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Virtual User Group:
Reporting & Dashboards

Tuesday, March 16, 2021

Adobe

Today's Host

Meredith Bohen

Sr. Customer Success Manager

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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

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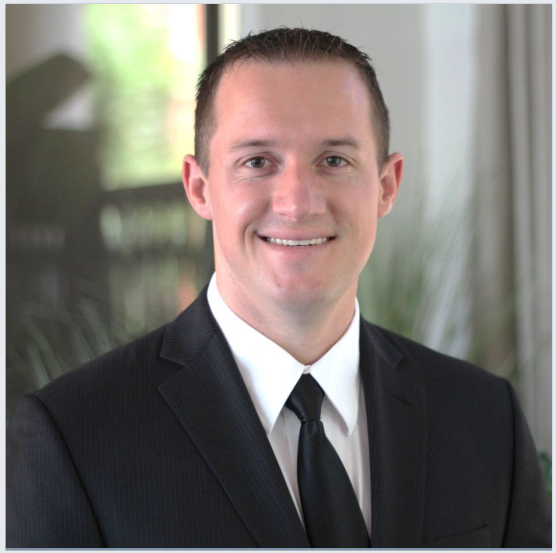
Speaker



Jordan Emery

Vice President, Marketing

J.P. Morgan

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

Intake Forms

Project templates

Reports and Dashboards

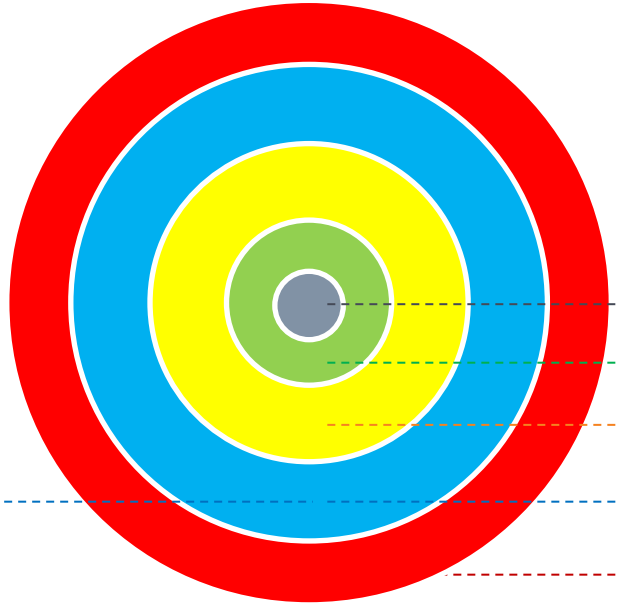
Dashboards can be helpful across the entire process depending on what you're trying to achieve

