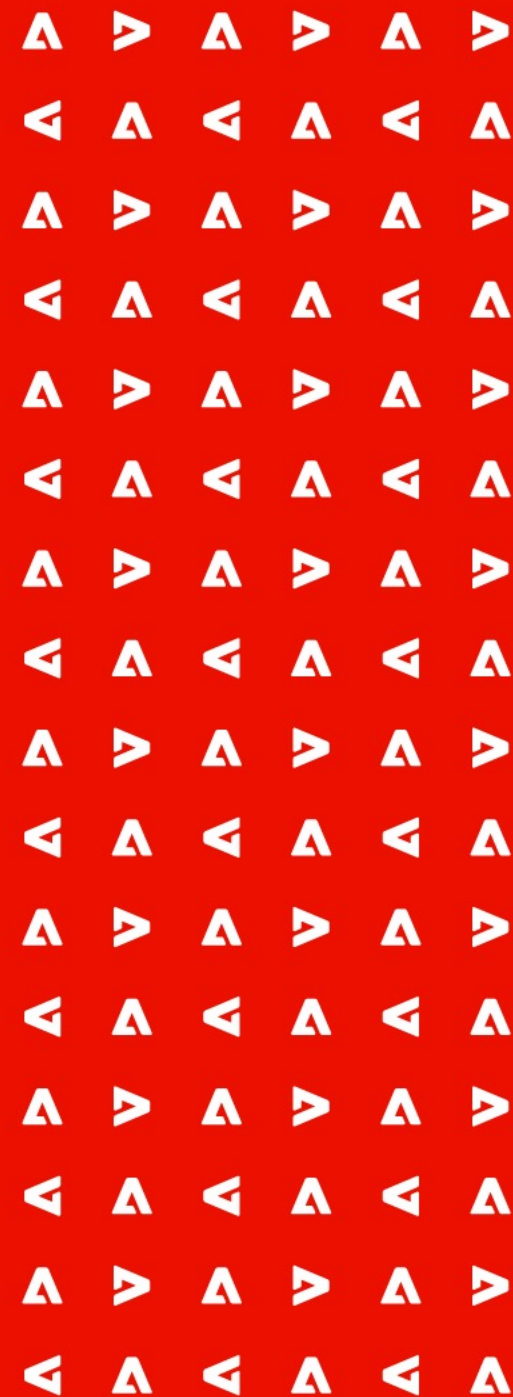




# Adobe Workfront Virtual User Group

Integrating Systems with Workfront Fusion  
Tuesday, December 7, 2021



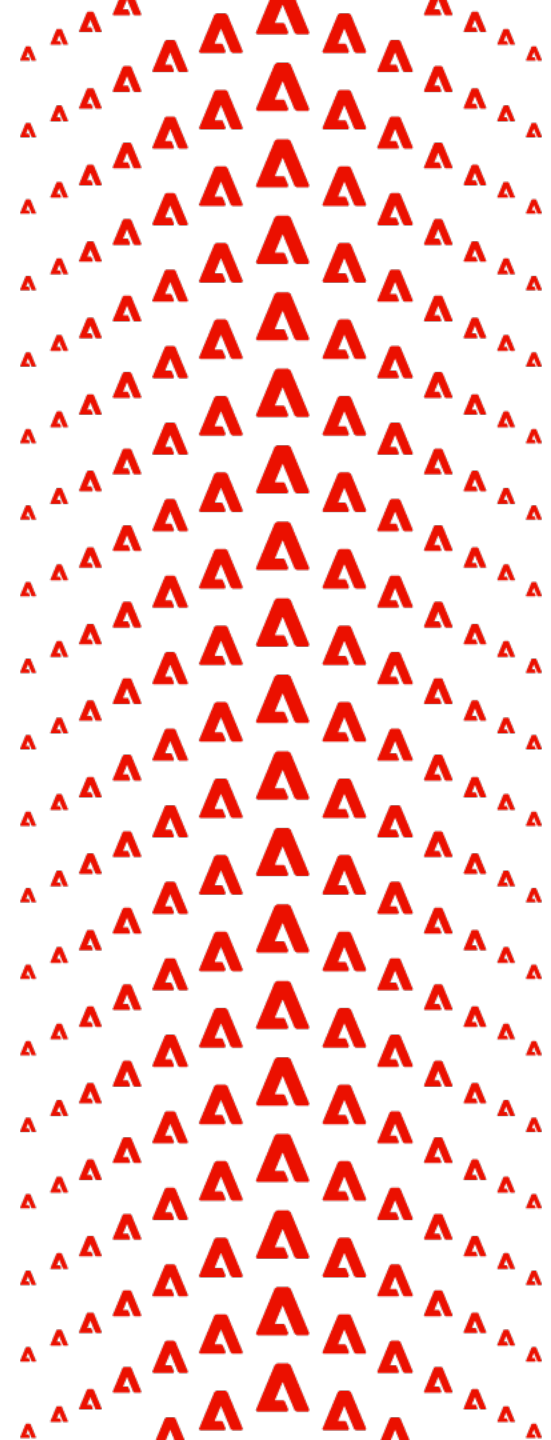
# Today's host



**Kyna Baker**

Sr. Manager, Customer Marketing

Adobe Workfront



This session is being recorded  
and will be made available to  
customers after the event.

# Say hello!

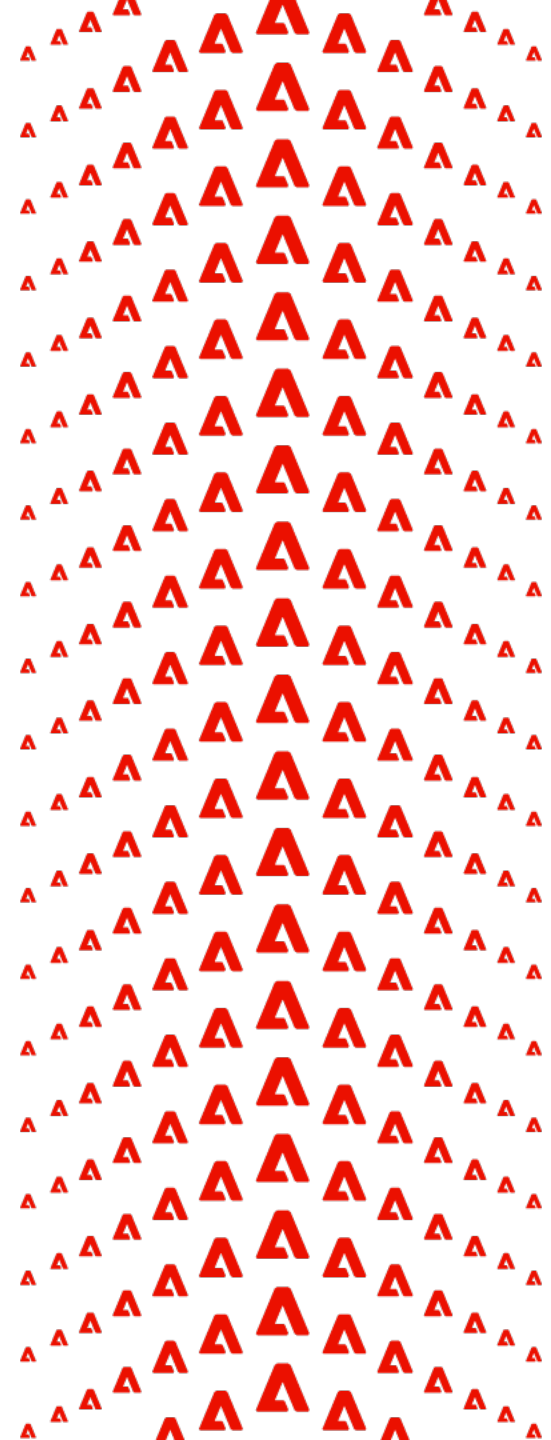
Type into chat:

