

# Virtual User Group: Reporting & Dashboards

Tuesday, March 16, 2021

Today's Host



# Meredith Bohlen

Sr. Customer Success Manager  
Workfront

# Agenda

- 11:00 a.m. Welcome and Agenda (5 min)
- 11:05 a.m. Customer Spotlight: JPMorgan Chase (20 min)  
*Jordan Emery, VP Marketing, Presentations and Proposals*
- 11:25 a.m. Group Discussion (20 min)
- 11:45 a.m. Customer Spotlight: Spark44 (20 min)  
*Marc Fletcher, Programme Director, Marketing Technologies*  
*Rohan Patel, Applications Specialist*
- 12:05 p.m. Group Discussion (20 min)
- 12:25 p.m. Wrap-up Next Steps (5 min)
- 12:30 p.m. Event Ends



Speaker



## Jordan Emery

Vice President, Marketing  
J.P. Morgan

# Dashboard considerations

What's your goal of the dashboard?

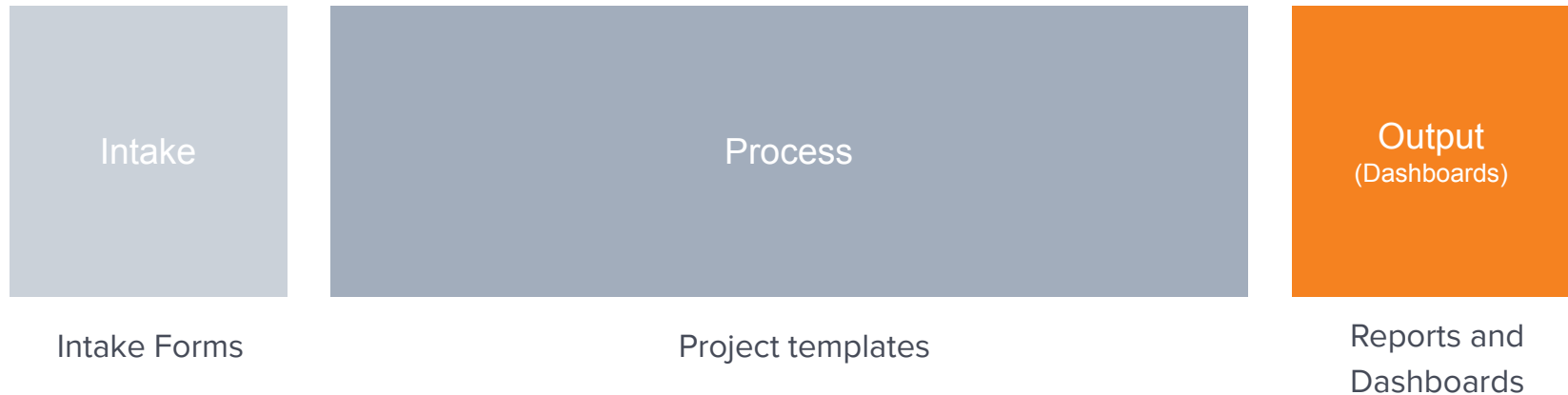
Why are you trying to achieve with each data point?

Have you filtered out the data noise?

Clear goal data points vs discovery data points.



# Level setting on a typical process



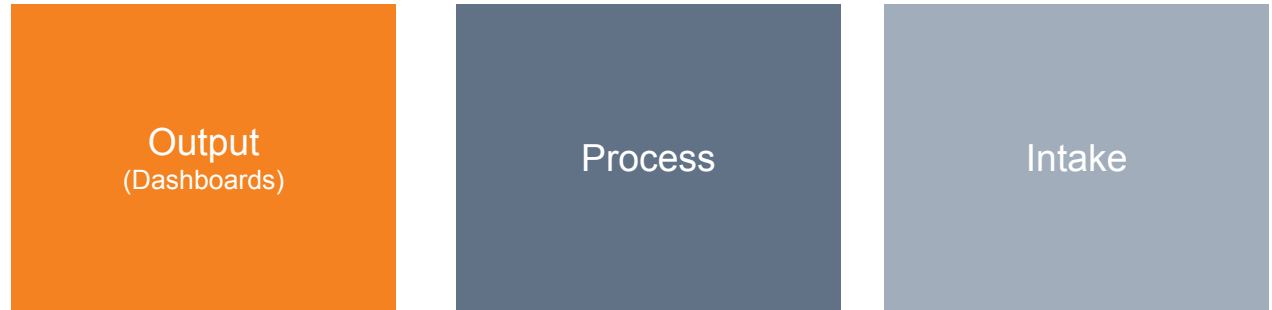
Dashboards can be helpful across the entire process depending on what you're trying to achieve

