Ask Your Peers – Logging Time in Workfront, Customer Panel

Adobe Workfront Customer Success – February 9, 2023

Agenda

Start Time	9:00am PT / 12:00pm ET
5 minutes	Welcome & Introductions
10 minutes	Logging time in Workfront – the why and how
10 minutes	Estimating hours in Workfront using custom fields
25 minutes	Panelist discussion
10+ minutes	Open Q&A
End Time	10:00am PT / 1:00pm ET

Introductions - Customer Panelists

Daniel Clarke
Sr Manager, Restaurant Solutions | Sysco Corporation
@DanielClarke - Community
Connect on LinkedIn

Lindsey Brown
Creative Operations Program Manager | Advisors Excel
@lindselib - Community
Connect on LinkedIn

Madalyn Destafney
Sr. Marketing Ops Consultant, WF Admin | Micron Technology
@MadalynD - Community
Connect on LinkedIn

Ramanan Lingamoorthy
Director of Project Management | Mobile Climate Control
@RamananLi - Community
Connect on LinkedIn

Do Your Users Know What Logging Time is (and isn't) For?

IS FOR

- More accurate project/resource planning (not just for you, for them!)

- Visibility into how time is spent by project type, by client/Business Unit, etc.

- Template & Planned Hours refinement

ISN'T FOR

- Micromanaging

- More = Better

The Scoop

Landscape: Only shared resources teams log time (web, creative)

Need: **How much time is Marketing spending on each business unit? How much time spent on project types?**

Problem: Only shared resources teams log time, project counts don't give the full picture. How can we account for teams that don't log time, while still using the value of the logged time that we do have?

Solution: Project custom form fields that use estimated + logged hrs by project type, grouped by BU

NOTE: Using a calculated field removes the reliance on users to enter something on their own for each project (know your audience).

Custom Form Fields

- You'll need a project custom form field for project type or however you want to categorize projects to indicate LOE. For us, it's 'Project/Deliverable Type.'

- Now create a calculated field in the same project custom form that references field above – use NUMBER format. I call this field 'Deliverable Types Est Hrs.'

```
SUM(IF(CONTAINS("Press Release",{DE:Project/Deliverable
Type}),16,0),IF(CONTAINS("Advertisement",{DE:Project/Deliverable
Type}),5,0),IF(CONTAINS("Blog",{DE:Project/Deliverable Type}),16,0),IF(CONTAINS("MicronNow
Post",{DE:Project/Deliverable Type}),14,0),IF(CONTAINS("Organic Social",{DE:Project/Deliverable
Type}),11,0),IF(CONTAINS("Dark Paid Social",{DE:Project/Deliverable
Type}),14,0),IF(CONTAINS("Influencer Partnership",{DE:Project/Deliverable
Type}),16,0),IF(CONTAINS("Podcast",{DE:Project/Deliverable Type}),23,0),IF(CONTAINS("Technical
Document",{DE:Project/Deliverable Type}),5,0))
```

- Always have this selected in calc field:

- Now create calculated field that references above – NUMBER format *(actual work required = actual hours)*

```
ROUND(SUM({DE:Deliverable Types Est Hrs},{actualWorkRequired}/60),0)
```