- Your company, role and location
- What do you hope to take away from today?
- Favorite holiday tradition



# Agenda (Pacific)

Time	Topic
8:00 a.m.	Welcome and agenda
8:10 a.m.	<b>Understanding Workfront Fusion</b> <i>Sam Taylor, Senior Product Manager, Adobe Workfront</i>
8:20 a.m.	<b>Customer Spotlight: Adobe Workfront</b> <i>Peter Nowak, Automation and Integration Specialist</i>
8:45 a.m.	<b>Customer Spotlight: McKesson</b> <i>Lou Ann Kleiman, Director of Marketing Service Operations</i> <i>Vidhya Ranganathan, Director of Portfolio Management</i>
9:10 a.m.	Group discussion
9:25 a.m.	Wrap-up and next steps
9:30 a.m.	Meetup ends



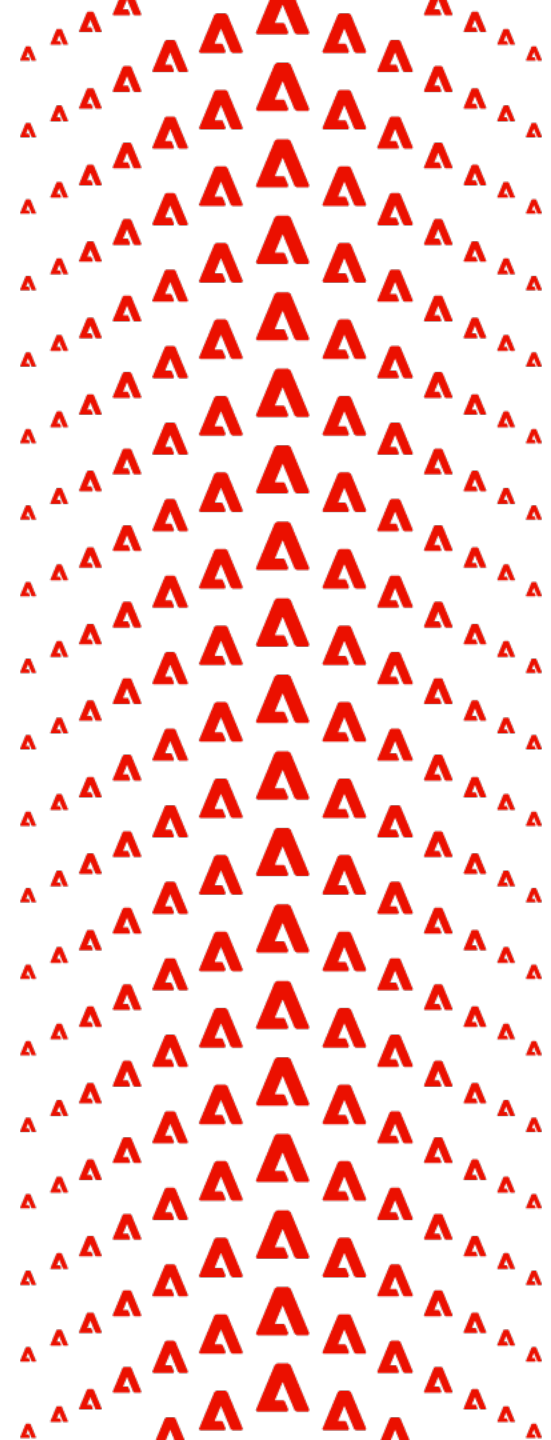
# Presenter



## **Sam Taylor**

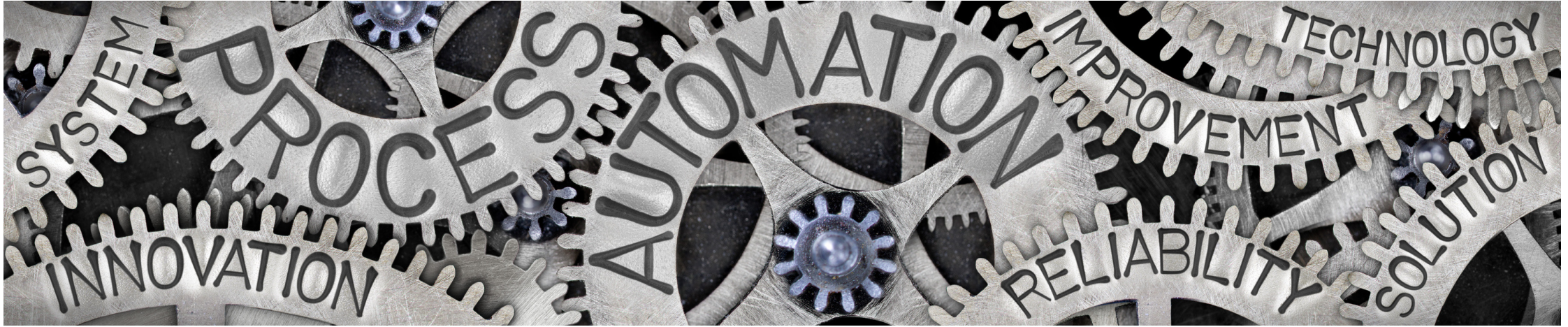
Senior Product Manager, Fusion

Adobe Workfront



# What is a Work Automation Engine?

Enables the capability for process managers to automate virtually any portion of a unique work process.



## Workfront Fusion for Work Automation

Automating Workfront itself to address unique business processes, scale actions, and eliminate toil

## Today's Session

## Workfront Fusion for Work Automation and Integration

Extend automations beyond Workfront to applications other than Workfront.

