workfront

Virtual User Group:
API & Integrations for Advanced Workfront Users

Tuesday, July 28, 2020

Today's Host

Heather Foeh

Sr. Director, Customer Success

Workfront

workfront

Ask the Expert: API 101

Wednesday, July 29

8 AM PT / 4 PM GMT

60 minutes

one.workfront.com/events

We will walk through the basics and share examples of how others are using the API and Workfront Fusion to achieve new efficiencies in enterprise work management.

Agenda

11:00 a.m.	Welcome and Agenda
11:10 a.m.	Leveraging the API for Integrated Business Reporting *Erich Giltinan, Navy Federal Credit Union*
11:40 a.m.	Group Discussion
12:25 p.m.	Wrap-up Next Steps
12:30 p.m.	Event Ends

workfront

workfront™

ADVANCED USER GROUP

JUL 28, 2020

NAVY FEDERAL Credit Union

ARMY
MARINE CORPS
NAVY
AIR FORCE
COAST GUARD
FAMILY

INTRODUCTION

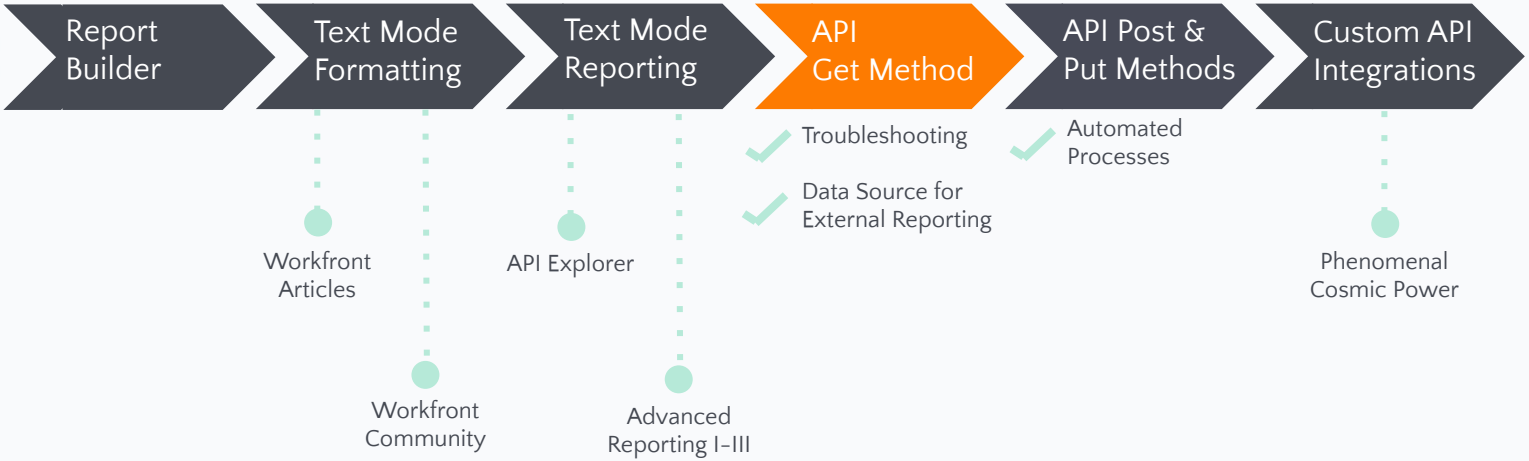
- WHY
  - Learning New Skills
  - Problem/Puzzle Solving
  - Servant Leadership
  - Dad Life
- HOW
  - I prioritize work that ‘gives back’ time
  - I strive to provide insights that are both accessible and actionable
- WHAT
  - Workfront System Admin
  - BS in Mathematics
  - Use data to monitor and develop reporting for project impacts

