

VIRTUAL NETWORKING SESSION

# Virtual User Group: IT Workflows & Approvals

# 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



**Mike Plunkett**

Sr. Customer Success Manager  
Workfront

## AGENDA

- 9:30 a.m. Welcome and Housekeeping
- 9:35 a.m. Implementing an IT Project Governance Process  
Cornell University
- 9:50 a.m. Group Discussion
- 10:25 a.m. Wrap-up and Next Steps
- 10:30 a.m. Session Concludes



## SESSION SPEAKERS



**Diane Kubarek**

Business Analyst and IT Project Manager  
Cornell University



**Heather VerSchneider**

Business Analyst and IT Project Manager  
Cornell University

# From Chaos to Collaboration: Implementing an IT Project Governance Process

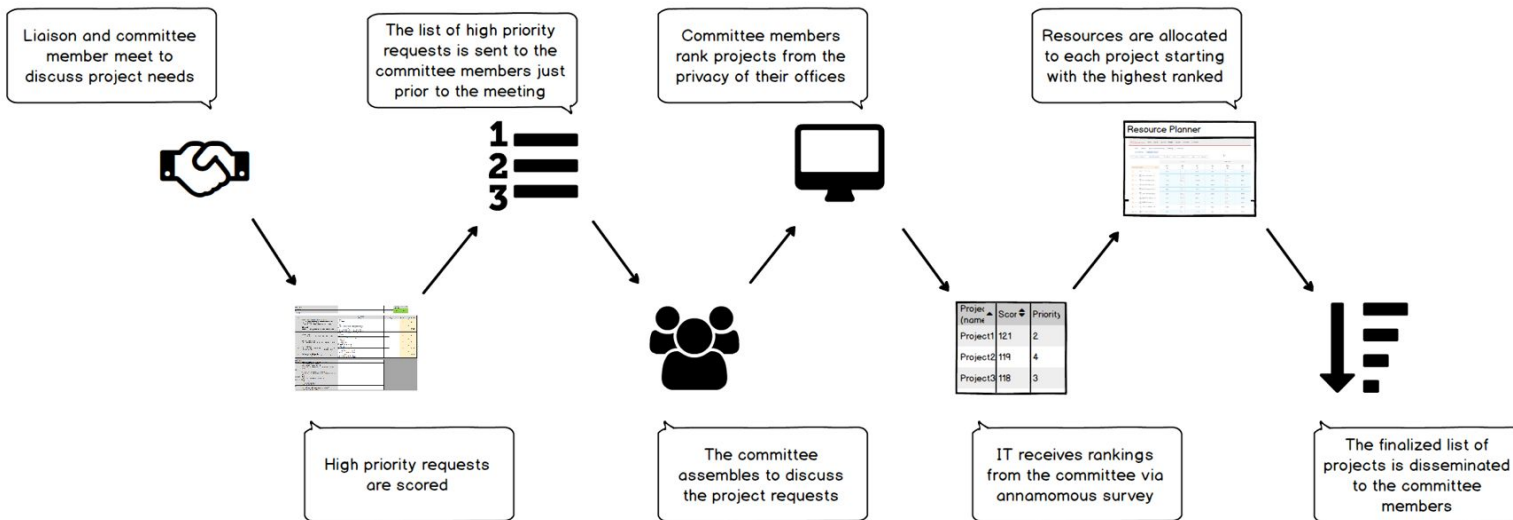
## BENEFITS

# Why Implement a Governance Process?

- Ensure IT is working on most important initiatives for the college
- Gain buy-in from college leadership on all IT projects
- Provide transparency into all IT projects across the college
- Document goals and expected outcomes for every project IT undertakes
- Establish realistic expectations for college constituents
- Establish achievable goals for IT team

## DETAILS

# Governance Process Overview



## DETAILS

# Project Request Scorecard

Project Name:					Score (Max = 100)	% of Total	
Date Scored:					0	0.0%	
IT Liaison:							
Scored by:							

