



Request Queues – Mastering the Intake Process from Submission to Completion

Customer Success Workshop – August 22, 2023



Agenda

5 minutes

Welcome & Introductions

10 minutes

3 Advantages to Using Request Queues
Request Queue Best Practices
Request Queues 101 - Setup

30 minutes

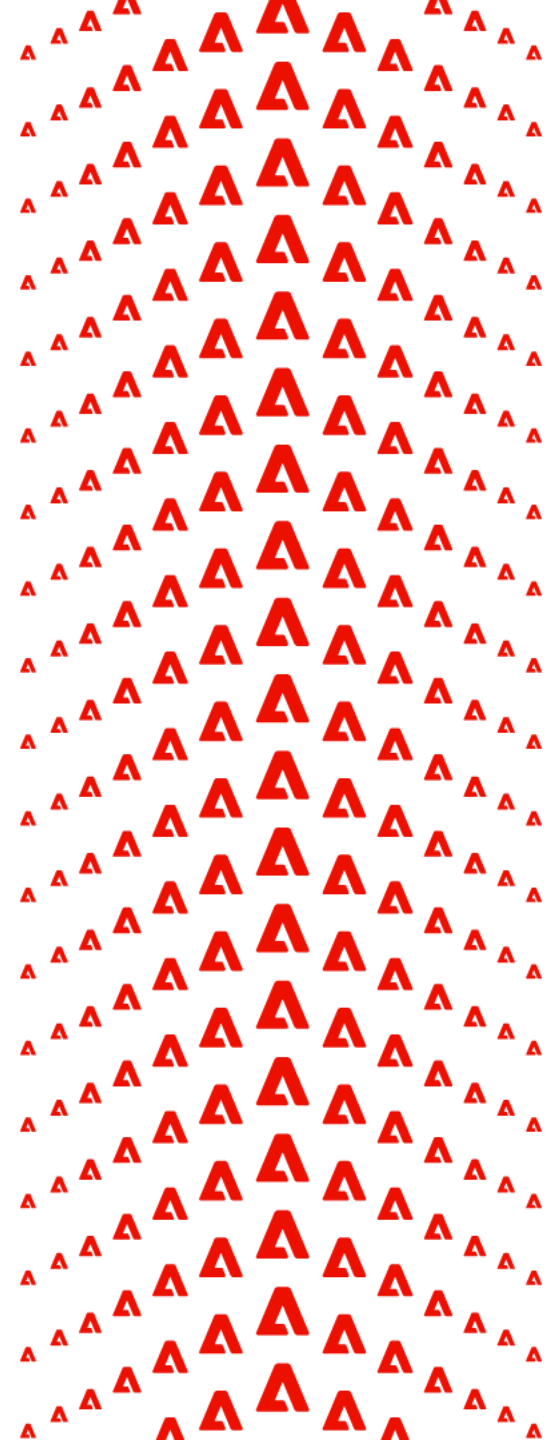
Sample Request Queues
Live Demo

5 minutes

Sample Success Metrics
Experience League Resources

10+ minutes

Open Q&A / Discussion



Meet the Team – Introduce Yourself



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Say hi in the chat!

- Name and Company
- How long you've been a Workfront Sys Admin
- **Are you currently using Request Queues?**

3 Advantages of Using Request Queues

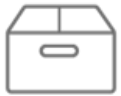


Track

Standardize the process for effective work management

Act as a funnel to capture all incoming work requests

Get important details upfront for immediate action – mirror current practice



Organize

System of record - all information in a single space

Make priorities clear – what should be focused on next

Easily make assignments, post comments and update progress



Report

Group requests by topic to analyze use or lack thereof

Provide a visual of what is being asked, by whom, on what topic, and how quickly it's delivered

Share data across the organization from users to leadership

Request Queue Best Practices

- Document your workflow. Train your requesters, traffic managers, fulfillment teams, and approvers on the process.
- Define metrics for reporting and analysis. Connect with stakeholders to see what matters to them with this new data.
- Create a custom project status for "Request Queue" that equates with Current to distinguish request queue projects.
- Leverage automation. Automatically assign new requests using Routing Rules.
- Include a description for each element —the request queue project, topic groups, queue topics, and routing rules.
- If you plan to use issue approvals with requests submitted through a queue, create an issue status called Rejected.
- Avoid sharing request queues with everyone. Set up the queue details settings so users only see relevant queues.
- Build a dashboard so traffic managers or system administrators can easily track, update and manage issues.
- Use layout templates to remove request queue setup options from the left panel menu for users who don't need access.
- Create a Sys Admin request queue for users to ask WF-related questions, update users, schedule new user training, etc.
- Audit request queues on a regular basis to identify and un-share queues that aren't being used.
- Keep custom forms simple. Share rows for less scrolling.
- Keep it organized. Use topic groups to create shorter, easier to manage lists.
- Create a project template specific for request queues, as these projects typically have different settings/configurations.
- **Do you have additional best practices to share?**

Request Queue Setup

Request Queue Setup – How To

You set up a request queue as a project. Recommendation: Add 1 task to your project titled "DO NOT ADD TASKS – REQUEST QUEUE PROJECT" or similar so users know not to add any.