ERICH GILTINAN

AGENDA

1. My Workfront Learning Roadmap
2. Interacting with the API
3. Leveraging ‘GET’
4. What Next?

MY LEARNING ROADMAP



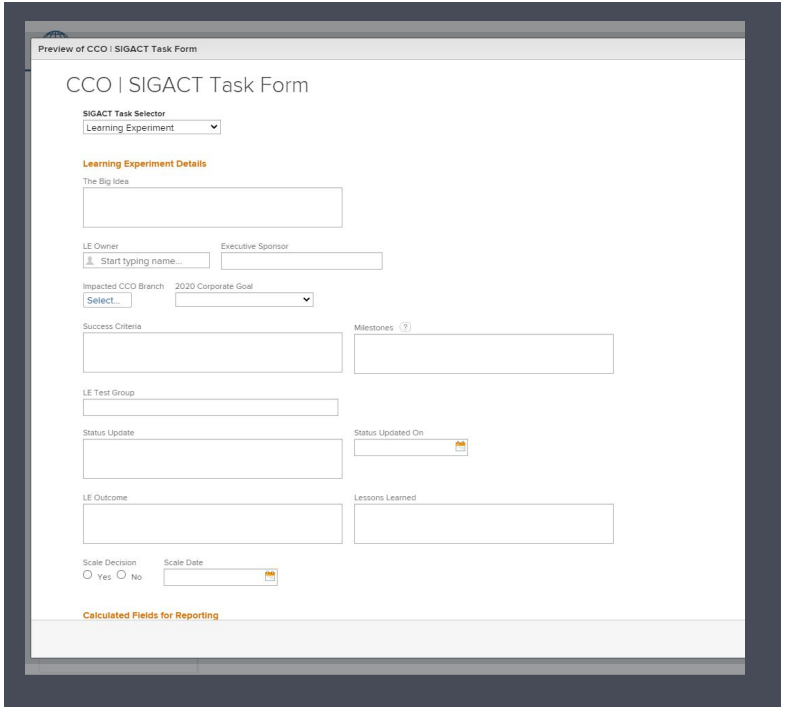
INTERACTING WITH THE API

API Explorer
A catalog of supported resources, parameters, and variables.

API Basics Article
Overview of the Workfront REST API basics and the GET, POST, PUT, and DELETE method behaviors

Postman
An open-source software for API testing and development. Not the only option, but certainly a strong one.

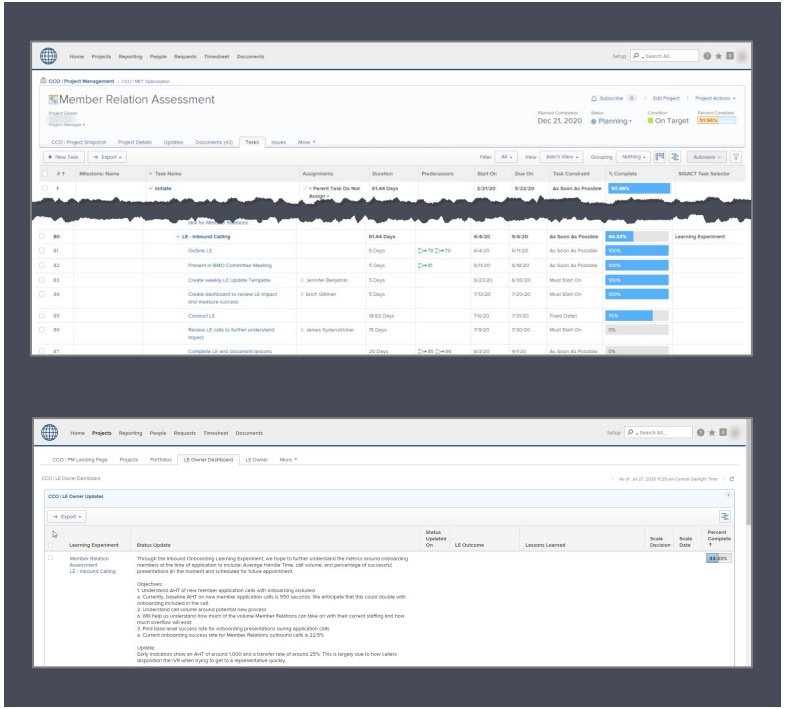
LEVERAGING ‘GET’ CASE STUDY



- Build a form to house the needed fields
- Keep scaling and maintenance front of mind
- Nothing new to see here…