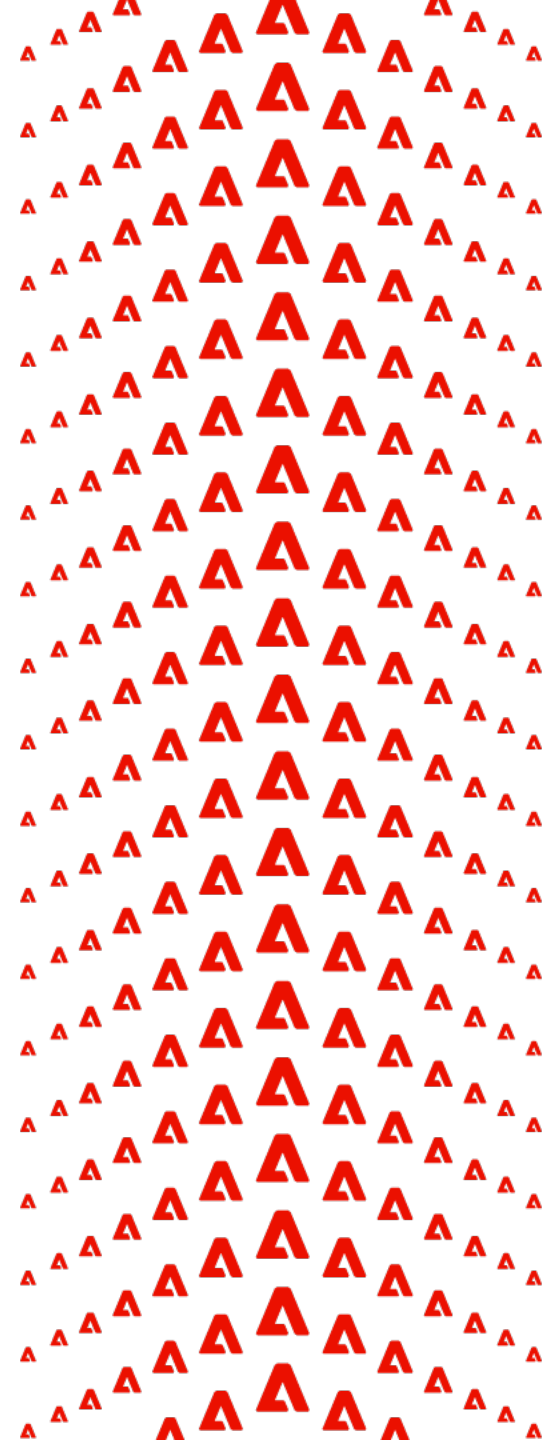
# Presenter



**Peter Nowak**

Automation & Integration Specialist

Adobe Workfront





# "Campaign Central" Fusion Flow

- **Goal:** Automate campaign tracking process

- **Problems:**

- Create different objects across four different systems
- Sync all objects
- Users Access Limited to specific systems
- Multiple requests for each system in certain order
- Engage multiple users
- Time consuming (PTO's, time differences)
- Error prone

- **Solution:**

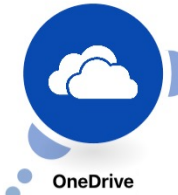
- Integrate Workfront with
  - Excel Online
  - Salesforce
  - Marketo
- Create single entry point for data (WF Custom Form)
- Automate data validation
- Automate creating & syncing objects in systems

# "Campaign Central" Fusion Flow

- **Before:** Creating objects manually, involve at least 3 users, multiple requests, up to 2 business days
- **After:** Auto object creation, involve 1 user, centralized data entry, up to 15-18 mins top

## User Action Required:

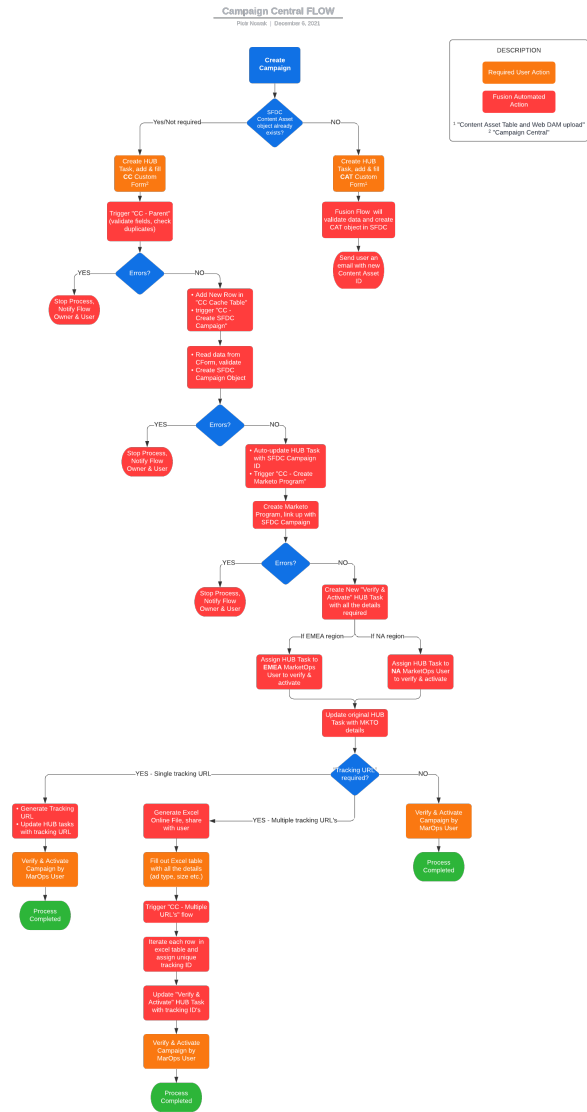
- Create a task
- Fill out "CC" Custom Form



## Fusion Automated Actions:

- Generate Excel Online file
  - Share & Send to requester to collect additional data
  - Attach to WF task
- 
- Verify & Validate data
  - Create & Set up Salesforce Content Asset
  - Create & Set up Salesforce Campaign
- 
- Verify & Validate Data
  - Create & Set up Marketo Program
  - Synchronize all objects
- 
- Update Source task
  - Create "Verify & Activate" task & assign MarTech user
  - Create "QA Review" task & assign MarTech user
  - Create "List upload" task & assign MarTech user