# Process development

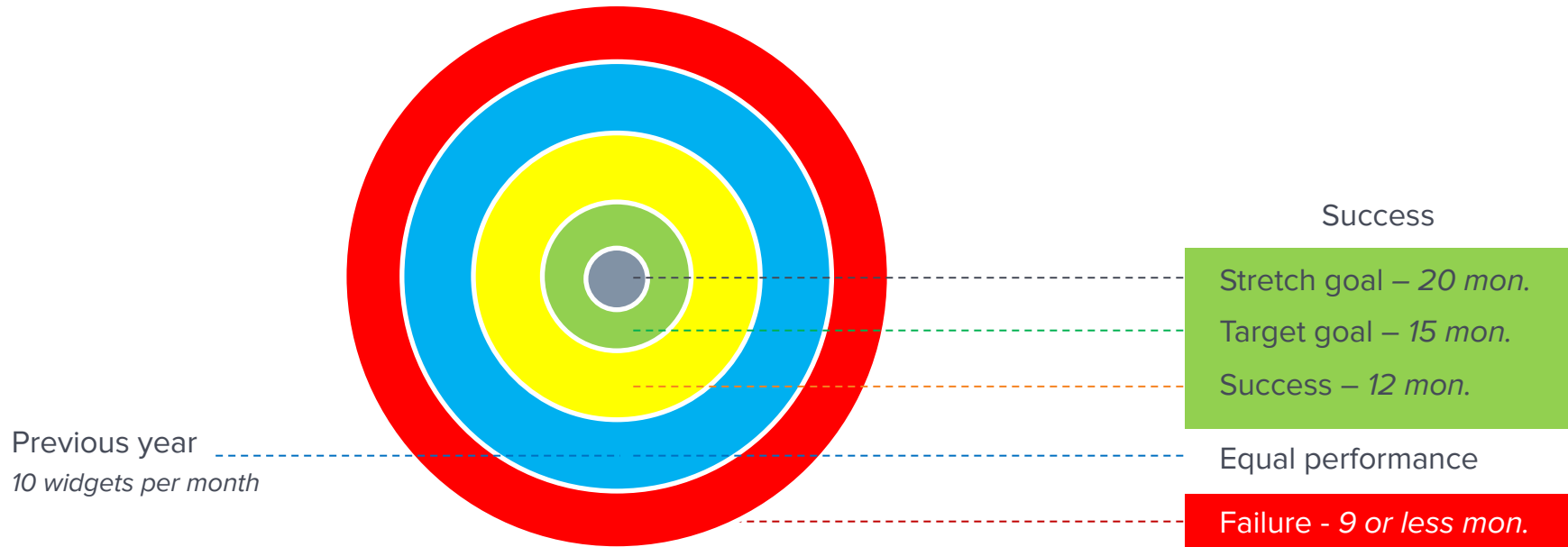
## Typical approach



## Metric-drive approach



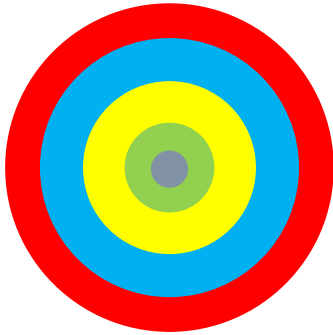
# Defining success for each business goal



