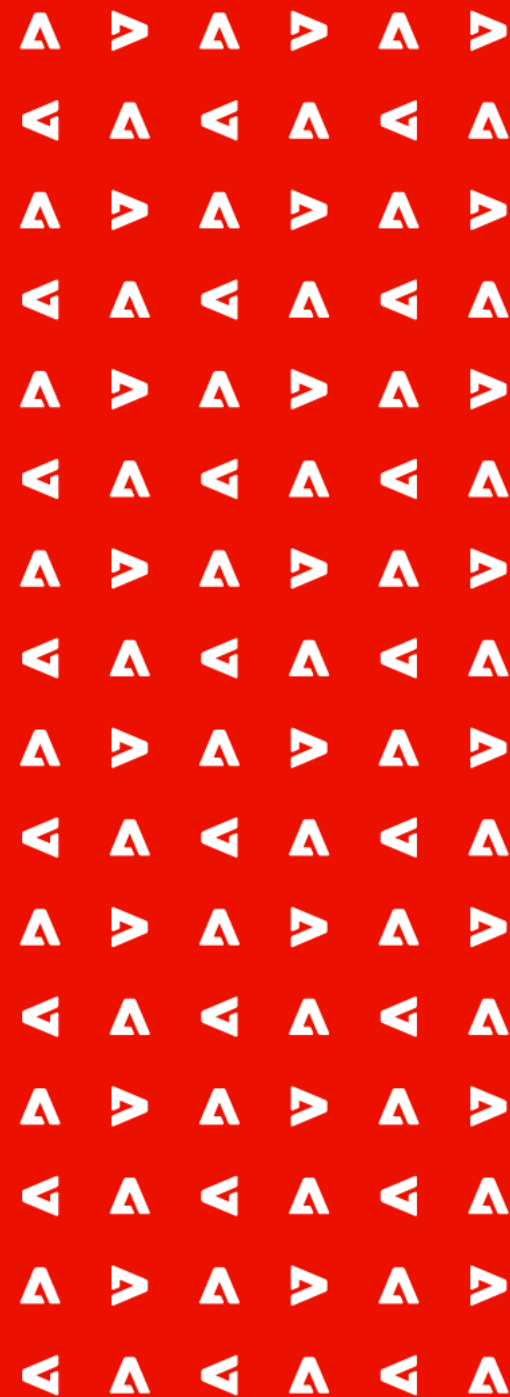






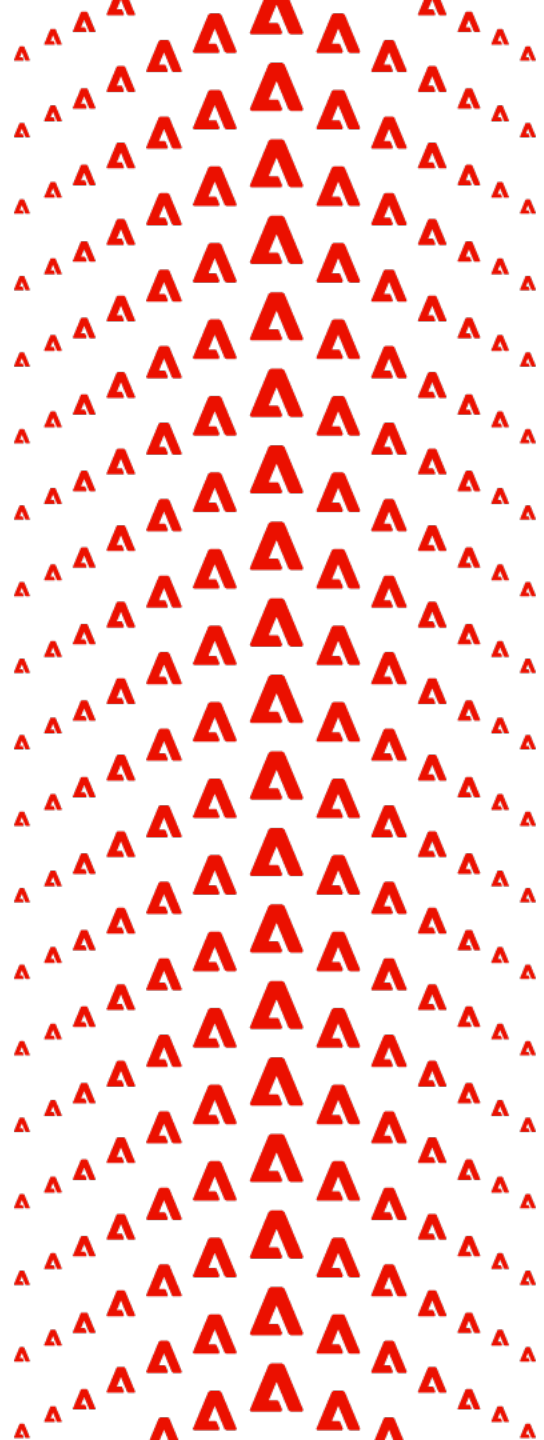
System Admin Essentials: Improving User Experience With Interface Design

March 15, 2023



Agenda

Time (PST)	Topic
8:00 a.m.	Welcome and agenda
8:05 a.m.	Improving User Experience With Interface Design <div><div><p>Kurt Jones Workfront Admin JP Morgan & Co.</p></div><div><p>Jeremy Flores Sr. Product Manager Adobe</p></div></div>
8:45 a.m.	Ask the Experts! Audience Q&A
8:55 a.m.	Wrap-up and next steps



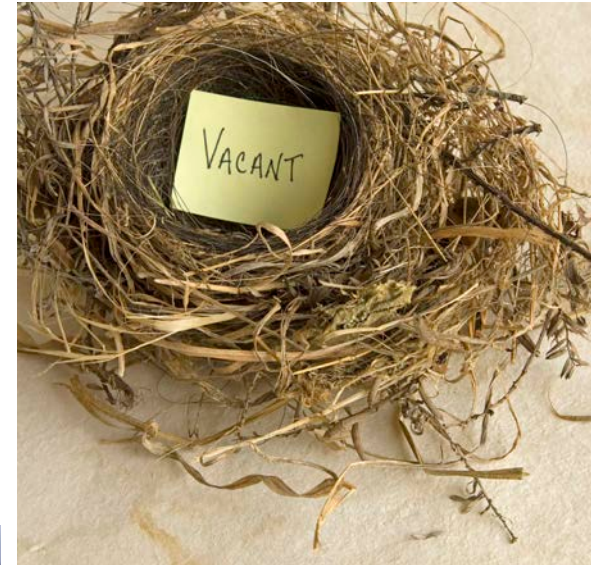
Kurt Jones

VP, Marketing Delivery Lead & WF/Fusion Admin
JP Morgan & Co.