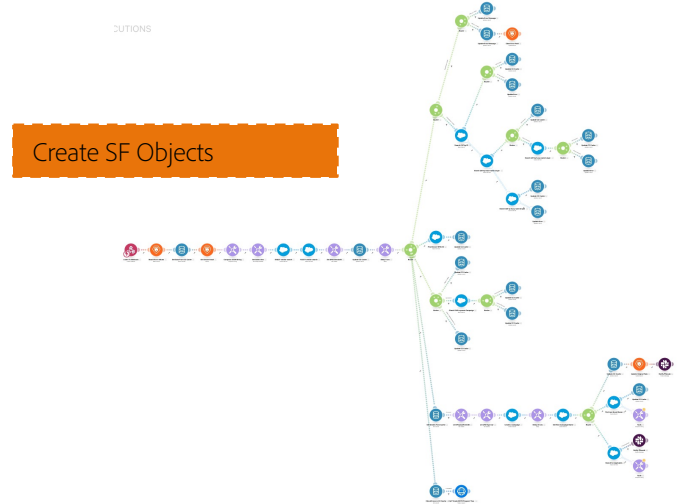
# "Campaign Central" Fusion Flow



## Trigger



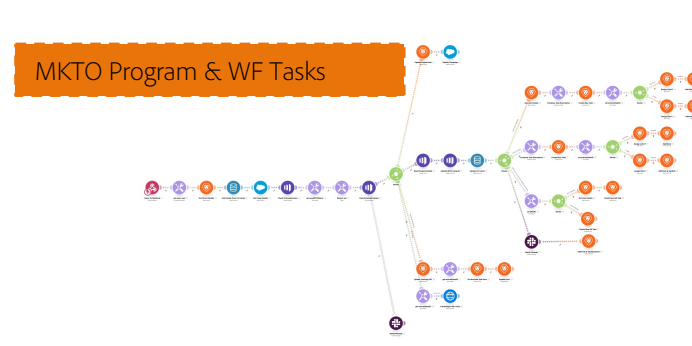
## Create SF Objects



## Generate Excel File



## MKTO Program & WF Tasks



# "Campaign Central" Fusion Flow

Marketing - Campaign Central

IMPORTANT: Before editing Custom Form remember to assign Piotr Nowak to this task. It may take up to few hours to process this task.

#Marketing

CC - What to create  
 Just build me a campaign  I need one tracking URL  I need multiple tracking URLs

CC - Parent Campaign?

CC - Allocate Line Item ID

CC - Campaign Type

CC - Plan

CC - Primary Objective

CC - Campaign Owner

CC - Optional Variable for Campaign Name

CC - Campaign Theme

CC - Region

CC - Team Region  CC - Team Area

CC - Team Function

CC - Vendor Name

Content Asset ID or Name

CC - Offer Type

CC - Channel Category - Channel

CC - Product  CC - Playable Job We Do  CC - Buyers Journey Stage  CC - Demand Type  CC - Buying Center

CC - Job Role Target  CC - Company Size Target

CC - Start Date

CC - End Date

CC - Marketo Program Type

Customer Center  Executive Event (Integrated)  Form Fill Listener (Digital)  
 LinkedIn LeadGen Form (Integrated)  LinkedIn LeadGen Form (api - EMEA)  PPS API Listener (in-p. Integrated)  
 Vendor Hosted Local Event  Vendor Hosted Local Event (Integrated)  Vendor Hosted Webinar - Template B...  
 Virtual Trademark  Webinars - DR24 Request  Workfront Hosted Webinar (Integrated)

CC - Ready to create?  
 Yes

Marketing - Fusion Section - DO NOT EDIT BELOW

#Marketing

CC - Created Salesforce Campaign ID - Fusion Use Only

CC - Created Marketo Program ID - Fusion Use Only

CC - Tracking URL - Fusion Use Only

CC - OneDrive File ID with URL Metadata - Fusion Use Only

Updates

New Updates Log Time Edit Custom Forms Show System Updates

Start a new update

Piotr Nowak 11/8/2021 At 2:11 PM - Like

Content asset record has been created in Salesforce.  
<https://workfront.my.salesforce.com/s1F4X00000PQao0UAD>

Salesforce Campaign Has Been Created  
<https://workfront.lightning.force.com/lightning/r/Campaign/7014X000001yPauQAE/view>

Marketo Program created:  
<https://app-sj13.marketo.com/#PG4613A1>

Verify & Activate Task Created:  
<https://adoberm.my.workfront.com/task/6189220305d70db97a907ee492959c46/updates>

List Upload Task Has Been Created  
<https://adoberm.my.workfront.com/task/6189220505fe8cd814b5f3077455f2ea/updates>

Subtasks

New Task

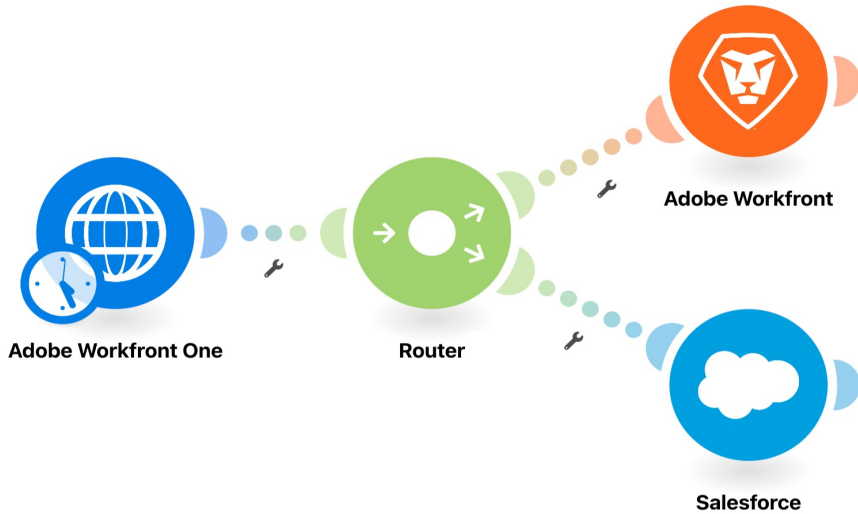
#	Task Name	Assignments	Duration	Pin Hrs	Predecessors	Start On	Due On	% Complete
2	Verify and Activate Marketo Program for 21Q4-NA-Generic--Event-WKF-ess-Customer Succes-Customer Success Workshop - Repo	John Peduto	0 Days	0 Hours		10/22/21	10/22/21	100%
3	Upload List of Registrants / Attendees into Marketo	John Peduto	0 Days	0 Hours		10/22/21	10/22/21	100%

