workfront

Virtual User Group: System Admin Best Practices

Tuesday, September 29, 2020



Andrew Dadour
Strategic Customer Success Manager
Workfront

Agenda

11:00 a.m. Welcome and Agenda

11:10 a.m. System Admin Best Practices

Anthony Imgrund, FCB

11:40 a.m. Group Discussion

12:25 p.m. Wrap-up Next Steps

12:30 p.m. Event Ends





Anthony Imgrund

Project Manager FCB Global



SYSTEM ADMIN - BEST PRACTICES

September 29, 2020

A LITTLE BIT ABOUT FCB

FCBGLOBAL NETWORK

FCB is a locally focused global agency network. Our "glocal" orientation provides unique benefits to our clients, allowing us to deliver global consistency while being locally relevant.









GLOBAL LEADERSHIP

Carter Murray, Worldwide CEO

Susan Credle, Global Chief Creative Officer

Nigel Jones, Global Chief Strategy Officer

Jen Hohman, Global Chief Marketing Officer

Brandon Cooke, Global Chief Communications Officer

Carmine Battista, Global Chief Financial Officer

Cindy Augustine, Global Chief Talent Officer

Dana Maiman, CEO & President/FCB Health

Luis Dias, CEO/FCB International

Elyssa Phillips, EVP, Chief of Staff

Bryan Crawford, Vice Chairman

KEY CLIENTS

















DISC@VER











North America **Key Offices**







Tyler Turnbull, North America CEO

1. FCB CHICAGO

Kelly Graves, President Andrés Ordóñez, CCO

2. FCB NEW YORK

Emma Armstrong, President Ari Harper, CCO

3. FCB WEST (San Francisco)

Karin Onsager-Birch, CCO Simon White, CSO

4. FCB CANADA

Bryan Kane, President Nancy Crimi-Lamanna, Co-CCO Jeff Hilts, Co-CCO

5. FCB MONTRÉAL

Samia Chebeir, President Sylvain Dufresne, CCO

Latin America Key Offices



1. FCB BRAZIL Aurélio Lopes, Chairman

Ricardo John, CEO & CCO

2. FCB MEXICO

Eric Descombes, President Ana Noriega, CCO

Africa **Key Offices**





1. FCB AFRICA

Brett Morris, Group CEO Mike Barnwell, CCO/HelloFCB+ Cape Town

EUROPE & THE MIDDLE EAST Key Offices







1. FCB INFERNO (London)

Frazer Gibney, CEO Owen Lee, CCO

2. FCB HAMBURG

Christoph Nann, CCO

3. HORIZON FCB DUBAI

Mazen Jawad, President Rodrigo Rodrigues, ECD

4. FCB MILAN

Giorgio Brenna, CEO Alessandro Antonini, ECD Massimo Verrone, ECD

5. CHANGE (Paris)

Patrick Mercier, CEO

Asia Pacific Key Offices



1. FCB INDIA

Rohit Ohri, Group Chairman & CEO Swati Bhattacharya, CCO/FCB Ulka Robby Mathew, CCO/FCB Interface

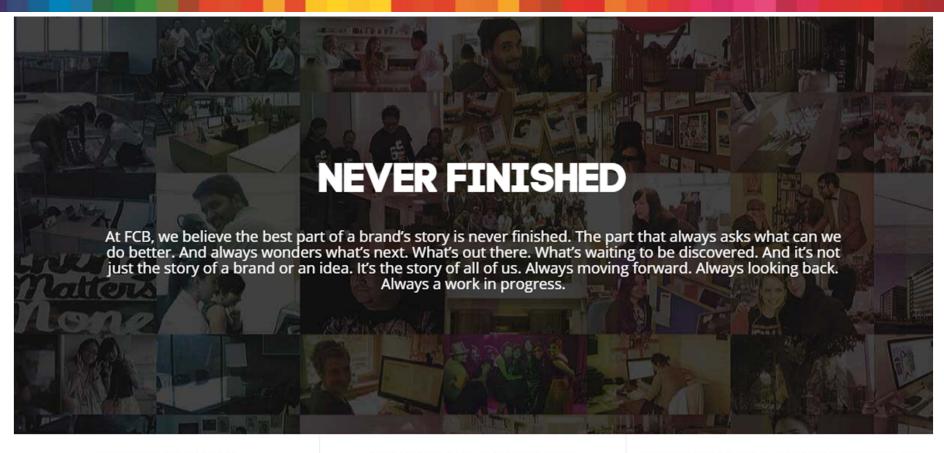
2. FCB CHINA

Josephine Pan, CEO/FCB Shanghai Kat Tan, GCD/FCB Shanghai

3. FCB NEW ZEALAND

Paul Shale, CEO Tony Clewett, ECD





KNOW WHO THE BRAND IS

BEDROCK

MAKE PEOPLE CARE ABOUT THE BRAND

CREATE BEHAVIOR

ENSURE THE BIGGEST EGO IN THE ROOM IS THE BRAND

BRAVE TOGETHER



OUR WORKFRONT INSTANCE

- On Workfront since Oct 2013
- 4500+ users across 35 Workfront Groups
- 60+ layouts
- 350+ teams
- 4,800+ projects
- 3,500+ reports
- 700+ dashboards

