

VIRTUAL NETWORKING SESSION

Virtual User Group: Emails & Notifications

Welcome!

We will begin shortly



*Please ensure your
microphones are muted.*



*Enable your camera,
if possible.*



*Use the chat function if you
have any questions.*

SESSION HOST



Brandon Ellis

Strategic Customer Success Manager
Workfront

AGENDA

9:30 a.m. Welcome and Housekeeping

9:35 a.m. Presentation and Q&A

9:50 a.m. Group Discussion

10:25 a.m. Wrap-up and Next Steps

10:30 a.m. Session Concludes



Notifications

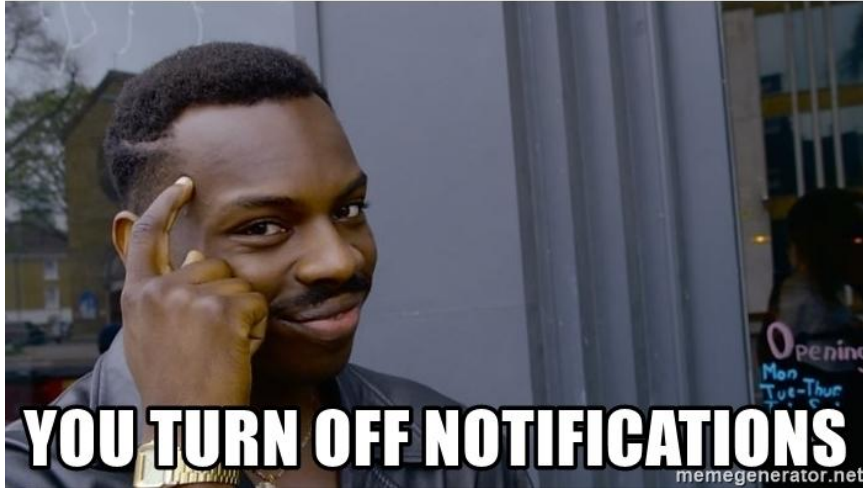
User Group



Cory Anderson

Workfront Administrator,
Cisco powered by Lionbridge

**CAN'T GET ANNOYED BY
NOTIFICATIONS IF**

 A meme of an email notification bubble. The text "YOU HAVE 537 UNREAD EMAILS, 2 OF WHICH ACTUALITY MATTER" is overlaid in large, bold, black letters. An "OK" button is visible at the bottom right of the notification bubble. A watermark "imgflip.com" is visible in the bottom left corner.

**YOU HAVE 537
UNREAD EMAILS,
2 OF WHICH
ACTUALITY MATTER**

Personalized Notification Settings starts in Setup





Email

Notifications

Event Notifications

Reminder Notifications

Email Templates

Export

<input type="checkbox"/>	Active	Name	Description ↑	Email Subject
▼ Action Needed (16)				
<input type="checkbox"/>	✓	Work Item Request to Work Item Assignee	I get a new work request	New Work Request: Reference Object:Name
<input type="checkbox"/>	✓	Document pending approval to approvers	I need to approve a document	Entered By:Display Name asked you to approve a document in Workfront
<input type="checkbox"/>	✓	Project Pending Approval to Approvers	I need to approve a project	Project Pending Approval: Name
<input type="checkbox"/>	✓	Task Pending Approval to Approvers	I need to approve a task	Task Pending Approval: Name
<input type="checkbox"/>		Timesheet Submission to Approver	I need to approve a timesheet	Timesheet Submitted: User:Name, Start Date - End Date
<input type="checkbox"/>	✓	Issue Pending Approval to Approvers	I need to approve an issue	Issue Pending Approval: Name
<input type="checkbox"/>	✓	Project Pending Approval to Delegated Approver	I need to review a project approval I've been delegated	Delegated Project Approval - Please Review Name
<input type="checkbox"/>	✓	Task Pending Approval to Delegated Approver	I need to review a task approval I've been delegated	Delegated Task Approval - Please Review Name
<input type="checkbox"/>	✓	Issue Pending Approval to Delegated Approver	I need to review an issue approval I've been delegated	Delegated Issue Approval - Please Review Name
<input type="checkbox"/>	✓	Issue Assignment to Issue Assigned To	I'm assigned to an issue	You're now assigned to Issue:Name
<input type="checkbox"/>	✓	Task Assignment to Task Assigned To	I'm set as the primary assignee of a task	Task Assignment: Task:Name
<input type="checkbox"/>	✓	Work Item Request to Team	My team gets a new work request	New Work Request: Reference Object:Name
<input type="checkbox"/>		Timesheet Re-opened to User	My timesheet is re-opened	Timesheet Re-opened: Start Date - End Date