+ Add More Tasks

Showing 2 tasks

# Other automations – Chrome Extension

Adobe WF One Community Chrome Extension

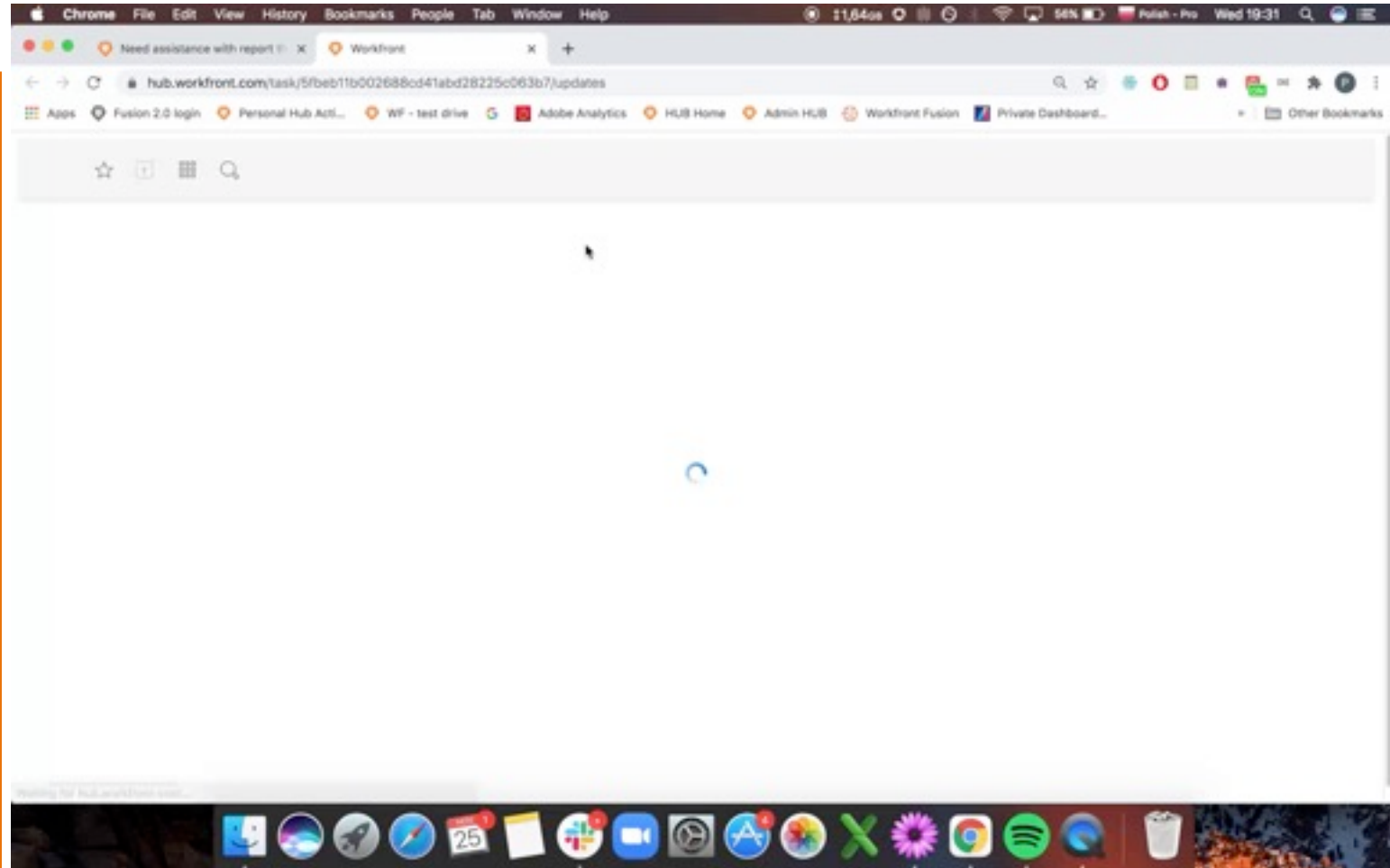


## User Action Required:

- Select unsolved WF One Community post
- Use Chrome Ext action

## Fusion Automated Actions:

- Scrap page source
- Create a WF Task with post content so it can be assigned to the right user
- Create Salesforce Support Ticket with all details

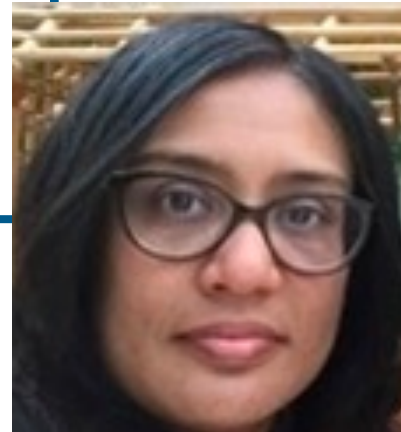


# **Workfront Fusion Integrations**



**Lou Ann Kleiman**

Director, Marketing Operations



**Vidhya Ranganathan**

Director, Portfolio Management

# Who **we** are

McKesson Corporation is a global leader in healthcare that partners with biopharma companies, care providers, pharmacies, manufacturers, governments and others to deliver the right medicines, medical products and healthcare services to the patients who need them, when they need them.

## Our Vision:

To improve care in every setting – one product, one partner, one patient at a time

## Workfront Stats:

5+ Years using Workfront

20+ Groups using Workfront in different capacities

280 Paid Licenses - FY23 projecting 350

2,548 Active Workfront Users



# Workfront/Cvent Integration

## Problem:

- New Organizational Change that pushed multiple Business Segment Planners and Corp Planners into one team
- Different processes – some entered in Cvent, some in Workfront, some in both creating duplicate entries and no one single source of truth
- Business Partners had no access to overall Event schedules
- No Resource Management

