





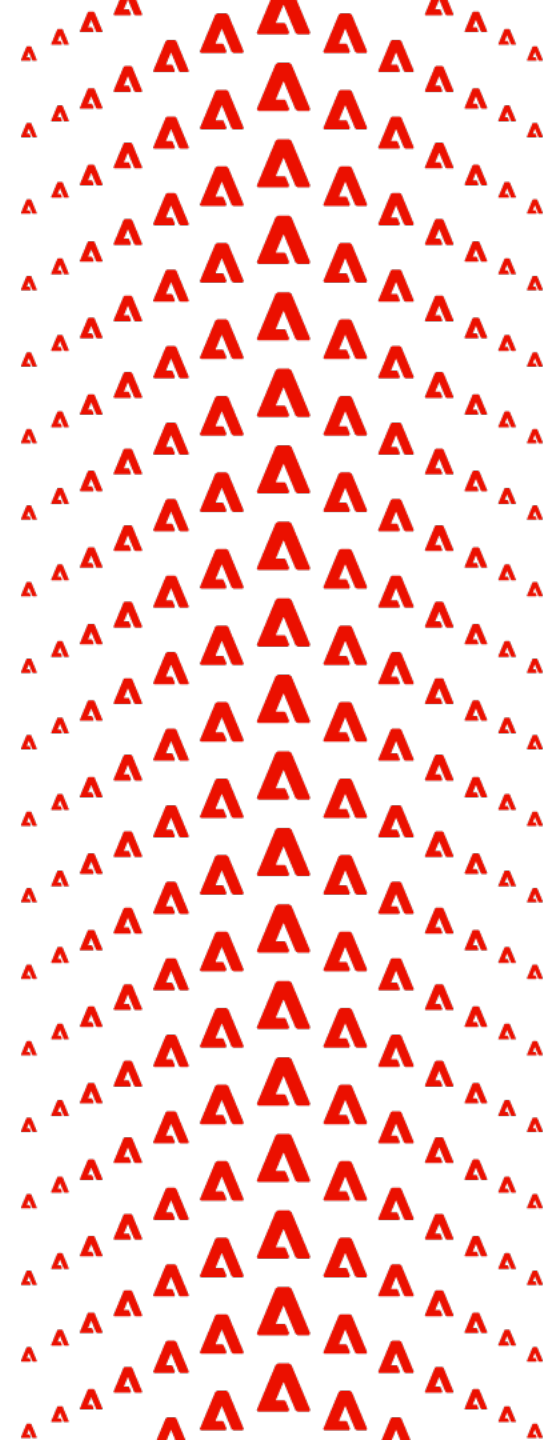
# System Admin Essentials: Finding Efficiencies with Automation

April 19, 2023



# Agenda

Time (PST)	Topic
8:00 a.m.	Welcome and agenda
<b>8:05 a.m.</b>	<b>Finding Efficiencies with Automation</b>
	 <b>Monique Evans</b> Systems Operations Manager Stanley Black & Decker, Inc.
	 <b>Ewan Hruska</b> Senior Customer Success Architect Adobe Workfront
8:45 a.m.	Ask the Experts! Audience Q&A
8:55 a.m.	Wrap-up and next steps



# Hi, I'm Monique! A theme park enthusiast, Community Advisor, and Workfront nerd

PERFORMANCE // INNOVATION // RESPONSIBILITY



Connect with me on LinkedIn!

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

# How We Use Workfront at Stanley Black & Decker



## Global Marketing Department

- Content Studio (In-House Agency)
  - Produces 50,000+ assets a year or 200/day
- Industrial Design
- Packaging
  - Manages 14,000+ SKUs a year (1,600 NPD)
- Digital
- Brand
- Licensing

## Operations, Project & Program Management

- 4 Project Studio Coordinators
- 11 Packaging Program Managers
- 1 System Admin

Finding efficiencies is **crucial** for my success

# Ewan Hruska

Senior Customer Success Architect  
Workfront Customer Success, Adobe

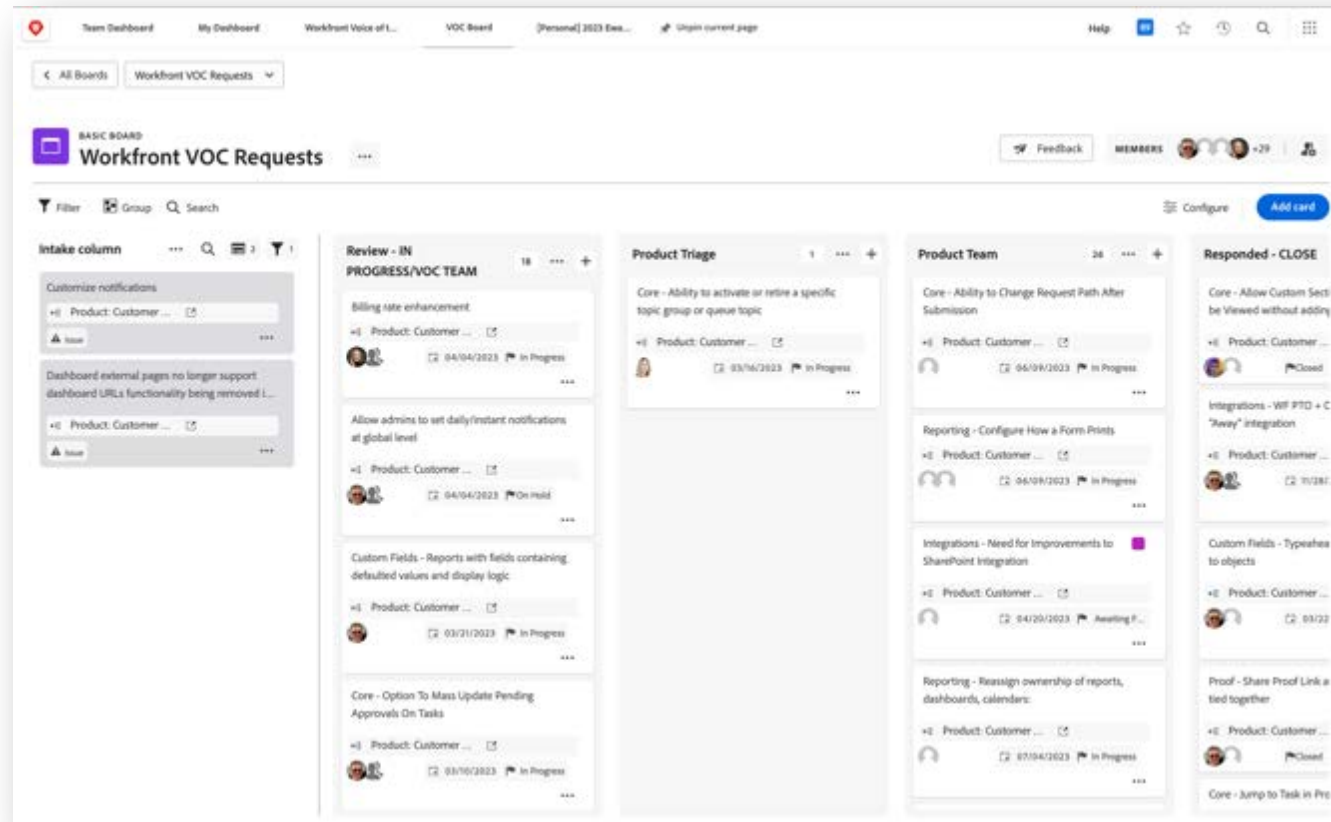
- Based in Seattle, Washington
- Joined Workfront/Adobe in 2019
- Previous Workfront and Adobe customer (Retail)
- Passionate about helping customers get the most out of their Workfront investment – with specialties in Agile and Fusion
- Love to hike, camp, and play harmonica



