Adobe Workfront Virtual User Group

Workfront System Maintenance
Tuesday, July 27, 2021

Today's host

Summer Shelton

Principal Customer Success Manager

Adobe Workfront

Agenda (Pacific)

Time	Topic
8:00 a.m.	Welcome and agenda
8:05 a.m.	What IS System Maintenance?
8:15 a.m.	Panel Discussion *Considerations for system setup, regular maintenance, and clean-up*
9:10 a.m.	Group discussion
9:25 a.m.	Wrap-up and next steps
9:30 a.m.	Meetup ends

Today's panelists

Skye Hansen

Workfront System Administrator

T-Mobile

William English

Workfront System Administrator

T-Mobile

Shawn Loutensock

Global Workfront System Administrator

Adobe Workfront

Ryan Eaton

Sr. Technology Admin

Adobe Workfront

T Mobile

Skye Hansen
Workfront System Administrator
T-Mobile

William English
Workfront System Administrator
T-Mobile

Quick Stats:

Overall instance:

- 5,000 users, 3 system admins, 4 group admins
- Primarily used for marketing and legal divisions
- Most common workflows: submit request + close out, or submit request + convert to project
- Products used: Workfront, Proof, Fusion
- Request Queues: 46 / Queue Topics: 3,697
- 198 custom forms / 2,823 custom fields

2020:

- 23,800 requests submitted
- 6,700 projects created
- 33 team implementations or changes to existing implementation (each implementation takes anywhere between 3 weeks and 6 months)
- 1,630 users created

Adobe Workfront

Shawn Loutensock

Workfront System Administrator

Workfront Adobe

Ryan Eaton

Workfront System Administrator

Workfront Adobe

Quick Stats:

Workfront Hub instance:

- 1000+ heavy users
  - (5 sys admins, 10 group admins)
- Every department - product engineering to professional services
- Most common workflows:
  - submit request + close out
  - submit request + convert to project
- Products used: Yes
  - Workfront Core & Proofing
  - Fusion
  - Native Integrations

Workfront Customer Zero 2021:

- 30k+ users
- Enterprise administration practices
- Every Adobe employee & partner

What IS "System Maintenance"?

What do we mean by ‘System Maintenance’?

System maintenance is an ongoing activity which includes actions to remove design errors, update documentation, testing and user support. It can be categorized into three types:

- **Corrective Maintenance**: removing errors which might have occurred due to faulty design or wrong assumptions.
- **Adaptive Maintenance**: changes to satisfy user needs or organizational changes such as changes to process, goals, forms, manager needs, security, and product changes
- **Perfective Maintenance**: performance enhancements including new tools and integrations

When you are first setting up a Workfront instance, what are the most important elements to consider to make it easier to maintain in the long-run?

Name	Do	Don't	Any handy reports or dashboards? Other tools? Community links?
Project Preferences			
Projects, tasks & requests	* document the selection for each option, and the rationale for each option at the time it is set. if considering a change to any preference, you can be reminded why it is set that way and consider what may be impacted if it is changed.	* customize for groups (this will increase your maintenance cost significantly) * allow life after death actions on projects – many main areas in Workfront do not account for activity in closed projects	cleanup reports for, and governance around expectations for: * projects not in a portfolio * projects 100% done but still active * projects with inactive project owners
Statuses	* create matching request statuses for each project status; then hide them from all users - this will more clearly indicate on requests that they've been converted to a project, and that status of that project. * for teams that require an assortment of unique statuses, track those in custom fields and position it as giving the team more flexibility to let their set of statuses evolve without impacting the system. (also see Expense Types)	* Add new custom statuses without thorough examination and extreme caution. * Add new custom statuses just for one group without considering the risk that multiple groups will want that status as well (it's better to set these as system statuses that you can hide and turn on per group).	Synchronizing custom statuses between resolving and resolvable objects https://one.workfront.com/s/document-item?bundleId=the-new-workfront-experience&topicId=Content%2FManage_work%2FIssues%2FConvert_issues%2Fresolving-and-resolvable-objects.html&_LANG=en#synchronizing-custom-statuses Reporting/Storing original request data on converted projects https://one.workfront.com/s/question/0D50z00006Px3a2CAB/calculated-field-for-convertedoptask-data
Priorities, Severities, Conditions	* Only make changes here when you truly want them to be global	* Change the number values in these areas (it can mess with your kickstarts and API/Fusion calls).	
Processes			
Approvals	* Put details of the approval - e.g. who's involved, which workflow is it for - in the description (for esoteric object types, the description field can be used to store and filter on in a report). You can also run reports on where these approvals are being used		
Custom Forms			
Forms	* Identify and keep all the global fields pertinent to your reporting/system admin needs on a separate form and make attachment of this form as universal as possible	* Share forms with specific individuals (or teams/groups/roles/companies) – it makes their view more cluttered, increases the likelihood of error, and can be better controlled by templates and request queues	
Fields	* use naming conventions to easily identify which fields belong to which team or process * reserve any punctuation or special characters for the labels, rather than the field names	* Use overly simple names (or names similar to Workfront system fields) that are likely to cause confusion later, like "Project Description"	https://one.workfront.com/s/document-item?bundleId=the-new-workfront-experience&topicId=Content%2FAdministration_and_Setup%2FCustomize_Workfront%2FCreate_manage_Custom_Forms%2Fview-all-reports-that-use-a-particular-custom-field.html&_LANG=en
Sections	* Standardize and socialize an "office use only" section for the working team, and an "admin use only" section, so that your requesting users get used to ignoring these sections, everyone else gets used to targetting them, and only one of each every needs to be made or used.		
Job Roles			
Job Roles	* Set up leadership roles per group and standardize sharing objects to them, so that if leaders come into the system they can automatically see pertinent work * put the reason for the role in the description (e.g. was role built for reporting, routing work, or sharing)	* Create job roles based exclusively on job titles. (reasons for creating a job role relate to skill sets needed for work in the system, or different billing rates)	
Teams			
Teams	* put the reason for the team in the description (e.g. was team built for reporting, routing work, or notifications) + identify the process the team is involved with	* Use overly simple names that are likely to cause confusion later, like "Intake Team"	
Companies			
Companies	* Have a Company custom form (to enable better reporting, maintenance, and auditing of the users in that company) e.g. if your Agencies are separate Companies, store their contract expiration date and point of contact on their custom form	* Create multiple companies for different groups in your company – it messes with your chain of command, e.g. managers cannot have direct reports in different companies	
Invitations			
Invitations	* If you're still sending out invitations (notifying new users you have created an account for them) put some useful information here, like reminding them to		