- Live outside Denver Metro area
- Workfront/Fusion Admin 2+ yrs.
- Joined JPMC in May 2022; Transamerica previous
- Brought in to help onboard additional teams and admin the implementation (started in 2020).
- Previous experience with project management, marketing, and Workfront.
- Passion for the gym, outdoors, reading, and Workfront.

Connect with me:

<https://www.linkedin.com/in/kurtwjones>



How We Use Workfront at JP Morgan – Payments Marketing

- **Project Management**

- Request intake
- Project workflow management
- Creative collaboration
- Vendor Engagement
- Deliverable review and approval

** Inherited a Workfront Environment

- **Dashboards/Reporting**

- Dashboards in layouts
- My/Team/Group/Sales dashboards
- Project reporting

Jeremy Flores

Sr. Product Manager, Adobe

- Lives in the Salt Lake City area
- Previous experience as an analyst, account management, consulting, enablement, and product management.
- Passion for snowboarding, tech, travel, and reading.
- Joined the Adobe Workfront product team in 2020.

Connect with me:

<https://www.linkedin.com/in/floresjeremy>

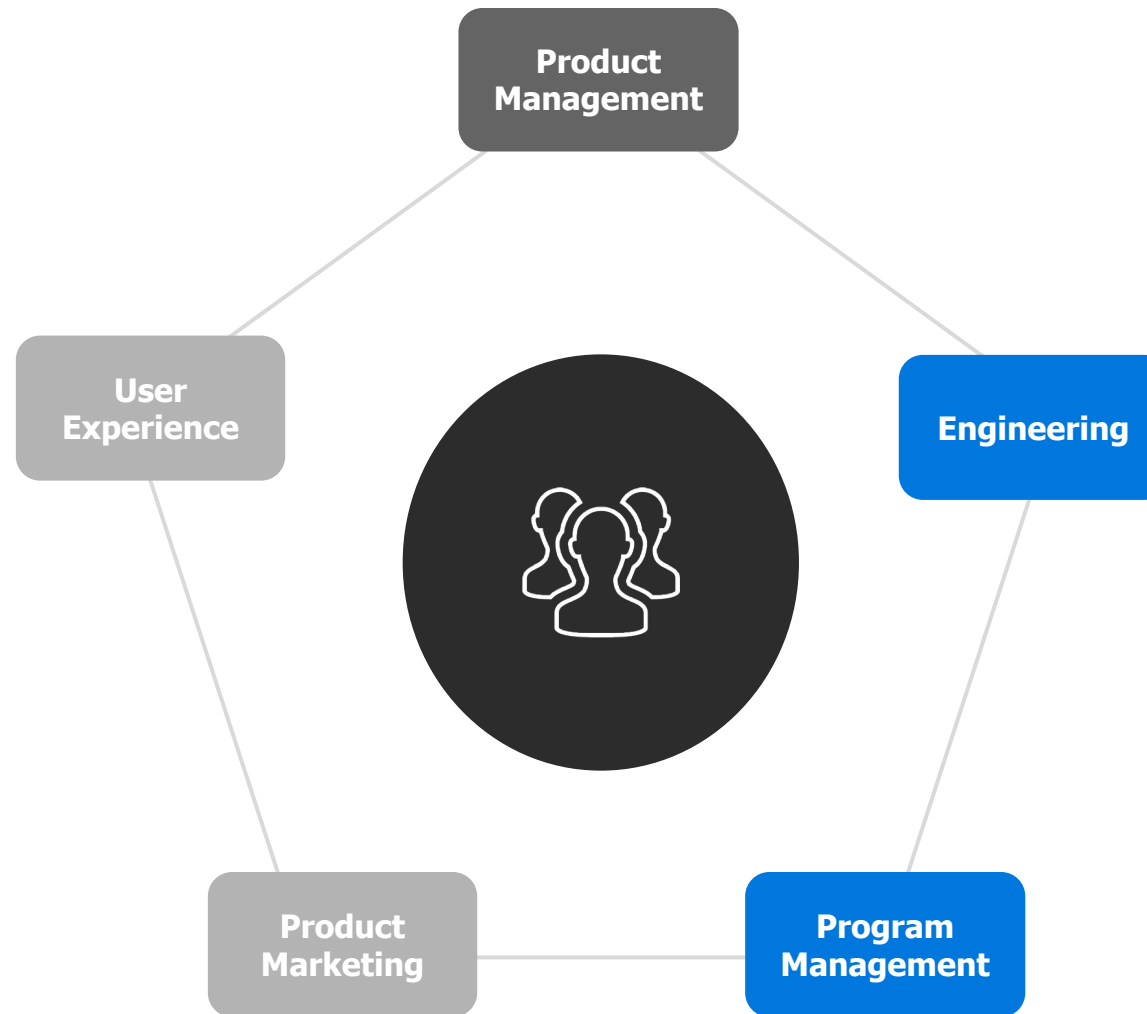


Adobe Workfront Product Team

Departments

Product

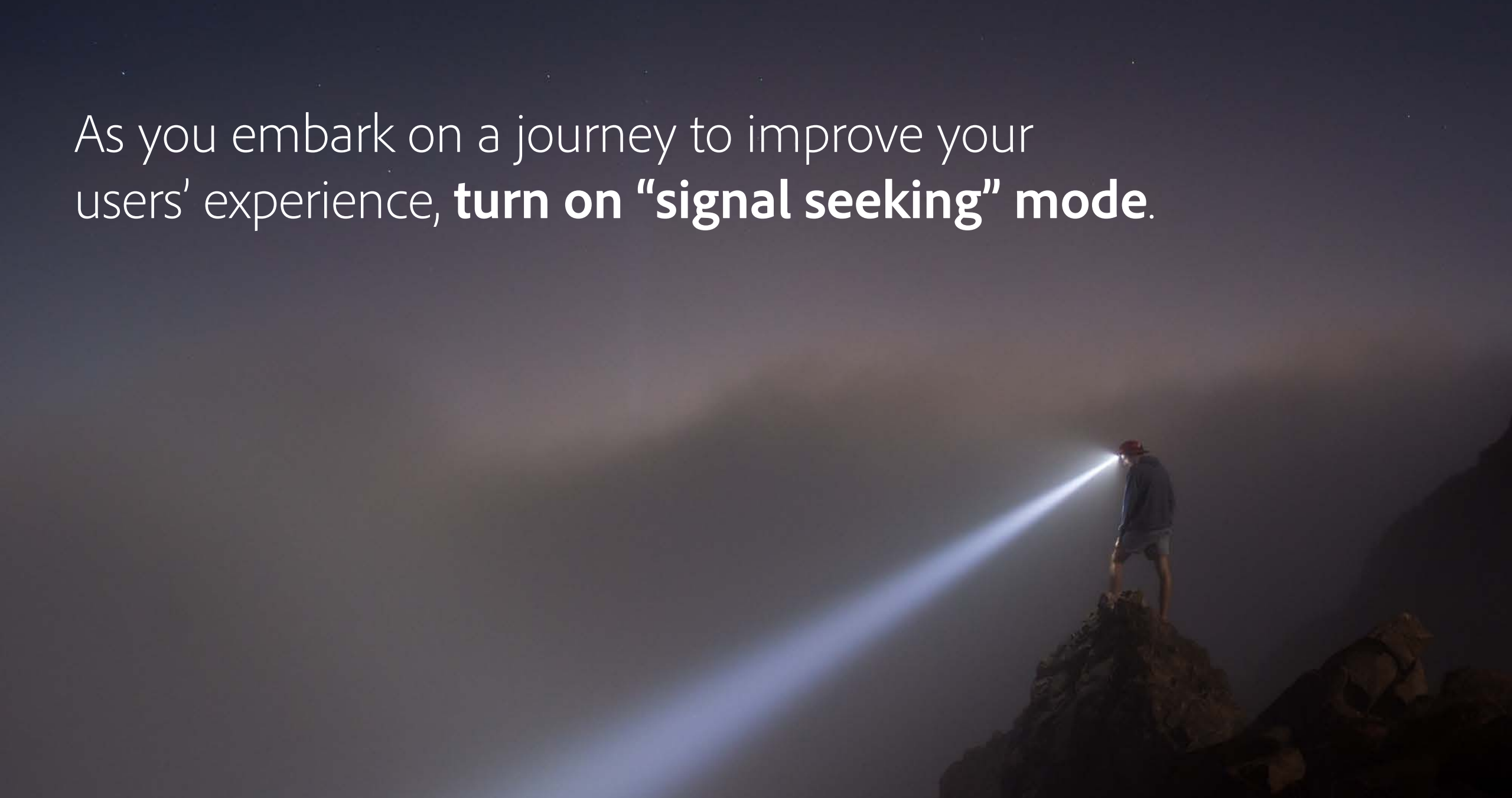
Technology



Focus Areas

- Activation
- Usability
- Reporting
- Unified Experience

As you embark on a journey to improve your users' experience, **turn on “signal seeking” mode.**



Optimizing the UX

Make it Relevant

Tailor to the users' needs,
information, flexibility



Keep it Simple

Reduce clutter, provide clarity



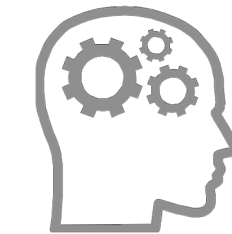
Test and iterate

Regularly test your interface
with users and collect feedback



Monitor Usage

How are users interacting
with your interface?



Personas

What are your users'
idiosyncrasies and styles?