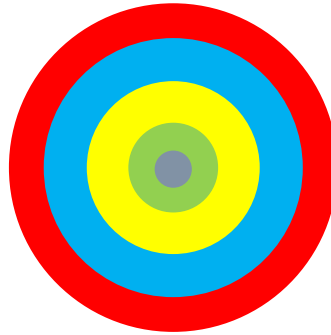


# Dashboard with meaning

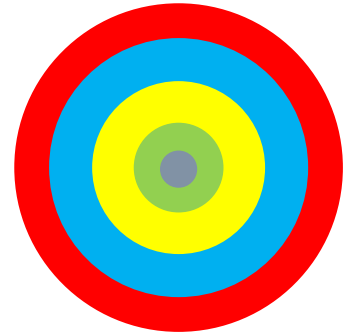
Completion time



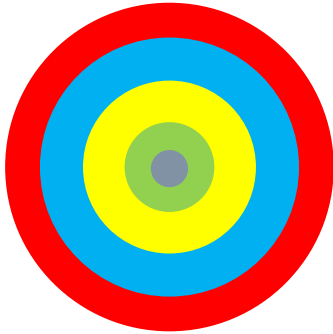
Total Monthly Completions



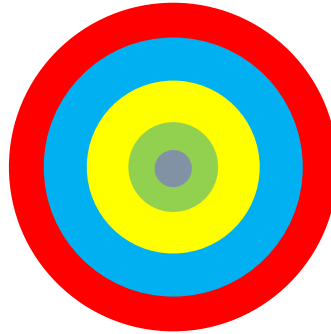
Total completions by person



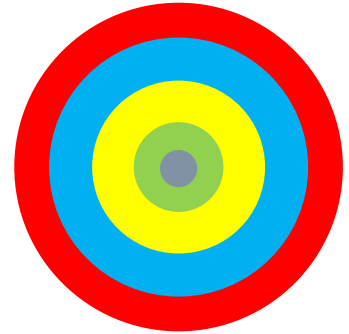
Discrepancies



Customer satisfaction

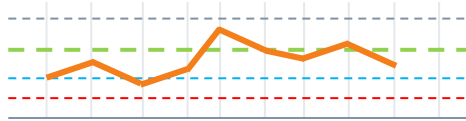


Customer Surveys

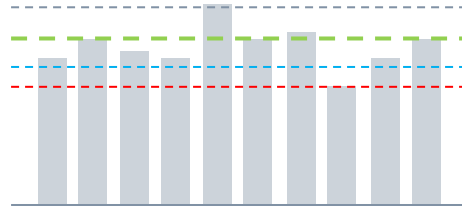


# Dashboard with meaning

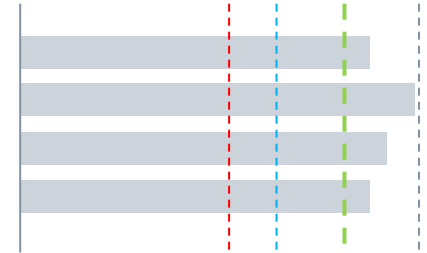
Completion time



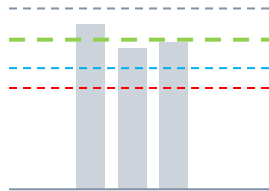
Total Monthly Completions



Total completions by person



Discrepancies



Customer satisfaction

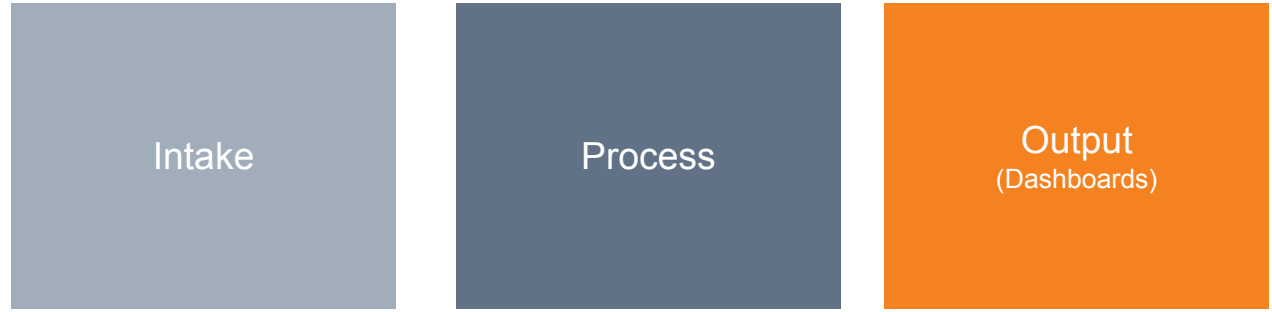


Customer Surveys

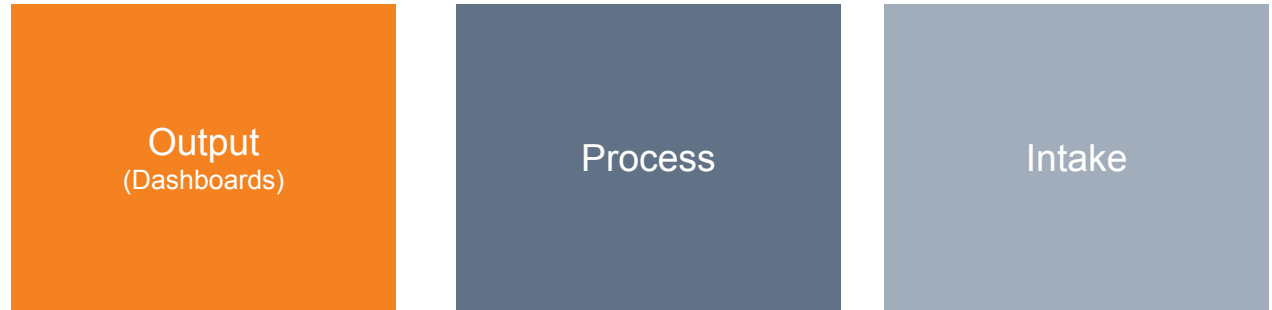


# Process development

## Typical approach



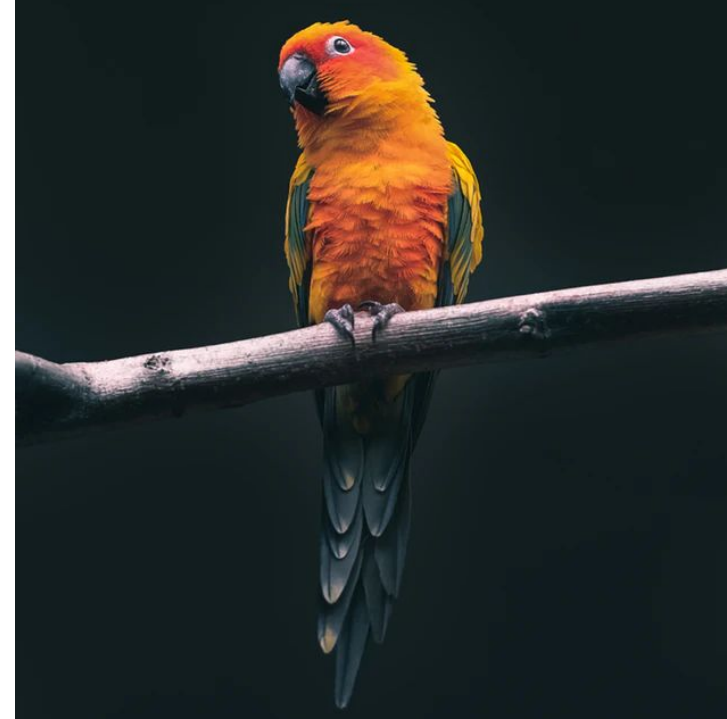
## Metric-drive approach



# “Birds of a Feather” Group Discussions

Go around the room and share:

- What advice would you give someone creating a new set of reports or dashboards?
- How do you get users to use the reports you have created vs. asking ad hoc information?





# SPARK44

Be bold. Be brave. Be  
honest

# SPARK44



**MARC FLETCHER**  
PROGRAMME DIRECTOR - MARKETING TECHNOLOGIES



**ROHAN PATEL**  
APPLICATIONS SPECIALIST

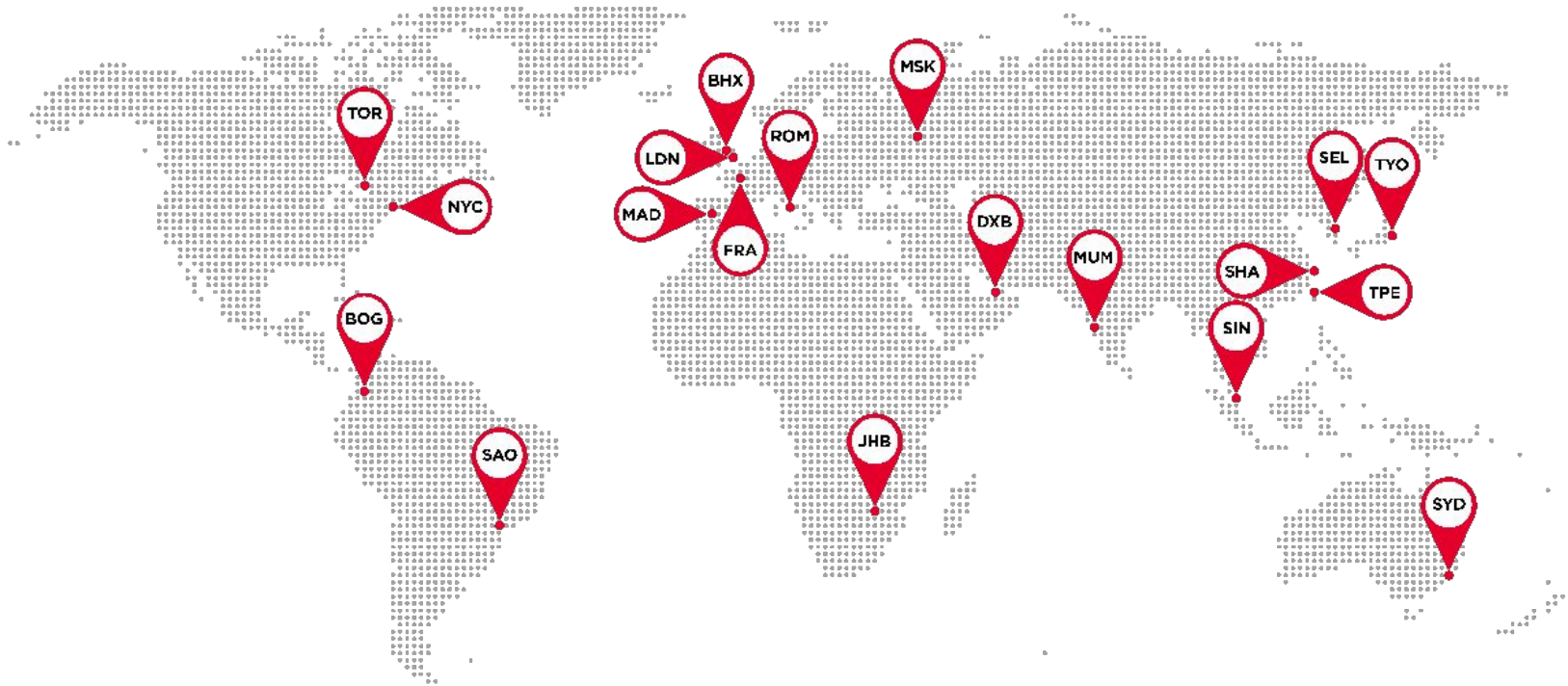
## WHO IS SPARK44

- Advertising/Marketing Agency launched in 2011 as joint venture with Jaguar/Land Rover to handle the global marketing of the JLR products and the brand.
- Clients also include, Master and Dynamic, Harley Davidson, BP Fuels and Castrol Oils, TATA Communications
- Multi award winning agency:
  - Campaign Tech Awards 2020 : Best use of Tech in CRM
  - DMA Triple Award winner 2019 for Jaguar & Land Rover campaigns
  - Winner 2019 EFFIE US Awards – Range Rover Campaign