There are **2 requirements** for the queue to become accessible from the Requests area:

- Check the box for, Publish as a Help Request Queue. Click Save.
- Set the project to a Current (or equivalent) status.

Additional things to consider

- Who can submit requests?
- Routing rules
- Issue (request) fields
- Custom Forms – are forms shared?

PROJECT **Request Queue 1** ☆ Share ○○○ Percent Complete 0% Project Owner Stan Rizzo Planned Completion Date Aug 9, 2023 Condition On Target Status **Current**

Queue Details

Queue Type

Publish as Help Request Queue

Who can add requests to this queue?

Anyone

People with view access to this project

People in this project's company

People in this project's group (Marketing)

Share with these links

Direct Access URL

<https://csatscale.testdrive.workfront.com/requests/new?activeTab=tab-new-h>

Embed Code

`<iframe src="https://csatscale.testdrive.workfront.com/requests/newRequestE`

Queue Properties

Request Types

Change Order

Issue

Ram Risk

Attaching custom forms to your requests? Be sure Contribute is selected.

When someone makes a request, automatically grant...
Contribute Access ▾

Request Queue Setup – Routing Rules

Routing Rules automatically assign incoming work. Recommendation: Route requests to a team, rather than an individual. If you are creating a team specifically for routing rules, consider labeling it something like "Request Routing" so you can easily identify which role this team plays in your Workfront instance.

Additional things to consider

- Make sure the email notification for My team gets a new work request (Work Item Request to Team) is activated at the global level and users have it turned on in their personal profile.
- Create an issue report that pulls in all issues assigned to this team for quick access

Issue > Team ID > Equal > Request Routing

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Work Item Request to Team	My team gets a new work request	New Work Request: Reference Object:Name	<input checked="" type="checkbox"/>
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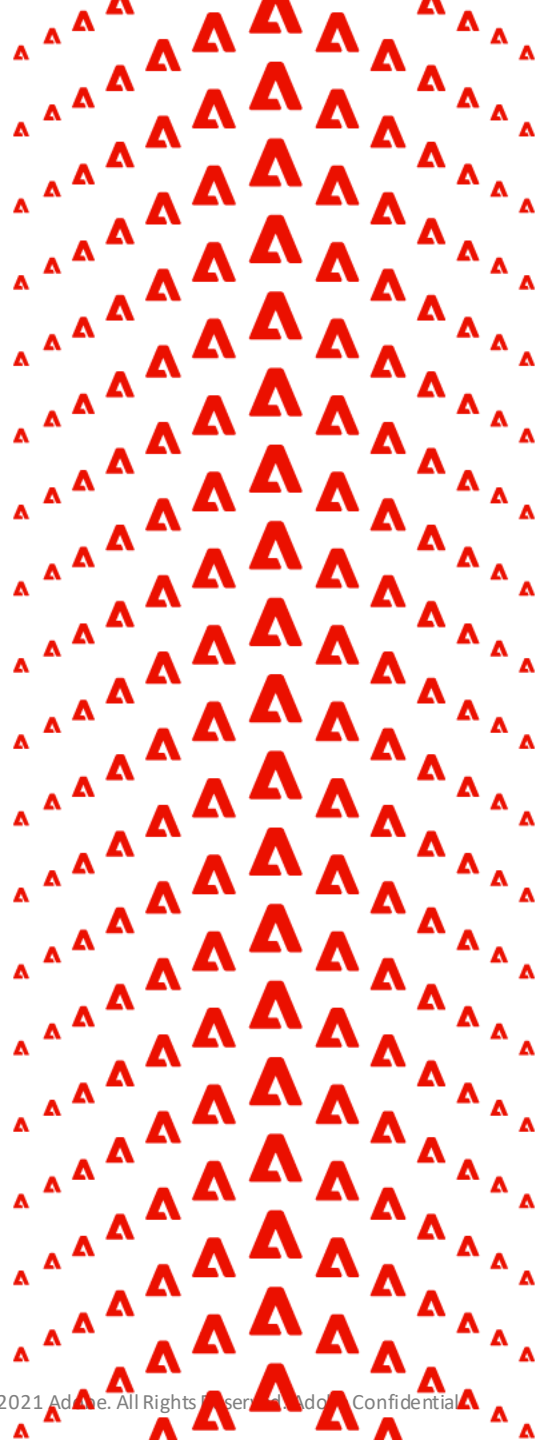
Request Queue Setup – Topic Groups & Queue Topics

Topic Groups and Queue Topics help layer requests into categories. Think of them like parent-child relationships in a project. The project name is the name of your Request Queue. Topic Groups are the Parent Tasks (not always required) and Queue Topics are the child tasks.

Recommendation: If multiple layers are needed, create Topic Groups first. That way, when you create Queue Topics, you can associate them to the appropriate Topic Group.