#	Factors	Scoring Values (0, 3, 6, 9)	Select (X)	Weight	Score	Min/Max Score	% of Total Score
1	<b>Mandated Service/Product (are any of these true?)</b> <ul style="list-style-type: none"> <li>University system or government mandate and/or legal/compliance</li> <li>School and/or College (district) request</li> <li>Impacts foundational service and/or other products depend on it</li> </ul>	0: none are true 3: one is true 6: two are true 9: all are true		5		0 - 45	#VALUE!
2	<b>Risk Mitigation</b> Would the college, school or department be exposed to a risk or impact if this solution is not completed?	0: little risk to college or customer if not completed 3: some risk to college or customer if not completed 6: much risk to college or customer if not completed 9: high risk to the college or customer if not completed		4		0 - 36	#VALUE!
3	<b>Leverage Potential</b> Solution can be leveraged for other departments/schools in the college.	0: little leverage potential, isolated service 3: some leverage 6: much leverage 9: service could be leveraged by many		3		0 - 27	#VALUE!
4	<b>Impact on Academic Mission</b> Directly impacts student learning and/or student experience in the classroom.	0: little impact 3: some impact 6: a lot of impact 9: essential/critical impact		3		0 - 27	#VALUE!
5	<b>Value to the Customer</b> Customers are consumers or users of the solution and could be students, staff, faculty, other schools or departments and even other services.	0: little value to the customer(s) 3: some value 6: a lot of value to customer 9: essential/critical to customer(s)		3		0 - 27	#VALUE!
6	<b>Significance to Users/Customer Base</b> What impact will this project have on the college or department?	0: low impact, low number of users 3: low impact, high number of users 6: high impact, low number of users 9: high impact, high number of users		2		0 - 18	#VALUE!

Project Name:	0
<b>Business Justification (what need or issue would you like to discuss)</b>	
How does this benefit your department?	
What is the risk in not doing this project?	
Has your department researched other possible solutions? (Alternative Solutions)	
<b>Multi-purposed solutions</b>	
Are other schools or departments doing anything similar?	
How could this solution be leveraged by other departments /schools in the college?	
<b>Expected Timeline</b>	
Is there a specific date this must be completed by?	
<b>Resources - Budget</b>	
Is this a budgeted item?	
If no, can the money be found?	
What is the target fiscal year?	
<b>Resources - People</b>	
Number of FTEs available to help implement this solution?	
Who would be the project contact?	



#	Factors	Scoring Values (0, 3, 6, 9)	Select (X)	Weight	Score	Min/Max Score	% of Total Score
1	<b>Mandated Service/Product (are any of these true?)</b> - University system or government mandate and/or legal/compliance - School and/or College Dean(s) request - Impacts core/foundational service and/or other products depend on it	0: none are true	<input type="checkbox"/>	5		0 - 45	#VALUE!
		3: one is true	<input type="checkbox"/>				
		6: two are true	<input type="checkbox"/>				
		9: all are true	<input type="checkbox"/>				
2	<b>Risk Mitigation</b> Would the college, school or department be exposed to a risk or impact if this solution is not completed?	0: little risk to college or customer if not completed	<input type="checkbox"/>	4		0 - 36	#VALUE!
		3: some risk to college or customer if not completed	<input type="checkbox"/>				
		6: much risk to college or customer if not completed	<input type="checkbox"/>				
		9: high risk to the college or customer if not completed	<input type="checkbox"/>				
3	<b>Leverage Potential</b> Solution can be leveraged for other departments/schools in the college.	0: little leverage potential, isolated service	<input type="checkbox"/>	3		0 - 27	#VALUE!
		3: some leverage	<input type="checkbox"/>				
		6: much leverage	<input type="checkbox"/>				
		9: service could be leveraged by many	<input type="checkbox"/>				
4	<b>Impact on Academic Mission</b> Directly impacts student learning and/or student experience <i>in the classroom</i> .	0: little impact	<input type="checkbox"/>	3		0 - 27	#VALUE!
		3: some impact	<input type="checkbox"/>				
		6: a lot of impact	<input type="checkbox"/>				
		9: essential/critical impact	<input type="checkbox"/>				
5	<b>Value to the Customer</b> Customers are consumers or users of the solution and could be students, staff, faculty, other schools or departments and even other services.	0: little value to the customer(s)	<input type="checkbox"/>	3		0 - 27	#VALUE!
		3: some value	<input type="checkbox"/>				
		6: a lot of value to customer	<input type="checkbox"/>				
		9: essential/critical to customer(s)	<input type="checkbox"/>				
6	<b>Significance to Users/Customer Base</b> What impact will this project have on the college or department?	0: low impact, low number of users	<input type="checkbox"/>	2		0 - 18	#VALUE!
		3: low impact, high number of users	<input type="checkbox"/>				
		6: high impact, low number of users	<input type="checkbox"/>				
		9: high impact, high number of users	<input type="checkbox"/>				