Process development

Typical approach

Metric-drive approach

Defining success for each business goal



Success

Stretch goal – *20 mon.*

Target goal – *15 mon.*

Success – *12 mon.*

Previous year

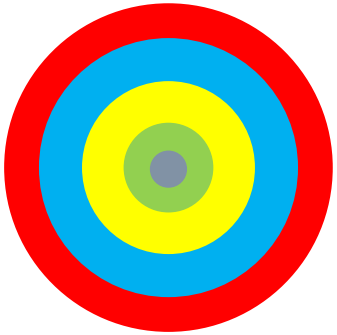
10 widgets per month

Equal performance

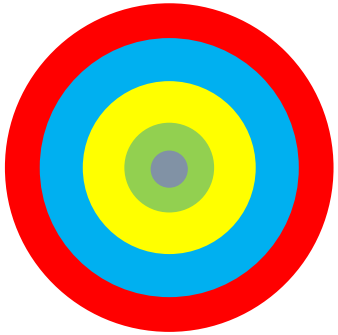
Failure - *9 or less mon.*

Dashboard with meaning

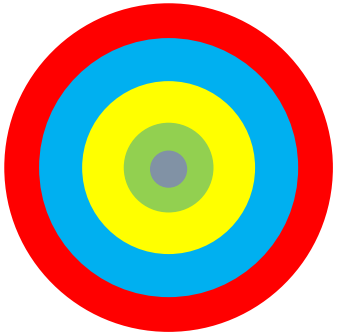
Completion time



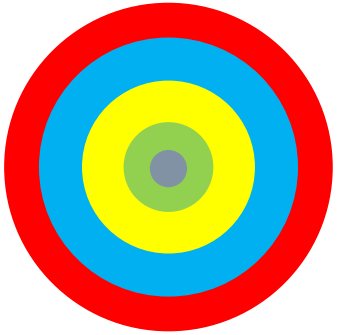
Total Monthly Completions



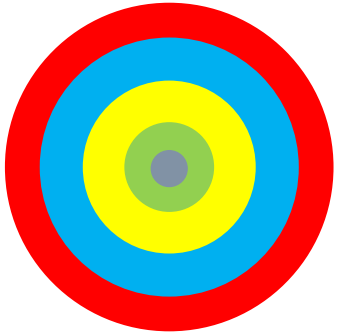
Total completions by person



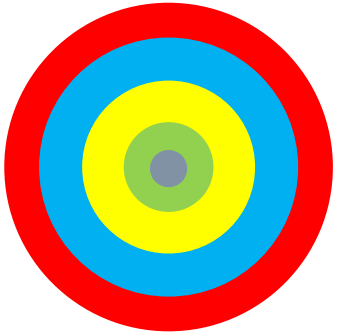
Discrepancies



Customer satisfaction

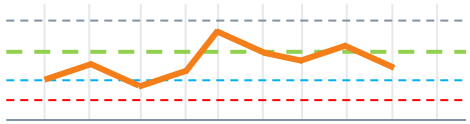


Customer Surveys

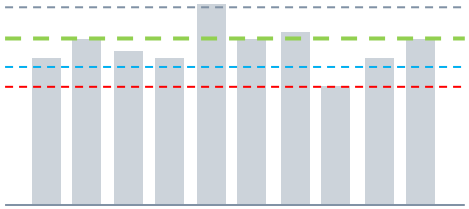


Dashboard with meaning

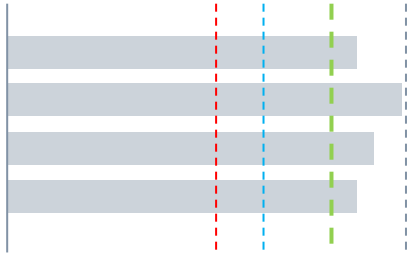
Completion time



Total Monthly Completions



Total completions by person



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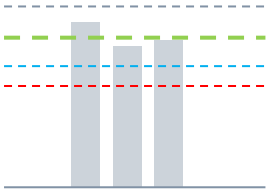
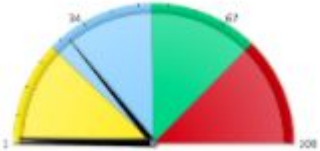


Customer satisfaction



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 of dashboards?
- How do you get users to use the reports you have created vs. asking ad hoc information?

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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