The image shows two overlapping screenshots of the 'New request' form. The top screenshot, labeled 'OPTION 1', shows a form with three dropdown menus: 'Request Type' (Marketing Requests), 'Marketing Requests' (Digital Requests), and 'Digital Requests' (Social Media Ad). Red arrows point from these dropdowns to labels: 'Project Name' for the first, 'Topic Group' for the second, and 'Queue Topic' for the third. The bottom screenshot, labeled 'OPTION 2', shows the same form but with the 'Marketing Requests' dropdown menu open, displaying a list of options: 'Email Campaign', 'Mailer', and 'Social Media Ad'. Red arrows point from the 'Marketing Requests' dropdown and the 'Email Campaign' option to labels: 'Project Name' and 'Queue Topic' respectively. The form also includes a 'Subject' field with a red asterisk and a 'This field is required.' error message, a 'Description' text area, and 'Submit' and 'Close' buttons at the bottom.

Sample Request Queues

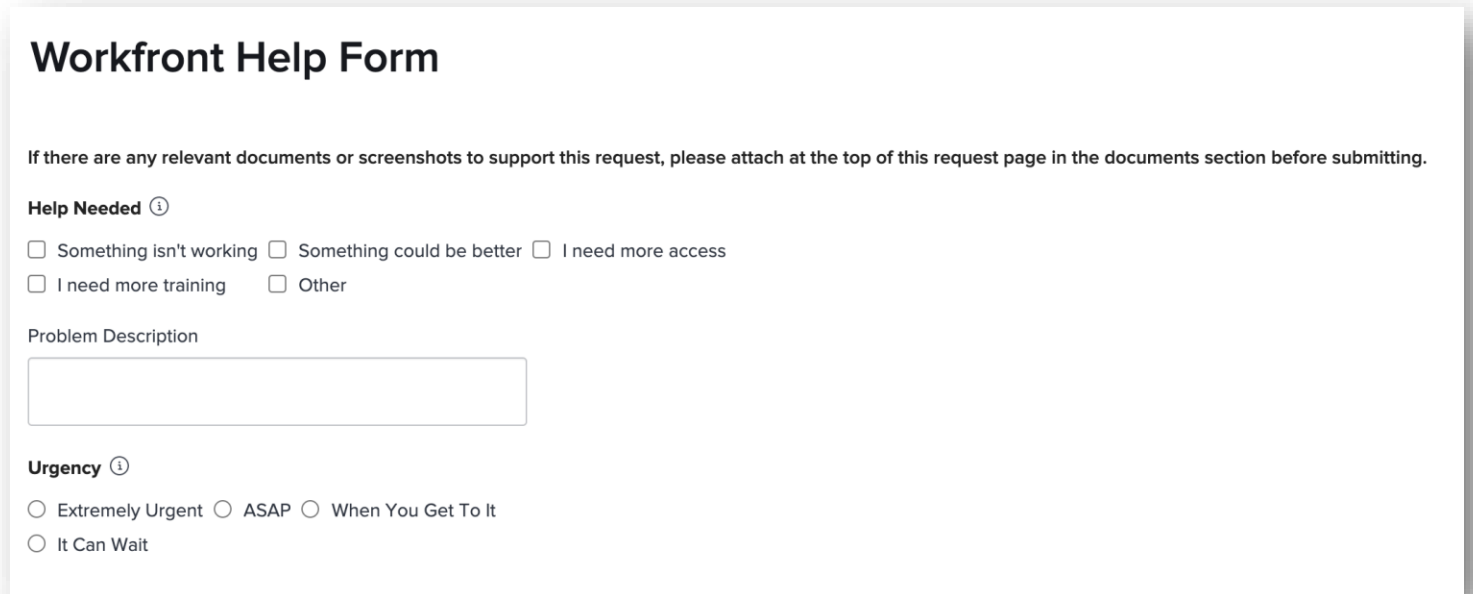


Sample Request Queue #1 – System Admin Requests

How often are you being asked to build reports, add or deactivate users, edit custom forms, help with training, create new teams, adjust layout template settings and everything else? Can you turn those ad-hoc asks into an organized funnel for Sys Admin Requests to track, filter and report on those?

Request Queue details/setup:

- Anyone can submit a request
- Stick to issue resolution vs converted projects
- Leverage single custom form with minimal choices for optimal end user experience
- Automatically route to Sys Admin



Workfront Help Form

If there are any relevant documents or screenshots to support this request, please attach at the top of this request page in the documents section before submitting.

Help Needed ⓘ

Something isn't working Something could be better I need more access
 I need more training Other

Problem Description

Urgency ⓘ

Extremely Urgent ASAP When You Get To It
 It Can Wait

Pro-Tip: [Submit Adobe Workfront Requests from MS Teams](#)

Sample Request Queue #2 – Project Request & Approval

The real magic of the request queue functionality is when initiating new projects or large cross-functional campaigns. Create a standardized, transparent intake process for requests, capture key (reportable) details for those projects, along with seamless review and approval workflows, supported by consistent yet flexible project creation templates that include milestone and proofing processes from initiation to delivery.