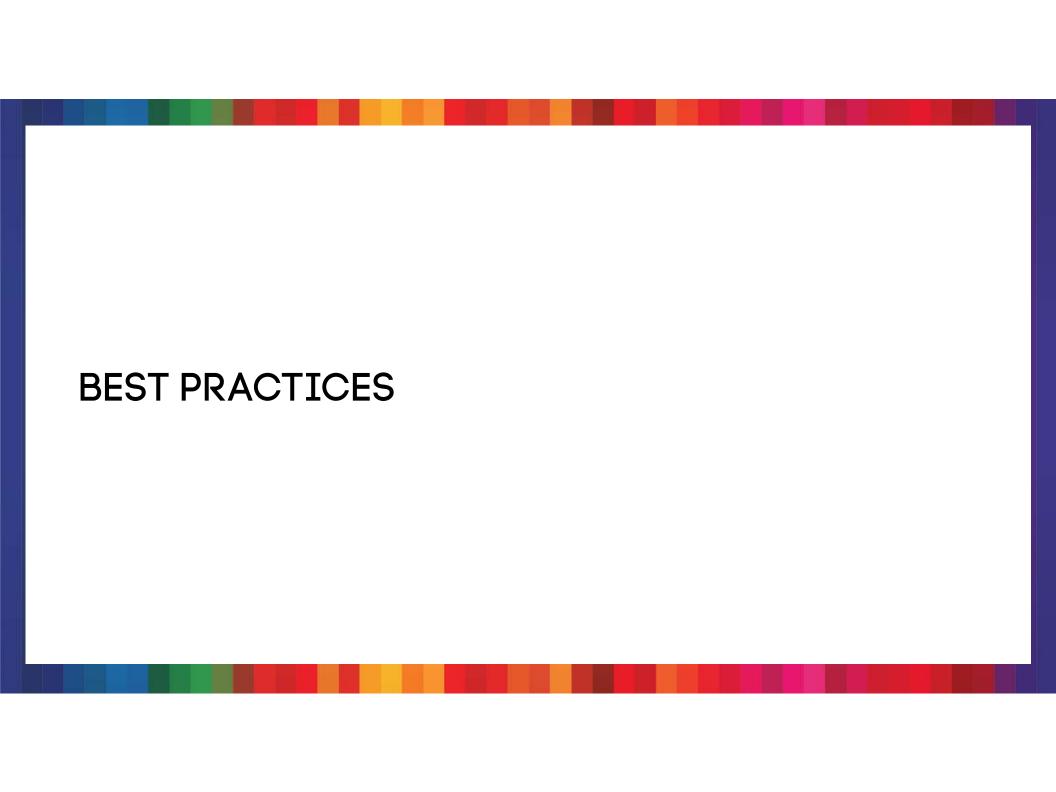
- Using:
 - Project/Task Mgmt.
 - Resource Mgmt.
 - Request Queues
 - ProofHQ Integration
 - Templates
 - API (through developer not connector tool)
- Not Using:
 - Timesheets
 - Financial Data
 - Task/Project/Document Approvals



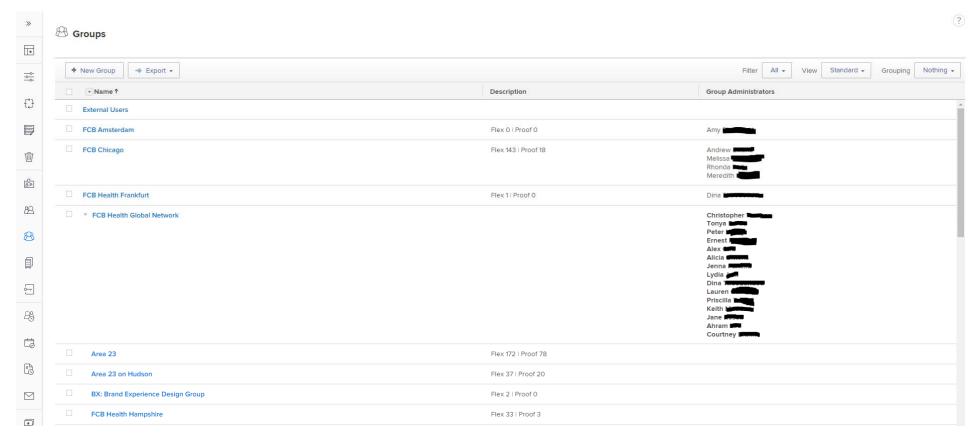
NEW WORKFRONT EXPERIENCE

- FCB was part of Alpha and Beta testing and had it available in our instance for awhile.
- All users will be switched October 5th
- Using NWE screenshots here for future/new Workfront clients