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Customer January 2020

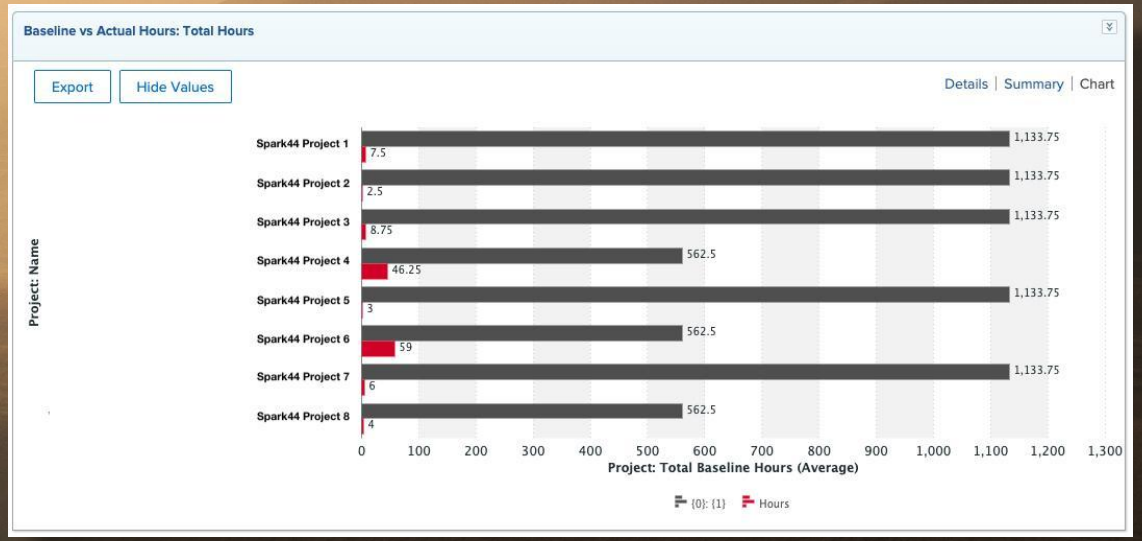
Launched May 2020

REPORTING & DASHBOARDS

MEETING OUR AGENCY NEEDS

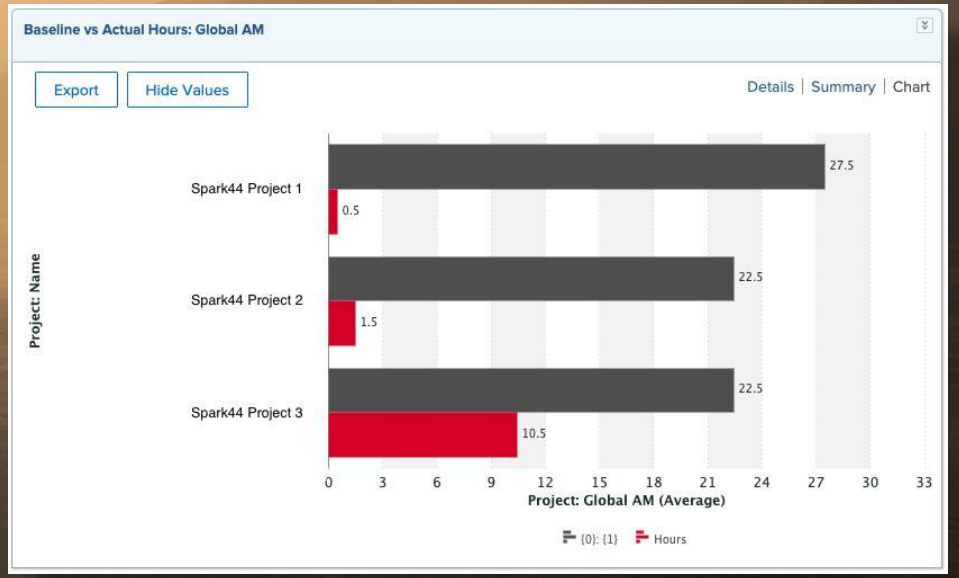
BASELINE HOURS BY PROJECT

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



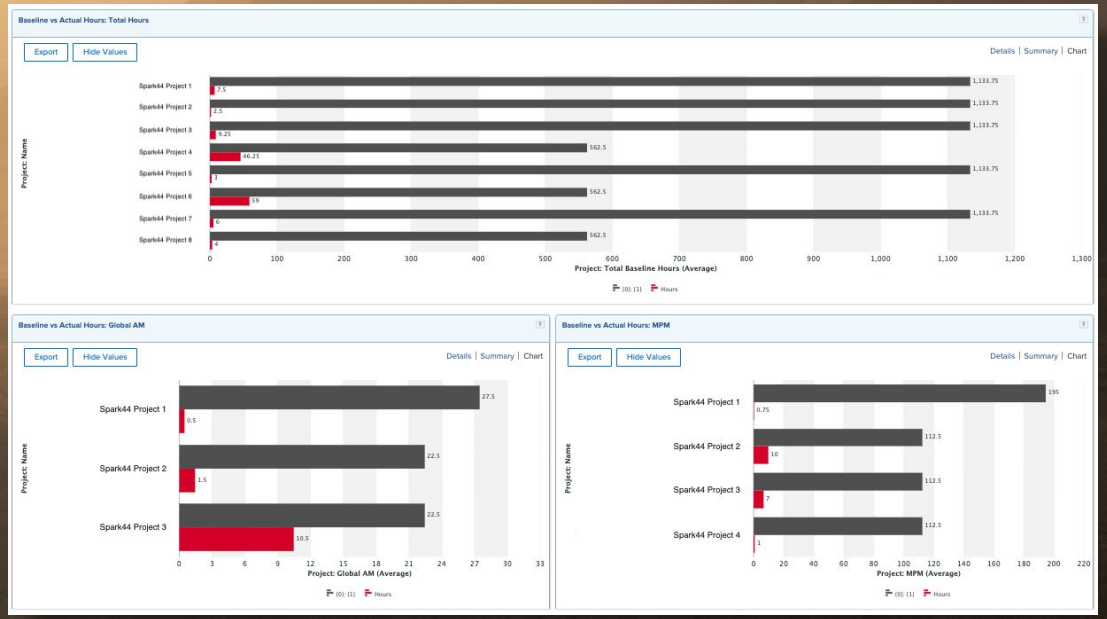
BASELINE HOURS BY JOB ROLE

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.