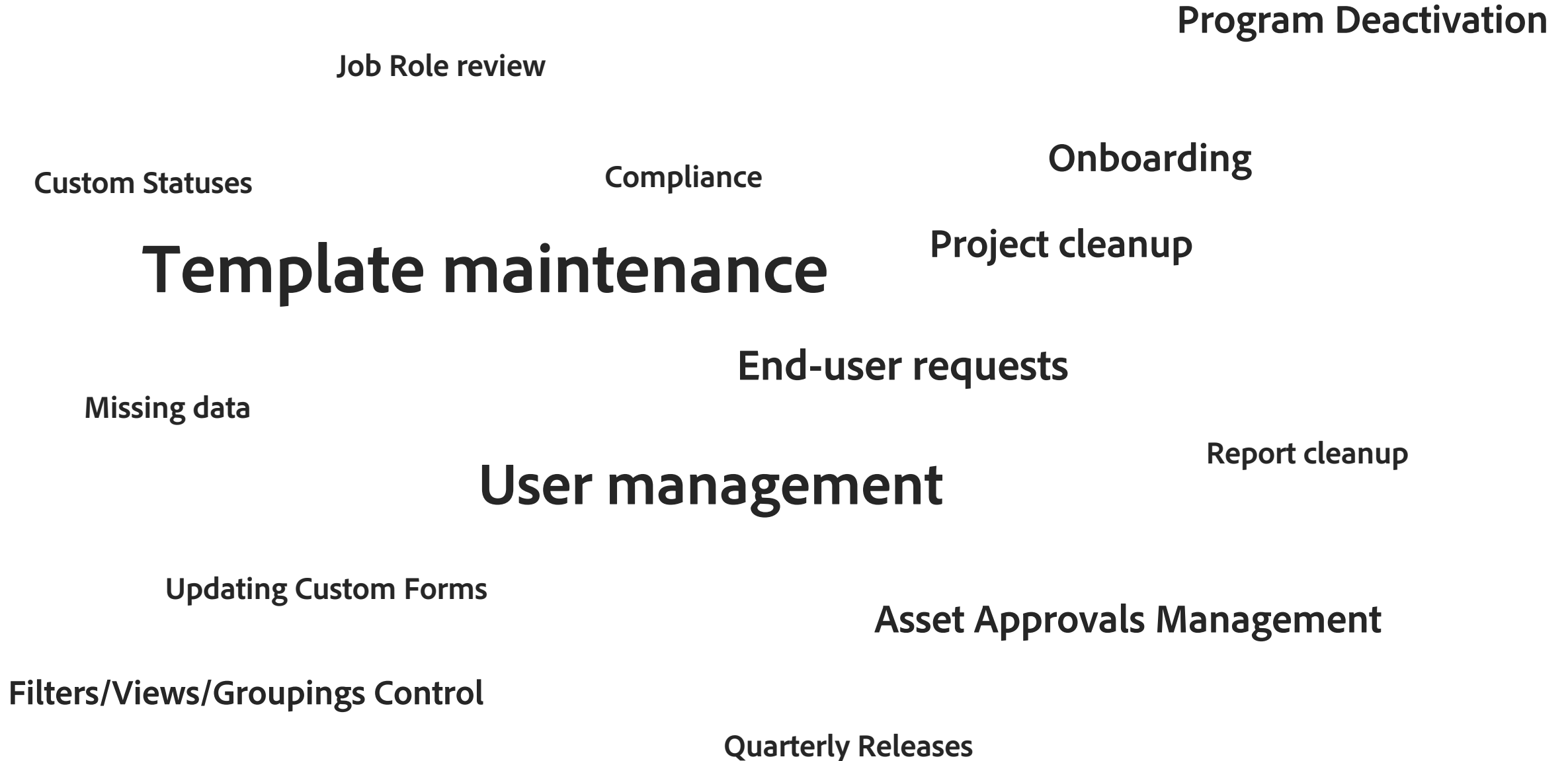
Connect with me: [linkedin.com/in/ewanhruska](https://www.linkedin.com/in/ewanhruska)

# The Workfront CSA team at Adobe

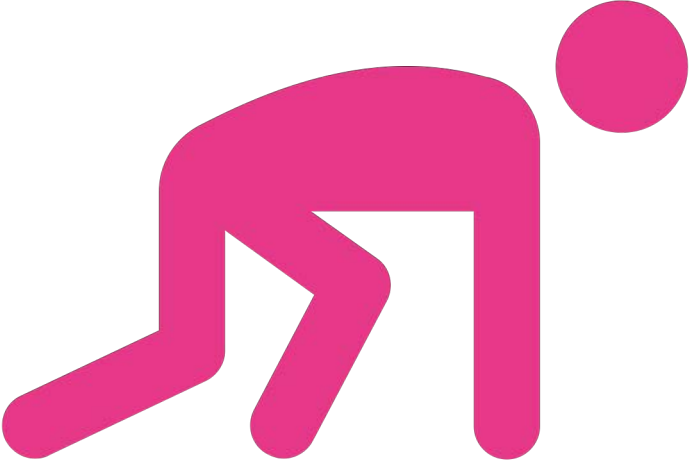
We're a team of 5 former System Admins and practice owners with more than 20 years of combined Workfront experience. We incorporate Workfront capabilities into our work lifecycle to better help us support our customers and we love to try out the newest functionality.



# What are the things that slow YOU down?



# Use a Crawl-Walk-Run Approach





# Don't Start from Scratch



**Workfront Blueprints** is a collection of best practice building blocks built into and distributable inside Adobe Workfront as templates.

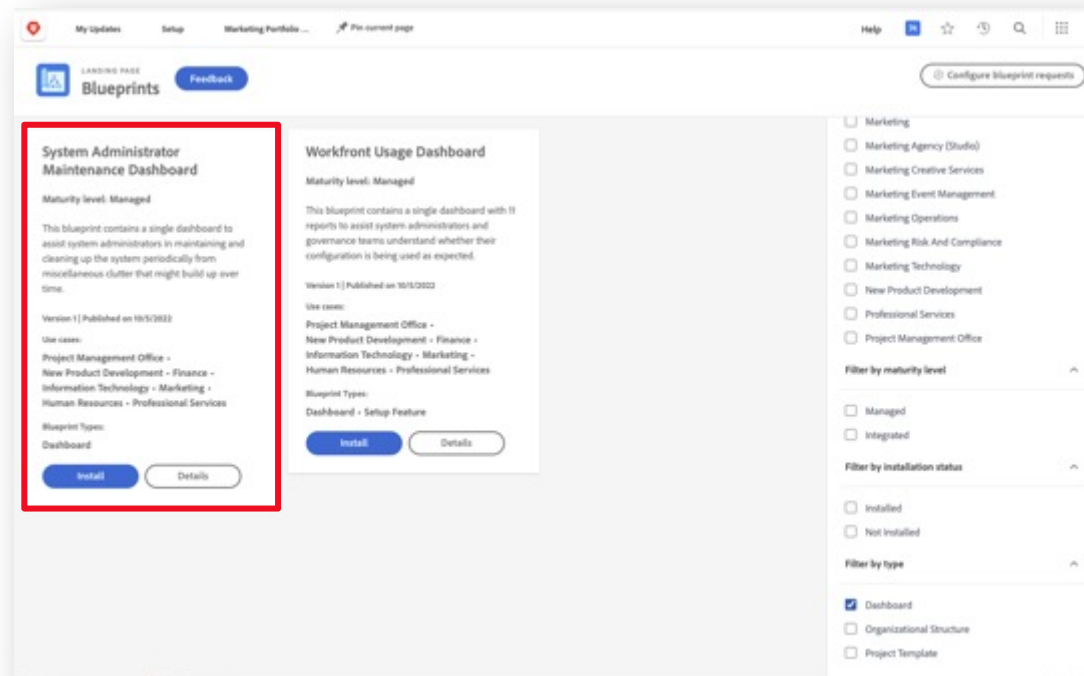
Find more information on Blueprints on Experience League [here](#).