## Solution:

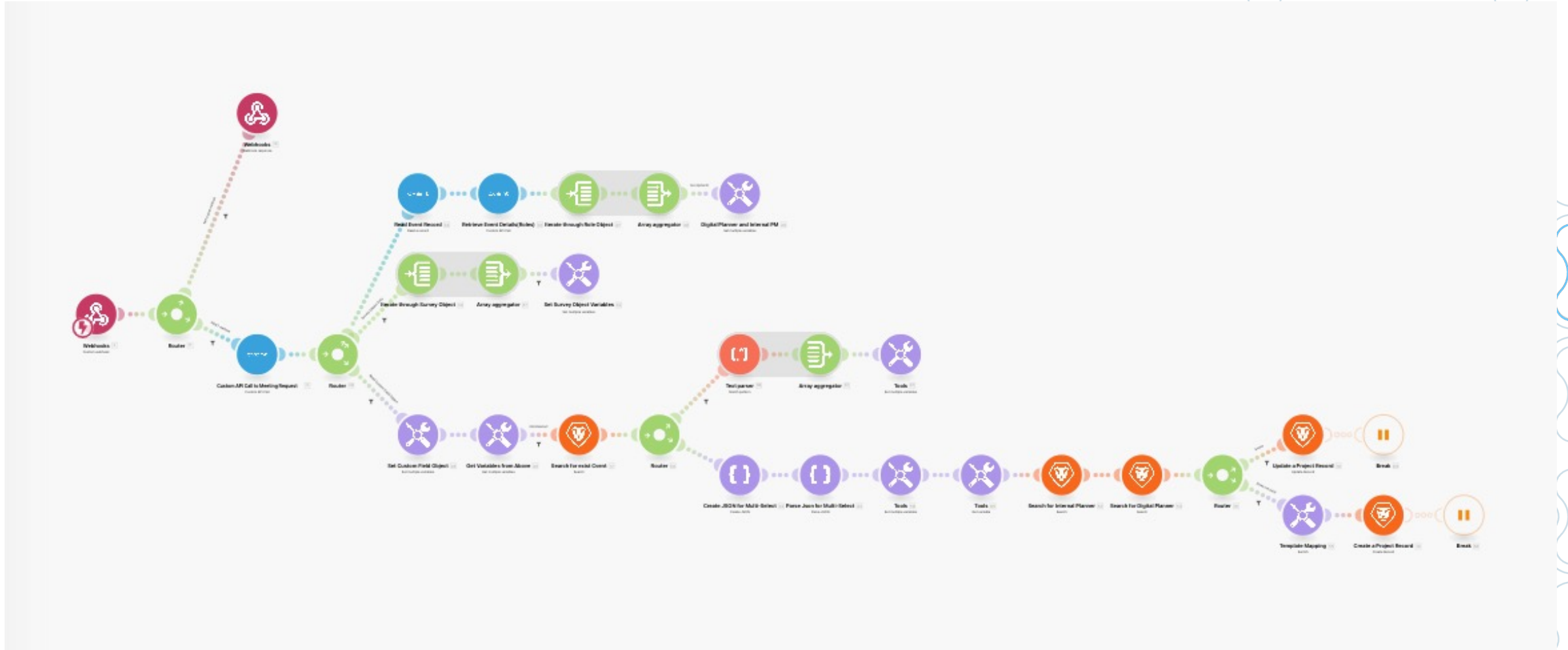
- Integrated Workfront with Cvent – one way push from Cvent to Workfront
- Updates push also
- All Event entries into Cvent, push to Workfront Calendars & Reports with system-wide views and public shareable links
- Event entries are also able to convert to projects and now track Planner's workload/availability in the Workload Balancer across all segment and corporate events

# Workfront/Cvent Integration

## Action Items:

- Do RFP for integration consulting (Cost was approx. \$18,000)
- Determined fields needed to push from Cvent to Workfront
- Add Admin fields to back-end of Cvent – Assigned Planner names, etc.
- Determine triggers for initial push and updates
- Get Webhooks from Cvent internal IT team

# Workfront/Cvent Documentation



# Workfront/Cvent Documentation

- Trigger: The Webhook is created to receive if there an event created or updated in WF
- Webhook Response: If the request is a “Get” method, the scenario sends a 200 response back to Cvent
- This path is created to find the details on the Internal Planner and the Digital Planner, once found, we store them in a set variable to be used downstream
- This path is created to iterate over the “Survey Object”, this object stores mainly the trigger events (Workload balancer, PSaS and the Complexity field) along with fields that are part of the tradeshow event. Once the fields are found, we store it in the Set Variable to be used downstream
- This is the last path but performs multiple functions:
  - It stores the data from the CventCustomField object (This object has majority of the fields that need to map over
  - Then it GETS the variables from path 3 and 4
  - Once it gets the variable it checks if the values from the “PSaS Workfront Report” OR from the “Workfront Workload Planner” are set to Yes.
    - If both are NO, the scenario **ENDS**
    - If one of them is “YES, the scenario **continues**
- This path is created to extract the values from the McKesson properties field(multi-select) and then set it into a variable for downstream use
- This path is created to extract the values of the Booth Type and Attendee type fields(multi-select)
- If the Cvent Code does not exist in WF, the scenario finds the template ID based on the complexity field and **creates** a project in WF and assigns the Internal Planner as the project owner
- If the Cvent code exists in WF, the scenario **updates** the project with the fields from Cvent

