

VIRTUAL NETWORKING SESSION

Virtual User Group: All Things Reporting

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



Bret Friedrich

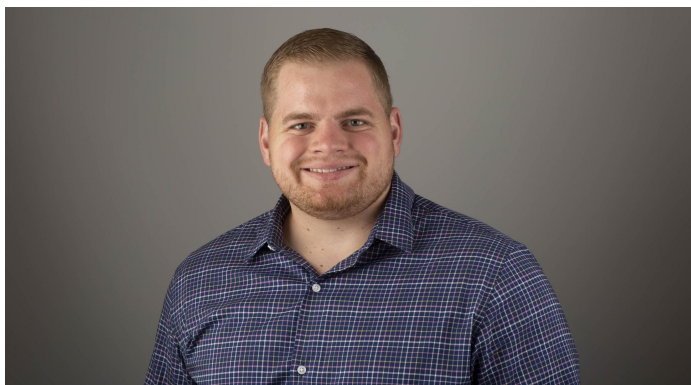
Strategic Customer Success Manager
Workfront

AGENDA

- 8:00 a.m. Welcome and Housekeeping
- 8:05 a.m. Reporting Tips and Tricks
Trevor Pierce, Workfront
- 8:20 a.m. Group Discussion
- 8:55 a.m. Wrap-up and Next Steps
- 9:00 a.m. Session Concludes



USER GROUP SPEAKER



Trevor A Pierce

Training Specialist, Workfront

trevorpierce@workfront.com



My goal for the next 10 minutes is to share...

- Tips and tricks to configure reports to be useful for other users.
- Answers to frequently asked questions about peripheral functionalities of Reports.

BASICS OF REPORT CREATION

New Project Report
Report Settings | ✕

Columns (View) | Groupings | Filters | Chart

Filter = Help you to narrow down what appears on the list

View = The columns of information you see

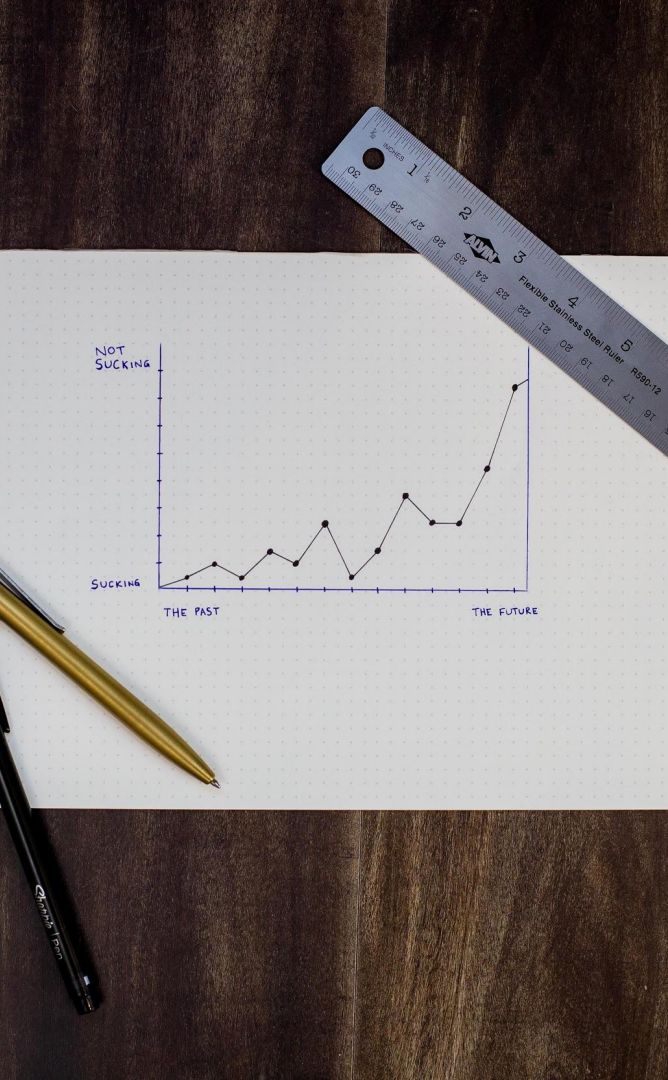
Grouping = Organizing the list into groupings

You should have learned this in the LEAP course.

Column Preview
Apply an Existing View -
+ Add Column

Name	Owner	Desc	Start On	Due On	% Complete
CRM Integration - Tampa Office	John Smith	Get the Tampa team up and running with the new CRM tool.	4/15/11	9/23/19	84% <div style="width: 84%; height: 10px; background-color: #3498db; border: 1px solid #3498db;"></div>