Custom Forms Workfront **API** Explorer **Postman** **BI** Tool

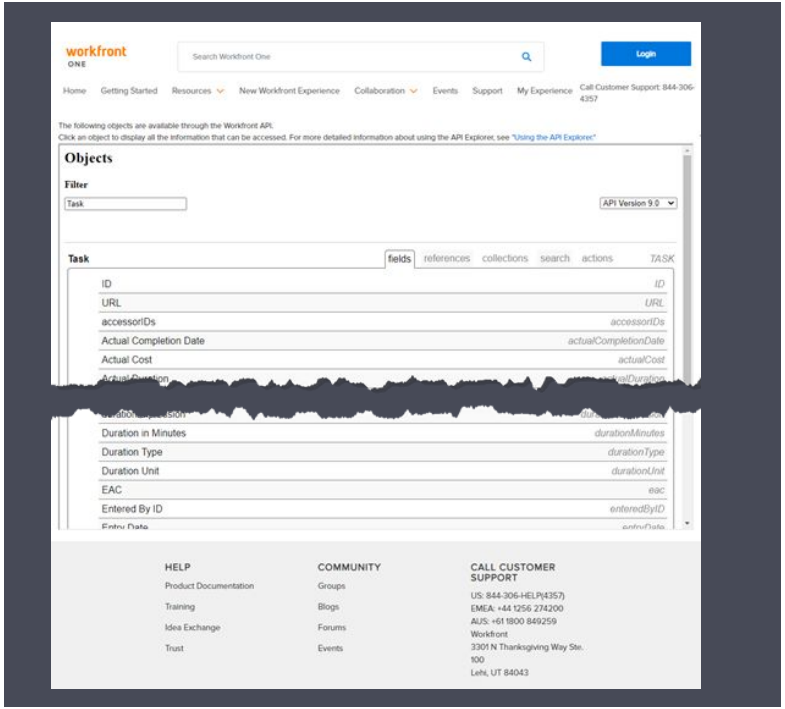
LEVERAGING ‘GET’ CASE STUDY



- Make fields used for automated reporting readily available to Project Owners
- Optional: I added a single column for Significant Activity or “SIGACT” Tasks
- Optional: I also built a dashboard for the Owners to maintain their SIGACT tasks, rather than having to drill down into the custom forms

Custom Forms **Workfront** API Explorer Postman BI Tool

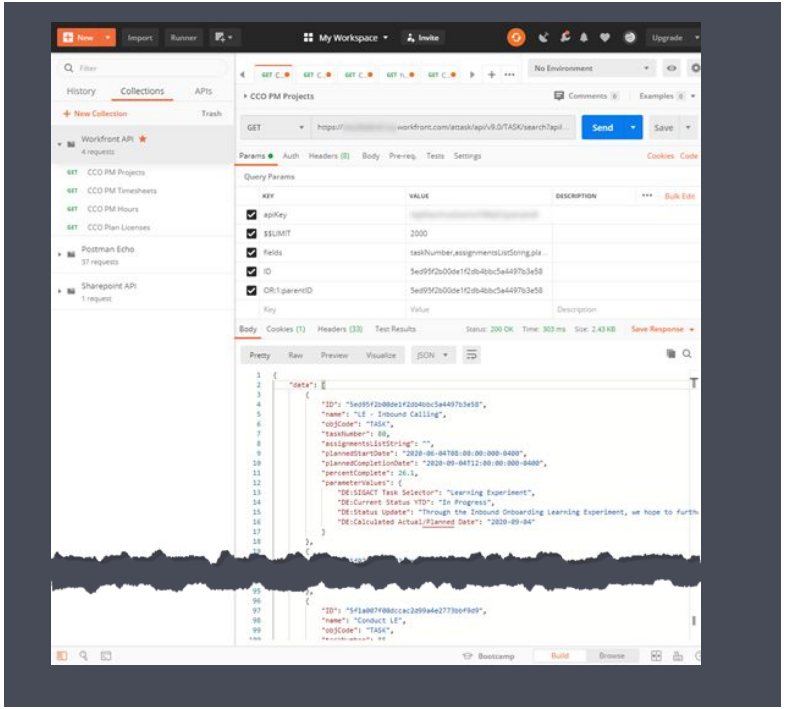
LEVERAGING ‘GET’ CASE STUDY



- Open the API Explorer for a sanity check, generally I have this open while building my API request

Custom Forms Workfront **API** Explorer Postman **BI** Tool

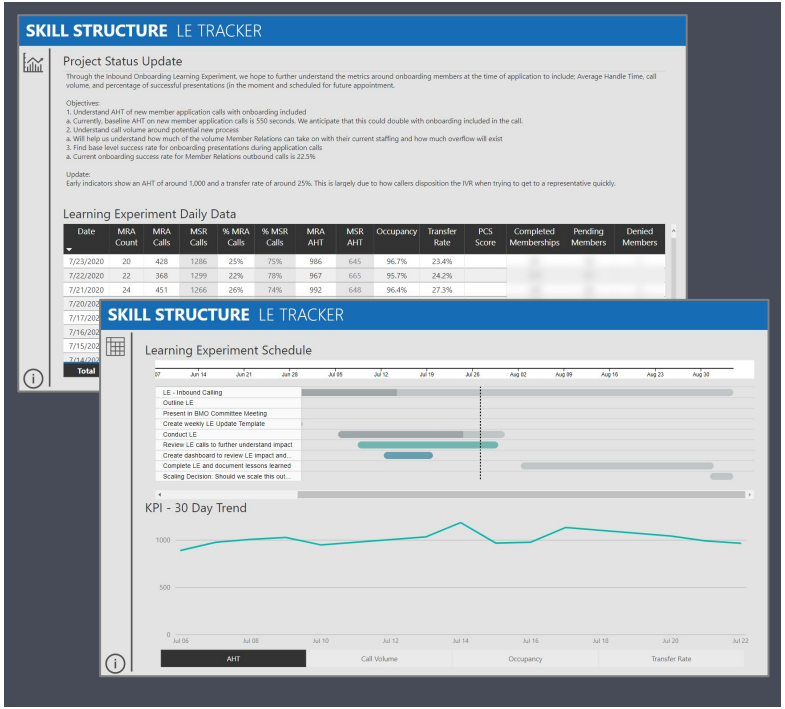
LEVERAGING ‘GET’ CASE STUDY



- Used for testing and writing API requests
- Filtering is VERY similar to Text Mode report building
- Pro Tip: use the field **parameterValues** to pull in all custom fields for an object