Conduct User Research

Determine users'
needs and preferences



JP Morgan & Co - Our Approach to User Experience

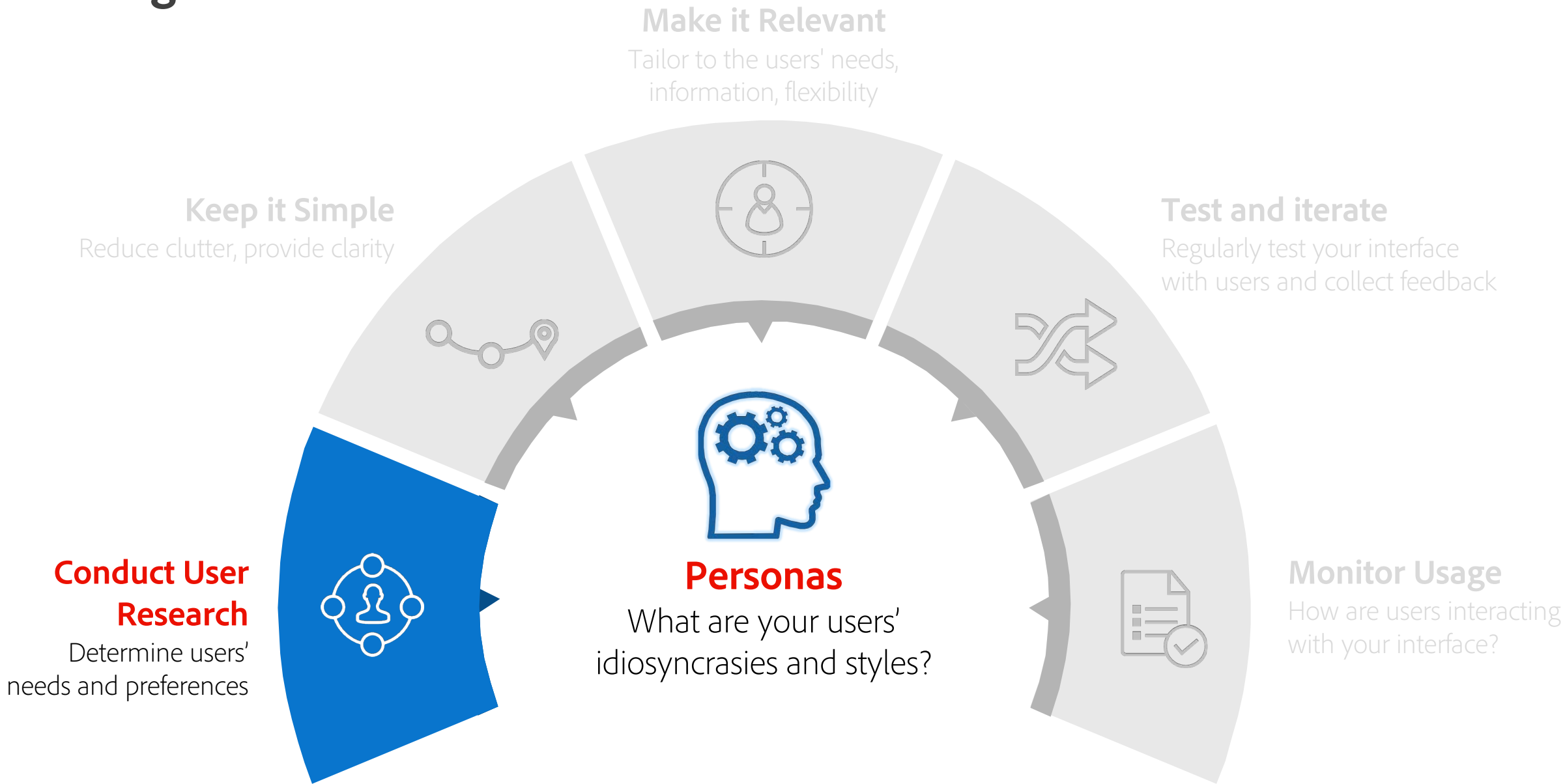
Current

- Identify what Users need & want
- What can help adoption?
- Focus on Teams
- More layout templates initially
- Some user reviews
- Reduce noise (fields, views, filters, groups)

Future

- Identify what Users need
- Focus on Roles
- Re-use/restructure of layout templates
- Increase user reviews
- Better align fields, views, filters, groups

Optimizing the UX



Conduct User Research

Gather Information

Surveys, user interviews, focus groups, usability testing

Understand Your Users

Challenge biases and assumptions

Ask Good Questions

Open-ended, focus on the job to be done



Ask yourself: What do I want to learn? This can be a high-leverage activity resulting in a high ROI.



Presentation Layout

User

- Presentation Worker

Need

- Assist in self-assignment
- Specific nomenclature, regional

Currently logged in as Logout

My Dashboard

Presentations Team

Design

Strategic Content

Global Proposals Tra...

Time-Off Calendar

Sales Support Reque...

GPPSG Presentation ...

GPPSG Presentation ...

Unpin current page

Help

66

DASHBOARD

GPPSG Presentation My Dashboard

Dashboard Actions

As of Feb 21, 2023 11:56 am Mountain Standard Time

GPPSG Presentation Unassigned Projects

Report Default

Report Default

Nothing

<input type="checkbox"/>	Project Type	Project Link	Client / Prospect Name	Requestor	Support Needs	Opp. Type	Project Owner	Entry Date	Due Date	Regions in Scope	Line of Businesses in Scope	Total Revenue
<input type="checkbox"/>	Master	Go to project			Graphics, Presentation	Follow-up		2/20/23	3/10/23	NAMR	Treasury	
<input type="checkbox"/>	Sub Project	Go to project			Presentation	Follow-up		2/20/23	3/10/23	NAMR	Treasury	
<input type="checkbox"/>	Master	Go to project			Graphics, Presentation	Follow-up		2/21/23	3/15/23	NAMR	Merchant Services	
<input type="checkbox"/>	Sub Project	Go to project			Presentation, Graphics	Follow-up		2/21/23	3/15/23	NAMR	Merchant Services	
<input type="checkbox"/>	Master	Go to project			Presentation	New		2/8/23	3/31/23	NAMR	Merchant Services	
<input type="checkbox"/>	Sub Project	Go to project			Presentation	New		2/8/23	3/3/23	NAMR	Merchant Services	

Showing all 6 project

GPPSG Presentation My Projects

Report Default

Report Default

Nothing

<input type="checkbox"/>	Project Type	Project Link	Client / Prospect Name	Requestor (Legacy Form)	Requestor	Support Needs	Owner	Due Date (legacy form)	Due Back To Client Date	Planned Completion Date	Type of Presentation	Line of Businesses in Scope	Regions in Scope	Total Revenue	Master Project Lead	Assigned Designer	APAC Proposal Manager	EMEA Proposal Manager
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Optimizing the UX