The screenshot displays the Adobe Workfront Blueprints landing page. At the top, there's a navigation bar with 'My Updates', 'Setup', 'Marketing Portfolio ...', and 'Pin current page'. A 'Feedback' button is visible. The main content area features a grid of blueprint cards. Each card includes a title, maturity level (e.g., 'Managed'), a brief description, version information (e.g., 'Version 2 | Published on 4/21/2021'), use cases, and blueprint types. 'Install' and 'Details' buttons are present on each card. On the right, a 'Filter blueprints' sidebar allows filtering by use case (Finance, Human Resources, Information Technology, Marketing, etc.), maturity level (Managed, Integrated), and installation status.


# Blueprint: System Admin Maintenance Dashboard



The System Administrator Maintenance Dashboard Blueprint is a distributable collection of 20 pre-built reports based on best practices. It is purpose-built for System Administrators to perform regular administrative tasks.



## Simple to install:

1. Go to **Blueprints** in your Main Menu
2. Select "**Dashboard**" under **Filter by Type** section
3. Click on **Install** under System Administrator Maintenance Dashboard
4. Click **Continue**
5. Click **Install as is**
6. When you get the  you are good to go!

# Template Reports



The System Administrator Maintenance Dashboard Blueprint includes two **Project Template Reports**:

**Number of Projects by Template** – Provides a list of all the templates in your environment and how many projects they are used by. Includes a graphical chart that is useful to get a read on your templates. Click on a column or go to Details to see more information about the associated projects.

**Template Audit** – Lets you know what is in each Template and highlights what isn't.

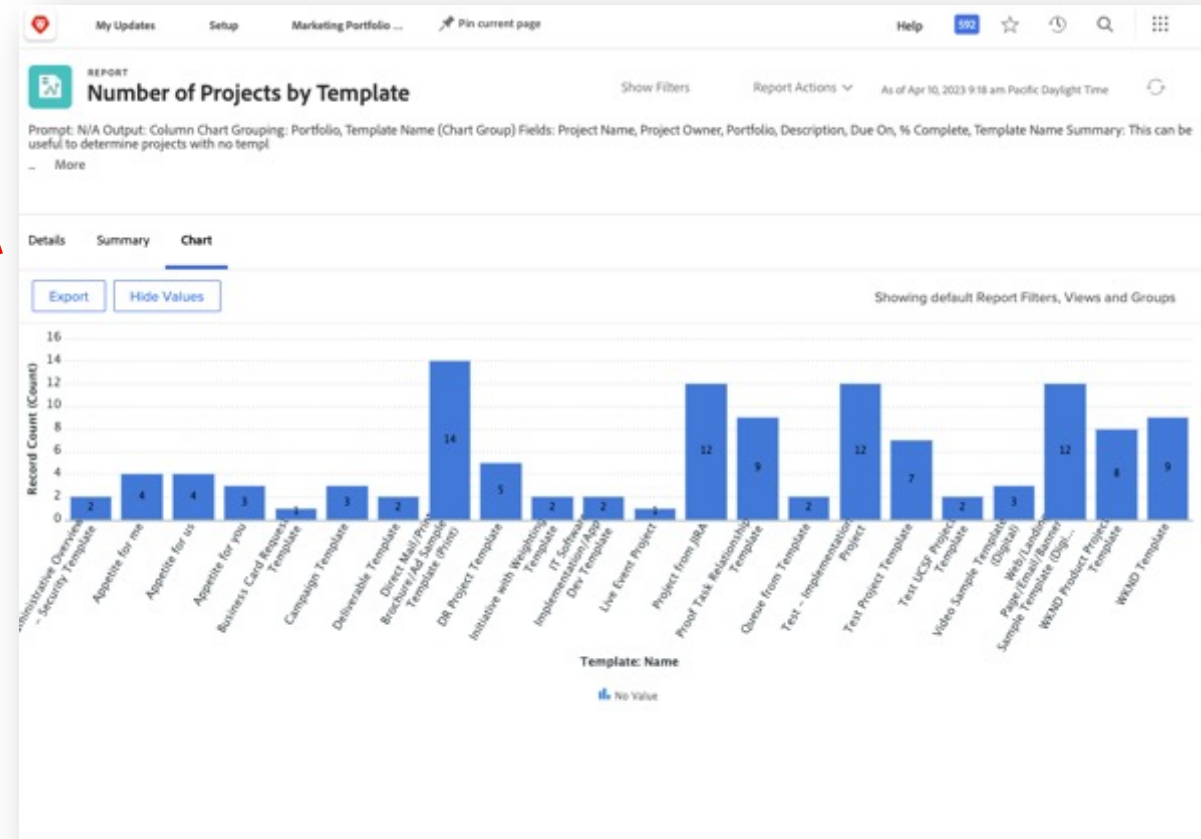
# Number of Projects by Template Report



## What insights can you capture from this report?

- Insight on HOW OFTEN templates are being used
- Insight on when a template was LAST USED (from the details tab)

Project Name	Project Owner	Portfolio	Desc	Due On	% Complete	Template Name
Template Name: Text Project Template (7)						
<input type="checkbox"/> Text Project Template - Project	Upside Down		Text Project Description	3/26/20	0%	Text Project Template
<input type="checkbox"/> Text Fusion 1	Upside Down		Ewan Hruka	4/18/22	100%	Text Project Template
<input type="checkbox"/> Goldberry gook	Upside Down		Ewan Hruka	2/21/20	0%	Text Project Template
<input type="checkbox"/> Text Fusion	Upside Down		Wah de blah Ewan Hruka	3/21/20	100%	Text Project Template
<input type="checkbox"/> This is a Text Fusion 5	Upside Down		Body Content Ewan Hruka	3/21/20	0%	Text Project Template
<input type="checkbox"/> Template Text Project 2	Upside Down			6/14/21	0%	Text Project Template
<input type="checkbox"/> PRQ: Test issue for Salesforce Link Success	API Connector			11/2/20	0%	Text Project Template
Template Name: Appetite for me (4)						
<input type="checkbox"/> Implementation Project - Sears PRQ - Appetite For Me	API Connector		Text Project Description	3/14/20	0%	Appetite for me
<input type="checkbox"/> Appetite for me - Project	Upside Down			6/17/21	100%	Appetite for me
<input type="checkbox"/> Plans of Appetite for me - Report	Upside Down			4/11/21	100%	Appetite for me

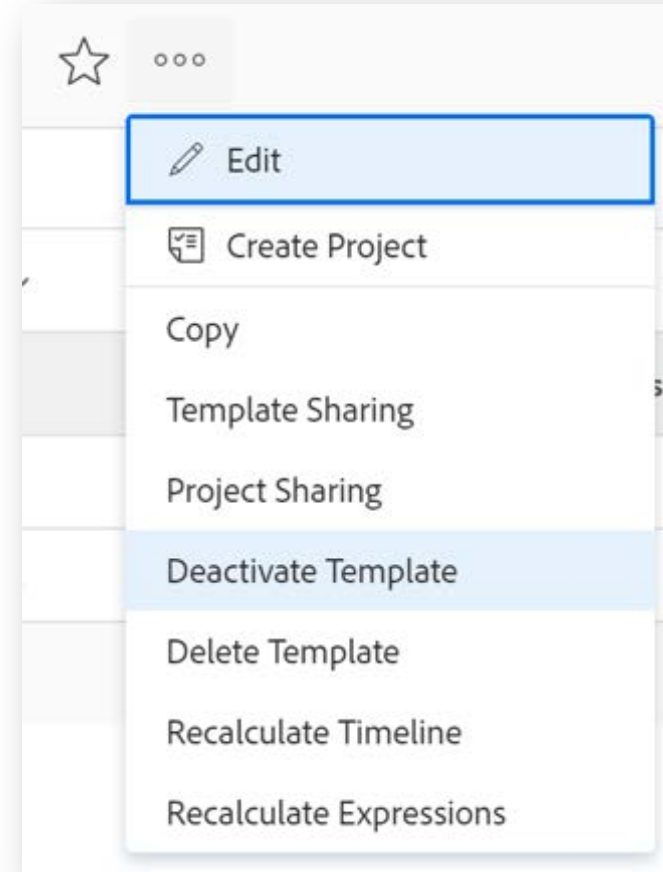


# Actions to Take



There are various actions you can take after reviewing the 'Number of Projects by Template' report, including:

- Mark a project template **inactive**
- **Rename** the template
- **Un-share** a project template
- **Delete** a project template (tread lightly!)