[Event Notifications](#)[Reminder Notifications](#)[Email Templates](#)[Export](#)

<input type="checkbox"/> Active	Name	Description ↑	Email Subject
▶ Information about Work Assigned to Me (11)			
▼ Information about Projects I'm On (11)			
<input type="checkbox"/>	Document Add to Project Team	A document is added to a project I'm on	Document added to Project:Name
<input type="checkbox"/>	Milestone Task Completion to Project Team	A milestone task is completed on a project I'm on	Complete: Name on Project:Name
<input checked="" type="checkbox"/>	Current Project Status Change to Project Team	A project I'm on becomes active	Name is Status Label
<input type="checkbox"/>	Project Completion to Project Team	A project I'm on is completed	Complete: Name
<input type="checkbox"/>	Current Project Status Change to Assigned Team	A project my team is on becomes active	Name is Status Label
<input type="checkbox"/>	Task Completion to Project Team	A task is completed on a project I'm on	Complete: Name on Project:Name
<input type="checkbox"/>	Issue Add to Project Team	An issue is added to a project I'm on	Issue added to Project Name
<input type="checkbox"/>	Issue Completion to Project Team	An issue is completed on a project I'm on	Complete: Name on Project:Name
<input type="checkbox"/>	Unassigned Issue Added to Project Team	An unassigned issue is added to a project I'm on	Who should be assigned to this new issue on Project Name ?
<input type="checkbox"/>	Project User Add to Project User	I'm added to a project	You've been added to the project team for Project:Name
<input type="checkbox"/>	Project Status Change to Project Team	The status changes on a project I'm on	Project Status Change: Name
▶ Information about Projects I Own (11)			

[Event Notifications](#)[Reminder Notifications](#)[Email Templates](#)[Export](#)

<input type="checkbox"/> Active	Name	Description ↑	Email Subject
▸ Information about Work Assigned to Me (11)			
▸ Information about Projects I'm On (11)			
▸ Information about Projects I Own (11)			
▼ Information about Projects I Sponsor (9)			
<input type="checkbox"/>	Document Add to Project Sponsor	A document is added to a project I sponsor	Document added to Project:Name
<input type="checkbox"/>	Milestone Task Completion to Project Sponsor	A milestone task is completed on a project I sponsor	Complete: Name on Project:Name
<input type="checkbox"/>	Project Progress Change to Project Sponsor	A project I sponsor gets behind	Project Progress Change: Name
<input type="checkbox"/>	Task Completion to Project Sponsor	A task is completed on a project I sponsor	Complete: Name on Project:Name
<input type="checkbox"/>	Task Progress Change to Project Sponsor	A task on a project I sponsor gets behind	Task Progress Change: Name
<input type="checkbox"/>	Issue Add to Project Sponsor	An issue is added to a project I sponsor	Issue added to Project Name
<input type="checkbox"/>	Issue Completion to Project Sponsor	An issue is completed on a project I sponsor	Complete: Name on Project:Name
<input type="checkbox"/>	Unassigned Issue Add to Project Sponsor	An unassigned issue is added to a project I sponsor	Who should be assigned to this new issue on Project Name ?
<input type="checkbox"/>	Project Sponsor Assignment to Project Sponsor	I'm set as the sponsor of a project	Project Sponsor: Name
▸ Miscellaneous Information (11)			