# GLOBAL AGENCY

## 19 OFFICES / 17 COUNTRIES





workfront<sup>®</sup>

Customer January 2020



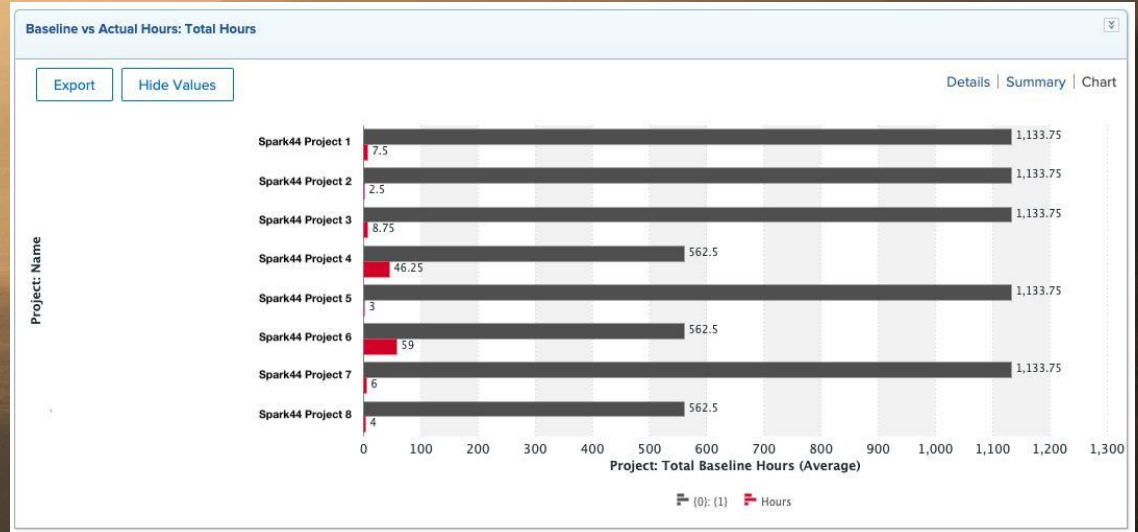
Launched May 2020

# REPORTING & DASHBOARDS

MEETING OUR AGENCY NEEDS

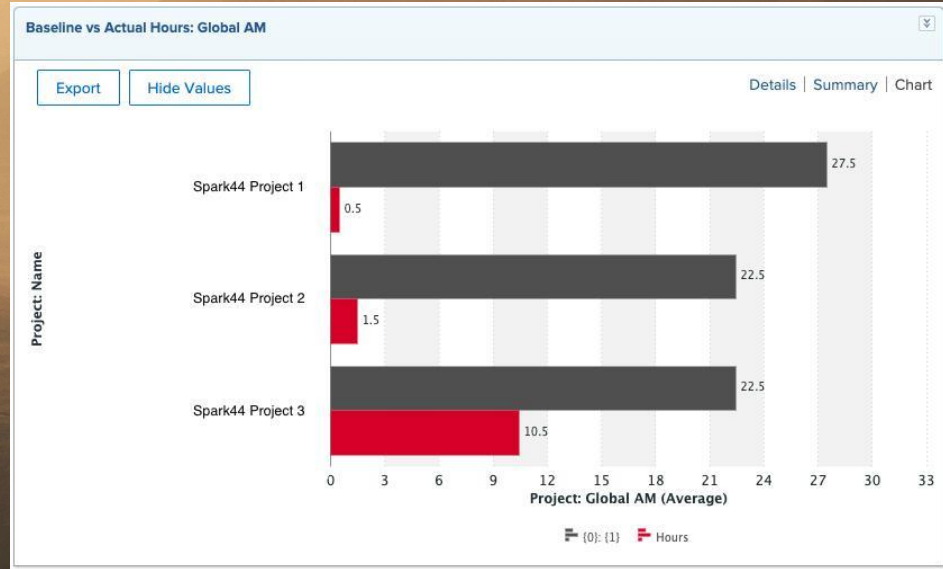
## BASELINE HOURS BY PROJECT

**Baseline Hours** report provides visibility on number of **actual hours** logged vs **hours agreed** (baseline) in the scope of work.



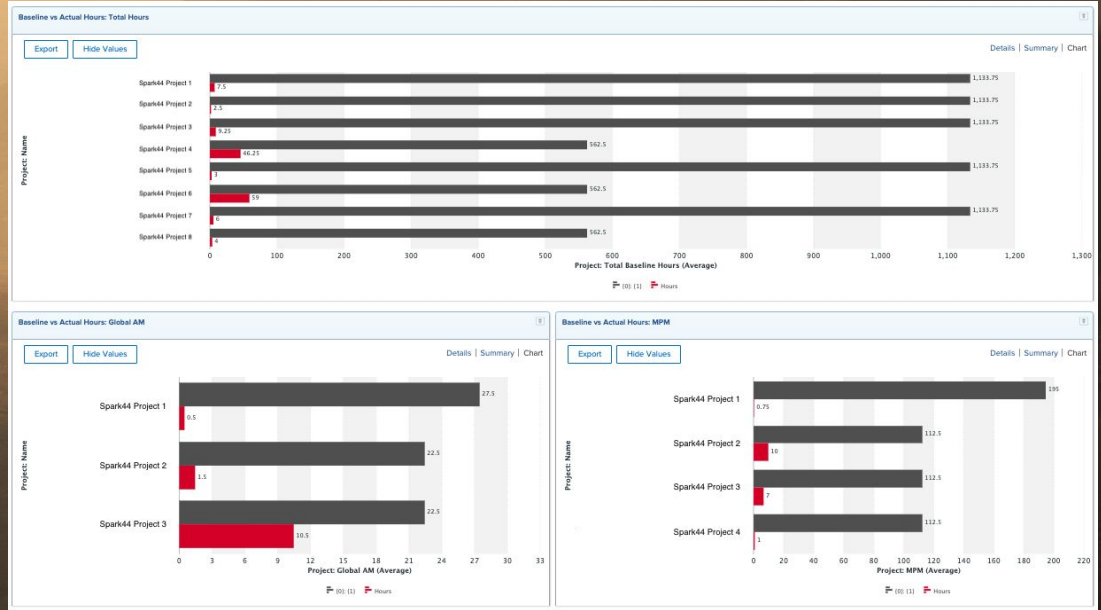
## BASELINE HOURS BY JOB ROLE

**Baseline Hours** by role provides visibility on number of **actual hours** logged vs **hours agreed** ( **baseline** ) **allocated within the scope of work** to a **specific role** or **group of roles**.