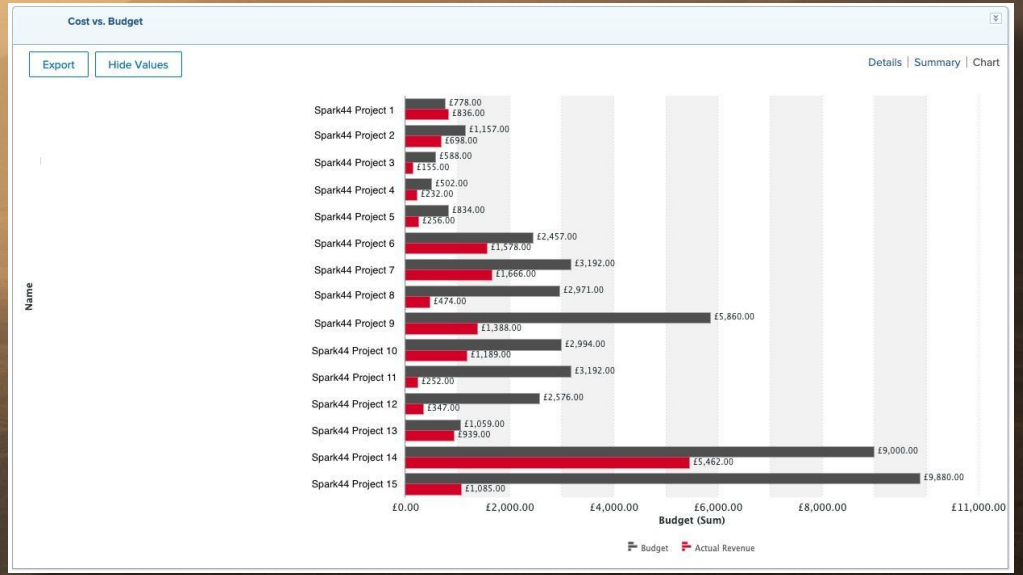
BASELINE HOURS DASHBOARD

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



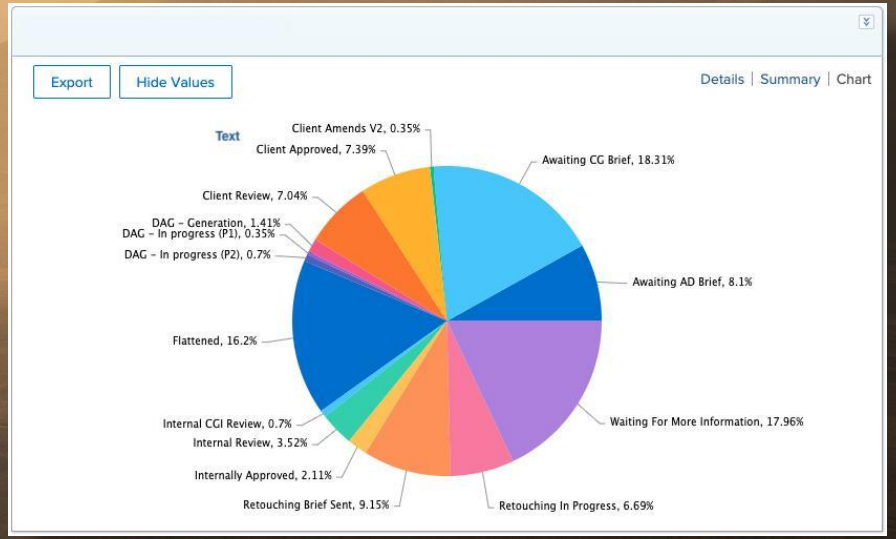
COST VS BUDGET BY PROJECT

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

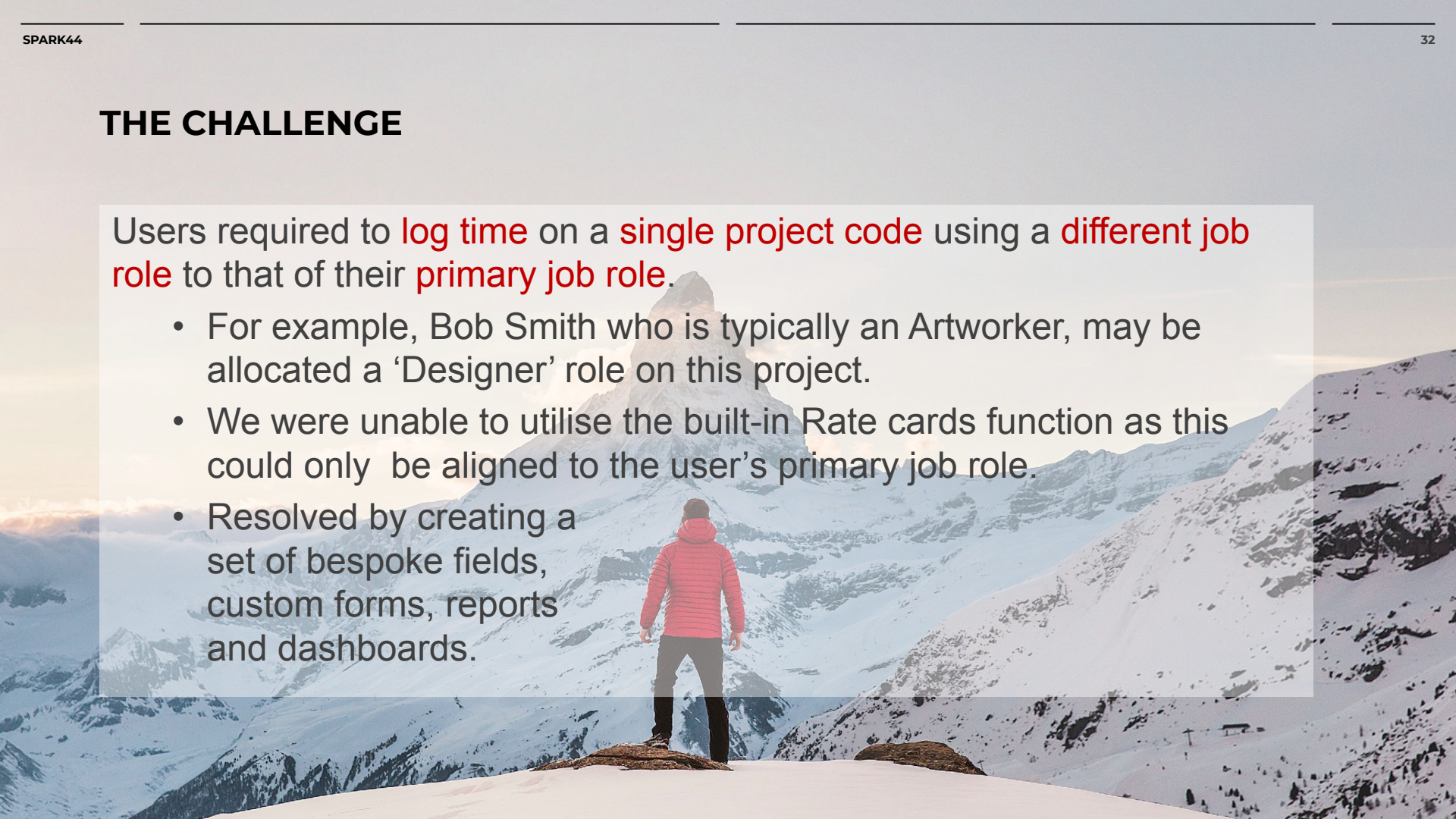
THE BRIEF

- 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