UTILIZE GROUPS



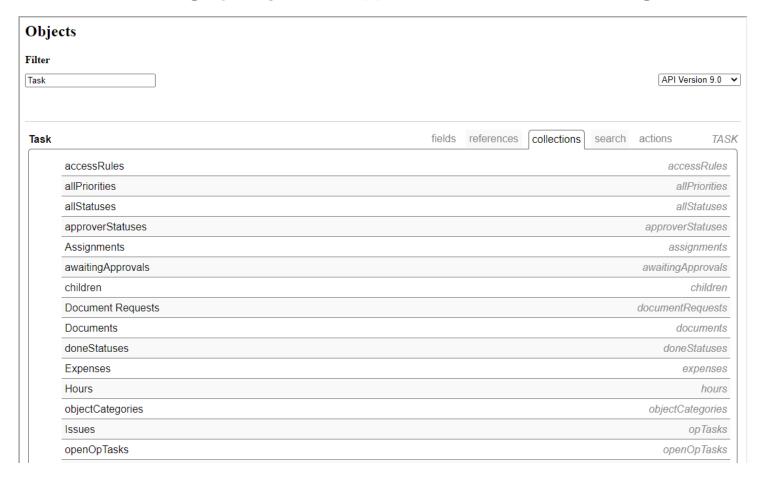


UTILIZE GROUPS

- Great way to create separate areas in Workfront for different business units
- Get to have Group Admins help without giving them full access
- Get to customize things like statuses and project preferences
- Two things though:
 - Not a fan of separating by department if all departments work on the same projects
 - Not a fan of subgroups (at least not in their current state)



FAMILIARIZE YOURSELF WITH API EXPLORER





FAMILIARIZE YOURSELF WITH API EXPLORER

- Don't wait until you do integrations, totally helps with reporting as well
- Teaches you about object types and their relationships
 - Especially when it comes to references and collections



REVIEW RELEASE NOTES BEFOREHAND

Contents

Collapse All | Expand All

Product announcements

Product releases

Workfront releases

> 20.3 release overview

v 20.4 release overview

20.4 release activity: Week of September 21, 2020

20.4 release activity: Week of Sept 14, 2020

20.4 release activity: Week of September 7

20.4 release activity: Week of August 24, 2020

20.4 release activity: Week of August 17, 2020

- > Workfront Align release activity
- > Workfront Scenario Planner release activity
- > Workfront Fusion 2.0 release activity
- > 2020.2 release overview
- > 20201 release overview

20.4 release overview







Aug 20, 2020 8 min read

This page provides information about functionality for both Workfront Classic and the new Workfront experience that is included in the 20.4 release.

As the 20.4 release nears its planned Production release, this page will be updated with all functionality included with 20.4.

Workfront enhancements

- · Administrator enhancements
- · Resource Management enhancements
- · Project Management enhancements
- Proofing enhancements
- Mobile enhancements
- Other enhancements

Administrator enhancements

Feature	Release dates and environments
New for administrators: Associate portfolios, programs, and companies with groups When Workfront administrators create or edit a portfolio, program, or company, they can assign it to a group. With groups assigned to these objects, it's easy to identify your group's responsibilities for them.	Available on these dates: Beta Preview release: September 25, 2020 Production release: With the 20.4 release Available in these environments: The new Workfront experience Workfront Classic
Assign a group to a team To make it easier to manage and report on the teams that are associated with a group, you can now assign any group	Available on these dates: Beta Preview release: August 29, 2020 Production release: With the 20.4 release



REVIEW RELEASE NOTES BEFOREHAND

- Gives you a chance to learn about the new enhancements
- Gives you a chance to ask product for clarification (and perhaps little improvements).
- Quick test for bugs, especially with your data (i.e. lots of data, custom data, etc.)



UTILIZE THE COMMUNITY SITE

Daily Digest for All Discussions

Thursday, September 24, 2020



Samantha Isin (Melaleuca Inc.) asked a question.

Show me your proof reports!