## DETAILS

# Workfront Resource Planner

Workfront College of Business

Home

Projects

Reporting

People

Requests

Timesheet

Documents

Teams

People

Legacy Resource Planning

Planning

Scheduling

Resource Pools

Resource Planner

▼

SLOT Planning ▼

View by Project

▼

Week

Month

Quarter

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Today

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FTE ▼

Portfolio Priorities		Order	JAN 2020					FEB 2020					
			AVL	PLN	BDG	VAR	NET	AVL	PLN	BDG	VAR	NET	
1	1	>	Your Time Spent on ...	10.435	0	1.1	1.1	18.335	21.4	0	1.2	1.2	20.2
2	2	>	Your Time Spent on ...	18.335	0	0.475	0.475	17.86	20.2	0	0.475	0.475	19.725
3	3	>	Your Time Spent on ...	17.86	0	3.294	3.294	14.566	19.725	0	3.3	3.3	16.425
4	4	>	Your Time Spent on ...	14.566	0	1.017	1.017	13.549	16.425	0	1.017	1.017	15.408
5	5	>	WDES Governance C...	13.549	0	0.05	0.05	13.499	15.408	0	0.05	0.05	15.358
6	6	>	JCBIT Service Reque...	13.499	0	3.533	3.533	9.966	15.358	0	3.617	3.617	11.742
7	7	>	WordPress Service R...	9.966	0.004	0.304	0.30	9.571	11.742	0.004	0.4	0.396	11.342
26	26	>	12Twenty and Salesf...	1.383	0.145	0.315	0.17	1.068	3.641	0.083	0.19	0.107	3.651
27	27	>	Accessibility Safega...	1.068	0	0.75	0.75	0.318	3.651	0	0.75	0.75	2.901
28	28	>	Food Executive Progr...	0.318	0.145	0	-0.145	0.318	2.901	0.083	0.1	0.017	2.801
29	29	>	Admissions 3.0 Disco...	0.318	0	0.8	0.8	-0.482	2.801	0	0.75	0.75	2.051
30	30	>	Retire Duplicate Intra...	-0.482	0.144	0	-0.144	-0.482	2.051	0.084	0	-0.084	2.051

Saves

Cancel

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[Resource Pools](#)
[Resource Planner](#)