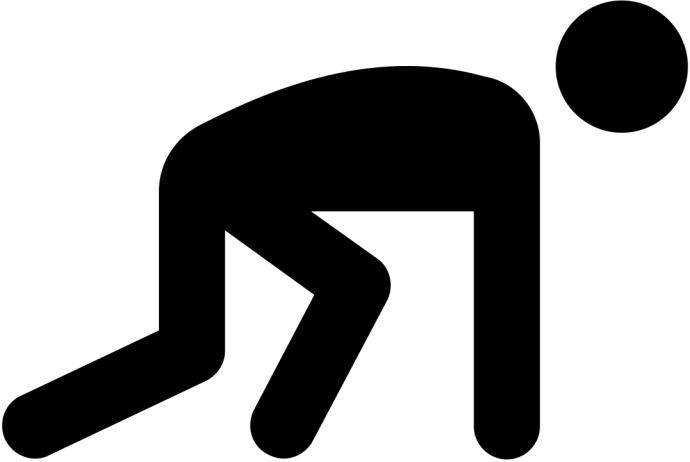
The System Admin Maintenance Dashboard helps answer the question:

*What is currently in my Workfront environment?*

but...

**Will it provide ALL the answers you're looking for?**

# Use a Crawl-Walk-Run Approach





# Updating the Report to Better Reflect My Use Case

- **Filter**
  - Added my specific Groups
  - Template Is Active
- **Grouping**
  - Single-Level Grouping for Template Name

The screenshot shows a web interface for configuring report filters. At the top, there are tabs for 'Columns (View)', 'Groupings', 'Filters', and 'Chart'. The 'Filters' tab is active. Below the tabs, there is a header 'Set Filter Rules for your Report' and a sub-header 'Only show me Projects in which the...'. The main area contains two filter rules. The first rule is 'Project >> Group ID' with a dropdown menu set to 'Equal'. The second rule is 'Template >> Is Active' with a dropdown menu set to 'Equal (Case Sensitive)' and radio buttons for 'True' (selected) and 'False'. There is an 'AND' button between the two rules and an 'Add another Filter Rule' button at the bottom. In the top right corner, there are links for 'Switch to Text Mode' and 'Apply an Existing Filter'.





# Updating the Report to Better Reflect My Use Case

## ■ View

- Added Entry Date
  - Summarize this column by Maximum
- Removed Portfolio, Description, and % Complete
- Sorted columns by Template Name and Entry Date

## ■ Report Options

- Changed the default view to Summary

The screenshot shows a report configuration interface for 'CLD#2 Number of Projects by Template (GCX version)'. The interface includes a navigation bar with options like 'My Updates', 'Projects', 'Dashboards', 'Requests', 'Reports', 'Active Support', and 'Pin current page'. The main content area is divided into 'Columns (View)', 'Groupings', 'Filters', and 'Chart'. Under 'Columns (View)', there is a list of columns to show, with 'Entry Date' selected. The 'Column Settings' panel is open, showing options to sort by this column (Second) and sort it (Ascending (A-Z)). A yellow arrow points to the 'Summarize this column by: Maximum' dropdown. Below the settings is a 'Column Preview' section showing a table with columns: ENTRY DATE, NAME, OWNER, DUE ON, and TEMPLATE NAME. The table contains one row of data: 4/15/11, CRM Integration - Tampa Office, John Smith, 4/29/23, Sample Text.



# The Updated Version of the Report

Details Summary Chart

[→] v

Entry Date ↑	Name
> 4/14/23	Template: Name: CAS Internal Printer Project Template (829)
> 1/18/23	Template: Name: CO - Automation Project (1)
> 3/17/23	Template: Name: GCX - Campaign Big Idea/Activation Template (33)
> 4/11/23	Template: Name: GCX - Copywriting (113)
> 2/6/23	Template: Name: GCX - Creative Development (14)
> 4/16/21	Template: Name: GCX - Digital - Email (171)

REPORT CLD#2 Number of Project... Show Filters Report Actions As of Apr 17, 2023 3:49 pm Eastern Daylight Time

Prompt: N/A Output: Column Chart Grouping: Template Name Fields: Name, Owner, Description, Due On, % Complete, Template Name Summary: Display how many projects have been created in the system, grouped by their Template. This can be useful t  
- More

Details Summary Chart

NAME	COUNT	ENTRY DATE
Template: Name: ANF - Dynamic Label Template	300	Maximum: 4/14/23
Template: Name: ANF - On-Product Labels Template	42	Maximum: 2/28/23
Template: Name: ANF - Packaging Design Proposal Template	1	Maximum: 7/30/20
Template: Name: ANF - Packaging Template	29	Maximum: 3/1/23
Template: Name: ANF - Photography Beauty	64	Maximum: 4/13/23
Template: Name: ANF - Tech Pages	199	Maximum: 4/3/23
Template: Name: **AY TEMP** LX Brand Revit Template	3	Maximum: 12/3/21
Template: Name: Bynder Ingestion	1	Maximum: 3/2/23
Template: Name: CAS E-Blast / E-Mail Project Template	17	Maximum: 4/13/23
Template: Name: CAS Ecomm Project Template	62	Maximum: 4/5/23
Template: Name: CAS External Printer Project Template	121	Maximum: 4/13/23
Template: Name: CAS Internal Printer Project Template	829	Maximum: 4/14/23
Template: Name: CO - Automation Project	1	Maximum: 1/18/23
Template: Name: GCX - Campaign Big Idea/Activation Template	33	Maximum: 3/17/23
Template: Name: GCX - Copywriting	113	Maximum: 4/11/23



# Add in an Automation

Use the **Send Report** feature to automate reminders to review the templates at a regular cadence

The screenshot shows a software interface for configuring a repeating report. It is divided into two main sections: configuration and summary.

**Configuration Section:**

- Send Now** and **Repeating Deliveries** tabs are at the top.
- Email Subject:** CLD#2 Number of Projects by Template (GCX v)
- Email Message:** Review the template list to see which aren't being used as often and should possibly be deactivated
- Deliver this report with the Access Rights of:** Monique Evans
- Format:** PDF
- Paper Size:** Letter (8.5" x 11")
- Orientation:** Portrait (indicated by a selected icon)
- Repeats:** Monthly
- Repeats Every:** 6 Months
- Time:** 6:00 AM
- Repeats On:** Day of week (selected), Day of month, Last day of the Month
- Starts On:** Jan 20, 2023
- Ends On:** Never (selected), Apr 17, 2023
- Buttons:** Save, Delete

**Summary Section (REPEATING DELIVERIES):**

- + New Repeating Delivery
- EVERY 6 MONTHS ON THE 3RD FRIDAY
- To: Monique Evans



## **Don't start deactivating templates just yet!**

The project report may not account for all templates used in your instance!!