I'm super interested in seeing any kind of document approval reports people have created to manage their proofs! Here is a screenshot of the report we're currently using, but it's in need

Wednesday, September 23, 2020 2:50 PM Answer

Kyna Baker and Adina Pierce like this.



Kiersten Kollins (Customer)

Hi Samantha,

I posted a question the other day in community to see if there is a way to pull the stage end time into a report like this to know when the route period has ended and the stage

Wednesday, September 23, 2020 9:30 PM



Anna Welsh (Customer) asked a question.

Bulk approving hours

Hi,

Is there a way to bulk approve hours, like from a report? Right now to approve hours, the PMs are having to go into each individual project. Since we have a lot of projects it take a ... More

Wednesday, September 23, 2020 2:48 PM Answer

Kyna Baker likes this.



Nichole Vargas (Workfront, Inc.)

NEW BLOG POST! Create Your Roadmap to Success

By having a strategic plan and a roadmap to success, you can define desired outcomes and identify a series of best next actions, ensuring that

More

Wednesday, September 23, 2020 1:29 PM Comment





Pamela Miller (H&R Block) asked a question.

Can you attach a custom form to a request queue but keep it hidden from the intake process? Need the fields attached to the requests for reporting but don't want the fields to be part of the intake view for a requestor.

Wednesday, September 23, 2020 11:35 AM Answer





UTILIZE THE COMMUNITY SITE

- Chance to ask others their advice
- Set aside time to go over Daily or Weekly Digests
 - Try to solve an unanswered question
 - Practice implementing a solution in your instance
- Try to attend as many Events as you can (Virtual User Groups, Leap, etc.)



NEW DEPLOYMENTS: ALIGNMENT ARROW

Culture

- · Active executive sponsor?
- · Identify agency SMEs
- Identify change mgmt. resisters

Is the agency willing to give up the necessary time and resources to deploy new solution?

Policy

- Create roles and responsibilities for different personas
- Select specific dates for any pilots, phases, cut overs

Process

- Conduct process deep dives and identify pain points
- Must be honest about current process first before moving to ideal state to set phased approach
- Not just high-level overview.
 Needs to be specific like
 "How is a project started?"

Technology

- · How can Workfront help?
- Build out master data, users, and custom forms
- Build out layout templates
- Build out automations
- Build out reporting
- Create Request Queue to collect ongoing feedback

Executive Sponsorship

Super Users

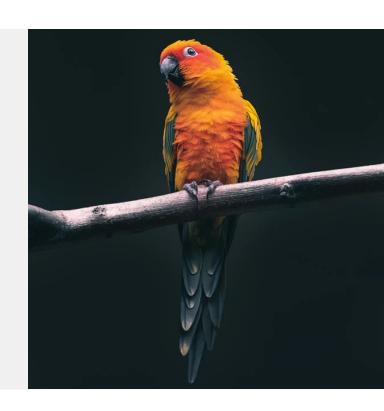
WF Admin Team



Questions?

"Birds of a Feather" Group Discussions

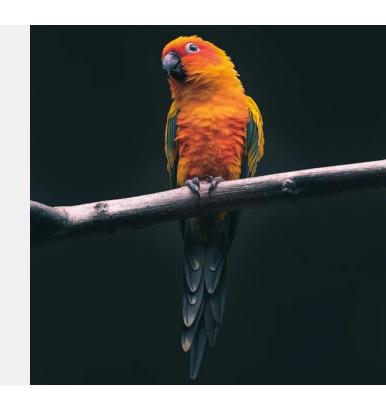
 What is your favorite System Admin "Life Hack"?



"Birds of a Feather" Group Discussions

Let's Switch Groups!

 What do you wish you had known as a new System Admin?
 (Or if you ARE a new System Admin, what do you wish someone would tell you!)

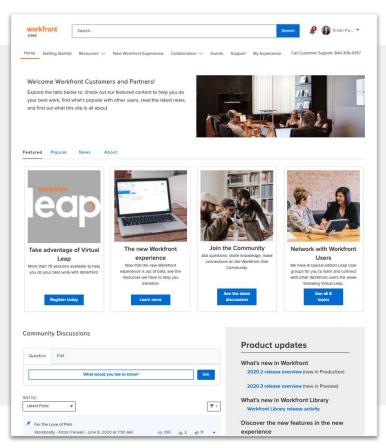




Wrap-up and Next Steps

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





Virtual User Groups - Fall 2020

one.workfront.com/events

- Oct 13: Governance in Workfront
- Oct 27: New Workfront Experience
- Nov 3: Workflow and Process
- Nov 17: Tracking Time in Workfront (i.e. Timesheets!)

Coming soon!

- Reporting to Executives
- Integrations and Process Automation



Thank you.

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