+ New Reminder Notification ▾

→ Export ▾

Filter

All ▾

View

Standard ▾

Grouping

Object Type ▾

<input type="checkbox"/> Name ↑	Description	Email Template
▼ Object Type: Issue (5)		
<input type="checkbox"/> Corporate Editing Survey	Send a notification email to 'Assigned To,Entered By' after 24 hrs of the Actual Completion Date of the issue	Corporate Editing
<input type="checkbox"/> PC2 Survey	Send a notification email to 'Entered By' after 1 hrs of the Actual Completion Date of the issue	PC2 Survey
<input type="checkbox"/> Print Services Survey	Send a notification email to 'Assigned To,Entered By' after 24 hrs of the Actual Completion Date of the issue	Print Services
<input type="checkbox"/> Security Design Group Survey	Send a notification email to 'Entered By' after 1 hrs of the Actual Completion Date of the issue	SDG Survey
<input type="checkbox"/> Send Hatch Survey	Send a notification email to 'Assigned To,Entered By' after 24 hrs of the Actual Completion Date of the issue	Hatch Verint Survey (Issue)
▼ Object Type: Task (3)		
<input type="checkbox"/> Initial Contact with Stakeholder	Send a notification email to 'Entered By' after 1 days of the Actual Completion Date of the task	Initial Contact with Stakeholder
<input type="checkbox"/> Past Due	Send a notification email to 'Assigned To' after 1 days of the Planned Completion Date of the task	Overdue Task
<input type="checkbox"/> Task Due Date Reminder	Send a notification email to 'Assigned To' before 2 days of the Planned Completion Date of the task	Task Due Date Approaching
▼ Object Type: Project (3)		
<input type="checkbox"/> PC2 Delivery Email	Send a notification email to 'Project Owner' after 1 hrs of the Actual Completion Date of the project	PC2 Delivery Email
<input type="checkbox"/> PCD Reminder (Project Owner)	Send a notification email to 'Project Owner' before 2 days of the Planned Completion Date of the project	Reminder: PCD
<input type="checkbox"/> Peer Review Reminder	Send a notification email to 'Dependent Task Assignees,Project Owner' before 2 days of the Planned Completion Date of the project	Peer Review Reminder
▼ Object Type: Timesheet (1)		
<input type="checkbox"/> Timesheet Reminder	Send a notification email to 'Timesheet Owner' before 12 hrs of the End Date of the timesheet	Timesheet Reminder

LCC Request Completion

Name Object Type

22/255

Description

Message to requestor

20/2000

Email Content

Subject

Your LCC request, **\$\$\$name\$\$**, is now complete!

44/255

Body

```
<div>
<p>Hello $$enteredBy.firstName$$</p>
</div>
<div>
<p>We are happy to let you know that your request has been completed by the LCC Team. Please find the details below.</p>
</div>
<div>
<table>
<tbody>
<tr>
<td><strong>Request Name:</strong></td>
<td><a href="https://ciscocomm.my.workfront.com/issue/view?ID=$$ID$$">$$$name$$</a></td>
</tr>
<tr>
<td><strong>Date Closed:</strong></td>
<td>$$$actualCompletionDate$$</td>
</tr>
</tbody>
</table>
</div>
```

Comms Services Vovici Survey (Task)

Name Object Type

35/255

Description

0/2000

Email Content

Subject

Please give us your feedback

28/255

Body

```
<p>$$enteredBy.name$$</p>

<p>Thank you for engaging with the Communication Services team. <a href="https://ciscocomm.attask-ondemand.com/attask/projectView.cmd?ID=$$ID$$">Your request</a> is now closed. To help us serve you better, please complete this brief survey: <a href="https://www.cisco.vovici.com/se.ashx?s=2C85931E04E46619">https://www.cisco.vovici.com/se.ashx?s=2C85931E04E46619</a>.</p>

<p>Thank you for using the Communications Resource Center <br>
<a href="http://iwe.cisco.com/web/communications-resource-center">http://iwe.cisco.com/web/communications-resource-center</a></p>
```

Save

Cancel



Personal Notification Settings

- 1** The available notification options are determined by the notification settings in your Setup
- 2** Users can select the notifications that are useful to them
- 3** Choose from instant notifications, daily summary, or both

Edit Person

Personal Info

Preferences

Notifications


Access

Organization

Resource Planning

Custom Forms

Comment

▼ Action Needed (13) 

Email Me When...	Daily	Instant
I get a new work request	<input type="checkbox"/>	<input checked="" type="checkbox"/>
I need to approve a document	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I need to approve a project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I need to approve a task	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I need to approve an issue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I need to review a project approval I've been delegated	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I need to review a task approval I've been delegated	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I need to review an issue approval I've been delegated	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
I'm assigned to an issue	<input type="checkbox"/>	<input checked="" type="checkbox"/>
I'm set as the primary assignee of a task	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Edit Person

Personal Info

Preferences

Notifications

Access

Organization

Resource Planning

Custom Forms

Comment

Information about Work Assigned to Me (6)

Email Me When... Daily Instant

A task I complete is approved or rejected

All predecessors of my tasks are completed

Documents are uploaded or changed on requests I'm assigned to

The due date changes on a task I'm assigned to

The due date changes on an issue I'm assigned to

The status changes on one of my work items

Information about Projects I'm On (1)

Information about Projects I Own (3)

Miscellaneous Information (4)

Save Changes Cancel



Questions?



