=Filter definition
textmode=true
valuefield=filter:definition
valueformat=HTML

View

displayname=View definition
textmode=true
valuefield=view:definition
valueformat=HTML

Grouping

displayname=Grouping definition
textmode=true
valuefield=groupBy:definition
valueformat=HTML

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#7: Set it and Forget it

- The send report feature isn't just for executive summaries and PM status meetings
- **Admin Reports I use Personally**
  - Orphaned Fields
  - Empty Projects
  - Request Queues nearing 10k issues
  - Users created by Proof
- **Added Benefits**
  - One less thing for you to remember or actively monitor
  - Some can become WF2WF Fusion automations

REPORT
GCX Scheduled Reports

Show Filters | Report Actions | As of Mar 2, 2022 12:32 pm Eastern Standard Time

Details

Export | Filter: Report Default | View: Report Default | Grouping: Nothing

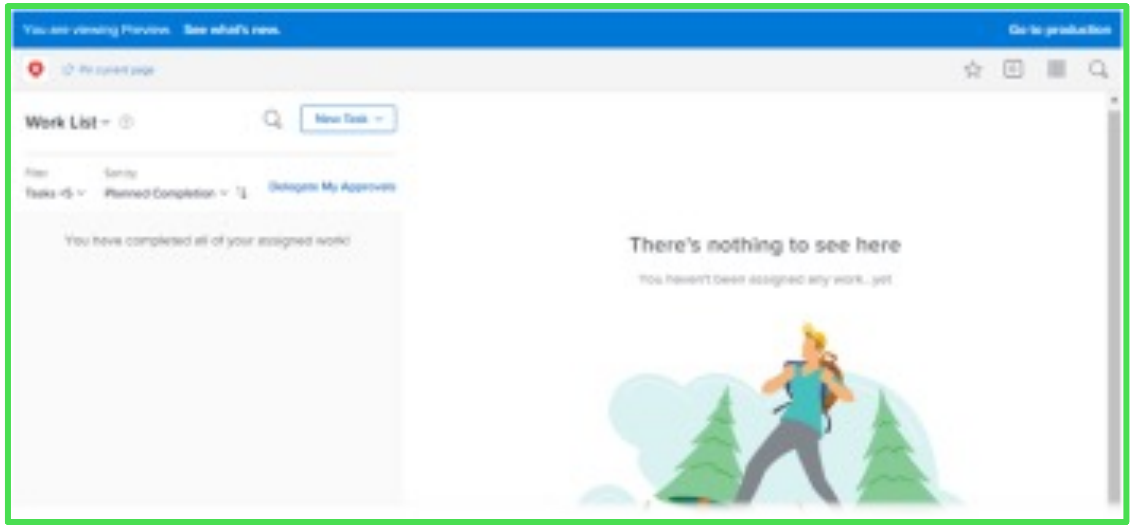
Name	Description	Type	Entered By	Scheduled Report: Schedule	Scheduled Report: Recurrence Rule	Scheduled Report: Recipients
GCX Abandoned Workfront Projects	All open projects within the GCX portfolio that has a planned completion date prior to 2 years ago or has not been updated in 18 months. These projects have been deemed abandoned and can be marked dead. Yellow highlighted rows indicate projects that have been recently updated. Green dates indicate the planned completion date has not yet passed.	Project	Monique Evans	• Monthly	• Every 2 Months at 9 PM	• **Users**: Monique Evans

BUILD TIP!

Look for the Scheduled Report object when building your filter or view. This will show you the available options around the "Send Report" feature

