

Virtual User Group: System Admin Best Practices - Enablement

Tuesday, January 19, 2021

Today's Host



Kristin Farwell

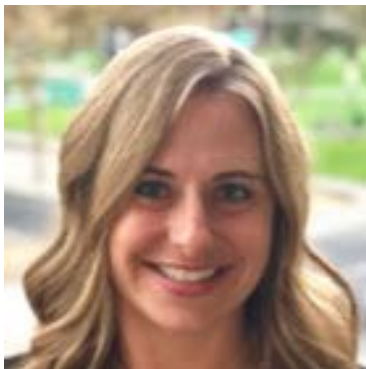
Sr. Manager, Customer Marketing
Workfront

Agenda

- 11:00 a.m. Welcome and Agenda (5 min)
- 11:05 a.m. System Admin Tips (25 min)
- *Christa Levine, Google*
- *Heather Kulbacki, Thermo Fisher*
- 11:30 a.m. Group Discussion: Enabling Your Users (25 min)
- 11:55 a.m. System Admin Tips (10 min)
- *Kasia Osipowicz, Dentsu*
- 12:05 p.m. Group Discussion: Your Enablement (20 min)
- 12:25 p.m. Wrap-up Next Steps (5 min)
- 12:30 p.m. Event Ends



PRESENTER



Christa

Program Manager

Google (*Vendor*)

I am the yearbook editor for my son's elementary school. Go Capri Cougars!

About Google

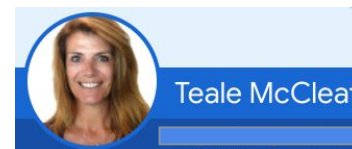
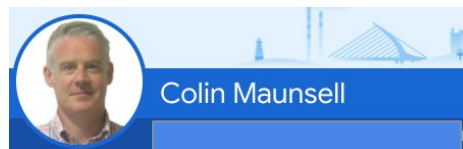
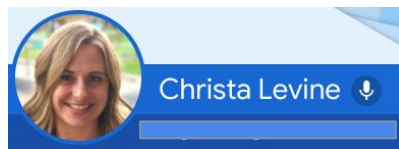
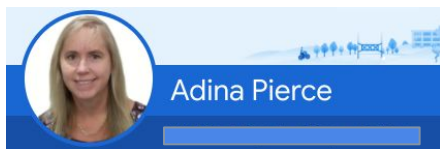
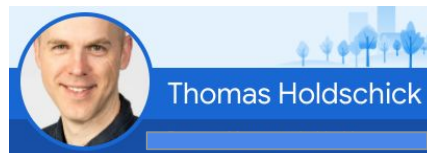
Their mission is to **organize** the world's **information** and make it **universally accessible** and **useful**.



Google & Workfront

The Program Management Automation and Tools (PMAT) team provides portfolio and program management tooling and automation services to enable Googlers to achieve planning and execution excellence through data driven decisions.

Workfront is used by 5,000+ Googlers across 25+ teams and is supported by 6 PMAT team members.



System Admin Best Practices: Top 5 Tips for Enablement

Tip #1: Create a Workfront Help Site

The screenshot displays the Workfront Help Site interface. On the left, there is a sidebar with the Workfront logo, a search bar, a dH score of 95, and a 'Quick Links' section containing: Open a Ticket, News, Access Levels and Sharing, Instances, Glossary, and Contact Us. The main content area features an orange header with the 'Workfront' logo and navigation links: Home, Onboarding, Knowledge Base, Integration, and Team-Specific Help. A dropdown menu is open over the 'Knowledge Base' link, listing: Workfront UIs Comparison (dated 2020-12-28), Classic Workfront UI, New Workfront Experience UI, Reports and Dashboards, and Workfront-Managed Help. Below the navigation, the 'Introduction' page is visible, starting with the text: 'Workfront is a third party, customizable, extensible Portfolio-Program-Project management planning and tracking tool used by 5,000+ Googlers across 25+ teams, and supported by CorpEng PMAT.' A video player is indicated by the text: 'Please take a moment to watch the video below, showing a high-level overview of Workfront's capabilities.' On the right side, there is a 'Was this page helpful?' feedback prompt and a 'Contents' sidebar with a list of links: Introduction, Key Features, Cost, Support, and Access.