# Adding a Task Report to the Cleanup Dashboard

- **View**
  - Mimics Project Report
  - Added Project Template Name (Text Mode Needed)
- **Grouping**
  - Project Template Name (Text Mode Needed)
  - Template Task Name
- **Filter**
  - Template Task ID is not Blank
- **Prompt**
  - Project Template ID
  - Project Group ID
  - Template Task ID

REPORT  
CLD#3 Number of Tasks by Template (GCX version) Report Actions ▾

**What should we include in your Report?**

Project Template ID  
-- Any -- ▾

Project Group ID  
-- Any -- ▾

Template Task ID  
-- Any -- ▾

[Run Report](#)



# Additional Benefits of Creating a Task Report

REPORT  
CLD#3 Number of Tasks by Templ... Show Filters and Prompts Report Actions As of Apr 6, 2023 1:01 pm Eastern Daylight Time

Details Summary Prompts

Entry Date ↑	Task	Assignments	Due On	Template Task Name ↑	Project Template ↑
▼	Project: template: name: GCX: Workfront Admin Project Template (188)	1/19/23			
>	Template Task: Name: Content Gathering & Discovery (42)	1/19/23			
>	Template Task: Name: Enhancements (3)	1/19/23			
>	Template Task: Name: Kickoff Meeting and Planning Sessions (37)	1/19/23			
>	Template Task: Name: Testing (29)	1/19/23			
>	Template Task: Name: Training (37)	1/19/23			
>	Template Task: Name: Workfront Build (40)	12/20/22			

Showing All (188) tasks 1 - 188 of 188 tasks

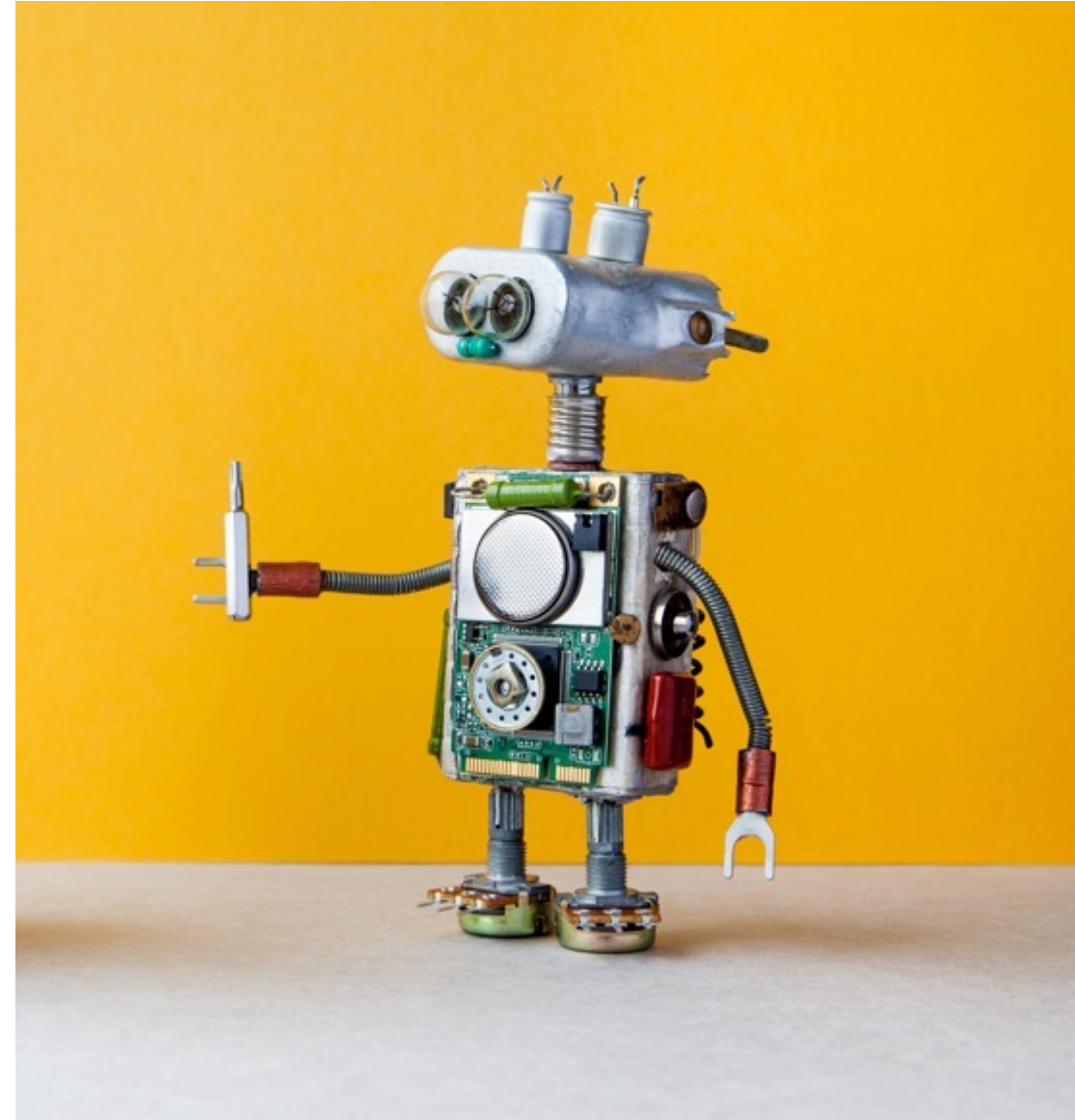
- Analyze add-on templates
- Accounts for projects where an incorrect template is selected and then deleted
- Determine if specific tasks should be deleted



## What's next?

- ✓ You've worked hard to establish a standard operation for auditing/reviewing your templates
- ✓ Every month you do the same thing
- ✓ You have other things you'd rather do
- ✓ **Can we automate this?**

# Welcome to Workfront Fusion!



# Use a Crawl-Walk-Run Approach





# Fusion Template: Project Templates that haven't been used in X years



Workfront - Find project templates not used in policy time and notify

0

Once a month, review your project templates using your own policy with this easy to manage template that notifies appropriate users on templates in violation of your policy.

This is a predefined template that will make the creation of your scenario much easier. Of course, you can always expand and customize the scenario to meet your own individual needs.