This example includes:

- Queue setup with Marketing Project Brief as Custom Form
- Queue Topic Routing based on type of request
- Issue Approval Path with Custom Status for Executive Approval
- Project Templates with Approval Path, Milestones, and Portfolio attached
- Approval Path routes from PM to TC and then back to PM for Initiation

New request

Request Type
Start a New Marketing Project

Start a New Marketing Project ⓘ

- New Creative Services Project
- New Marketing Ops Project
- New Product Marketing Project

Description

Request a project for the Creative Services team.

Marketing Operations Project Brief Form

If there are any relevant documents or screenshots to support this request, please attach at the top of this request page in the documents section before submitting.

Stakeholder
Start typing name...

Project Overview/Request Details*

Urgency* ⓘ

- Extremely Urgent
- ASAP
- When You Get To It
- It Can Wait

Submit Close

Sample Request Dashboard

Dashboards don't have to be used just for reporting – they can also be a way to find, manage, update and complete work. Consider building a request dashboard that shows ALL work requests, everything from new, to in progress, to closed, to converted and project (or task) status updates.

Include reports for:

- Issues entered this month that are still in a new status (not converted)
- Issues entered this month that are in progress (not converted)
- Issues closed this month (not converted)
- Issues converted to projects / tasks with that resolve object status and recent update

NEW Issues (not converted)

Ref #	Name	Assignments	Entry	Status	Priority
10950	Testing 22.1 Release	CS@Scale Team	1/25/22	New	Normal
12200	Request to add new user	CS@Scale Team	3/2/22	New	Normal
12650	March 30 Meet with Customer	CS@Scale Team	3/30/22	New	Normal
12800	Reporting Workshop for Adobe	CS@Scale Team	4/4/22	New	Normal
10900	LS Test Issue for Workfront	Leslie Spier	1/21/22	New	Normal

Incomplete Issues Converted to Projects

Ref #	Name	Entry Date	Entered By	Resolve Project: Name	Resolve Project: Status	Last Update on Project
6392	Branding for Vending Machines	2/28/20	Cecilia Zettici	Branding for Vending Machines	Current	John - please see note below and get back to me. I have a meeting scheduled for Thursday to discuss next steps.
6650	Reverse Scheduling Project	4/9/20	Admin User	Reverse Scheduling Project	Current	Hope all is well! 🙌
7339	Baby Yoda	5/7/20	Admin User	Baby Yoda	Current	It's Baby Yoda! 🙌

In Progress Issues (not converted)

Name	Entry	Status	Last Update
New hire team training request	3/11/22	In Progress	Training scheduled for Monday, May 2
Object Name Change	4/4/22	In Progress	See report HERE. Please change name to 0087 Projects by Status by Portfolio