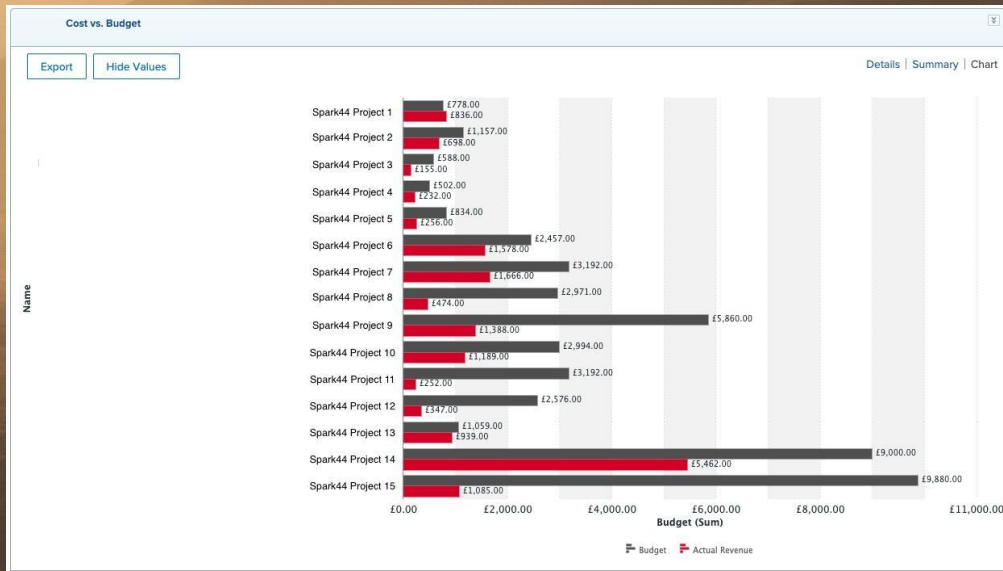
# BASELINE HOURS DASHBOARD

**Baseline Hours** dashboard provides an accurate **real-time overview** of the **actual hours** by **project** and by **user role group** (combined roles).



## COST VS BUDGET BY PROJECT

**Cost vs Budget** report provides visibility on the **actual cost** - by hours logged /rate cards - vs **agreed budget**.



## ASSET TRACKING – IMAGE RETOUCHING

Utilising a **pie chart** report  
**Producers** are able to **easily**  
and **visually** understand **where**  
**asset** are in the workflow cycle  
in **real time**.



## BASELINE HOURS BY JOB ROLE

Using a **matrix report** studio resource managers have advanced visibility of total planned weekly effort required by their team **by project**.

BHM Studio : Weekly Planned Hours Per Month

Export ▾ Details | Matrix

Project: Name	Planned Start Date					Total
	28 Feb, 2021	07 Mar, 2021	14 Mar, 2021	21 Mar, 2021	28 Mar, 2021	
Spark44 Project 1	-	-	-	-	15 Hours	15 Hours
Spark44 Project 2	1.5 Hours	-	-	3.5 Hours	16.5 Hours	21.5 Hours
Spark44 Project 3	1 Hour	-	21.5 Hours	67 Hours	-	89.5 Hours
Spark44 Project 4	1 Hour	-	51.5 Hours	55.5 Hours	15.5 Hours	123.5 Hours
Spark44 Project 5	0 Hour	12 Hours	4 Hours	12 Hours	17.5 Hours	45.5 Hours
Spark44 Project 6	2 Hours	1.5 Hours	0.5 Hour	66 Hours	50 Hours	120 Hours
Spark44 Project 7	-	4 Hours	2 Hours	2 Hours	12 Hours	20 Hours
Spark44 Project 8	-	-	-	-	2 Hours	2 Hours
Total	5.5 Hours	17.5 Hours	79.5 Hours	206 Hours	128.5 Hours	437 Hours