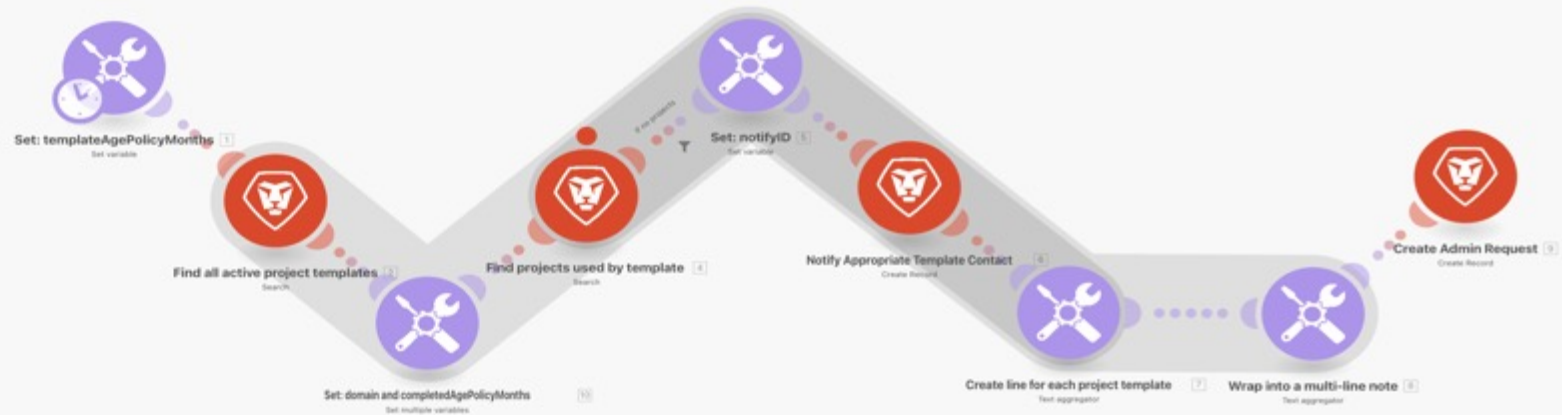


Tools

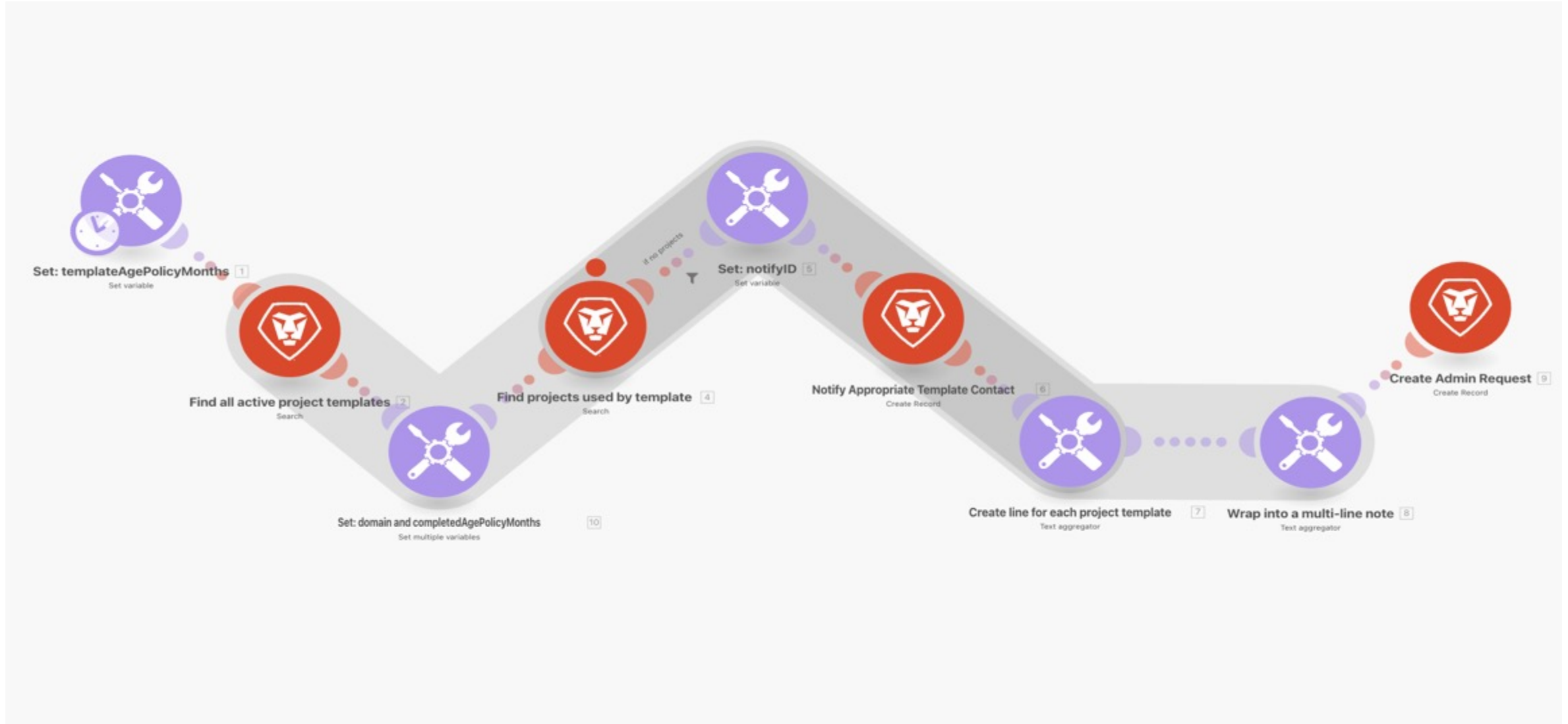


Adobe  
Workfront

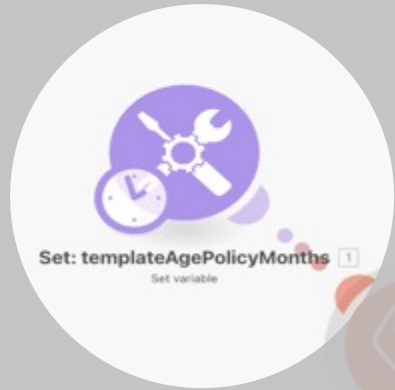
Create new scenario from template



# Fusion Template: Animated Walkthrough



# Fusion Template: Animated Walkthrough



Set the number of months (24 by default) that you permit in your organization for a Workfront project template to remain not used. This setting will impact which templates are included in this automated review.

Variable value

24

# Fusion Template: Animated Walkthrough



Change the connection to your Adobe Workfront instance.

**Connection**

ewanhruska connection (API Connect) Add

For more information on how to create a connection to Adobe Workfront, see the [online Help](#).

Review and consider adding an additional filter to further reduce scope (eg. Portfolio ID).

**Search criteria**

Is Active Equal to true

and

Entry Date Less than

```
addMonths( now ; -  
1. templateAgePolicyMonths )
```

Add AND rule Add OR rule

Please consider using In/Not in operators for the conditions on the same field

Find all active project templates

# Fusion Template: Animated Walkthrough



**Change the variable value from 'yourdomainname' to your Adobe Workfront domain name (eg. where 'domain' in the following URL is yourdomainname in https://domain.my.workfront.com).**

The completedAgePolicyMonth variable allows for some variance between when projects are completed and when they are created.

**Variables**

- Variable name: domain  
Variable value: yourdomainname
- Variable name: completedAgePolicyMonth  
Variable value: 1. templateAgePolicyMonths - 3

+ Add item

# Fusion Template: Animated Walkthrough



**Connection**

Change the connection to your Adobe Workfront instance.

ewanhruska connection (API Connecto) Add

For more information on how to create a connection to Adobe Workfront, see the [online Help](#).

Note that the Actual Completion Date filter is set to the policy number of years + 3 months. If you need to change that, we recommend only changing the "3".

**Search criteria**

Actual Start Date Greater than

addMonths( now ; - 1. templateAgePolicyMonths )

and

Template ID Equal to

2. ID

Add AND rule Add OR rule

**or**

Actual Completion Date Greater than

addMonths( now ; - 10. completedAgePolicyMonth )

and

Template ID Equal to

2. ID

Add AND rule Add OR rule

Please consider using In/Not in operators for the conditions on the same field

We are including the Tasks:templateTaskID as a collection here just in case you need that for additional refinement. You may consider removing for optimization if not needed.

**Collections**

tasks:templateTaskID



# Fusion Template: Animated Walkthrough

**Variable name**

  
**Variable lifetime**

One cycle

**Variable value**

```
ifempty( if( 2. owner.isActive = true ;  
2. owner.ID ; "" ) ; ifempty( if(  
2. lastUpdatedBy.isActive = true ;  
2. lastUpdatedBy.ID ; "" ) ;  
2. enteredBy.ID ) )
```



**Note:** This is not a configurable step from the template.  
*Optional: To edit, go to your completed Scenario.*

# Fusion Template: Animated Walkthrough



**Change the connection to your Adobe Workfront instance.**

**Connection**

ewanhruska connection (API Connect) Add

For more information on how to create a connection to Adobe Workfront, see the [online Help](#).