# Workfront/Cvent Reports



REPORT

2022 PSaS Master Event Report (User Group)

Show Filters

Report Actions

As of Dec 6, 2021 8:43 am Central Standard Time



Details Summary

Export

Filter

Report Default

View

Report Default

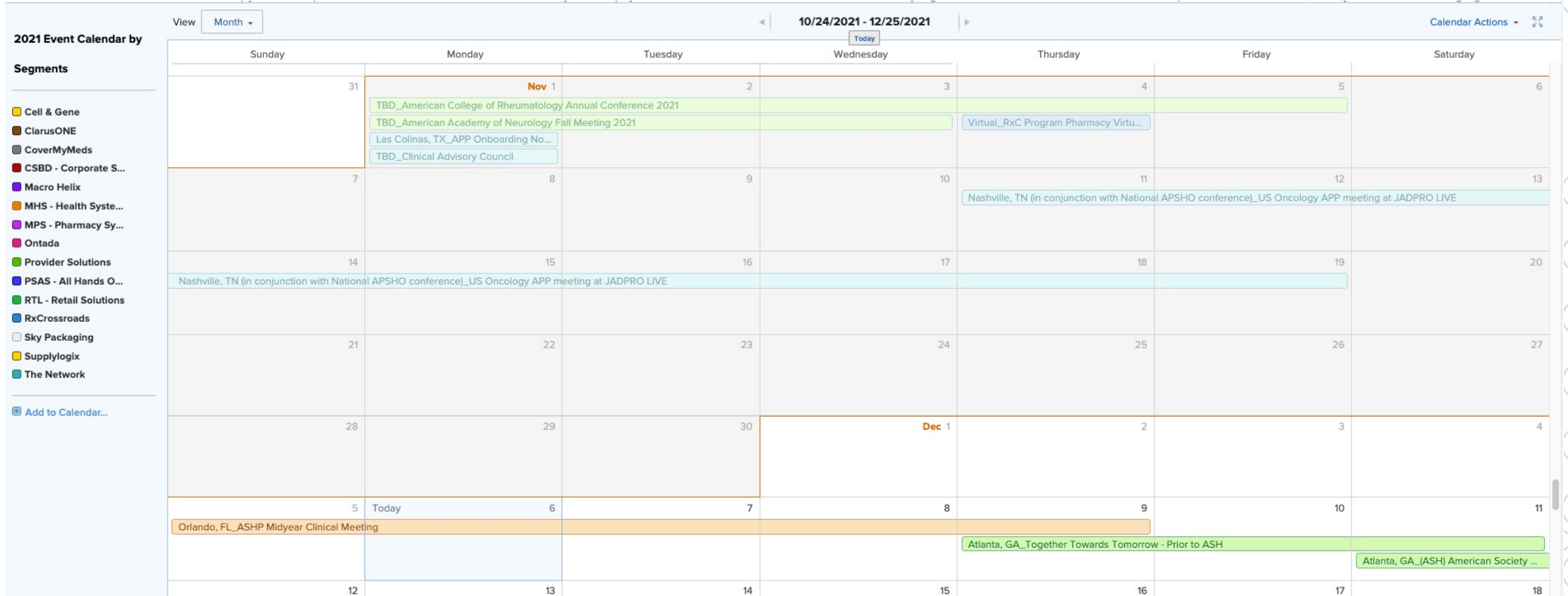
Grouping

Report Default



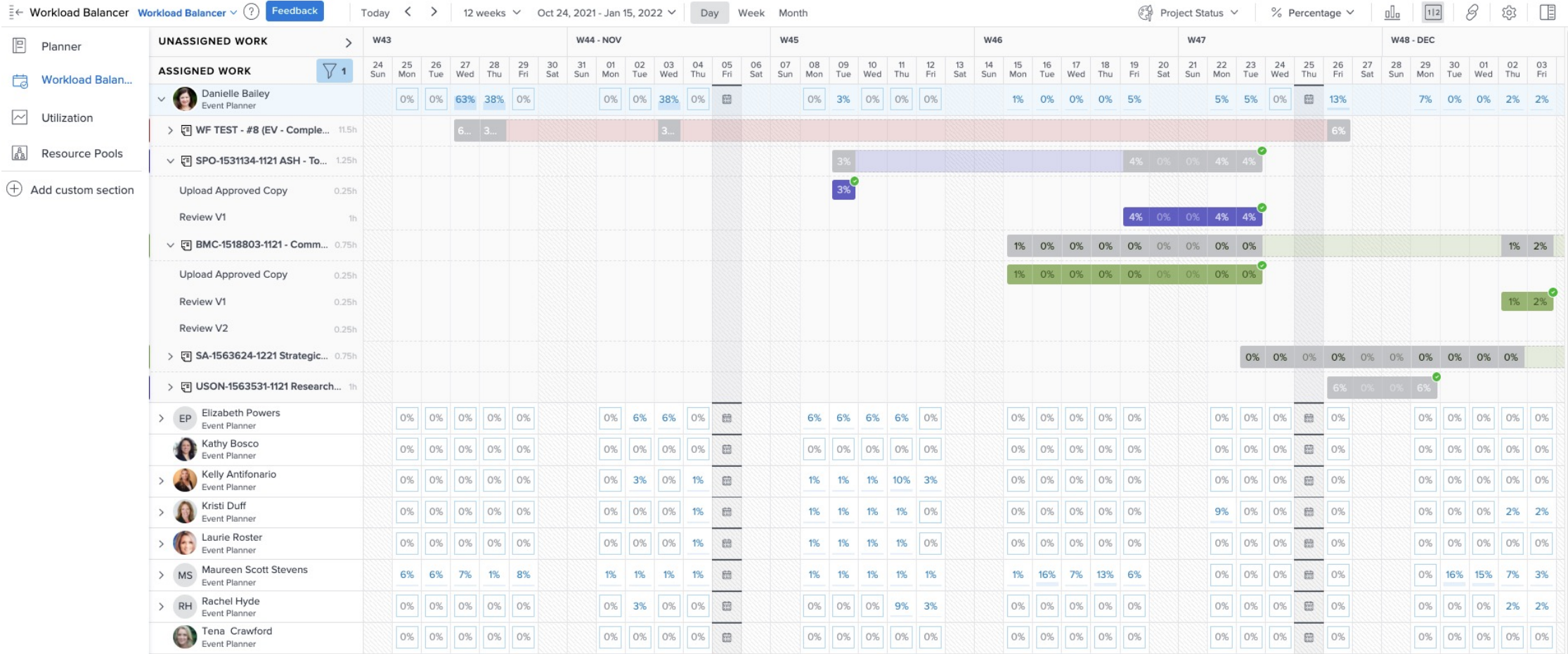
<input type="checkbox"/>	Event Start	Event End	Business Unit	Cvent Code	Event Name	Event Location	Event Venue	Event City	Event State/Province	Previous Location	Last Year's Event ID	Previously held offsite?	McKesson Properties	Event Tier	Frequency of Event	Contracted Property - Hotel choice	Event Planner	Event Contact	Contact FN	Contact LN
Event Start Date: Jan, 2022 (11)																				
Event Start Date: Feb, 2022 (8)																				
Event Start Date: Mar, 2022 (6)																				
<input type="checkbox"/>	3/3/22	3/6/22	Pharmaceutical Solutions and Services (PSaS)	14597	EPIC Pharmacies Annual Meeting and Tradeshow		Gaylord National Harbor	National Harbor, MD	Maryland		0000000	Offsite Event Space		Unknown/Other	Annual		Frances Surillo	Frank	Dolce	Ir
<input type="checkbox"/>	3/9/22	3/9/22	Pharmaceutical Solutions and Services (PSaS)	14341	Ontada Town Hall - March 2022	Virtual (All Remote Attendees)									Quarterly		Danielle Bailey	Beth	Hollis	
<input type="checkbox"/>	3/15/22	3/18/22	Pharmaceutical Solutions and Services (PSaS)	14647	FPN Annual Meeting 2022		Manchester Grand Hyatt	San Diego	California		0	Offsite Event Space		Unknown/Other	Annual		Frances Surillo	Amanda	Kirkindall	Ir
<input type="checkbox"/>	3/22/22	3/22/22	Pharmaceutical Solutions and Services (PSaS)	14094	PSaS Town Hall	Virtual (All Remote Attendees)									Quarterly		Laurie Roster	Laurie	Roster	
<input type="checkbox"/>	3/30/22	4/1/22	Pharmaceutical Solutions and Services (PSaS)	14589	2022 MHA Business Summit		Bellagion Hotel and Conference	Las Vegas	Nevada		00000	Offsite Event Space		Unknown/Other	Annual		Frances Surillo	Amanda	Kirkindall	Ir

# Workfront/Cvent Calendars



# Workfront/Cvent Resource Management

## Resource Management



# Workfront/Jira Integration

## Problem:

Need a Portfolio level rollup to represent work completed in Jira with our outside contractors for our IT Projects.