# THINKING OUTSIDE OF THE BOX



## THE BRIEF

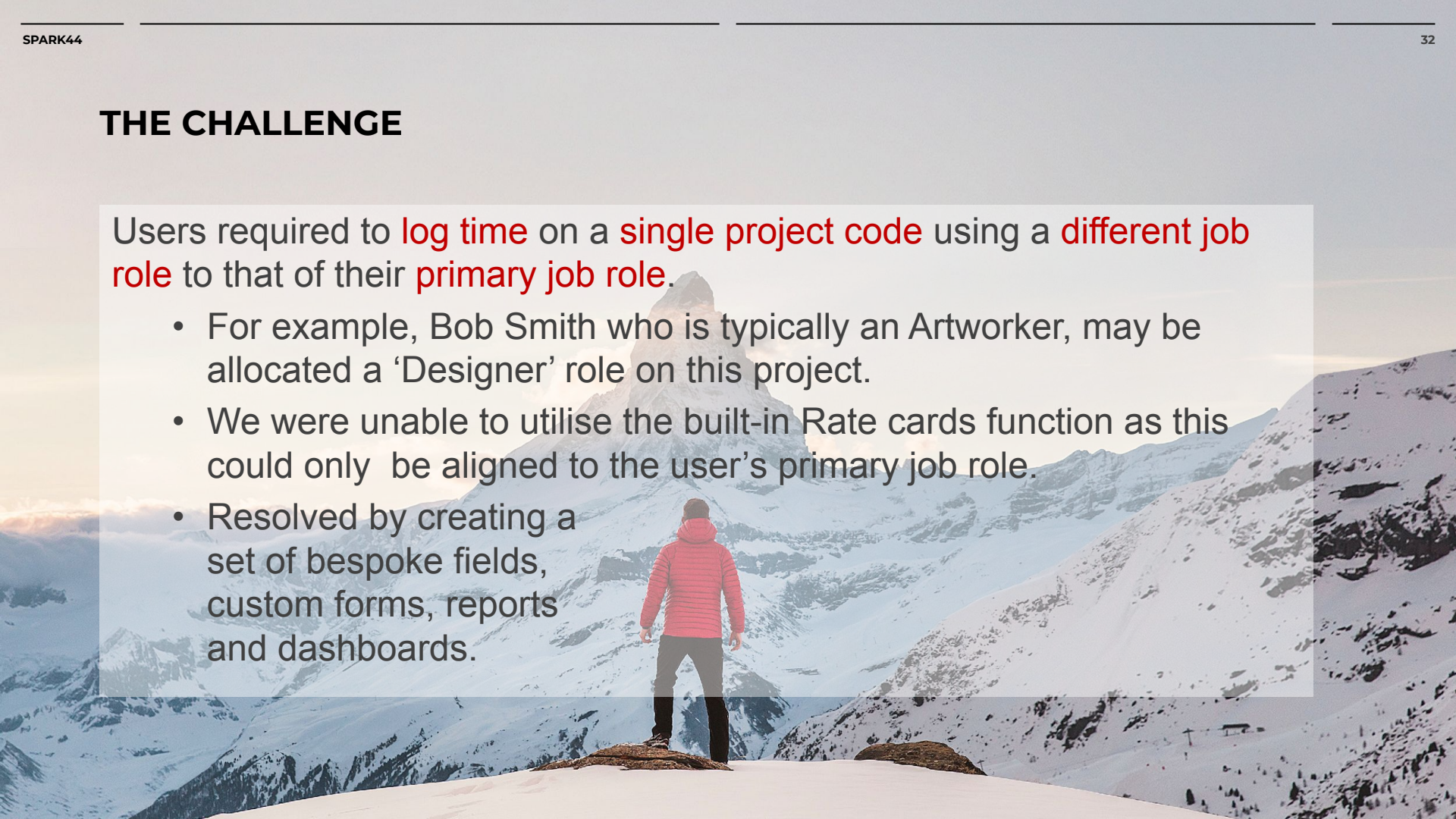
- Due to the global impact of COVID pandemic, 60 new FTC hires recruited to deliver on our 22MY projects.
- Required to track time to a single Job Code.
- Fixed budget for each job role.
- Different budgets for each quarter.
- Each role has a different hourly rate.
- Visibility of Cost vs Actual against each budget per quarter.



## THE CHALLENGE

Users required to **log time** on a **single project code** using a **different job role** to that of their **primary job role**.

- For example, Bob Smith who is typically an Artworker, may be allocated a 'Designer' role on this project.
- We were unable to utilise the built-in Rate cards function as this could only be aligned to the user's primary job role.
- Resolved by creating a set of bespoke fields, custom forms, reports and dashboards.



## THE CONFIG – BUDGETS

- Created a project custom form on which the **budget** for **each role per quarter** could be **defined**.
- This was made up of currency free **text fields** so a value could be defined against each budget.
  - These were broken down by:
    - Total duration
    - Q3 (Oct – Dec 2020)
    - Q4 (Jan – Mar 2021)
    - Q1 (Apr – Jun 2021)

### Budgeted Hours Across Whole Projects Duration

22MY | Budgeted Hours | Art Director Role

GBP

22MY | Budgeted Hours |

GBP

22MY | Budgeted Hours | Configurator Executive Team Lead Role

GBP

22MY | Budgeted Hours |

GBP

22MY | Budgeted Hours | Designer Role

GBP

22MY | Budgeted Hours |

GBP

22MY | Budgeted Hours | Market Project Manager Role

GBP

22MY | Budgeted Hours |

GBP

### Budgeted Hours for Q3 2020 | Oct - Dec

22MY | Budgeted Hours | Art Director Role | Q3 2020

GBP

22MY | Budgeted Hours | Accou

GBP

22MY | Budgeted Hours | Configurator Executive Team Lead Role L...

GBP

22MY | Budgeted Hours | Conte

GBP

22MY | Budgeted Hours | Designer Role | Q3 2020

GBP

22MY | Budgeted Hours | Global

GBP

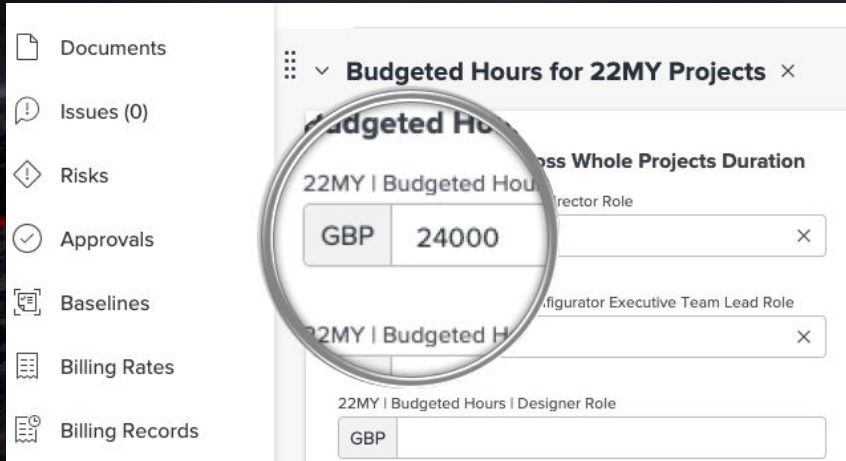
22MY | Budgeted Hours | Market Project Manager Role | Q3 2020

GBP

22MY | Budgeted Hours | Assoc

GBP

## THE CONFIG – BUDGETS



Documents

Issues (0)

Risks

Approvals

Baselines

Billing Rates

Billing Records

**Budgeted Hours for 22MY Projects** ×

**Budgeted Hours** **Cross Whole Projects Duration**

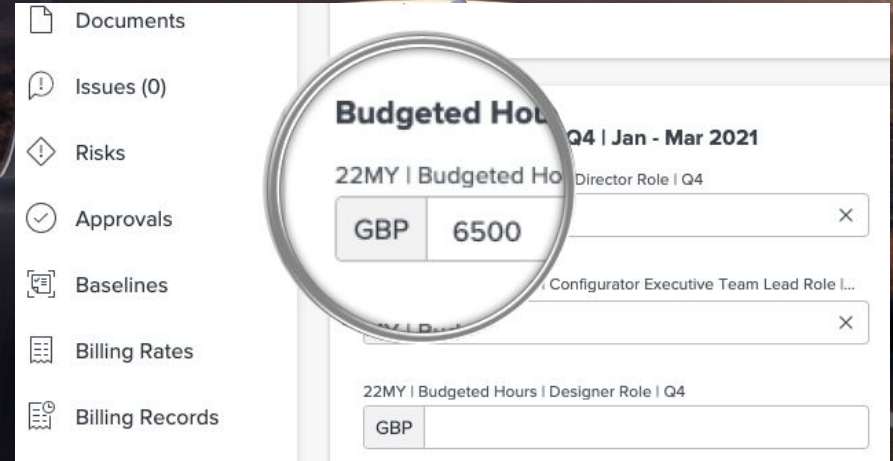
22MY | Budgeted Hours | Director Role

GBP 24000 ×

22MY | Budgeted Hours | Configurator Executive Team Lead Role ×

22MY | Budgeted Hours | Designer Role

GBP ×



Documents

Issues (0)