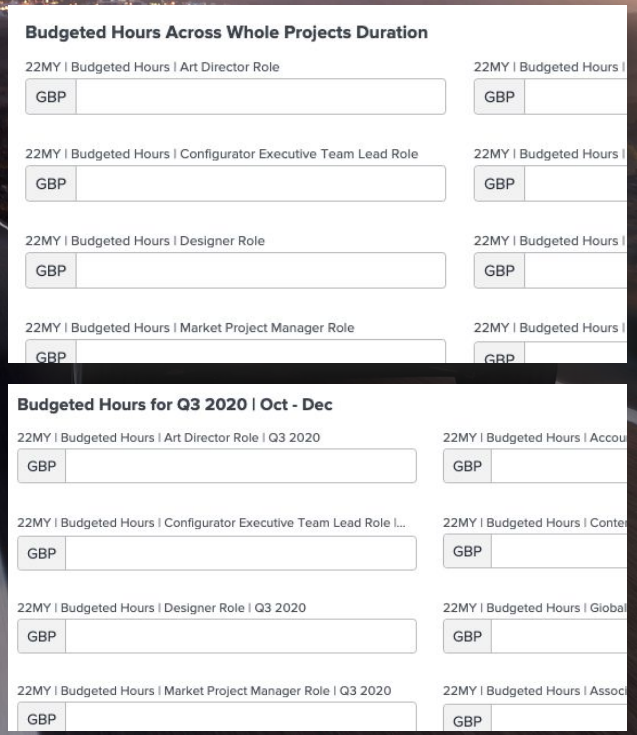
Users required to log time on a single project code using a different job role to that of their primary job role.

- 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.

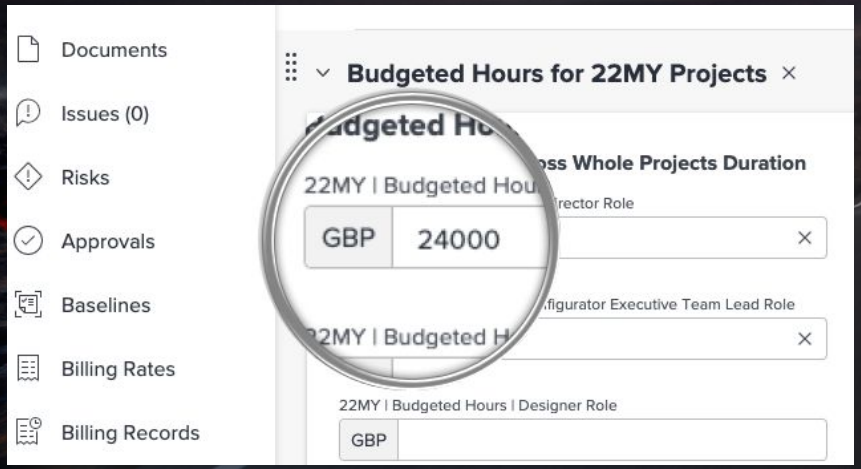


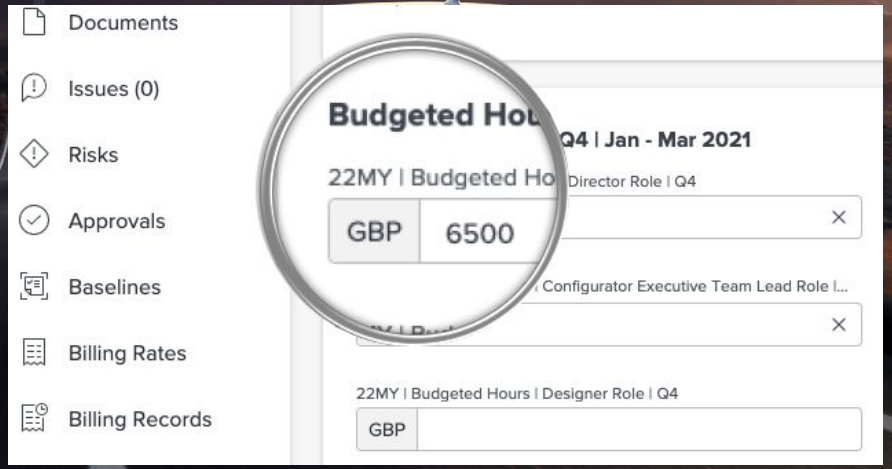
THE CONFIG – BUDGETS

- 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)