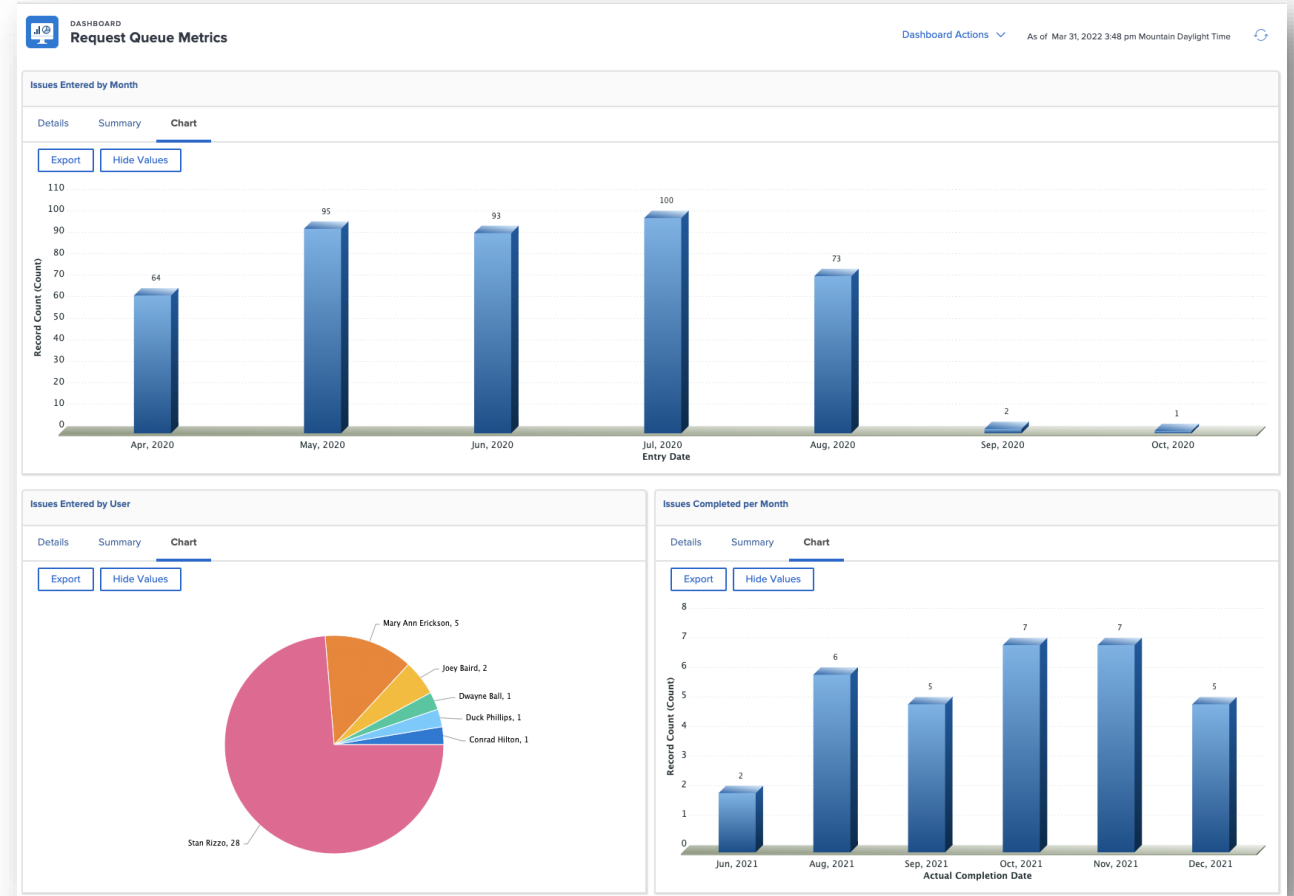
Closed Issues this month

Name	Status	Actual Completion Date
More Biz Cards Please!	●	4/6/22
Announcement Email	●	4/5/22
Fusion User Group - Announcement	●	4/1/22
Remote Consulting Hours	●	4/1/22
Holiday Video Needed	●	4/4/22

Live Demo

Sample Success Metrics

- # of days between actual start date and actual completion date – avg per month, quarter, year
- # of days between entry date and the actual start date – avg per month, quarter, year
- # of requests submitted per month, quarter, year
- # of requests completed per month, quarter, year
- # of requests by user per month, quarter, year
- # of requests by topic per month, quarter, year
- # of rejected requests per month, quarter, year
- # of requests converted to tasks and/or projects per month, quarter, year
- **What KPIs/metrics are you currently using?**



Step-by-step report creation instructions

of requests submitted per month

- Create an issue report
- Group the results by Issue Entry Date > Month
- Add a chart of your choice. By default, the chart will use the entry date grouping you selected
- Save and close your report

of requests completed per month

- Create an issue report.
- Add a filter for Issue > Status Equates With > Closed
- Group the results by Issue > Actual Completion Date > Month
- Add a chart of your choice. By default, the chart will use the actual completion date grouping your selected
- Save and close your report

of requests by user per month

- Create an issue report
- Group the results by Issue Submitted By > Name followed by Issue Entry Date > Month
- Add a column chart. Set your bottom (x) axis to Submitted by > Name and then toggle on Group Columns. Choose the Stacked option and group data by Submitted By > Name
- Save and close your report

of days between actual start date and actual completion date

- Create (or edit) an issue custom form
- Create a new calculated custom field, $\text{ROUND}(\text{DIV}(\text{WORKMINUTESDIFF}(\text{Actual Completion Date}, \text{Actual Start Date}), 480), 2)$
- Attach custom form to all issues and include field in reports

Step-by-step report creation instructions (continued)

of days between issue entry date and issue actual start date

- Create (or edit) an issue custom form
- Create a new calculated custom field, $\text{ROUND}(\text{DIV}(\text{WORKMINUTESDIFF}(\text{Entry Date}, \text{Actual Start Date}), 480), 2)$
- Attach custom form to all issues and include field in reports

of days between issue entry date and resolve project actual start date

- Create (or edit) an issue custom form
- Create a new calculated custom field, $\text{ROUND}(\text{DIV}(\text{WORKMINUTESDIFF}(\text{Entry Date}, \text{Resolve Project.Actual Start Date}), 480), 2)$
- Attach custom form to all issues and include field in reports

Key Takeaways



Document and train users on a formal submission process

Share the WHY – why does this benefit you?

A single space to track, organize and prioritize all incoming work

Capture all details upfront to help reduce rework and guesswork



Leverage a Traffic Manager/Traffic Manager team to oversee incoming work requests

Build a high-level overview dashboard to easily identify new, in progress and completed work

Authority to assign, delegate and adjust deadlines as needed

Prioritize requests to ensure the right work is being done at the right time by the right people



Measure the impact of work

What were you hoping to accomplish by creating a request queue? Has it been successful?