Make it Relevant

Tailor to the users' needs,
information, flexibility

Keep it Simple

Reduce clutter, provide clarity

Test and iterate

Regularly test your interface
with users and collect feedback

Monitor Usage

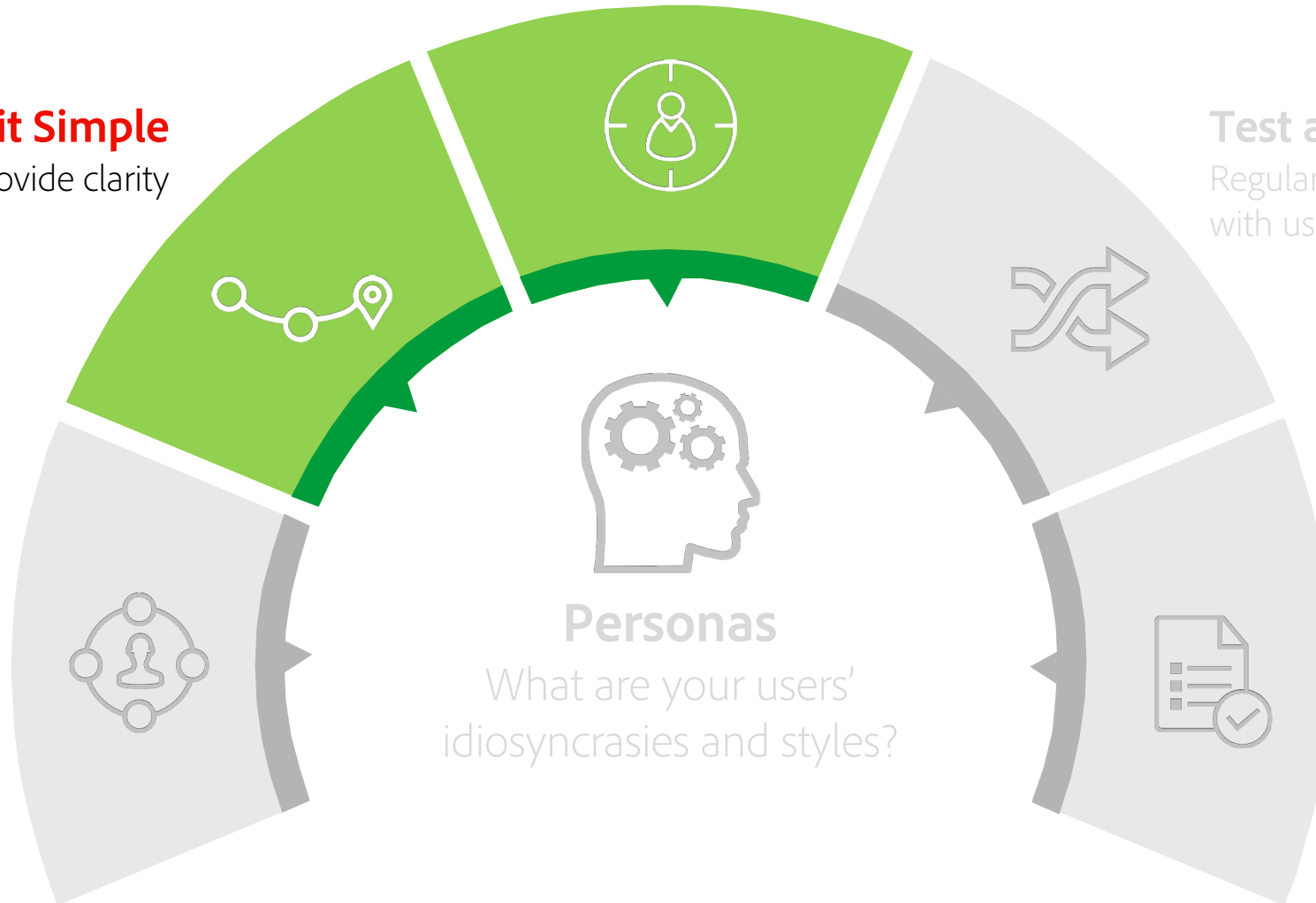
How are users interacting
with your interface?

Conduct User Research

Determine users'
needs and preferences

Personas

What are your users'
idiosyncrasies and styles?



Keep it Simple

Avoid Clutter

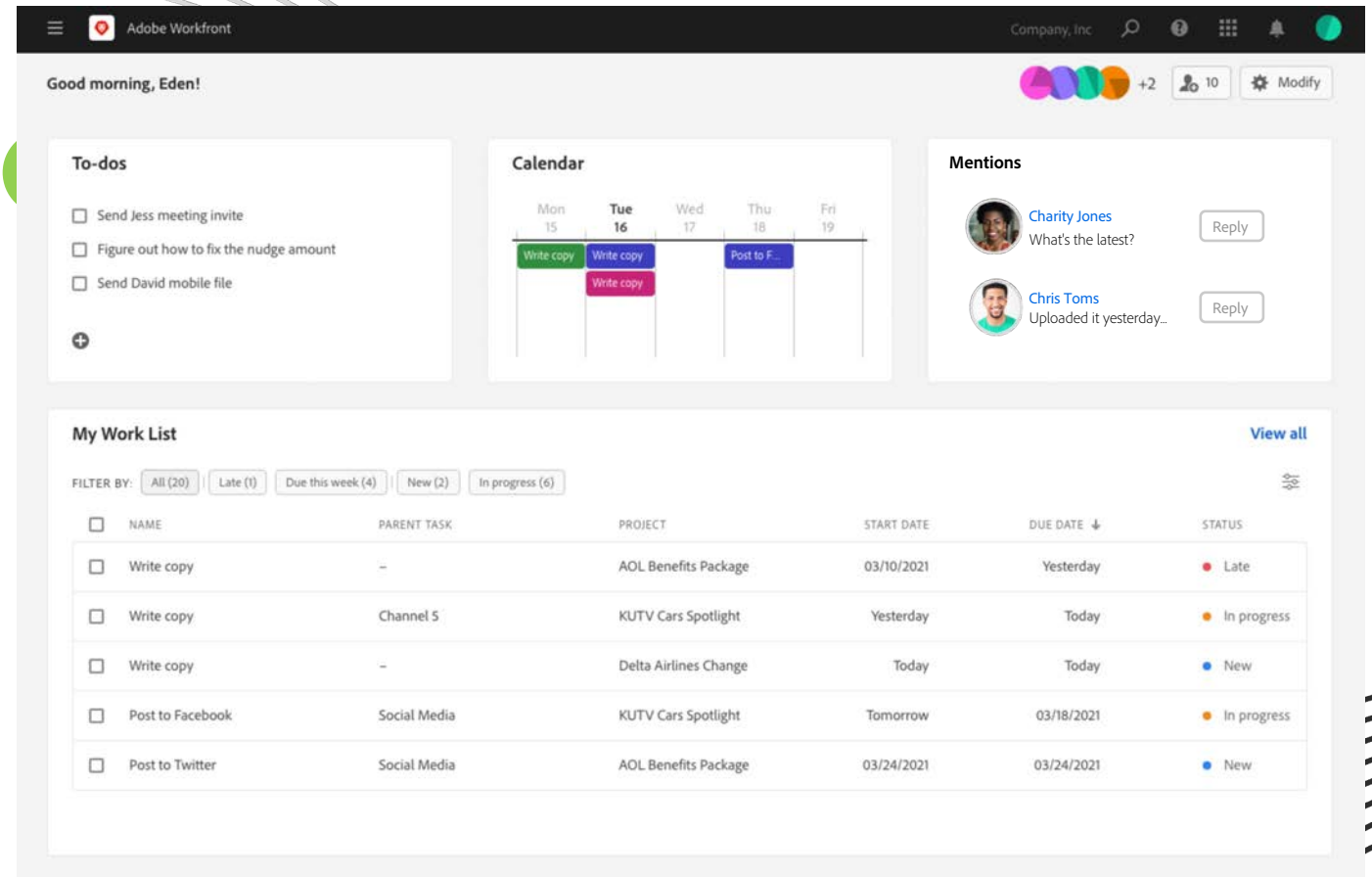
Use white space effectively, resist adding things

Use Clear, Concise Language

Naming conventions, re-label things

Build or Design for Efficiency

Users need to be able to find and complete their work



Get rid of anything that's not making a real contribution.