THE CONFIG – BUDGETS

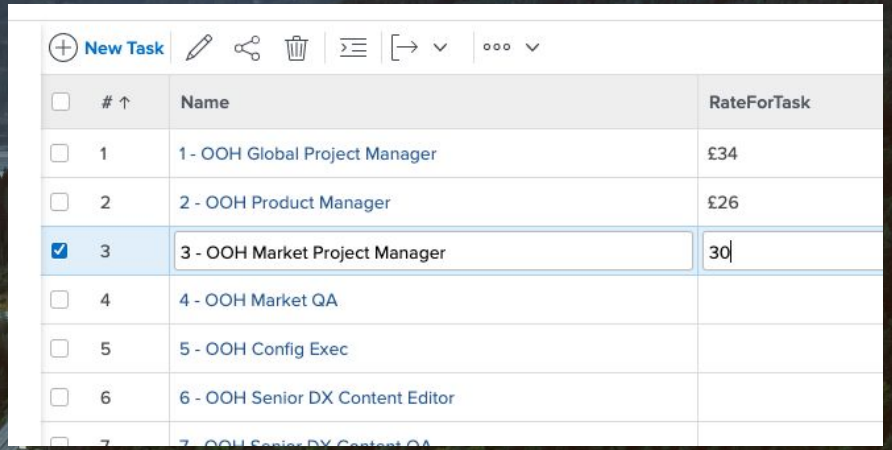




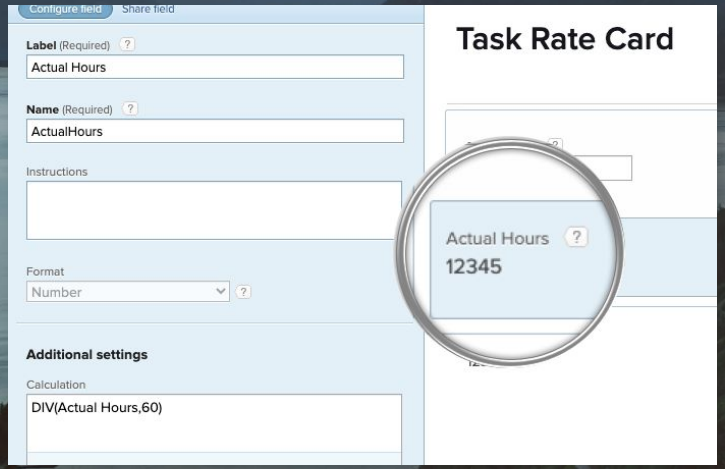
The custom form allows project specific budgets to be applied by both quarterly and total.

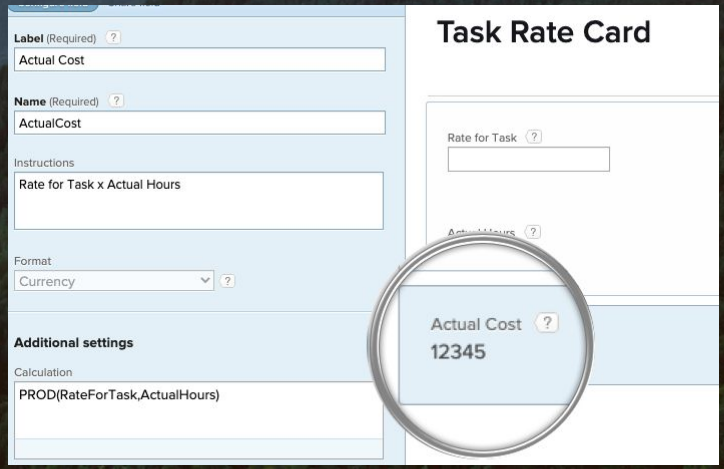
THE CONFIG – RATE CARDS

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



THE CONFIG – RATE CARDS

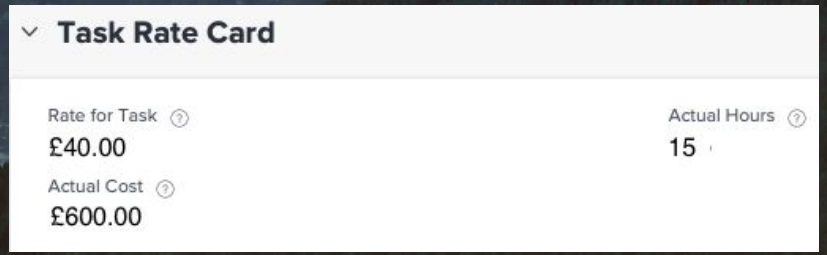




Using calculated expressions the total cost for each role can be calculated by multiplying the hourly rate by the actual hours logged.