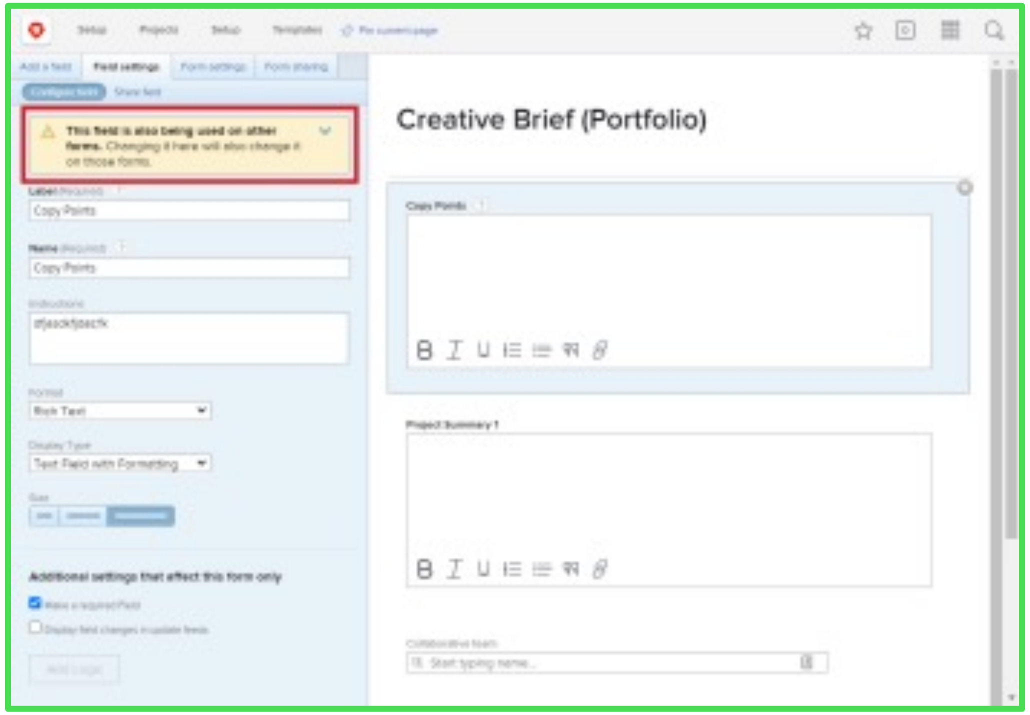
#8: Use Preview Environment for Data Recovery

- **Story Time**
  - An automation went wildly wrong, and it changed hundreds of users' access levels and home groups. After stopping the automation, I thought I was going to have to spend a Day trying to restore everyone. Then I remembered Preview updates weekly
  - Created a report in Production of all Users that were last updated during the automation window
  - Created a report in Preview with the User IDs from the production report to identify the affected users
  - After some manipulation in Excel, I had a list of users who needed to be updated and sorted so I could bulk edit in Production; using ID as the report filter



#9: Custom Form Best Practices

- Plan everything out on paper, in excel, on a whiteboard, etc before building
    - This is also for editing existing forms
    - It's easier to see and fix flaws before it exists in system
- Push your users to use the same fields whenever possible
- If there's a lot of display logic needed map the logic to sections instead of individual fields
- The request form and project form do not need to be identical. If it makes sense for the fields to be in a different order – do it



One Last Slightly Controversial Tip

#10: Don’t Ask; Unshare

- If you ask someone “do you still use/need XYZ?” the answer will be yes
    - Even when the data says they haven’t used it in months
- Instead remove the sharing access and see if anyone asks about it. After some time (depends on object and business case) you can delete it altogether
- **WARNING**
    - This **excludes** custom fields/forms
    - Your mileage may vary

Bonus Tips!

#11: Be Future Minded

- Your org will change; additional divisions may want to start using Workfront; new teams will form; Workfront itself will update
- You might not know exactly how or when, but you should always consider that in the back of your mind as you make decisions
    - When we started there were less than 500 users in Workfront; now we sit at 9k

What didn't make the presentation…

1. Crawl, Walk, Run Approach
   a. Remember there are humans on the other side of this & change is hard
2. Host & Record training sessions even if only one person shows up
3. Save a library of canned responses to FAQ
   a. Also create FAQ sheets
   b. Or use these for training session topics
4. Use filters, views, groupings, and prompts to reduce the number of reports
5. Locking a column from in-line editing
6. Create admin dashboards for workflows: Deactivating user dash
7. Make exception reports for your Project Owners and Workers
8. Use "run report as" feature when testing wildcard reports
9. Assignment vs Task Reports and Assigned To vs Assignment
10. Remind users mid-December that all "This Year" reports restart in January

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Q & A

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