SLOT Planning

View by Project

Week

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Today

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FTE

		JAN 2020					FEB 2020				
Portfolio Priorities	Order	AVL	PLN	BDG	VAR	NET	AVL	PLN	BDG	VAR	NET
1 1 >  Your Time Spent on ...		19.435	0	<input type="text" value="1.1"/>	1.1	18.335	21.4	0	<input type="text" value="1.2"/>	1.2	20.2
2 2 >  Your Time Spent on ...		18.335	0	<input type="text" value="0.475"/>	0.475	17.86	20.2	0	<input type="text" value="0.475"/>	0.475	19.725
3 3 >  Your Time Spent on ...		17.86	0	<input type="text" value="3.294"/>	3.294	14.566	19.725	0	<input type="text" value="3.3"/>	3.3	16.425
4 4 >  Your Time Spent on ...		14.566	0	<input type="text" value="1.017"/>	1.017	13.549	16.425	0	<input type="text" value="1.017"/>	1.017	15.408
5 5 >  WDES Governance C...		13.549	0	<input type="text" value="0.05"/>	0.05	13.499	15.408	0	<input type="text" value="0.05"/>	0.05	15.358
6 6 >  JCBIT Service Reque...		13.499	0	<input type="text" value="3.533"/>	3.533	9.966	15.358	0	<input type="text" value="3.617"/>	3.617	11.742
7 7 >  WordPress Service R...		9.966	0.004	<input type="text" value="0.394"/>	0.39	9.571	11.742	0.004	<input type="text" value="0.4"/>	0.396	11.342
26 26 >  12Twenty and Salesf...		1.383	0.145	<input type="text" value="0.315"/>	0.17	1.068	3.841	0.083	<input type="text" value="0.19"/>	0.107	3.651
27 27 >  Accessibility Safegua...		1.068	0	<input type="text" value="0.75"/>	0.75	0.318	3.651	0	<input type="text" value="0.75"/>	0.75	2.901
28 28 >  Food Executive Progr...		0.318	0.145	<input type="text" value="0"/>	-0.145	0.318	2.901	0.083	<input type="text" value="0.1"/>	0.017	2.801
29 29 >  Admissions 3.0 Disco...		0.318	0	<input type="text" value="0.8"/>	0.8	-0.482	2.801	0	<input type="text" value="0.75"/>	0.75	2.051
30 30 >  Retire Duplicate Intra...		-0.482	0.144	<input type="text" value="0"/>	-0.144	-0.482	2.051	0.084	<input type="text" value="0"/>	-0.084	2.051

Save

Cancel

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## DETAILS

# Workfront Resource Planner Export

Project	Role	User	JAN A	JAN B	JAN N	FEB A	FEB B	FEB N	MAR A	MAR B	MAR N	APR A	APR B	APR N	MAY A	MAY B	MAY N	JUN A	JUN B	JUN N
Your Time Spent on Professional Development	JCBIT Developer	Aaron Kaye	0.913	0.15	0.763	1	0.15	0.85	1	0.15	0.85	1	0.15	0.85	0.952	0.15	0.802	1	0.15	0.85
Your Time Spent on Administration	JCBIT Developer	Aaron Kaye	0.763	0.15	0.613	0.85	0.15	0.7	0.85	0.15	0.7	0.85	0.15	0.7	0.802	0.15	0.652	0.85	0.15	0.7
JCBIT Service Request Queue	JCBIT Developer	Aaron Kaye	0.613	0.2	0.413	0.7	0.2	0.5	0.7	0.2	0.5	0.7	0.2	0.5	0.652	0.2	0.452	0.7	0.2	0.5
IT - Upgrade to Ubuntu 18.04	JCBIT Developer	Aaron Kaye	0.345	0.4	-0.055	0.432	0.4	0.032	0.432	0	0.432	0.5	0	0.5	0.452	0	0.452	0.5	0	0.5
IT - Convert the SIP tool to RUCBIT Developer	JCBIT Developer	Aaron Kaye	-0.055	0.3	-0.355	0.032	0.3	-0.268	0.432	0.3	0.132	0.5	0	0.5	0.452	0	0.452	0.5	0	0.5
IT - Ruby upgrade Fall 2019 (F)	JCBIT Developer	Aaron Kaye	-0.355	0.15	-0.505	-0.268	0	-0.268	0.132	0	0.132	0.5	0	0.5	0.452	0	0.452	0.5	0	0.5
Rails 5.2 Upgrade	JCBIT Developer	Aaron Kaye	-0.505	0	-0.505	-0.268	0	-0.268	0.132	0	0.132	0.5	0.3	0.2	0.452	0.4	0.052	0.5	0.4	0.1
Accessibility - Phase 2	JCBIT Developer	Aaron Kaye	-0.505	0.068	-0.573	-0.268	0.068	-0.336	0.132	0.068	0.064	0.2	0	0.2	0.052	0	0.052	0.1	0	0.1
Aaron Kaye Total				1.418			1.268			0.868			0.8			0.9			0.9	