BIRDS OF A FEATHER

Group Discussion

- Introductions - meet your group!
- How are you using emails and notifications at your organization?
- What's working well? Where are you having challenges?



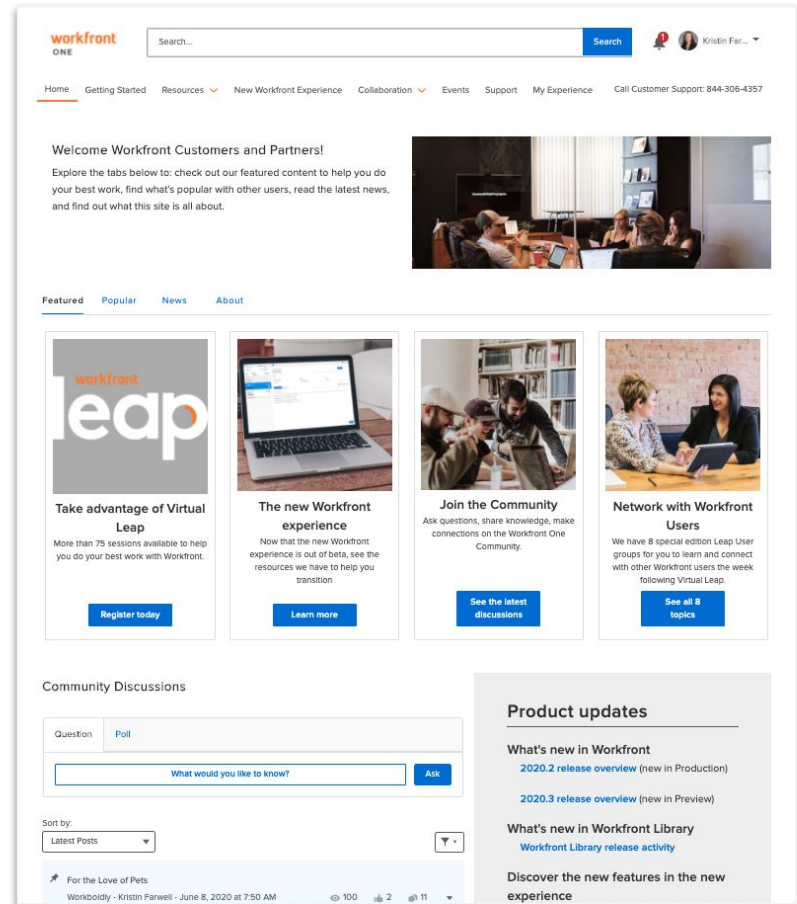
30 MINUTES



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 user profile for Kristin Farwell. The navigation menu includes Home, Getting Started, Resources, New Workfront Experience, Collaboration, Events, Support, My Experience, and Call Customer Support: 844-306-4357. A welcome message reads: "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." Below this is a large image of a meeting. The main content area features four cards: "Take advantage of Virtual Leap" (with a "Register today" button), "The new Workfront experience" (with a "Learn more" button), "Join the Community" (with a "See the latest discussions" button), and "Network with Workfront Users" (with a "See all 8 topics" button). The "Community Discussions" section includes a "Question" and "Poll" tab, a text input field with the placeholder "What would you like to know?", and a "Ask" button. Below this is a "Sort by" dropdown set to "Latest Posts" and a list of discussions, starting with "For the Love of Pets" by Workboldy - Kristin Farwell, dated June 8, 2020 at 7:50 AM, with 100 views and 11 replies. The "Product updates" section lists "What's new in Workfront" with links for "2020.2 release overview (new in Production)" and "2020.3 release overview (new in Preview)", and "What's new in Workfront Library" with a link for "Workfront Library release activity". A final link says "Discover the new features in the new experience".

Thank you.

workfront

leap