THE CONFIG – HOURLY RATE

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



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)

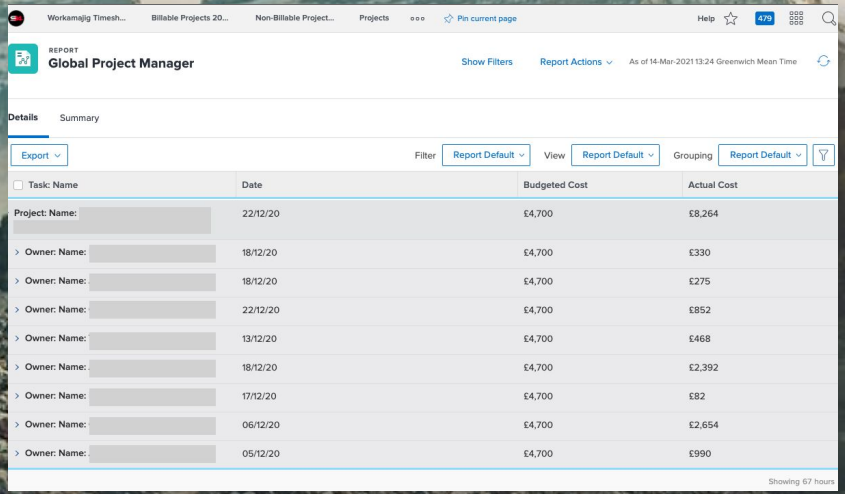
THE CONFIG – REPORTS

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.

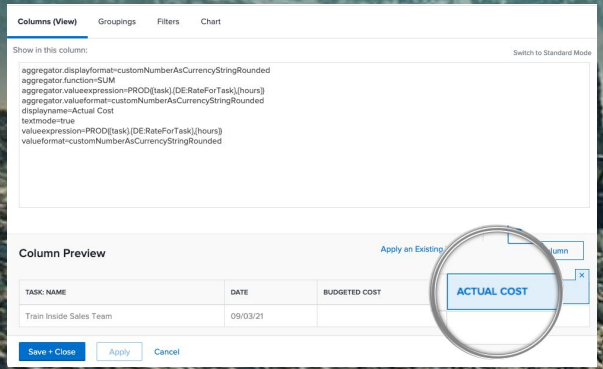
Budgeted Cost
The currency value taken from the Budget Custom Form shown on the previous slide.