System Admin Best Practices: Top 5 Tips for Enablement

Tip #2: Create Landing Pages for Users

Workfront Resources

Workfront Information

Workfront is a 3rd Party, cloud-based, customizable, extensible Portfolio-Program-Project management planning and tracking tool. The software provides solutions to manage, report on and understand projects and programs and their dependencies, risks, issues and progress.

Getting Started

You've reached this page because you have a **Reviewer Access level**. Reviewer access level has limited functionality. Click: [here](#) to see the differences between all of the access levels and determine if an upgrade is necessary. If yes, click [Request for User Edit Access](#) below.

Considering onboarding a new team into Workfront? Click on the [Workfront Onboarding Process](#) link to learn more. Or if you're ready to begin the process, Complete the [Onboarding Questionnaire](#) to get started today!

This section provides quick links to information and processes to assist new teams that want to use the Workfront tool. Workfront instances provide new users the ability to pilot their use cases in one of our test environments.

Onboarding	Access	Community Groups
Onboarding Questionnaire	Request for User Edit Access	Workfront-Announce
Workfront Onboarding Process	Workfront Help	Workfront-Discuss
Workfront Instances	Check Your Access Level	

Resources

This section will provide you with quick links for commonly asked questions about using Workfront get started with your teams' Portfolio.

Project Management	Reporting	Best Practices
Planner Guide	Report Training and Guidance	Approval Workflows
Project Sharing in Workfront	Reports and Dashboards	Risks & Issues (RAID) Guidance
How to Add a Favorite to Workfront	Supplemental Workfront Training Videos	Workfront Tools Ecosystem
Workfront Project Dates	Managing Buganizer Issues	Workfront Intake Process

- Welcome Dashboard Actions As of Jan 14, 21

Welcome to A

Workfront is a platform used by AR Experiences to provide visibility on project(s) status across various programs. Information in WF is updated weekly. Please refer to the above dashboards for info on upcoming, recently launched & projects at risk.

Top Level Dashboards

Quick links to High Level Dashboards

- [Major Snippets](#)
- [Team Snippets](#)
- [Moments and Key Features](#)
- [Projects at Risk](#)
- [This month's Launches](#)
- [Reviews Calendar](#)

Programs

Programs across AR Experiences - ongoing and completed projects

Other Links

Other links or resources

Trackers Directory

Program tracker links to Trives or WF Dashboard of ongoing projects

Sheet 1

Active Major Projects by Program	Active Team Projects by Program	Completed Project Launch (Past 3 Months)
Export Hide Values Details Summary Chart	Export Hide Values Details Summary Chart	Export Hide Values Details Summary Chart

System Admin Best Practices: Top 5 Tips for Enablement

Tip #3: Create Canned Responses



Teale McCleaf

Thank you for your interest in Workfront! We're excited that your team is considering Workfront for your work management needs.

To help us better understand your team's use case(s) and pain points that you'd like to solve, please complete our [Onboarding Questionnaire](#).

We recommend these resources to assist you in learning and onboarding Workfront.

- [wf-onboarding](#) - Step by step details and recommended best practices for onboarding
- [wf-nwe-training-materials](#) - Information to assist with navigation in Workfront
- [wf-request](#) - To submit requests for Workfront Support
- [wf-contactus](#) - To schedule office hours or a Demo with a Workfront SME

Please let us know if you have any questions and we look forward to chatting with you soon.

Best -
Teale

System Admin Best Practices: Top 5 Tips for Enablement

Tip #4: Create Communication Lanes

Home > WF News

NOTE: To receive real time updates with important information about Workfront, please join the [Workfront Announce Community Group](#)

December 12, 2020

December 2020 PMAT Fireside Chat

The PMAT team conducted their first Workfront Fireside Chat!

If you attended, thank you! We would love to hear your feedback on the session. Please take 2 minutes to [fill out this form](#) and help make future sessions better.