Project	Role	User	JAN A	JAN B	JAN N	FEB A	FEB B	FEB N	MAR A	MAR B	MAR N	APR A	APR B	APR N	MAY A	MAY B	MAY N	JUN A	JUN B	JUN N
Your Time Spent on Professional Development	JCBIT Developer	Donald Friedrichsen	0.913	0.05	0.863	1	0.05	0.95	1	0.05	0.95	1	0.05	0.95	0.952	0.05	0.902	1	0.05	0.95
Your Time Spent on Administration	JCBIT Developer	Donald Friedrichsen	0.863	0.1	0.763	0.95	0.1	0.85	0.95	0.1	0.85	0.95	0.1	0.85	0.902	0.1	0.802	0.95	0.1	0.85
Your Time Spent on Overhead	JCBIT Developer	Donald Friedrichsen	0.763	0.1	0.663	0.85	0.1	0.75	0.85	0.1	0.75	0.85	0.1	0.75	0.802	0.1	0.702	0.85	0.1	0.75
JCBIT Service Request Queue	JCBIT Developer	Donald Friedrichsen	0.663	0.15	0.513	0.75	0.2	0.55	0.75	0.2	0.55	0.75	0.2	0.55	0.702	0.2	0.502	0.75	0.2	0.55
Executive Education Backlog	JCBIT Developer	Donald Friedrichsen	0.513	0.04	0.473	0.55	0.04	0.51	0.55	0.04	0.51	0.55	0.04	0.51	0.502	0.04	0.462	0.55	0.04	0.51
Admissions 3.0 Discovery	JCBIT Developer	Donald Friedrichsen	0.473	0.2	0.273	0.51	0.2	0.31	0.51	0.2	0.31	0.51	0.2	0.31	0.462	0.2	0.262	0.51	0.2	0.31
Donald Friedrichsen Total				0.64			0.69			0.69			0.69			0.69			0.69	

Available (< 0.65)	
Some Availability (< 0.85)	
Engaged (> 0.85 and < 1.05)	
Some Overloading (> 1.05)	
Overloaded (> 1.15)	
Really Overloaded (> 1.25)	