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

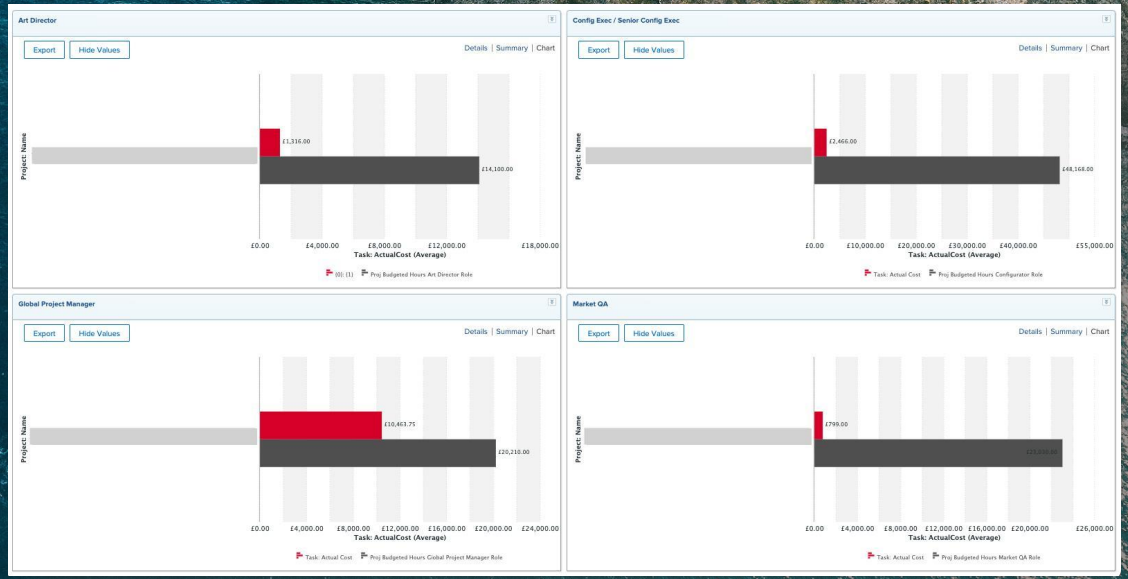
Applying text mode to the Actual Costs column on the report, the correct calculations can be determined and presented.




```
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.

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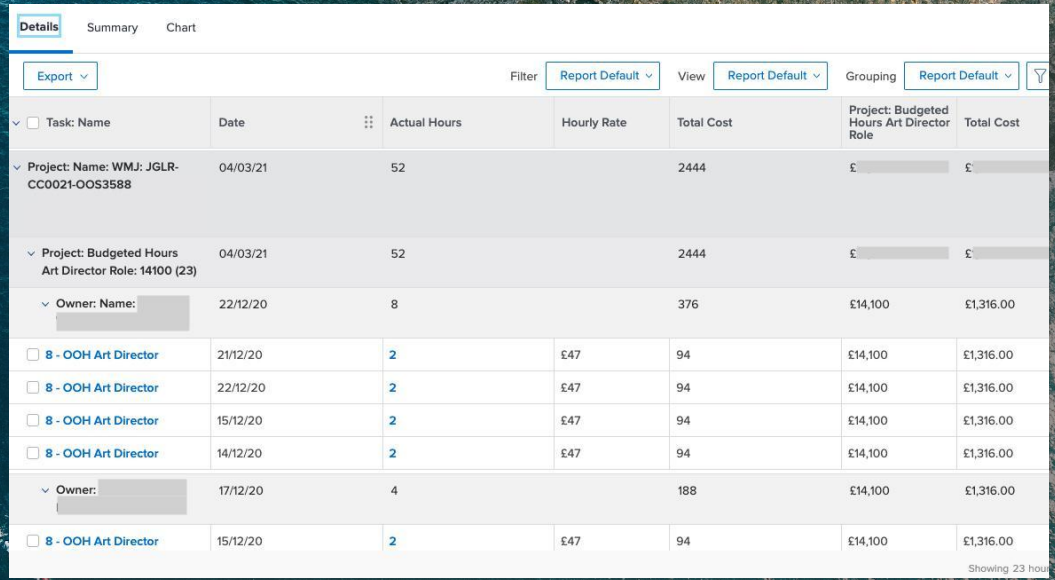

Details | Summary | Chart

Export | Filter: Report Default | View: Report Default | Grouping: Report Default

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:	22/12/20	8		376	£14,100	£1,316.00
8 - OOH Art Director	21/12/20	2	£47	94	£14,100	£1,316.00
8 - OOH Art Director	22/12/20	2	£47	94	£14,100	£1,316.00
8 - OOH Art Director	15/12/20	2	£47	94	£14,100	£1,316.00
8 - OOH Art Director	14/12/20	2	£47	94	£14,100	£1,316.00
Owner:	17/12/20	4		188	£14,100	£1,316.00
8 - OOH Art Director	15/12/20	2	£47	94	£14,100	£1,316.00

Showing 23 hou

THANK YOU

Wrap-up and Next Steps

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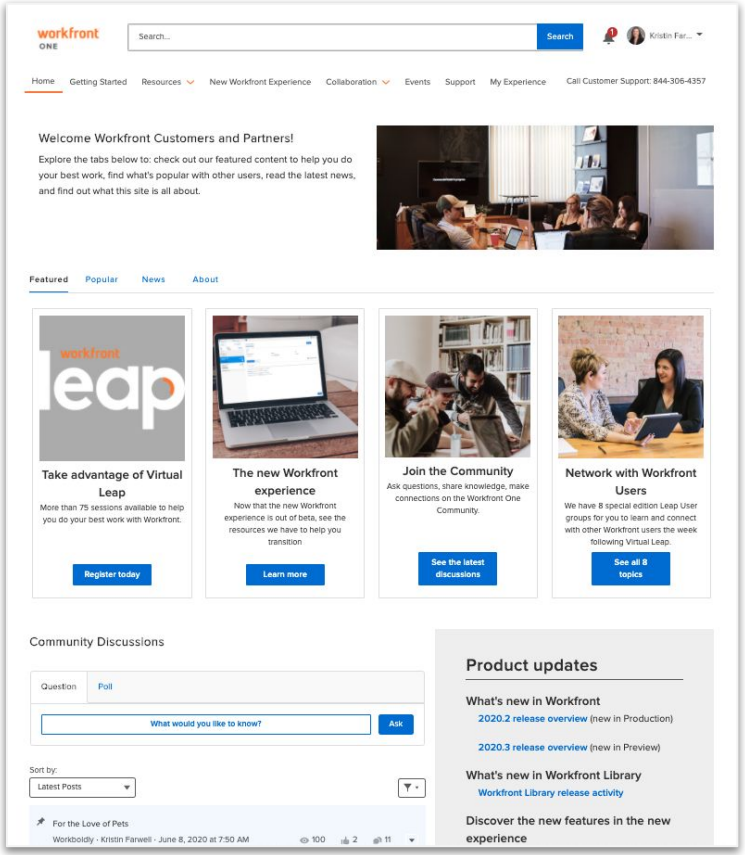
Continue the Conversation on Workfront One

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



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Upcoming Virtual User Groups

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*

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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

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Thank you.

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