Make continuous improvements based on user feedback – **adoption is key!**

Resources



Documentation / Training

- [Create and Manage Request Queues](#)
- [Request Queue best practices](#)
- [Request Queue Management Course](#)
- [Display vs Skip Logic – Custom Forms](#)

Connect with your Peers

- Ask questions and get ideas from other Workfront users on the [Community](#)
- Check the [Events](#) tab for upcoming webinars & workshops

Blogs

- [Customer Success Tips: Work Intake](#)
- [Workfront is Simple – Optimizing Work Management](#)
- [A Toolkit to Drive Efficiency and Visibility](#)

Sample Request Queue #3 – Change Requests

Here's an example of how to manage Change Requests/Changes in Scope to Projects. In this example, these were handled by attaching an Approval Process routed to a Governance Team, and then once approved, converting to a Task in the relevant Project.

This example includes:

- Queue setup with Change Existing Project Custom Form
- Queue Topic Routing based on type of request
- Issue Approval Path with Custom Status for Executive Approval

The screenshot displays a web form for submitting a change request. At the top, the 'Request Type' dropdown is set to 'Change an Existing Marketing Project'. Below it, a secondary dropdown is set to 'Change a Creative Services Project'. An information panel on the right contains a welcome message and instructions: 'Welcome to the Appetite Inc. Project Change Form! Use this form to request a change or addition to an EXISTING project or campaign. This form routes to Marketing Directors for review and approval. TIP: Use the Subject field to provide a high-level idea of the change needed. show less...'. The 'Details' section has a 'Subject' field with a red border and a red asterisk, containing the placeholder text 'Type request subject'. Below this is a red error message: 'This field is required.' The 'Change Request Information Form' section includes a text area for documents, followed by 'Existing Project Name' (with a search icon), and three dropdown menus for 'Change Request Category', 'Change Request Impact', and 'Primary Goal'. The 'Urgency' section has four radio button options: 'Extremely Urgent', 'ASAP', 'When You Get To It', and 'It Can Wait'. At the bottom, there is a 'Change Rationale' text area.

Sample Request Queue #3 – Change Requests

Additional Images of the Request and the Queue Details

Change Rationale

Exclusions/Assumptions/Special Considerations

Cost Estimate

Resource Cost Estimate in Hours:

Resource Cost Estimate in Dollars:

Additional Fixed Expense Cost:

Show on Dashboard

Yes

No

Documents

Drag and drop files

or

Queue Details

- Billing Records
- Expenses
- Hours
- Workload Balancer
- People
- Utilization
- Queue Details**
- Routing Rules
- March
- Queue Topics
- Topic Groups
- Metrics
- Milestone
- KPI Dashboard
- burn report

Default Approval:

Default Route:

New Issue Fields

Show the following selected fields to all users

<input type="checkbox"/> Description	<input type="checkbox"/> URL	<input type="checkbox"/> Assigned To
<input type="checkbox"/> Status	<input type="checkbox"/> Priority	<input type="checkbox"/> Severity
<input type="checkbox"/> Primary Contact	<input type="checkbox"/> Planned Start Date	<input type="checkbox"/> Planned Completion Date
<input type="checkbox"/> Planned Hours	<input type="checkbox"/> Job Role	<input type="checkbox"/> Team

Documents

Display the Documents area to allow users to upload files

After custom forms

Before custom forms

Show all selected and unselected fields to:

Custom Forms - Add multiple forms. Arrange them in the order that you would like them to appear.

Reorder Forms

Drag and drop the forms in the order you would like them to appear.

Adding Images to Custom Form from Workfront Image

Ensure the image is uploaded to your preferred Workfront Project, then right-click on the image name, copy link address and paste that address into the URL field in the Custom Form.

The screenshot displays the Workfront interface for a project named "Amazing Idea". The breadcrumb navigation shows the path: More > PORTFOLIO Appetite Inc Marke... / PROGRAM Product: Food Truc... / PROJECT Amazing Idea. The project details show a 36.08% completion rate, owned by Roman Novak, with a planned completion date of Dec 29, 2021. The "Documents (14)" section is active, showing a list of project folders. One folder, "Baby Twillite.jpg", is selected, and a context menu is open over it, with "Copy Link Address" highlighted. To the right, the "Field settings" panel for an "Image" field is visible. The "URL*" field is populated with the copied link address: <https://cynthiaboon.my.workfront.com/internal/document/preview?versio...>. Below the panel, a preview of the image shows a black dog wearing a white cone.

More info: [Add or Edit an image or other asset widget in a custom form](#)

Bonus Tips!

Super charge your Request Queues with Favorite Project Templates, Issue Approval Processes, and Request Status Dashboards.