Save + Close
Apply
Cancel



Report Charts



Report Prompts

Report Actions



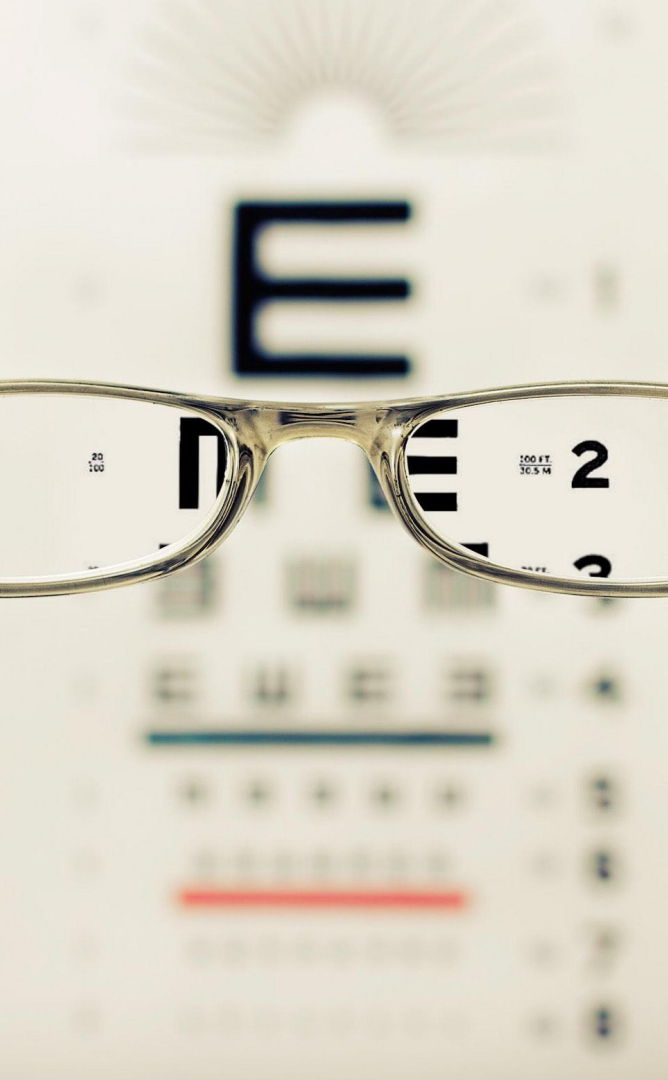
EDIT



SHARE



SEND



Changing IDs to Names

Questions?



BIRDS OF A FEATHER

Group Discussion

- Introductions - meet your group!
- What is your “must have”, can’t-live-without report?
- What’s working with regards to reporting? Where are you / your organization struggling?



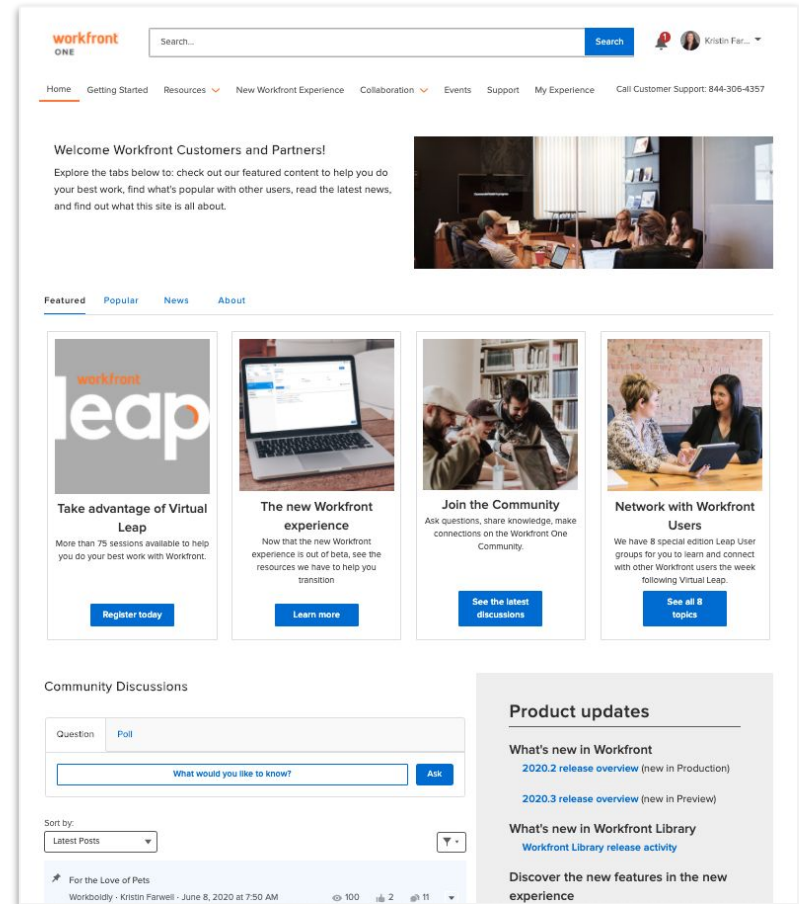
30 MINUTES



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 for customers and partners is displayed, along with a photo of a meeting. Below this, there are four featured content cards: 'Take advantage of Virtual Leap', 'The new Workfront experience', 'Join the Community', and 'Network with Workfront Users'. Each card has a 'Learn more' or 'Register today' button. At the bottom, there is a 'Community Discussions' section with a poll and a 'Product updates' section listing release overviews for 2020.2 and 2020.3.



Leap Session Q&A

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!

Thank you.

workfront

leap