Prune Aggressively

The following questionnaire is designed to provide us with information that will help us improve the site and make it more relevant to your needs. Please select your answers from the drop-down menus and radio buttons below. The questionnaire should only take you 2-3 minutes to complete.

At the bottom of this form you can choose to leave your name, address, and telephone number. If you leave your name and number, you may be contacted in the future to participate in a survey to help us improve this site.

If you have comments or concerns that require a response please contact Customer Service.

1. How many times have you visited this site?

This is my first visit



103

Please help us improve the site by taking 2-3 minutes to complete this survey.

NOTE: If you have comments or concerns that require a response, don't use this form. instead, please contact Customer Service.

34

Make it Relevant

Tailor to Their Needs and Preferences
Job role, team, job to be done

Provide Relevant Information
Default landing pages, pins, dashboards

Allow Them to Customize the Interface
Partner with them, expose other options/layouts



Ask yourself: What do my users need to get the job done?

Requester Layout

Keep it
Simple



User

- Requesters & Reviewers

Need

- Simple needs – make a request; sometimes approve items
- When Entered, What's the Status

Currently logged in as [Logout](#)

ADP

Requests

My Updates

Pin current page

Help

1

☆

🕒

🔍

⋮

Requests

New request

Submitted

Submitted

Drafts (0)

<input type="checkbox"/>	Name	Converted to	Path	Status	Entry Date	Last Update Date
<input type="checkbox"/>	Sales Support Request	Sales Support Request	Sales Support Request	In Progress	2/15/2023	2/15/2023

🔍

My Open Requests

Open summary

Creative Layout

Make it Relevant



User

- Creatives

Need

- Tasks & Due Date
- Proofs
- Work-driven

Currently logged in as

Logout

[CREATIVE] Group D...

Vendor Req. Tracker

Leadership Dashboard

[SMITA] Team Dashb...

Pin current page

Help193

DASHBOARD

[General] My Dashboard

Dashboard Actions

As of Feb 21, 2023 12:09 pm Mountain Standard Time

[General] My Overdue Tasks

DetailsSummary

[→] ▼

Report Default

Report Default

Report Default

☐

Name

Assignments

Due On

Project: Name: 198750 | 2022 AS CS: - client story page (1)

☐

Approval: preview link

2/17/23

Project: Name: 364080 | - case study (1)

☐

QC Process:

2/17/23

Project: Name: 365451 | Phase 1 - insight page refresh (1)

☐

Approval: preview link

2/16/23

Project: Name: 393802 | - Article 2 (1)

☐

Design: development R1

2/16/23

[General] My Tasks Due Today

DetailsSummary

[→] ▼

Report Default

Report Default

Report Default

☐

Task Name

Assignments

Due On

Project: Name: 315817 | - Insights Page (1)

☐

Design: development R1

2/21/23

Project: Name: 318125 | client story page (1)

☐

Approval: to publish

2/21/23

Project: Name: 364080 | - case study (1)

☐

Approval: to publish

2/21/23

Showing all 3 tasks

[General] Proof Reviews

Export

Hide Values

Details | Summary | Chart

[General] My Tasks Due Next 2 Weeks

DetailsSummary

[→] ▼

Report Default

Report Default

Report Default

☐

Task Name

Assignments

Due On

Project: Name: 315817 | 2022 - Insights Page (3)

☐

Design: changes - R2

2/24/23

Design: changes - R3

2/28/23

File Collect: all design files

3/2/23

Project: Name: 382605 | 2023 article (2)

☐

Design: development - R1

3/3/23

Review: design - R1

3/6/23

Project: Name: 393802 | 2022 - Article 2 (2)