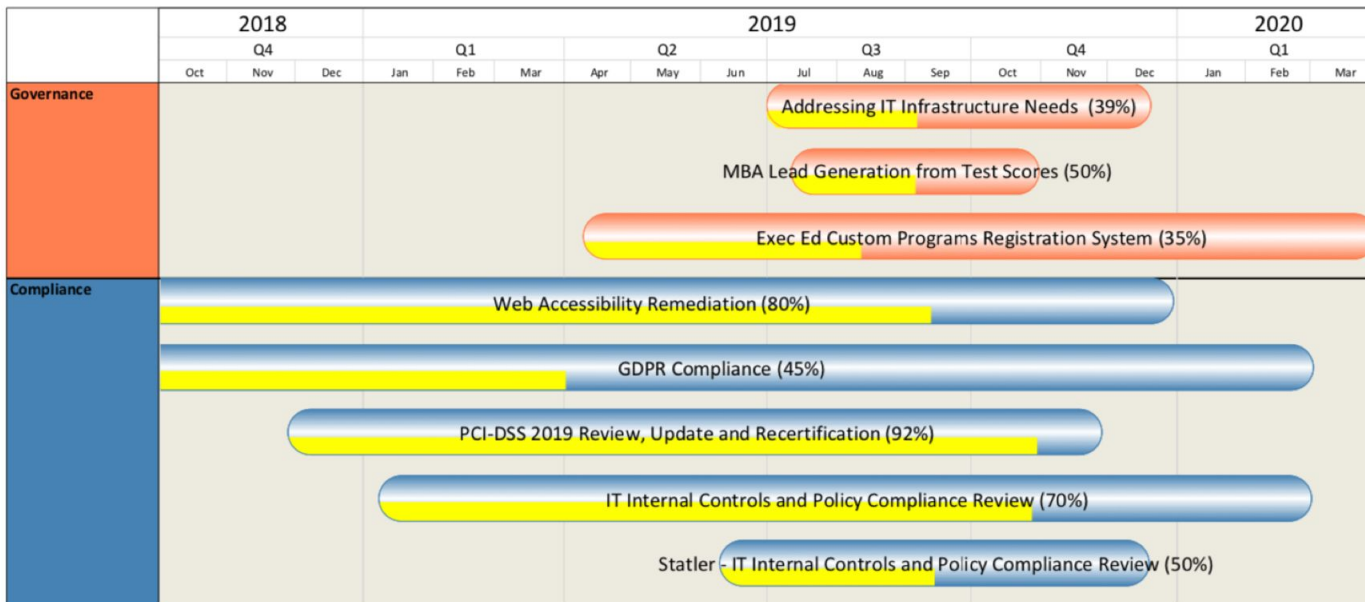
Project	Role	User	Y	JAN A	JAN B	JAN N	FEB A	FEB B	FEB N	MAR A	MAR B	MAR N	APR A	APR B	APR N	MAY A	MAY B	MAY N	JUN A	JUN B	JUN N
Your Time Spent on Professi	JCBIT Developer	Aaron Kaye		0.913	0.15	0.763	1	0.15	0.85	1	0.15	0.85	1	0.15	0.85	0.952	0.15	0.802	1	0.15	0.85
Your Time Spent on Adminis	JCBIT Developer	Aaron Kaye		0.763	0.15	0.613	0.85	0.15	0.7	0.85	0.15	0.7	0.85	0.15	0.7	0.802	0.15	0.652	0.85	0.15	0.7
JCBIT Service Request Queue	JCBIT Developer	Aaron Kaye		0.613	0.2	0.413	0.7	0.2	0.5	0.7	0.2	0.5	0.7	0.2	0.5	0.652	0.2	0.452	0.7	0.2	0.5
IT - Upgrade to Ubuntu 18.04	JCBIT Developer	Aaron Kaye		0.345	0.4	-0.055	0.432	0.4	0.032	0.432	0	0.432	0.5	0	0.5	0.452	0	0.452	0.5	0	0.5
IT - Convert the SIP tool to R	JCBIT Developer	Aaron Kaye		-0.055	0.3	-0.355	0.032	0.3	-0.268	0.432	0.3	0.132	0.5	0	0.5	0.452	0	0.452	0.5	0	0.5
IT - Ruby upgrade Fall 2019 (F	JCBIT Developer	Aaron Kaye		-0.355	0.15	-0.505	-0.268	0	-0.268	0.132	0	0.132	0.5	0	0.5	0.452	0	0.452	0.5	0	0.5
Rails 5.2 Upgrade	JCBIT Developer	Aaron Kaye		-0.505	0	-0.505	-0.268	0	-0.268	0.132	0	0.132	0.5	0.3	0.2	0.452	0.4	0.052	0.5	0.4	0.1
Accessibility - Phase 2	JCBIT Developer	Aaron Kaye		-0.505	0.068	-0.573	-0.268	0.068	-0.336	0.132	0.068	0.064	0.2	0	0.2	0.052	0	0.052	0.1	0	0.1
		<b>Aaron Kaye Total</b>			1.413			1.268			0.868			0.8			0.9			0.9	