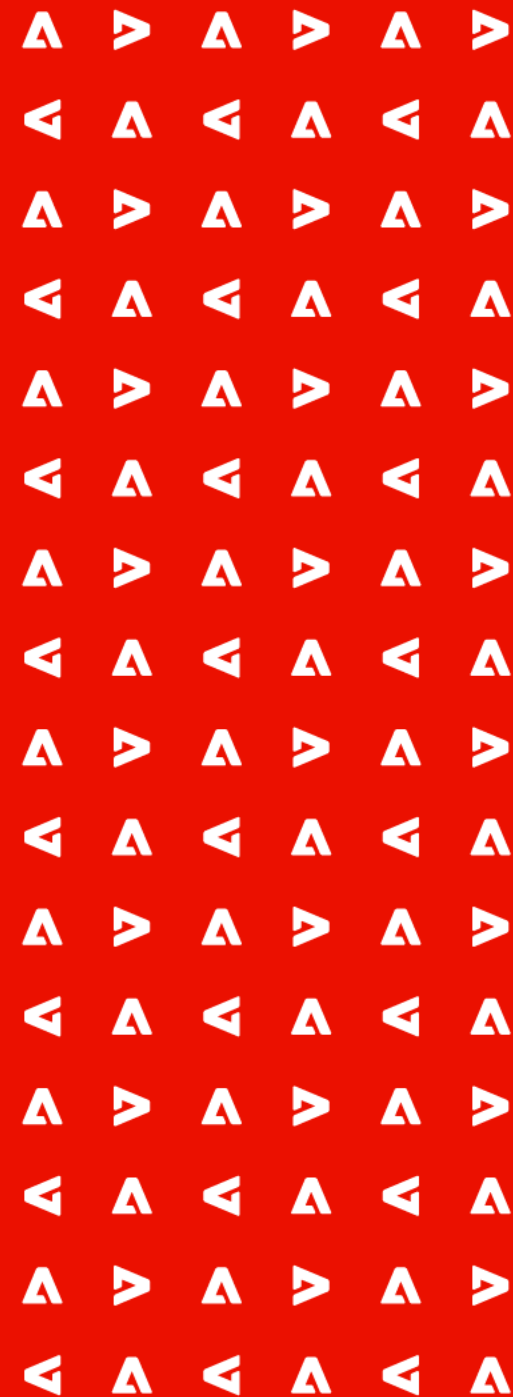
The image displays three overlapping screenshots from the Twilite application:

- Left Screenshot:** Shows the 'Issue Details' sidebar with a menu. The 'Favorite templates' option is selected, opening a list of templates including 'Baby Yoda Template', 'Governance Template', 'HR - HR Product Template', 'MRK - Creative Services Template', 'MRK - Social Media Template', 'New Hire Readiness Template', 'PMO Project Template', 'Workshop Template Example', and 'zzAdd/Edit/Delete Employee IT Se...'. A 'Baby Yoda' image is visible in the background.
- Middle Screenshot:** Shows a 'Governance Requests for Review' dashboard table. The table has columns for Name, Assignments, Status, Entry, Converted Project Name, Requested By, Request Form, Last Note: Note Text, and Governance Notes. It lists items under 'Urgency: ASAP (1)', 'Urgency: Extremely Urgent (1)', and 'Urgency: No Value (5)'. Below the table is a 'Governance Projects Pending Next Steps' section with a table showing Status (Approved, Requested - Pending Approval), Name, Owner, Start On, Due On, and Status.
- Right Screenshot:** Shows the 'Edit approval process' configuration screen. It includes fields for 'Approval process name' (Governance Approval Process), 'Description' (Used to route an approval request to the Governance Team (Marketing Directors)), 'Is Active' (checked), and 'This approval process can be used by' (All groups). It also shows 'Path 1' configuration with 'Start approval process when the status is set to' (New) and 'Stage 1' configuration with 'Name' (Stage 1) and 'Approvers' (MRK - Governance Team).

More info: [Add or Edit an image or other asset widget in a custom form](#)