☐

Review: design final approval - R3

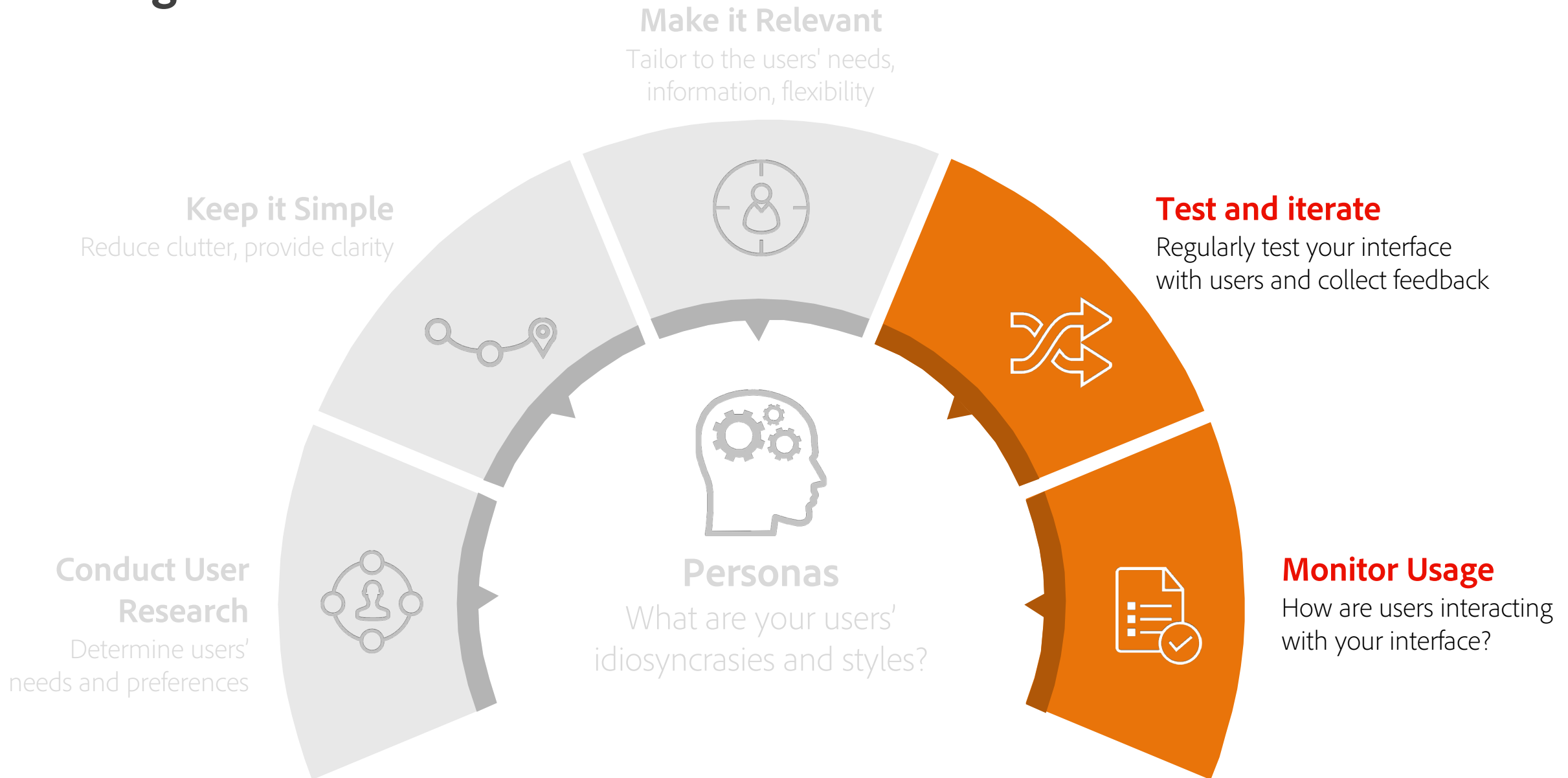
2/22/23

File Collect: all design files

2/22/23

Project: Name: 393935 | 2022 - Article 4 (4)

Optimizing the UX



Test and Iterate

Regularly Test your Interface

Test yourself, test with your users, different screen sizes

Iterate Based on Feedback

Visual cues, actions being taken, common themes

Accept it's Never One and Done

Identify areas of improvement and adjust over time



Prioritize the three most serious usability problems

Monitor Usage

Leverage Reports
Users logging in, actions being taken

Observe Your Users
Behaviors, and pain points

Use Analytics
Learn where people get stuck, improve efficiencies



Remember: What users do > What users say

Operations Layout

Test & Iterate



User

- Operations Worker

Need

- Work List
- Custom view
- Manage custom form from Work List

Customize what users see
Home and Summary ▾

Tasks

Date

● ● ●

Requests

Date

● ● ●

Projects

Date

● ● ●

Documents

Date

● ● ●

Document Versions

Date

● ● ●

⚙ Global Settings

>

Choose a category to customize

Request Working On

Request Requests

Request Approvals

Header

Project Name

Request name

Set primary action button

Done ▾

Customize the data you want users to see. You can add up to 16 custom or standard fields.

Reset to default

Users will see custom field labels instead of field names on their Home screen and in the Summary panel.

Request TID

Request Name

Primary Contact Name

Request On Behalf Name

Request Type of Vendor Engagement

Request Context / Insight for Spend

Request Marketing Team Lead

Request Total Amount Requested

Request Vendor ID

Request Vendor Name

Request Vendor Currency

Request Vendor's Banking Country

Request Start Date

Request End Date

Request Regions in Scope

Request Overall Status Update

Workfront Admin - Board

Test & Iterate
Monitor Usage

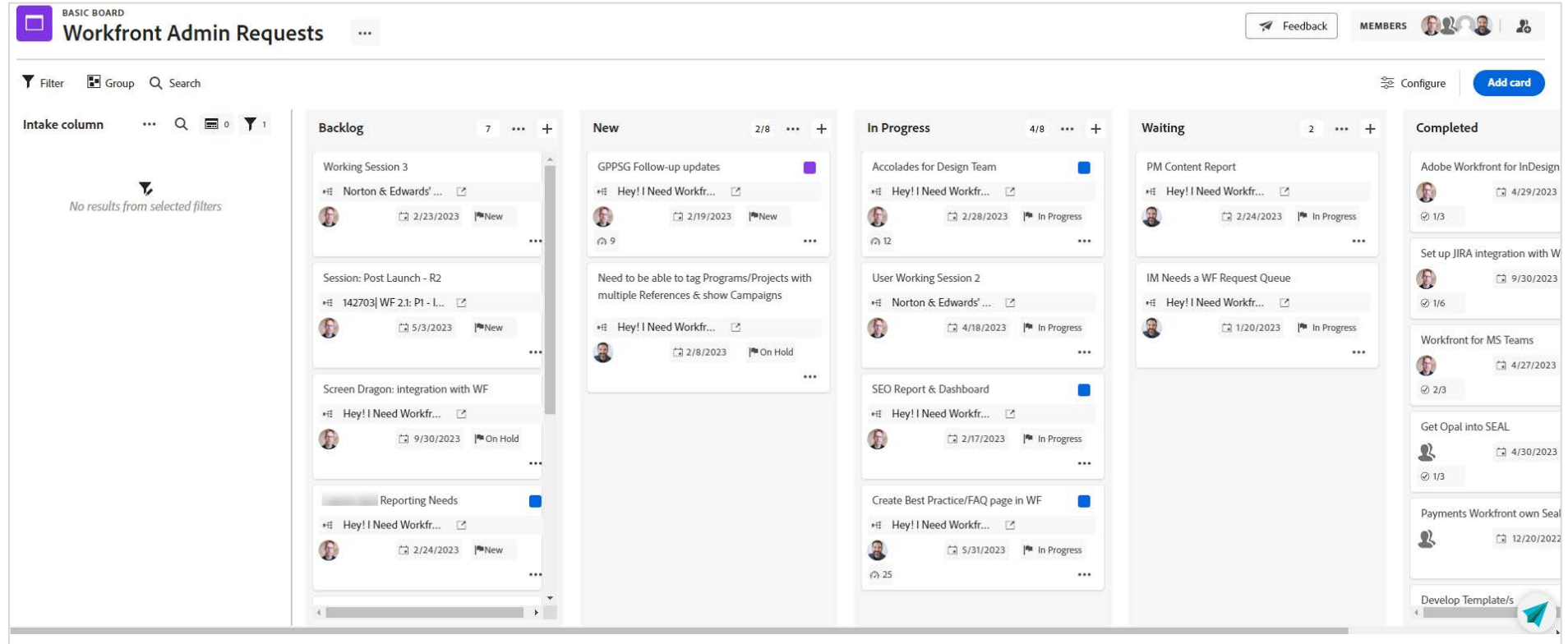


User

- Admins & Analytic Teams

Need

- Ad-hoc requests; no specific projects defined
- Teams have some agile understanding