Project	Role	User	Y	JAN A	JAN B	JAN N	FEB A	FEB B	FEB N	MAR A	MAR B	MAR N	APR A	APR B	APR N	MAY A	MAY B	MAY N	JUN A	JUN B	JUN N
Your Time Spent on Professi	JCBIT Developer	Donald Friedrichsen		0.913	0.05	0.863	1	0.05	0.95	1	0.05	0.95	1	0.05	0.95	0.952	0.05	0.902	1	0.05	0.95
Your Time Spent on Adminis	JCBIT Developer	Donald Friedrichsen		0.863	0.1	0.763	0.95	0.1	0.85	0.95	0.1	0.85	0.95	0.1	0.85	0.902	0.1	0.802	0.95	0.1	0.85
Your Time Spent on Overhea	JCBIT Developer	Donald Friedrichsen		0.763	0.1	0.663	0.85	0.1	0.75	0.85	0.1	0.75	0.85	0.1	0.75	0.802	0.1	0.702	0.85	0.1	0.75
JCBIT Service Request Queue	JCBIT Developer	Donald Friedrichsen		0.663	0.15	0.513	0.75	0.2	0.55	0.75	0.2	0.55	0.75	0.2	0.55	0.702	0.2	0.502	0.75	0.2	0.55
Executive Education Backlog	JCBIT Developer	Donald Friedrichsen		0.513	0.04	0.473	0.55	0.04	0.51	0.55	0.04	0.51	0.55	0.04	0.51	0.502	0.04	0.462	0.55	0.04	0.51
Admissions 3.0 Discovery	JCBIT Developer	Donald Friedrichsen		0.473	0.2	0.273	0.51	0.2	0.31	0.51	0.2	0.31	0.51	0.2	0.31	0.462	0.2	0.262	0.51	0.2	0.31
		<b>Donald Friedrichsen Total</b>			0.64			0.69			0.69			0.69			0.69			0.69	

Available (< .65)	
Some Availability (<.85)	
Engaged (> .85 and < 1.05)	
Some Overloading (>1.05)	
Overloaded (> 1.15)	
Really Overloaded (> 1.25)	