If you couldn't attend, check out the content that was presented below:

- [Deck](#)
- [Recording](#)
- [Dory](#)

If you have further questions, reach out to workfront-discuss@

November 02, 2020

Workfront 20.4 Release

Workfront 20.4 Release is coming soon. Some highlights of this release include:

- Plan work using Work Effort instead of Planned Hours
- Adjust user allocation using percentage values in the Workload Balancer
- Allow Multiple Drafts for a queue topic

Click [here](#) to read all the details about the 20.4 Release. This release will be rolled out the week of 11/9/2020. Workfront downtime may be needed, which will be communicated using the [Workfront Announce Group](#).

Groups

New conversation

My groups

Recent groups

All groups

Favorite groups

Starred conversations

stargate-proto4

Conversations 75

Approved 75

Pending

People

Members

Pending members

Banned users

About

My membership settings

Group settings

System Admin Best Practices: Top 5 Tips for Enablement

Tip #5: Hold Office Hours

Workfront Office Hours

PMAT is providing weekly office hours to provide Workfront Support. Please use the calendar below to schedule a demo, time to talk through challenges you're experiencing or discuss your use case and best practices. Include a short description of the problem to discuss. This will help us to be as prepared as possible during the call.

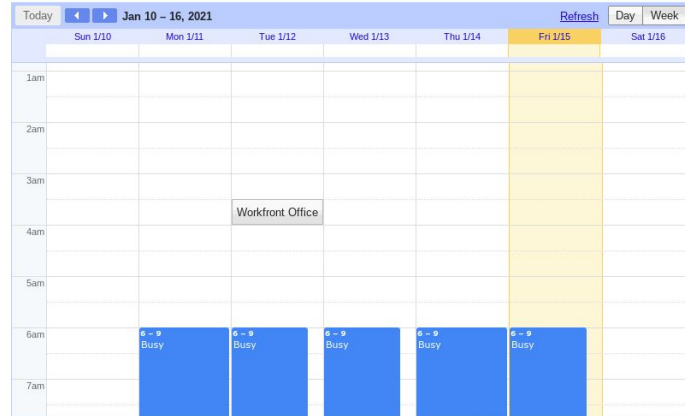
NOTE:

EMEA-friendly time: Every Tuesday, 11am to NOON BST

US-friendly time: Every Tuesday, 9am to 10am PST.



Click on an open appointment slot to sign up. If no slots are available, please try a different time range. To cancel an appointment slot you've already booked, leave this sign-up page and delete the event from your own calendar.