Risks

Approvals

Baselines

Billing Rates

Billing Records

**Budgeted Hours** **Q4 | Jan - Mar 2021**

22MY | Budgeted Hours | Director Role | Q4

GBP 6500 ×

22MY | Budgeted Hours | Configurator Executive Team Lead Role | Q4 ×

22MY | Budgeted Hours | Designer Role | Q4

GBP ×

The custom form **allows project specific budgets** to be applied by **both quarterly and total**.

## THE CONFIG – RATE CARDS

Using a separate task based custom form the **hourly rate** for each **job role** can be **defined**.

<input type="checkbox"/>	# ↑	Name	RateForTask
<input type="checkbox"/>	1	1 - OOH Global Project Manager	£34
<input type="checkbox"/>	2	2 - OOH Product Manager	£26
<input checked="" type="checkbox"/>	3	3 - OOH Market Project Manager	30
<input type="checkbox"/>	4	4 - OOH Market QA	
<input type="checkbox"/>	5	5 - OOH Config Exec	
<input type="checkbox"/>	6	6 - OOH Senior DX Content Editor	
<input type="checkbox"/>	7	7 - OOH Senior DX Content QA	

# THE CONFIG - RATE CARDS

Configure field Share field

### Task Rate Card

**Label (Required) ?**  
Actual Hours

**Name (Required) ?**  
ActualHours

Instructions

Format  
Number

**Additional settings**

Calculation  
DIV(Actual Hours,60)

Actual Hours ?  
12345

Configure field Share field

### Task Rate Card

**Label (Required) ?**  
Actual Cost

**Name (Required) ?**  
ActualCost

Instructions  
Rate for Task x Actual Hours

Format  
Currency

**Additional settings**

Calculation  
PROD(RateForTask,ActualHours)

Rate for Task ?

Actual Hours ?

Actual Cost ?  
12345

Using calculated expressions the total cost for each role can be calculated by **multiplying** the **hourly rate** by the **actual hours** logged.

## THE CONFIG – HOURLY RATE

### Rate for Task

Currency free text field to enter the Hourly Rate for a Job Role.

### Task Rate Card

Rate for Task ⓘ

£40.00

Actual Hours ⓘ

15

Actual Cost ⓘ

£600.00

### Actual Hours

Number calculated field to take the default Actual Hours field (which shows time in minutes) and divide it by 60 to show the amount in hours.

*$DIV(Actual\ Hours, 60)$*

### Actual Cost

Currency calculated field to multiply the Hourly Rate (Rate for Task) by the Actual Hours in hours.

*$PROD(RateForTask, ActualHours)$*



# THE CONFIG – REPORTS

The report provides a **summary** detailing **each user**, the amount of **time** they **logged** against the **job role** and the **cost** incurred.

## Owner

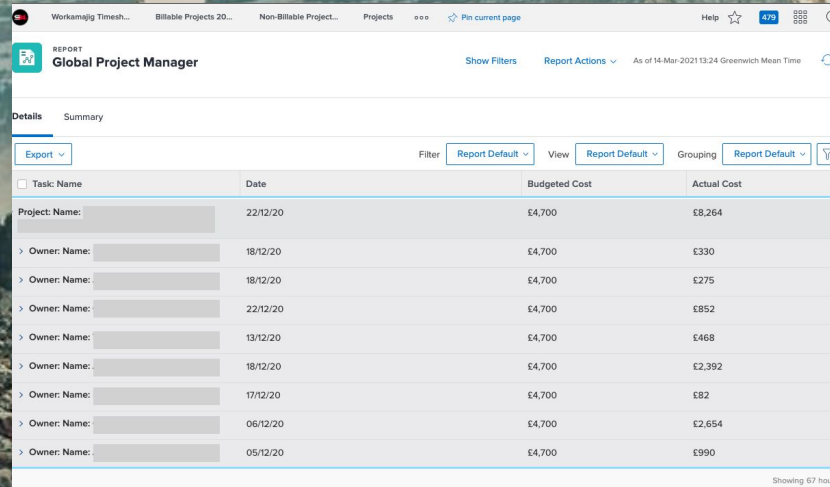
The name of the user that logged the time.

## Date

When the time was logged.

## Budgeted Cost

The currency value taken from the Budget Custom Form shown on the previous slide.



The screenshot shows a report titled "Global Project Manager" with a table of task details. The table has columns for "Task Name", "Date", "Budgeted Cost", and "Actual Cost". The data is as follows:

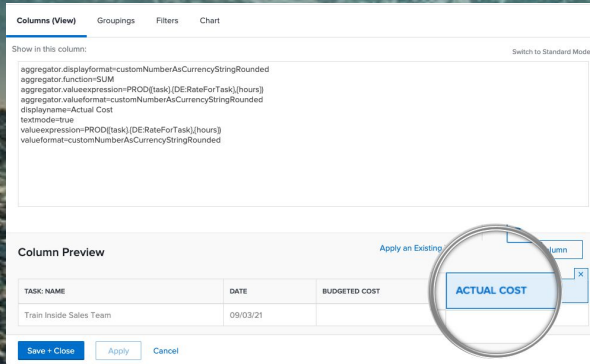
Task Name	Date	Budgeted Cost	Actual Cost
Project Name:	22/12/20	£4,700	£8,264
> Owner Name:	18/12/20	£4,700	£330
> Owner Name:	18/12/20	£4,700	£275
> Owner Name:	22/12/20	£4,700	£852
> Owner Name:	13/12/20	£4,700	£468
> Owner Name:	18/12/20	£4,700	£2,392
> Owner Name:	17/12/20	£4,700	£82
> Owner Name:	06/12/20	£4,700	£2,654
> Owner Name:	05/12/20	£4,700	£990

## Actual Cost

As the Actual Cost value we used in the Rate for Task Custom Form is a calculated field, it cannot be added to a column in a report.

## THE CONFIG – REPORTS

Applying **text mode** to the **Actual Costs** column on the report, the correct calculations can be determined and presented.