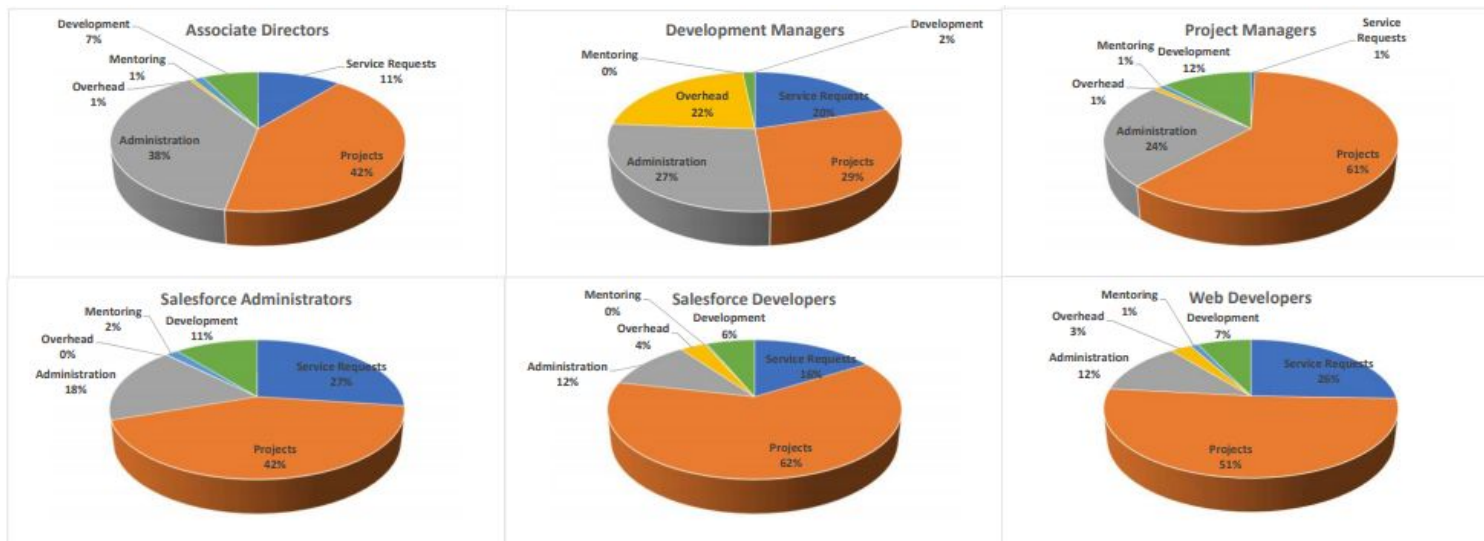
## DETAILS

# Active Project Report



## SUCCESSSES

# Resource Utilization Data



# Questions?





BIRDS OF A FEATHER

## Group Discussion

- Introductions - meet your group!
- What does the governance process look like at your organization?
- What's working well? Where are there challenges?



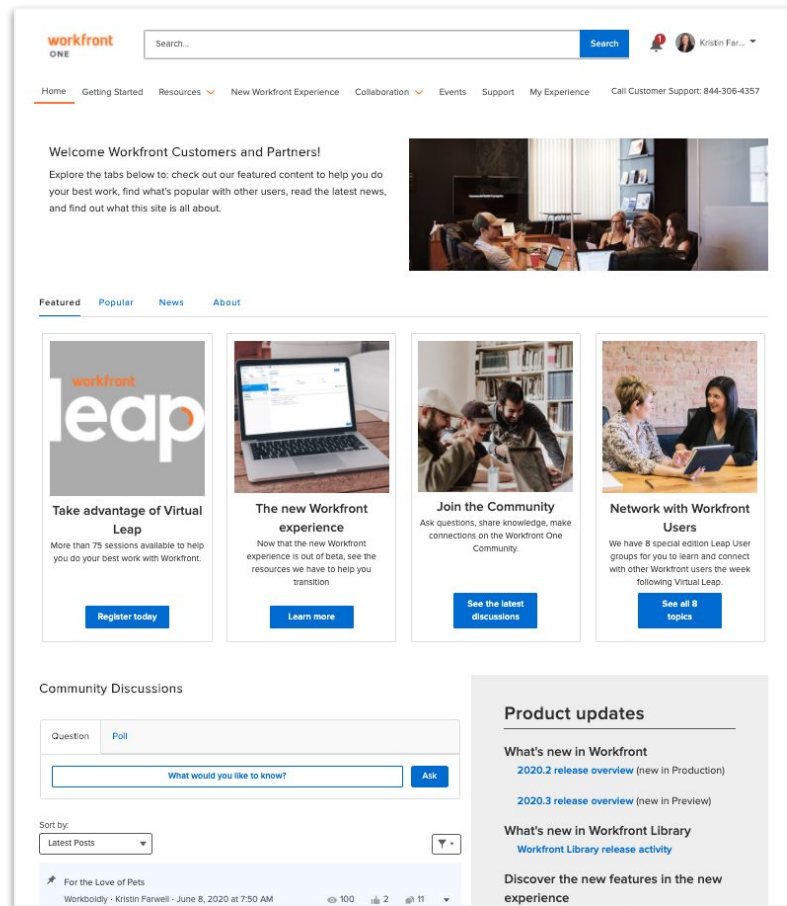
30 MINUTES



## 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 interface. At the top, there's a navigation bar with links: Home, Getting Started, Resources, New Workfront Experience, Collaboration, Events, Support, My Experience, and a call to action: Call Customer Support: 844-306-4357. A search bar is also present. Below the navigation bar, 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." To the right of this message is a photo of a group of people in a meeting. Below the welcome message, there are four featured content 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). At the bottom, there's a "Community Discussions" section with a "Question" tab selected, a search bar, and a "Sort by" dropdown set to "Latest Posts". A post titled "For the Love of Pets" by Kristin Farwell is visible. To the right of the community discussions is a "Product updates" section with links to "What's new in Workfront 2020.2 release overview" and "What's new in Workfront Library".



## 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