**Change this Update Text to meet your organization's needs.**

**Update Text**

Template: 2. name  
With ID: 2. ID  
Does not appear to have been used in at least 10. completedAgePolicyMonth months  
Please consider marking as inactive.

**Upside Down** ☆ ...

Updates

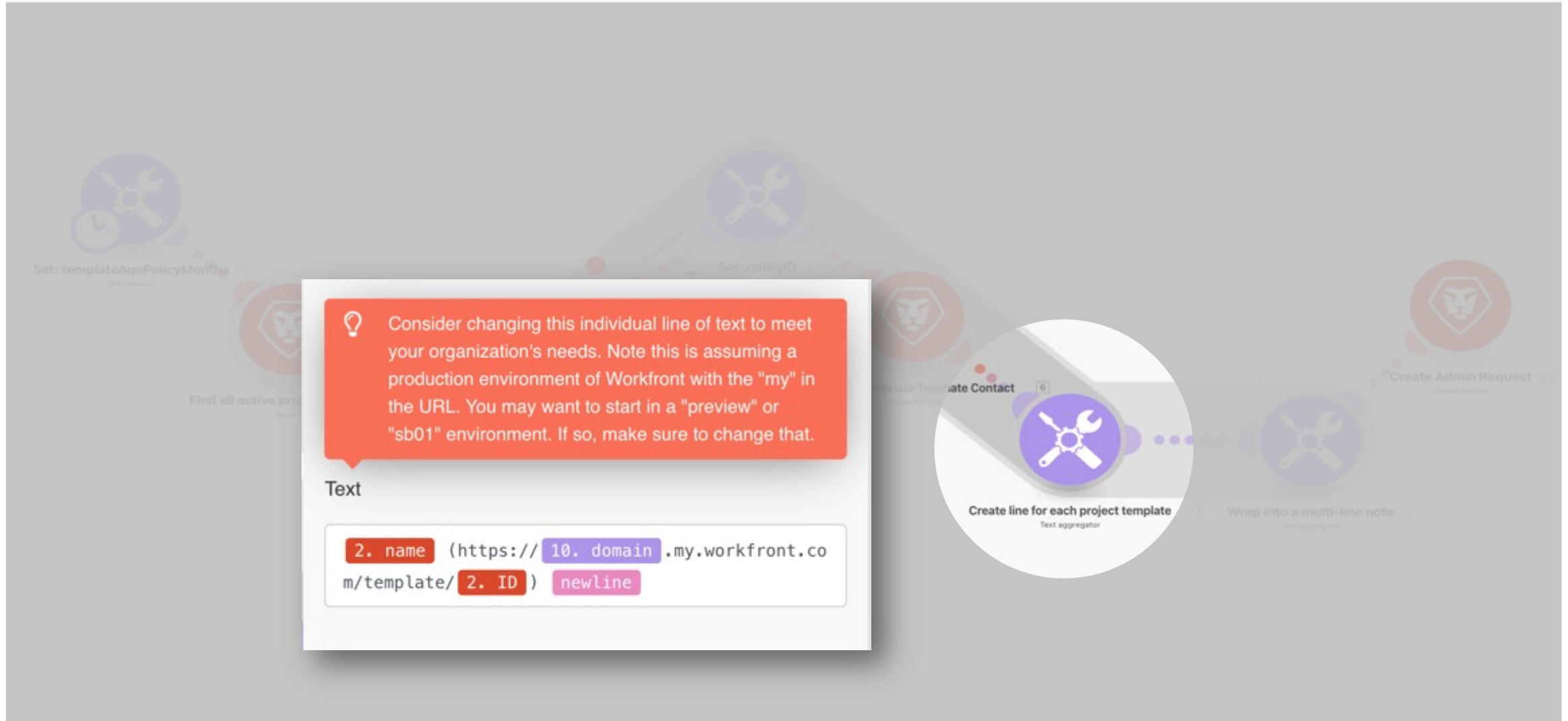
API Connector  
Today at 2:05 PM · Like ...  
to Upside Down

Template: Deliverable Template  
With ID: Sf3339d90519d888a45b5a82741f0aaf  
Does not appear to have been used in at least 21 months  
Please consider marking as inactive.

Reply



# Fusion Template: Animated Walkthrough



# Fusion Template: Animated Walkthrough



**Source Module**

Find all active project templates - Search [2] ⇅

**Text**

7. text

**Wrap into a multi-line note** 8  
Text aggregator

**Note:** This is not a configurable step from the template.  
*Optional: To edit, go to your completed Scenario.*

# Fusion Template: Animated Walkthrough



More > PROJECT Administrative Tas... | ISSUE Project Templates ...

ISSUE  
**Project Templates Requiring Review - 14/04/2023 03:05** ☆ ...

Issue Details

- Issue Details
- Updates
- Documents
- Hours
- Approvals

**Description**

Notifications have been sent to the appropriate contacts for each of the following Project Templates. The following templates may need to be reviewed as they appear to not have been used within the template policy age:

- Guided Self-Launch Implementation Template  
(<https://yourdomainname.my.workfront.com/template/94f8bf7ec4af401e0530a093a0aec2b>)
- Live Event Project  
(<https://yourdomainname.my.workfront.com/template/5f238c3b013038ba5e9513252c8e999c>)
- Workfront Communication and Launch Template  
(<https://yourdomainname.my.workfront.com/template/94f8bf7ec4b2b401e0530a093a0aec2b>)
- Integrated Campaign Template  
(<https://yourdomainname.my.workfront.com/template/94f8bf7ec594b401e0530a093a0aec2b>)
- Social Blog Post Template (Digital)  
(<https://yourdomainname.my.workfront.com/template/94f8bf7ec592b401e0530a093a0aec2b>)
- Video Sample Template (Digital)  
(<https://yourdomainname.my.workfront.com/template/94f8bf7ec598b401e0530a093a0aec2b>)
- DR Project Template  
(<https://yourdomainname.my.workfront.com/template/5f23425e00fab7ddad9cf71d208cd3d3>)
- Auto Assign Test Template  
(<https://yourdomainname.my.workfront.com/template/5f2340db00f84cf71d094dcaa2aad62>)
- Business Card Request Template  
(<https://yourdomainname.my.workfront.com/template/5dae028900cda456ecaa0ac32ceaaff>)
- Test UCSF Project Template  
(<https://yourdomainname.my.workfront.com/template/5e94bd73028d5f0327ed186fb3a9f13b>)
- Appetite for you (<https://yourdomainname.my.workfront.com/template/5e41e2570191686925f18ec10e18819a>)
- Test Project Template  
(<https://yourdomainname.my.workfront.com/template/5e175a5500517eefdbcea057ae1c8f6>)

+ Add a Dashboard

## Connection

ewanhruska connection (API Connect) Add

For more information on how to create a connection to Adobe Workfront, see the [online Help](#).

Review this Description and change to meet your organization's needs. Note that you may also want to append a Create Record->Update on the resulting Task with the same content depending on your environment.

## Description

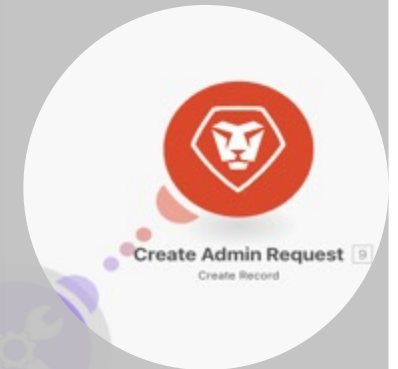
Notifications have been sent to the appropriate contacts for each of the following Project Templates. The following templates may need to be reviewed as they appear to not have been used within the template policy age:

8. text

Modify to meet your desired issue/request naming convention.

