leap

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.

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Brandon Ellis
Strategic Customer Success Manager
Workfront

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AGENDA

9:30 a.m.   Welcome and Housekeeping

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

9:50 a.m.   Group Discussion

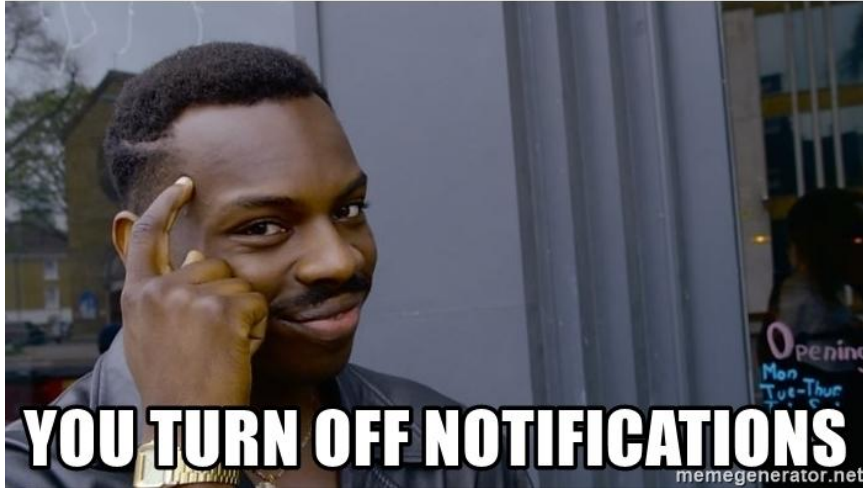10:25 a.m.   Wrap-up and Next Steps

10:30 a.m.   Session Concludes

Personalized Notification Settings starts in Setup

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Email
Notifications

➔ Export ▾

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

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➜ Export ▾

	Active	Name	Description ↑	Email Subject
☐ ▾				
Information about Work Assigned to Me (11)				
Information about Projects I'm On (11)				
☐		Document Add to Project Team	A document is added to a project I'm on	Document added to **Project:Name**
☐		Milestone Task Completion to Project Team	A milestone task is completed on a project I'm on	Complete: **Name** on **Project:Name**
☐	✔	Current Project Status Change to Project Team	A project I'm on becomes active	**Name** is **Status Label**
☐		Project Completion to Project Team	A project I'm on is completed	Complete: **Name**
☐		Current Project Status Change to Assigned Team	A project my team is on becomes active	**Name** is **Status Label**
☐		Task Completion to Project Team	A task is completed on a project I'm on	Complete: **Name** on **Project:Name**
☐		Issue Add to Project Team	An issue is added to a project I'm on	Issue added to **Project Name**
☐		Issue Completion to Project Team	An issue is completed on a project I'm on	Complete: **Name** on **Project:Name**
☐		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**?
☐		Project User Add to Project User	I'm added to a project	You've been added to the project team for **Project:Name**
☐		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)				

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➔ Export ▾

	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)**

		Name	Description	Email Subject
☐		Document Add to Project Sponsor	A document is added to a project I sponsor	Document added to **Project:Name**
☐		Milestone Task Completion to Project Sponsor	A milestone task is completed on a project I sponsor	Complete: **Name** on **Project:Name**
☐		Project Progress Change to Project Sponsor	A project I sponsor gets behind	Project Progress Change: **Name**
☐		Task Completion to Project Sponsor	A task is completed on a project I sponsor	Complete: **Name** on **Project:Name**
☐		Task Progress Change to Project Sponsor	A task on a project I sponsor gets behind	Task Progress Change: **Name**
☐		Issue Add to Project Sponsor	An issue is added to a project I sponsor	Issue added to **Project Name**
☐		Issue Completion to Project Sponsor	An issue is completed on a project I sponsor	Complete: **Name** on **Project:Name**
☐		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**?
☐		Project Sponsor Assignment to Project Sponsor	I'm set as the sponsor of a project	Project Sponsor: **Name**

▸ **Miscellaneous Information (11)**

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+ New Reminder Notification ▼   ➜ Export ▼   Filter All ▼   View Standard ▼   Grouping   Object Type ▼

☐	Name ↑	Description	Email Template
Object Type: Issue (5)			
☐	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
☐	PC2 Survey	Send a notification email to 'Entered By' after 1 hrs of the Actual Completion Date of the issue	PC2 Survey
☐	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
☐	Security Design Group Survey	Send a notification email to 'Entered By' after 1 hrs of the Actual Completion Date of the issue	SDG Survey
☐	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)			
☐	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
☐	Past Due	Send a notification email to 'Assigned To' after 1 days of the Planned Completion Date of the task	Overdue Task
☐	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)			
☐	PC2 Delivery Email	Send a notification email to 'Project Owner' after 1 hrs of the Actual Completion Date of the project	PC2 Delivery Email
☐	PCD Reminder (Project Owner)	Send a notification email to 'Project Owner' before 2 days of the Planned Completion Date of the project	Reminder: PCD
☐	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)			
☐	Timesheet Reminder	Send a notification email to 'Timesheet Owner' before 12 hrs of the End Date of the timesheet	Timesheet Reminder

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LCC Request Completion

Name

LCC Request Completion

22/255

Object Type

Issue

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>
```

Comms Services Vovici Survey (Task)

Name

Comms Services Vovici Survey (Task)

35/255

Object Type

Task

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

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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

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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	☐	☑
I need to approve a document	☑	☑
I need to approve a project	☑	☑
I need to approve a task	☑	☑
I need to approve an issue	☑	☑
I need to review a project approval I've been delegated	☑	☑
I need to review a task approval I've been delegated	☑	☑
I need to review an issue approval I've been delegated	☑	☑
I'm assigned to an issue	☐	☑
I'm set as the primary assignee of a task	☐	☑

Save Changes   Cancel

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Edit Person

Personal Info

Preferences

Notifications

Access

Organization

Resource Planning

Custom Forms

Comment

		Daily	Instant
⌄ 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

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Questions?

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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

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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

Thank you.

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