Appointment calendar owner: HCL L1 Support



System Admin Best Practices

Heather Kulbacki

Marketing Systems Specialist



 The world leader in serving science

How We Use Workfront

PROJECT MANAGEMENT

- Scheduling
- Communication & Collaboration
- Task Management

PERFORMANCE MEASUREMENT

- KPI Tracking
- Strategic Alignment Scores
- Data Integrity



workfront®

PORTFOLIO MANAGEMENT

- Project Vetting & Prioritization
- Campaign Planning
- Demand Planning

RESOURCE MANAGEMENT

- Yearly Capacity Planning
- Budget Allocation
- Workload Management

WORKFLOW APPLICATION

- Project Intake
- Routing & Proofing
- Asset Management

FINANCIAL REPORTING

- Time Tracking
- Chargebacks
- Vendor Management

System Admin Best Practices

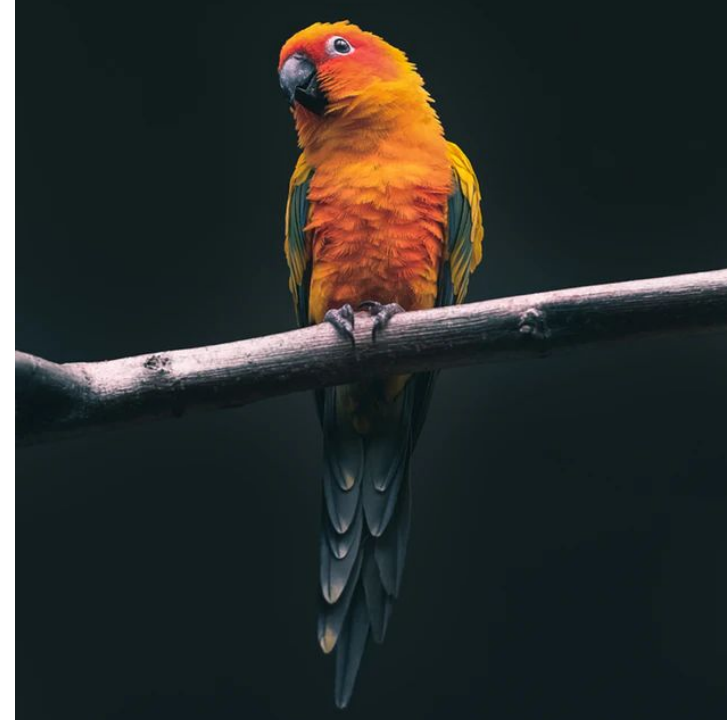
Top 5 Tips for Enablement

- Community digests
- Release notes
 - Review
 - Announcing to teams
- Optimization meetings
- Enhancements our team has asked for
- “Life Hack” – Managing your own work with Workfront



“Birds of a Feather” Group Discussions

- What does onboarding look like at your organization?
- How do you share new processes or updates w/ your users?



PRESENTER



Kasia Osipowicz

Project Manager

Dentsu

I have been working for Dentsu UK&I for over 4 years and have been the main contact for all things Workfront for over last 2 years.

I have become the top 50 certified Sys Admins in December 2020.

When not working, I could be found running up hills with two or four-legged friends.

Dentsu

Dentsu is a global media and digital marketing communications company operating in 145 countries worldwide with around 45,000 employees.

Dentsu champions for Meaningful Progress where innovation and growth are the mission.



How We Use Workfront

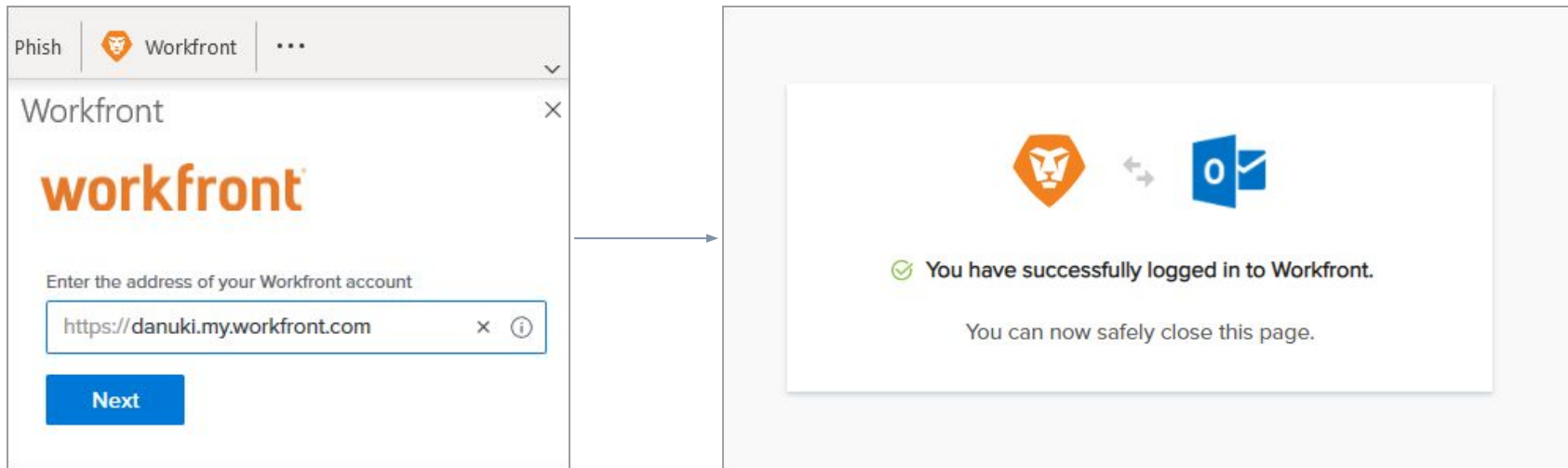
- Collaborate across teams and divisions to get work done
- Streamline and optimise processes (i.e. requests queues)
- Measure and report on progress
- Make more strategic decisions on delivery of work