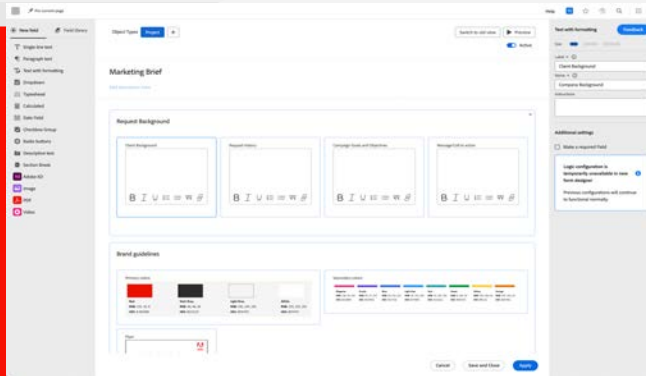


Tips / Advice

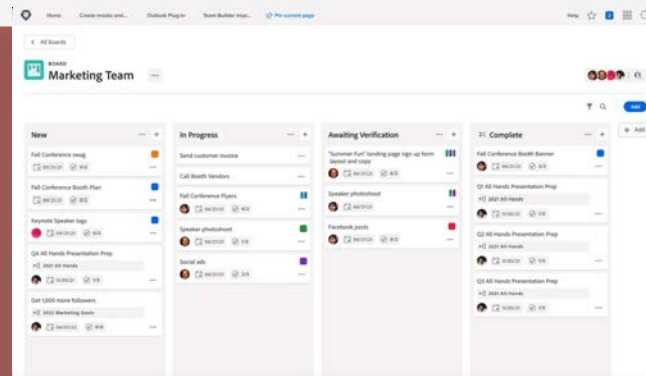
1. Use Experience League and its Events to learn different approaches
2. Work with users to develop, but do so with Workfront Admin hat on (how supportable is it?)
3. Reduce noise for teams, especially those that don't come in as often (fields, main menu, views, etc.)
4. Experiment with engaged & willing groups
5. Sometimes more is less; unless more is needed
6. Start over

Recent and Future Innovations

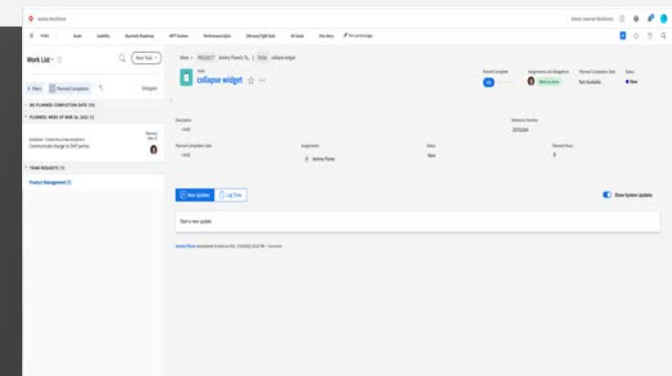
Forms



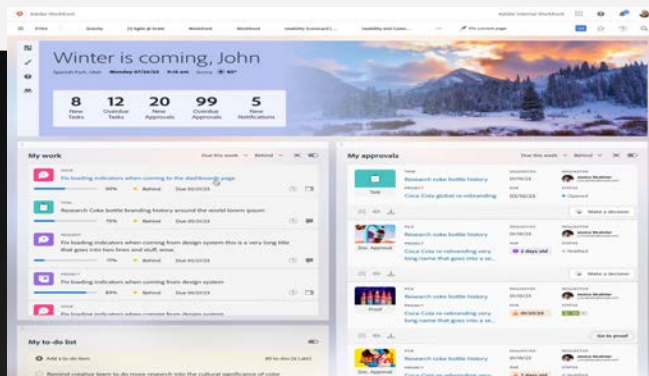
Boards



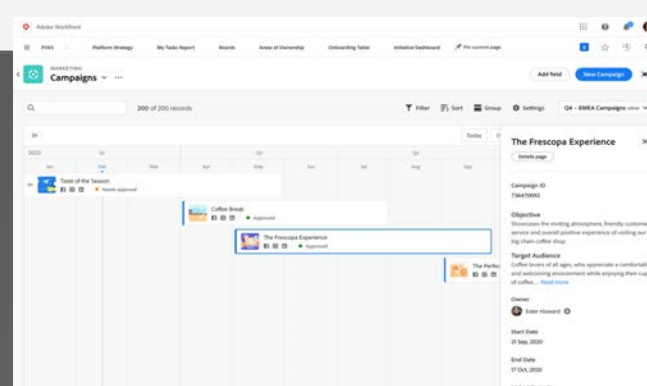
Pins



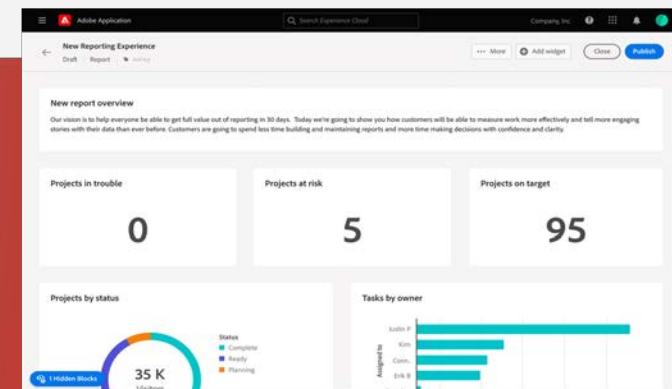
Home



Calendars



Reports



Questions?

Upcoming Events



Product Releases

- Video: Prepare for an Adobe Workfront quarterly release

System Admin Essentials Webinars

- Apr 19: Advancing Workflow Cleanup with Automation (Stanley Black & Decker)
- May 17: Foundations of Project Templates (DSW)

Ask-Learn-Connect: Free Weekly Meetups

- Mar 28: [Learn] Agile in Workfront
- ★ Mar 29: [Connect]: Ask the Experts – User Experience Follow-up



Register at <https://experienceleague.adobe.com/events>

Adobe Summit

The Digital Experience Conference

Mar 19–23, 2023 | Las Vegas and virtual

The ultimate experience is back.

Join us in Vegas for Summit 2023. Build skills, get inspired by industry leaders, and learn the latest from top brands.

Register now at summit.adobe.com

→ Find Workfront sessions in the **"Collaborative Work Management"** track!



Thank you!