## Name

Project Templates Requiring Review -  
formatDate( now ; DD/MM/YYYY hh:mm )



# Fusion Template: After your scenario is built! – Make these changes.



**Note:** This is not a configurable step from the template. This *MUST* be edited from the completed Scenario.

**Edit These to match Object IDs in your environment**

# Fusion Best Practices



## Variables

- **Set variables** early in your scenarios
- **Create variables** for frequently changed and reusable areas in a scenario

## Naming

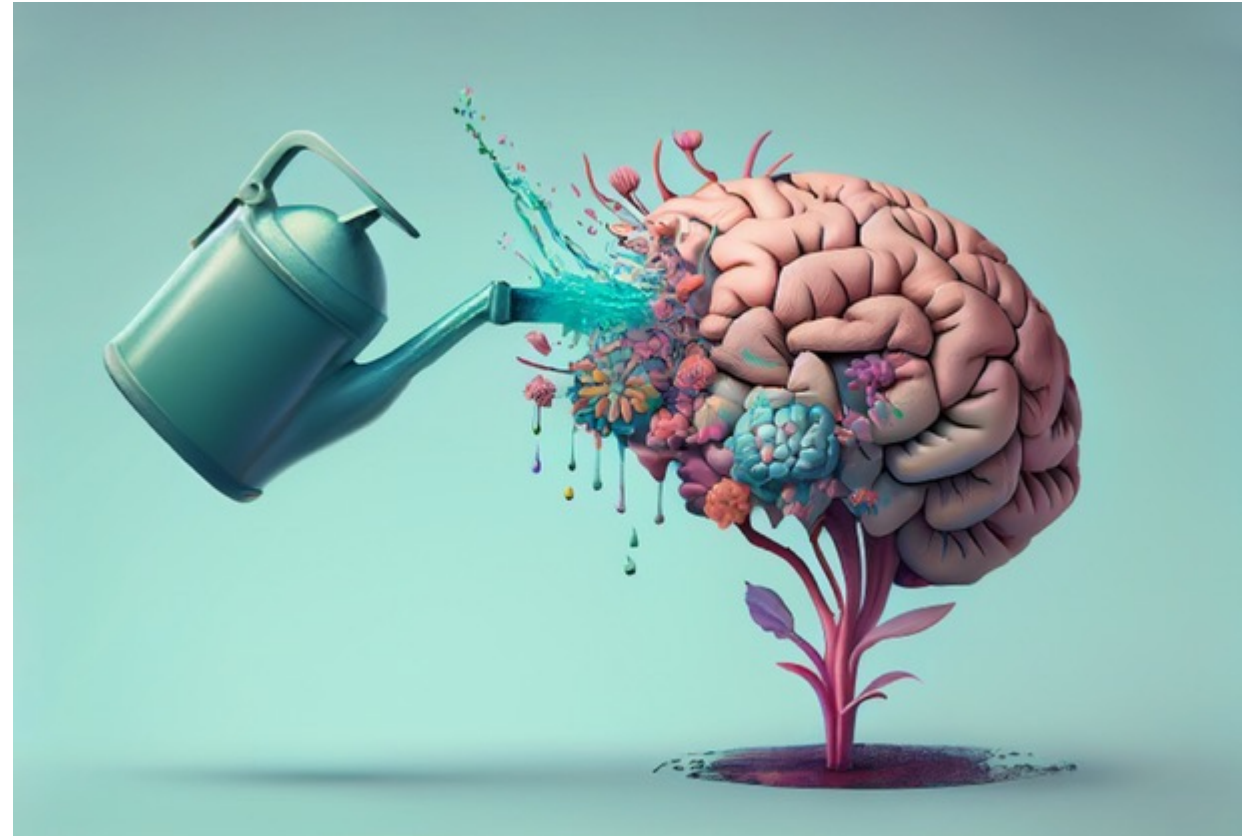
- **Name your scenarios** in a logical manner (eg. “Application(s) – Function”)
- **Labels** should be human readable and resemble a sentence (eg. “Find Projects that match pattern”)

## Notes

- **Include a note** in the first module of all scenarios with the business use case and either a link to a design doc or an overview of the steps.
- **Special notes** should be attached to respective modules of any hard-coded data or known obstacles.

# Takeaways

- **CRAWL.** Don't start from scratch! Use a hive mind approach to leverage the Workfront community / Customer Support / Customer Success
- **WALK.** Make it your own! Customize in Workfront. Add additional reports.
- **RUN.** Refine your needs and automate using Fusion
- **Rinse and Repeat.** There are always more things to refine



# Questions?



# Upcoming Events

## System Admin Essentials Webinars

- May 17: Foundations of Project Templates
- *Coming soon!* Governance & Onboarding for Group Admins
- *Coming soon!* Communicating with End Users

## “Ask the Expert” Office Hours + Small Group Workshops

- ★ Apr 27: Ask the Experts – Efficiency w/ Automation Follow-up
- May 5: Connect – Admin Chat for Marketing & Creative
- May 23: Learn – Intro to Scrum with Workfront

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





# Call for Speakers!

EXPERIENCE MAKERS  
THE SKILL EXCHANGE

We are looking for Adobe customers to share their stories, tips and tricks at the upcoming ***Experience Makers The Skill Exchange for Adobe Workfront*** on August 16<sup>th</sup>!

The Skill Exchange is a free, digital learning event where customers and experts can come together to share how they have achieved success.



## We want to hear from you!

Submit to speak at  
<https://adobe.ly/3Uq1pAD>  
or by scanning the QR code

→ *Submissions are due by April 28!*

**Questions?** Contact Shea Cibulsky at [cibulsky@adobe.com](mailto:cibulsky@adobe.com)



**Thank you!**





# Appendix



# Additional Resources

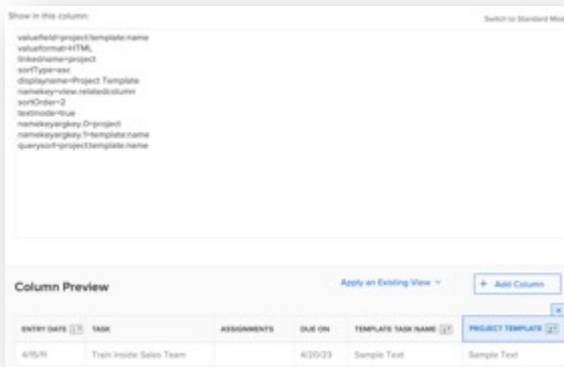
- [How To Install Blueprints](#)
- [The System Admin Maintenance Dashboard](#)
- [How Workfront Cleaned Up Its Own "Unbridled" Instance of Workfront](#)
- [Currently available Adobe Workfront Fusion templates](#)
- [How to create Workfront project templates and best practices for project templates.](#)
- [How to edit Project Templates](#)
- [API Explorer](#)
  
- **[Register for the System Admin Webinar in May on the Foundations of Project Templates \(or watch the on-demand\)!](#)**



# Task Report Text Mode

## View Project Template Column Text Mode

displayname=Project Template  
linkedname=project  
namekey=view.relatedcolumn  
namekeyargkey.0=project  
namekeyargkey.1=template:name  
querysort=project:template:name  
sortOrder=2  
sortType=asc  
textmode=true  
valuefield=project:template:name  
valueformat=HTML



## Grouping Text Mode

group.0.iscollapsed=true  
group.0.linkedname=project  
group.0.namekey=view.relatedcolumn  
group.0.namekeyargkey.0=project  
group.0.namekeyargkey.1=template:name  
group.0.valuefield=project:template:name  
group.0.valueformat=string  
group.1.iscollapsed=true  
group.1.linkedname=templateTask  
group.1.namekey=view.relatedcolumn  
group.1.namekeyargkey.0=templateTask  
group.1.namekeyargkey.1=name  
group.1.valuefield=templateTask:name  
group.1.valueformat=string  
textmode=true