System Admin Best Practices

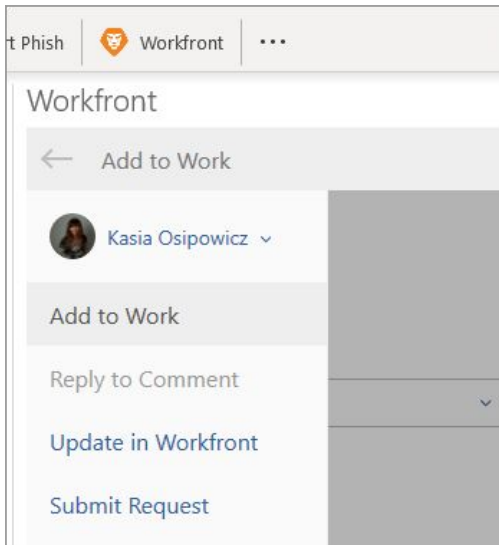
Top 2 Tips for Enablement

1. Workfront Add-in in Microsoft Outlook
2. Event notifications & letting users to choose what notifications they receive

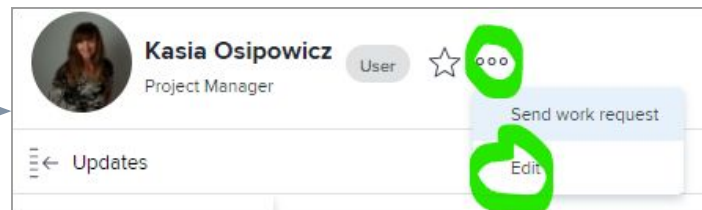
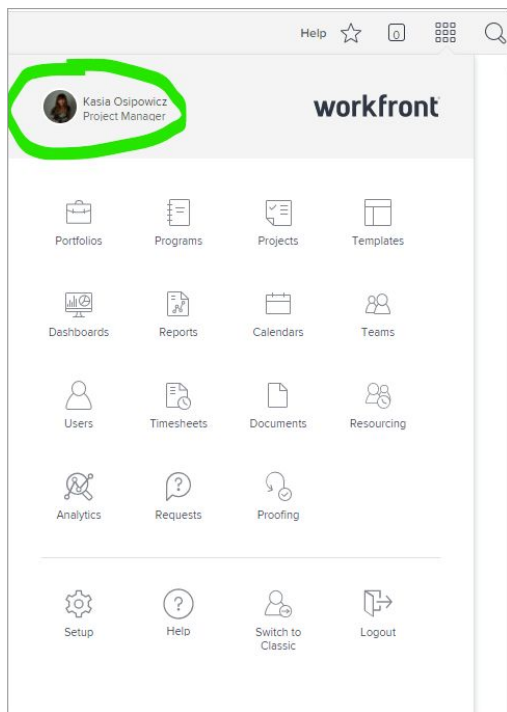
Workfront Add-in in Microsoft Outlook



Workfront Add-in in Microsoft Outlook



Event notifications & letting users to choose what notifications they receive



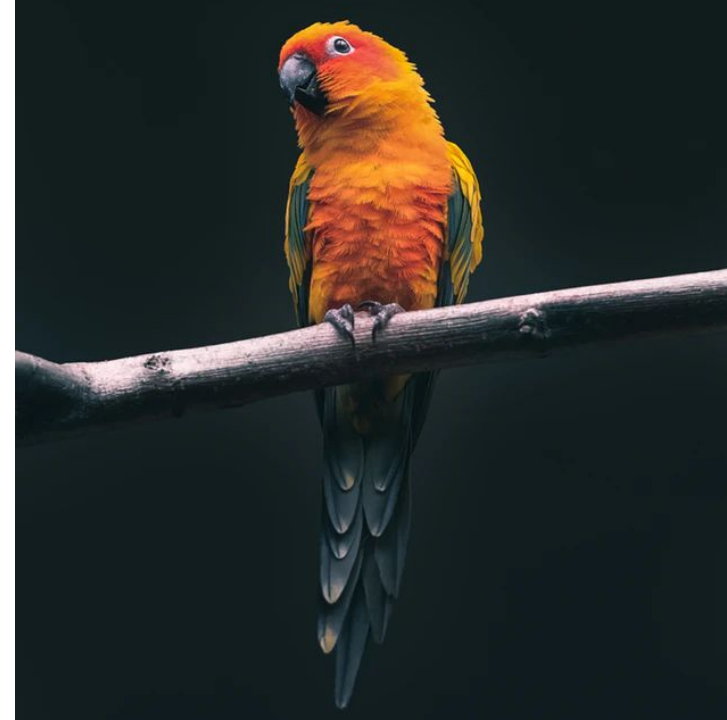
Event notifications & letting users to choose what notifications they receive