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Key Takeaways: Setting up a new Workfront instance

- Design the instance before you build it
- Build your instance as though your whole company will be using it (because one day they might be!)
- Establish a governance group
- Determine an organizational game plan for groups, portfolios, request queues, custom forms
- Leverage Group Admins
- Create onboarding AND offboarding templates

Once your Workfront instance is up and running, how do you maintain it on a daily/weekly/monthly basis?

Maintenance Category:	What you look for:
Users	Haven't logged in for X months
Users	Paid license: doesn't own or isn't assigned to objects
Users	Proof license permission profiles
Users	Inappropriately created
Roles	No longer being used
Teams	No longer being used for sharing or routing purposes, haven't been tagged in an update
Groups	This reflects the company structure and is maintained as reorgs happen
Projects	Not in portfolio
Projects	100% complete and not closed
Custom Forms	No longer used
Custom Fields	Zero/low usage
Templates	Not being used
Templates	Not adequately shared
Portfolios/programs	Not adequately shared

Key Takeaways: Regular System Maintenance

- Determine a regular system audit cadence
- Automated reports can be sent to System Admins to help determine what records need action.
- T-Mobile suggestions on some auditing reports (will attach to the community discussion thread)
- Establish a governance or advisory committee
- Create a ‘departing employee’ dashboard / Hygiene dashboards

How do you determine clean-up opportunities? What goes into that?

Key Takeaways: Clean-up Opportunities

- Create cleanup dashboards filtered by group/department and then solicit help from the assigned Group Administrator
- Monitor Request Queues regularly
- In addition to a regular maintenance cadence, review processes when your team or organization goes through a major change (acquisition, reorganization, etc.)
- If something is frustrating you in your instance, it might be an opportunity for cleanup!

What else do you need to consider?

Key Takeaways: Additional Considerations

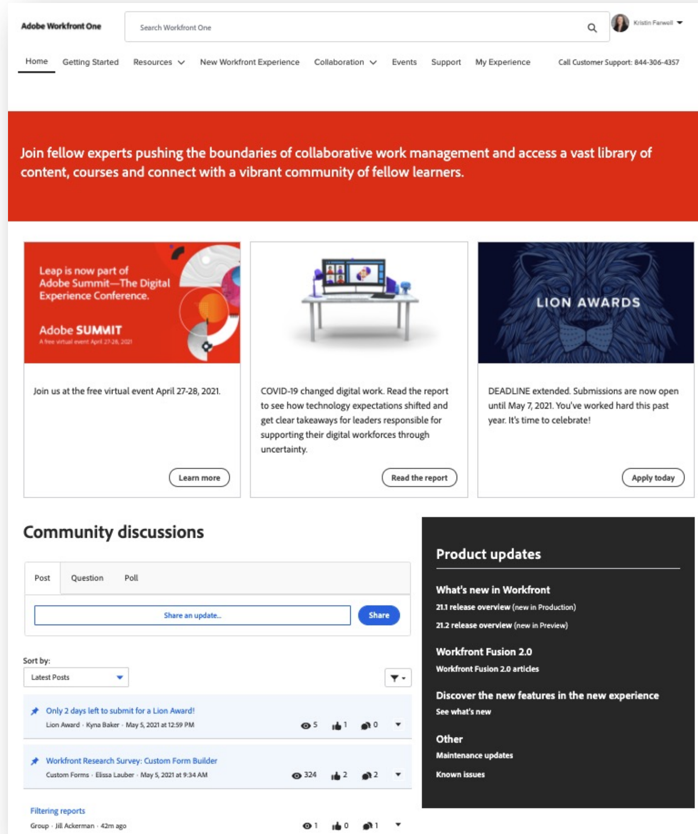
- Determine the “life span” for processes. Will you need this process forever? Does it need to be reviewed/updated on a regular basis?
- Have a plan for reviewing and communicating product release information to your users.
- Fusion! Review processes, look for areas to integrate and automate.
- Making sure a universal custom form is attached to every object
- Keep it simple.
- Update any system documentation "in bulk"
- Delete vs Deactivate

Wrap-up and next steps

Continue the conversation on Adobe Workfront One

- Later today we'll share the recording of today's session and a link to a follow-up discussion on Workfront One. **Keep this great conversation going!**

- Workfront One is the single best place to:
  - Collaborate with others in a similar industry or department
  - Harness the power of your peers to crowdsource inspiration and solutions
  - Learn about upcoming events



Upcoming meet-ups

Full list: http://one.workfront.com/events

- Aug 10: Dashboards and Data Visualizations
- Aug 17: Transitioning to the New Workfront Experience

Coming soon!

- *TBD: Extending Workfront with Integrations*
- *TBD: Leveraging Custom Forms*
- *TBD: User Onboarding - Requesters / Collaborators*

What other topics would you like to see?

Thank you!

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