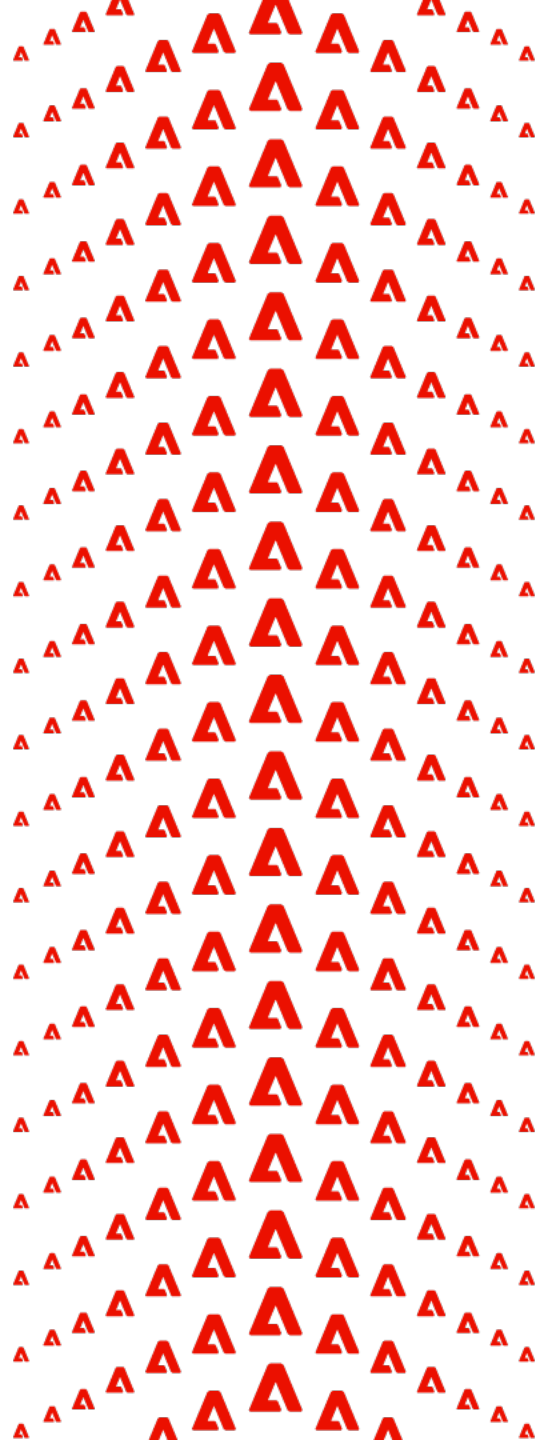
## Solution:

Use Fusion to get New Project, Task, and other details in Workfront to support Portfolio Management Work.



**Questions?**

Wrap-up and next steps



# Additional Information on Fusion

## Workfront One: Fusion 2.0 Group ([one.workfront.com](https://one.workfront.com))

Adobe Workfront One

Search Workfront One

Home Getting Started Resources New Workfront Experience Collaboration Events Support My Experience Call Customer Support: 844-306-4357

GROUPS

Great minds work alike

Join at least 3 groups to connect and collaborate with people like you. Find a regional group nearest you, join the Beta group to get the latest updates about what's coming next in the product, and join your industry group to meet and talk with others who are solving similar challenges to you.

Community  
Groups  
Innovation Lab

Search Groups

My Groups  Sort By Latest Group Activ Group Type All Types

Page 1/3 Previous Next

- All Discussions**  
All Discussions is the place for any questions about any Workfront products: from adoption and implementation o...  
Public group, owner kyna baker  
+ Join  
Last active 6 minutes ago 10399
- Workfront Fusion 2.0**  
This a group of Workfront professional service partners, Workfront team members, and customers that are engage...  
Public group, owner kyna baker  
+ Join  
Last active 19 hours ago 130
- Agile Conversation**  
This group is a place for our customers to learn and discuss Agile strategies and concepts they are applying in their...  
Public group, owner kyna baker  
+ Join  
Last active 19 hours ago 112

## Fusion Datasheet & Pricing

workfront  
An Adobe Company

### Pricing for Workfront Fusion (USD)

Workfront Fusion accelerates your Workfront platform by enabling enterprises to automate their unique work processes. Additionally, Workfront Fusion connectors can ensure work flows freely across virtually any system.

**PRICING DETAILS**

**Workfront Fusion for Work Automation**

- \$10,000 annually allows customers to automate Workfront with up to 10 scenarios
- A scenario is a process with a series of steps that is kicked off by a singular event
- An additional 5 scenarios is \$5,000 annually.

**Workfront Fusion for Work Automation and Integration**

- \$20,000 annually allows customers to connect Workfront to up to three other applications (connectors).
- Includes 15 Scenarios.
  - A scenario is a process with a series of steps that is kicked off by a single event (e.g. a record is added or updated or a period of time has elapsed).
  - Scenarios are managed and measured in aggregate.
  - Workfront and Workfront Pro connectors will not count towards the total number of connectors. However, active scenarios using these connectors toward the overall number of active scenarios.
- Each (incremental) connector is \$5,000 annually.
- An additional 5 scenarios is \$5,000 annually.

**PROFESSIONAL SERVICES**

Implementation services are provided by Workfront Professional Services or by Workfront Professional Services team leverages best practices and standardized processes to help the customer maximize business value from their Workfront Fusion investment.

**Professional Service Packages** - To ensure customers have successful implementation of Workfront Fusion (based on Workfront support) will need to get scoped by a Solution S Architect. The Solution Services Architect will work with your Pre-Sales person to call use cases in the Statement of Work. Please account for this in your sales timeline.

Please include Custom Workfront Fusion Starter Pack 4 on the opportunity.

WORKFRONT | UPDATED JANUARY 2021

### workfront FUSION™

Workfront Fusion connects the modern enterprise.

Workfront Fusion is the integration platform that allows you to connect Workfront to virtually any business application in your technology stack. It provides robust capabilities to integrate Workfront to thousands of business applications. This enables a seamless and connected enterprise knowledge work lifecycle.

The power and elegance of Workfront Fusion lies in its simplicity. Workfront Fusion provides business users with the capability to create and manage a virtual workflow of data processes and rules, transform data from one format to another, and monitor integrations in real-time.

Workfront Fusion ensures your enterprise is:

- FLEXIBLE**  
Tailor integration needs to business processes
- FASTER**  
Respond with agility both to business process and integration changes
- MORE PRODUCTIVE**  
Stop spending time on replicating data and other manual methods of synchronizing information between multiple systems
- COST-EFFECTIVE**  
Eliminate the need for a full-time staff of developers to build, maintain and support your integrations
- SEAMLESS**  
Bridge business gaps and ensure compliance with end-to-end processes

Thank you!