The screenshot shows a configuration window for a report column. The 'Columns (View)' tab is active. The configuration for the 'Actual Cost' column is as follows:

```
aggregator.displayformat=customNumberAsCurrencyStringRounded
aggregator.function=SUM
aggregator.valueexpression=PROD({task}.[DE:RateForTask],[hours])
aggregator.valueformat=customNumberAsCurrencyStringRounded
displayname=Actual Cost
textmode=true
valueexpression=PROD({task}.[DE:RateForTask],[hours])
valueformat=customNumberAsCurrencyStringRounded
```

Below the configuration is a 'Column Preview' section with a table:

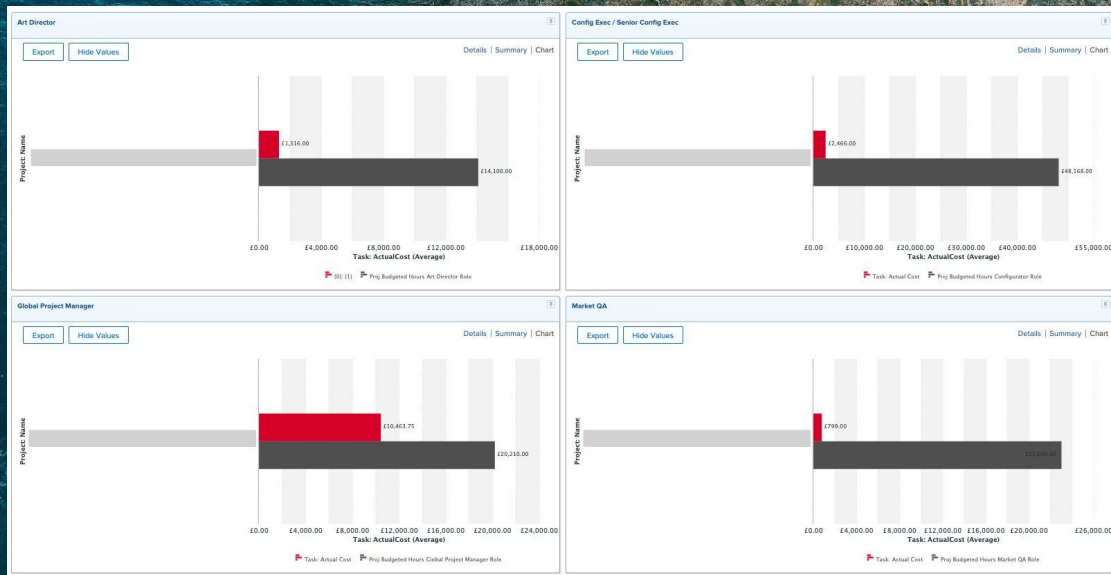
TASK: NAME	DATE	BUDGETED COST	ACTUAL COST
Train Inside Sales Team	09/03/21		

The 'ACTUAL COST' column header is circled in red. At the bottom of the window are buttons for 'Save < Close', 'Apply', and 'Cancel'.

```
aggregator.displayformat=customNumberAsCurrencyStringRounded
aggregator.function=SUM
aggregator.valueexpression=PROD({task}.[DE:RateForTask],[hours])
aggregator.valueformat=customNumberAsCurrencyStringRounded
displayname=Actual Cost
textmode=true
valueexpression=PROD({task}.[DE:RateForTask],[hours])
valueformat=customNumberAsCurrencyStringRounded
```

# DASHBOARDS

Using **custom dashboards** to combine the individual reports, a clear summary of the project performance by quarter is achieved.



# DASHBOARDS

**Chart view** provides overview of the entire budget vs entire actual cost



# DASHBOARDS

The **Report Details** provides an overview of how much time each user has logged against the job role and how much cost has incurred.

Details Summary Chart							
Export ▾		Filter	Report Default ▾	View	Report Default ▾	Grouping	Report Default ▾
<input type="checkbox"/> Task: Name	Date	⋮	Actual Hours	Hourly Rate	Total Cost	Project: Budgeted Hours Art Director Role	Total Cost
Project: Name: WMJ: JGLR-CC0021-OOS3588	04/03/21		52		2444	£	£
Project: Budgeted Hours Art Director Role: 14100 (23)	04/03/21		52		2444	£	£
Owner: Name: [REDACTED]	22/12/20		8		376	£14,100	£1,316.00
<input type="checkbox"/> 8 - OOH Art Director	21/12/20		2	£47	94	£14,100	£1,316.00
<input type="checkbox"/> 8 - OOH Art Director	22/12/20		2	£47	94	£14,100	£1,316.00
<input type="checkbox"/> 8 - OOH Art Director	15/12/20		2	£47	94	£14,100	£1,316.00
<input type="checkbox"/> 8 - OOH Art Director	14/12/20		2	£47	94	£14,100	£1,316.00
Owner: [REDACTED]	17/12/20		4		188	£14,100	£1,316.00
<input type="checkbox"/> 8 - OOH Art Director	15/12/20		2	£47	94	£14,100	£1,316.00

Showing 23 hours

---

**THANK  
YOU**

---



## 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

The screenshot shows the Workfront ONE website homepage. At the top, there is a search bar and a navigation menu with links for Home, Getting Started, Resources, New Workfront Experience, Collaboration, Events, Support, My Experience, and Call Customer Support: 844-306-4357. The main content area features a welcome message and a large image of a group of people in a meeting. Below this, there are four featured cards: 'Take advantage of Virtual Leap', 'The new Workfront experience', 'Join the Community', and 'Network with Workfront Users'. Each card includes a brief description and a call-to-action button. At the bottom, there is a 'Community Discussions' section with a form to ask a question or poll, and a 'Product updates' section listing recent releases.



# Upcoming Virtual User Groups

[one.workfront.com/events](https://one.workfront.com/events)

- Mar 30: Governance in Financial Services
- Apr 13: Creative Agencies & Marketing: Workfront Proof
- Apr 20: Transitioning to the New Workfront Experience

*Coming soon!*

- *Roles & Responsibilities: Group Admins and System Admins*
- *System Admin Best Practices: Training & Onboarding Users*
- *Resource Management*
- *Request and Intake Queues*





**CALL FOR  
VOLUNTEERS!**

## Workfront User Groups are successful because of customers like you!

Would you be interested to share your experience with one of the following topics? You don't have to be an expert!

- Roles & Responsibilities
- Training New Users
- Resource Management
- Before / After
- Change Management
- Implementation Dos and Don'ts
- Unique Use Case
- Other

**Thank you.**