Custom Forms **Workfront** **API** Explorer **Postman** **BI** Tool

LEVERAGING ‘GET’ CASE STUDY



- Use API request to ‘GET’ data into your BI Tool (in this case I’m using PowerBI)
- My strategy is to co-locate relevant business data along with Workfront project schedule and updates

Custom Forms **Workfront** **API** Explorer **Postman** **BI** Tool

WHAT NEXT?

- Replace current ‘t-shirt sizing’ practice with statistical analysis of Workfront hours data
- Automating Status Updates, End of Phase Audits, Quarterly Impact Reporting, etc…
- Full-scale integration of Workfront with other software used across the enterprise

ROAD BLOCKS

- Workfront in Tableau.
  difficulty building a Web Data Connector that meets business information security standards

- Workfront Event Subscription API.
  similar difficulties as the Web Data Connector, but for different reasons

Q & A

“Birds of a Feather” Group Discussions

- How do you use Workfront at your organization?
- How are you using the API / integrations within your Workfront workflow? What are your aspirations or challenges?

“Birds of a Feather” Group Discussions

Let’s Switch Groups!

- If you could wave a magic wand and integrate a system / workflow / tool with Workfront, what would it be?

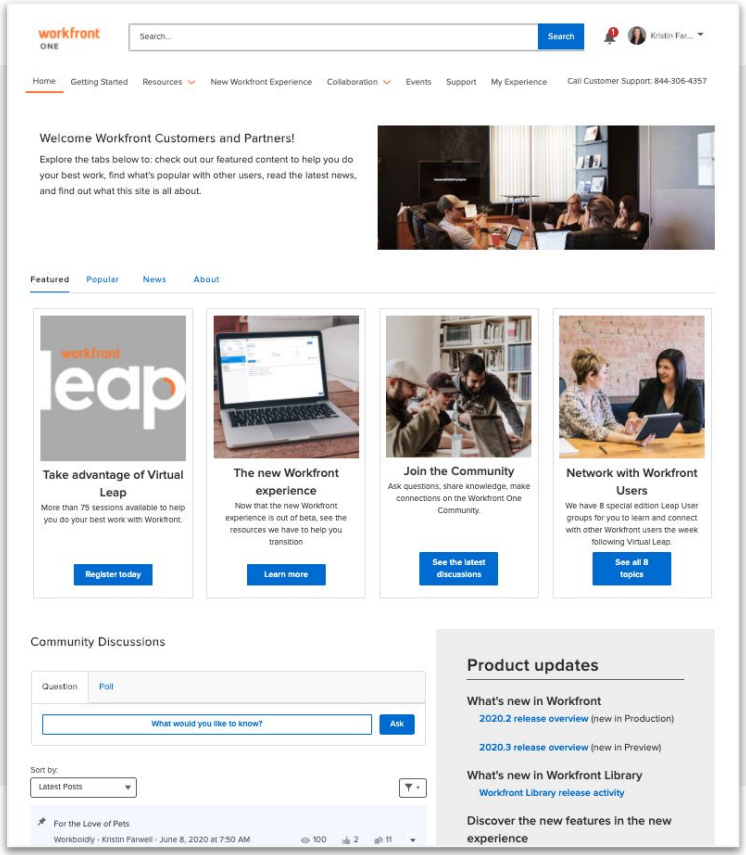
workfront

Wrap-up and Next Steps

workfront

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

Virtual User Groups - Summer 2020

one.workfront.com/events

- Aug 11: Creative Agencies & Marketing: Workfront Proof
- Aug 18: Workfront in Healthcare
- Aug 25: Change Management & the new Workfront Experience

Coming soon!

- *Sept 15: Agile in Marketing*
- *Sept 29: System Admin Best Practices*

Dive deeper into Leap!

- Over the coming weeks many of our fantastic Leap speakers will be starting a thread on the Community where you can ask them any questions about their sessions.

- Visit the “All Discussions” group regularly over the coming weeks to see that latest conversations!

workfront

Thank you.

workfront