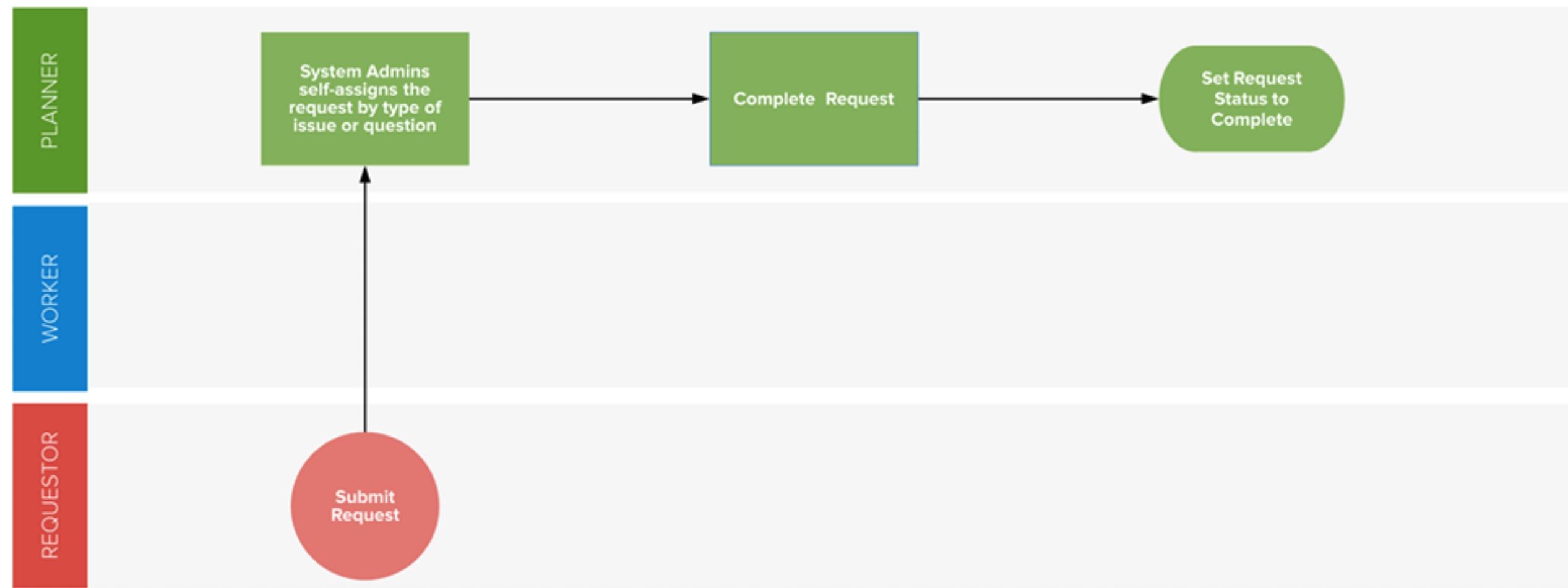
Appendix



Example: User Support & Sys AdminWorkflow



USER SUPPORT & SYSTEM MAINTENANCE WORKFLOW

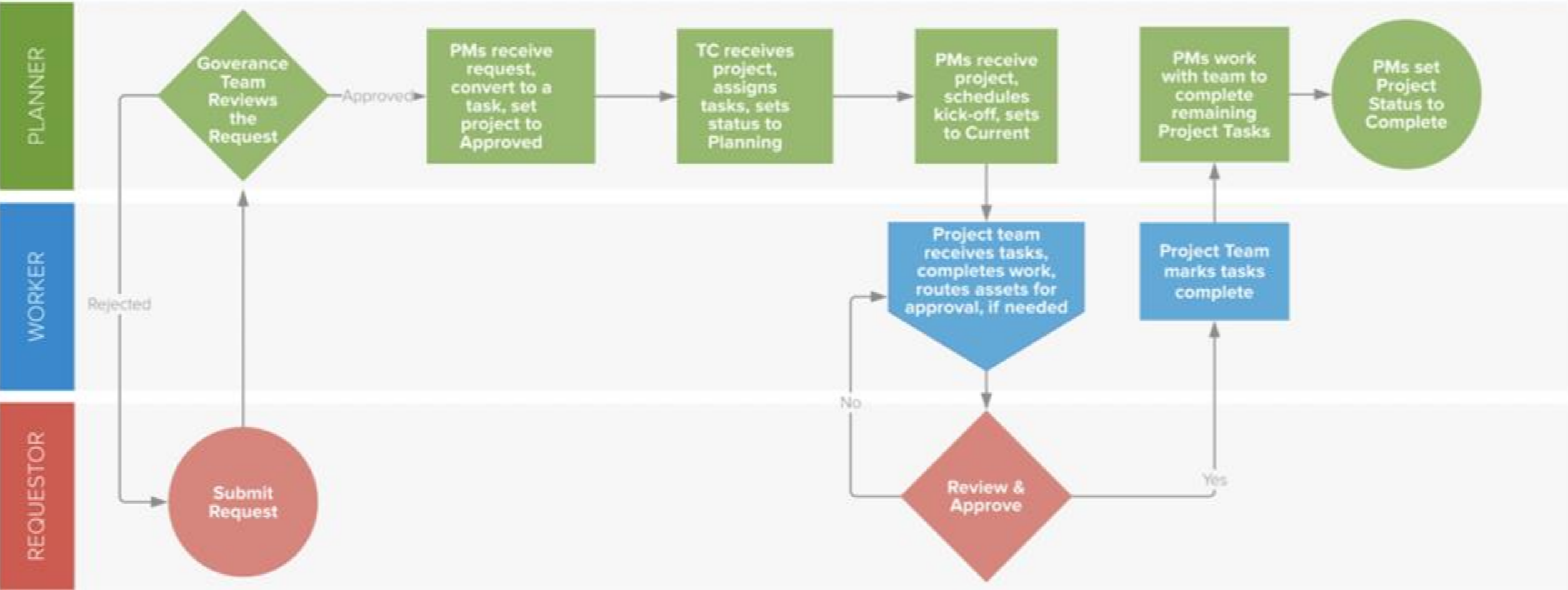


Example: Change Request & Approval



CHANGE REQUEST APPROVAL WORKFLOW

Workfront CUSTOMER EXPERIENCE



Example: Issues only Workflow



EXECUTIVE REQUESTS WORKFLOW