The screenshot shows the 'Edit Person' interface with a sidebar on the left containing menu items: Personal Info, Preferences, Notifications, Access, Organization, Resource Planning, Custom Forms, and Comment. The main content area is titled 'Edit Person' and includes a 'Locale' dropdown set to 'English (United Kingdom)'. Below this are several preference checkboxes: 'Show percent complete on update status' (checked), 'Send work I assign to myself to my Working On tab' (checked), and 'Automatically generate proofs when uploading documents' (unchecked). The 'Notifications' section is highlighted with a green circle and contains a table for configuring email notifications. The table has columns for 'Daily' and 'Instant' notifications. The 'Miscellaneous Information (5)' row has the 'Daily' checkbox checked. At the bottom of the page, the 'Save Changes' button is also circled in green.

	Daily	Instant
> Action Needed (16)	<input type="checkbox"/>	<input type="checkbox"/>
> Requests I Have Made (8)	<input type="checkbox"/>	<input type="checkbox"/>
> Communication (8)	<input type="checkbox"/>	<input type="checkbox"/>
> Approval Information (5)	<input type="checkbox"/>	<input type="checkbox"/>
> Information about Work Assigned to Me (7)	<input type="checkbox"/>	<input type="checkbox"/>
> Information about Projects I'm On (2)	<input type="checkbox"/>	<input type="checkbox"/>
> Information about Projects I Own (1)	<input type="checkbox"/>	<input type="checkbox"/>
> Miscellaneous Information (5)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

“Birds of a Feather” Group Discussions

- How do you stay up to date on the latest and greatest developments at Workfront?
- Where do you struggle?





Wrap-up and Next Steps

Continue the Conversation on Workfront One

- Collaborate with others in a similar industry or department
- Harness the power of your peers to crowdsource inspiration and solutions
- Learn about upcoming events

workfront ONE

Search... [Search](#)

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

Welcome Workfront Customers and Partners!
Explore the tabs below to: check out our featured content to help you do your best work, find what's popular with other users, read the latest news, and find out what this site is all about.

Featured Popular News About

Take advantage of Virtual Leap
More than 75 sessions available to help you do your best work with Workfront.
[Register today](#)

The new Workfront experience
Now that the new Workfront experience is out of beta, see the resources we have to help you transition.
[Learn more](#)

Join the Community
Ask questions, share knowledge, make connections on the Workfront One Community.
[See the latest discussions](#)

Network with Workfront Users
We have 8 special edition Leap User groups for you to learn and connect with other Workfront users the week following Virtual Leap.
[See all 8 topics](#)

Community Discussions

Question Poll

What would you like to know? [Ask](#)

Sort by:
Latest Posts

For the Love of Pets
Workboldy - Kristin Farwell - June 8, 2020 at 7:50 AM

Product updates

What's new in Workfront
[2020.2 release overview](#) (new in Production)
[2020.3 release overview](#) (new in Preview)

What's new in Workfront Library
[Workfront Library release activity](#)

Discover the new features in the new experience

Upcoming Virtual User Groups

one.workfront.com/events

- Jan 19: System Admin Best Practices - Enablement
- Feb 2: Transitioning to the New Workfront Experience
- Feb 9: Advanced: Integrations and Process Automation

Coming soon!

- *TBD: Marketing & Creative Agencies: Workfront Proof*
- *TBD: Resource Management*
- *TBD: System Admin Best Practices: Training & Onboarding Users*



Thank you.