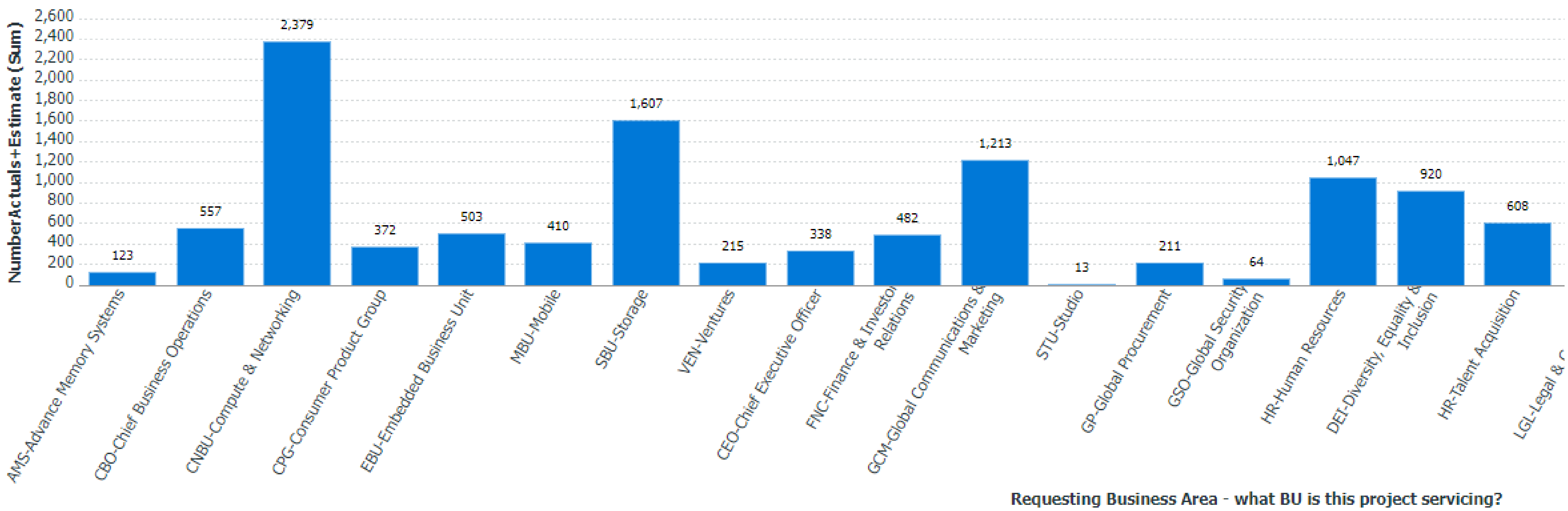
Can Create a Report Like This

REPORT

Estimated+Actual Project Hrs FY23 by BU

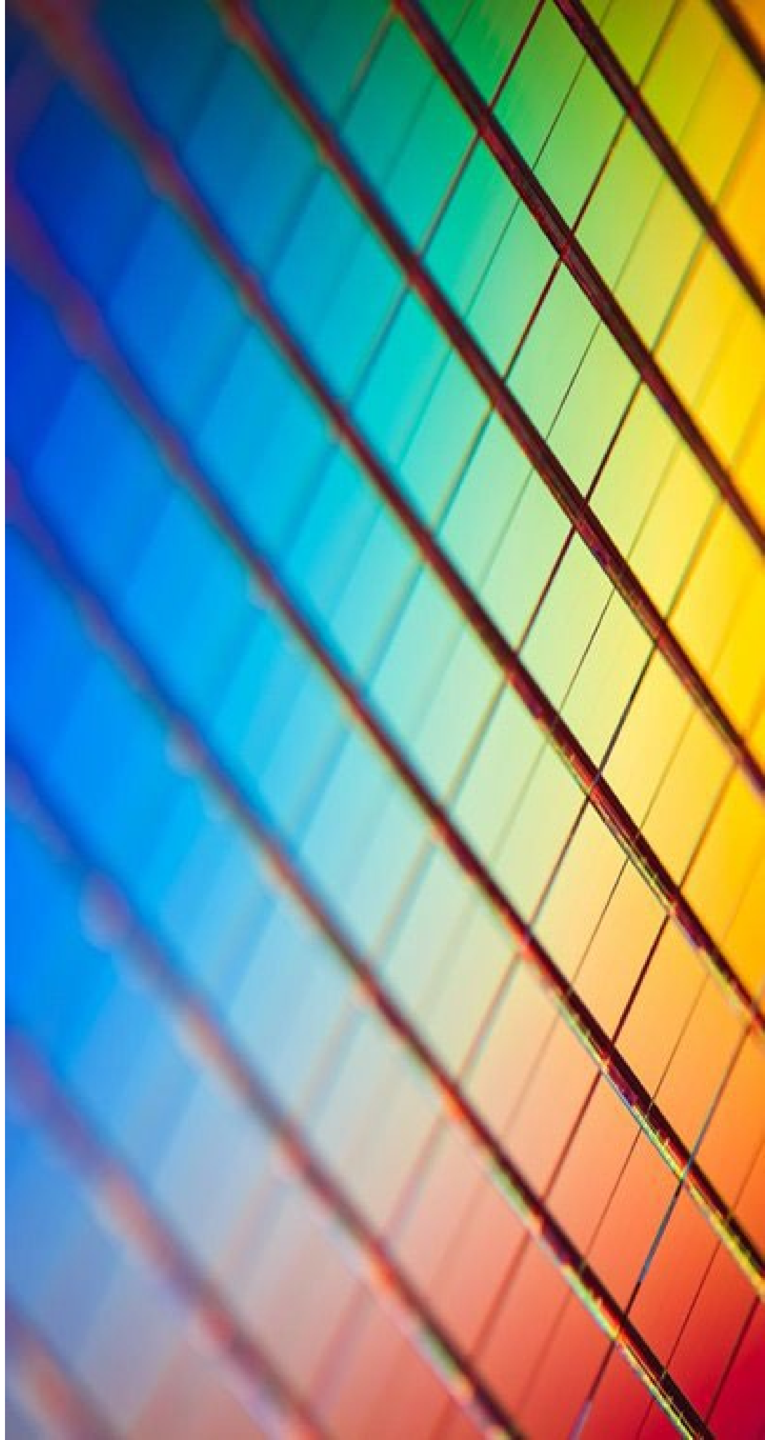
Details Summary **Chart**

Export Hide Values



Pointers

- Getting estimates will take time, depending on your org size. This is the hardest part.
- Can use on multiple project forms as long as referencing same ‘core’ field the estimated hrs field is referencing
- Have a way to categorize your projects that indicates LOE
- Make sure each project type in your calculated field is unique
- Even if your team tracks task time, will still roll up under project time
- If a team starts tracking time that didn’t used to, revise estimates accordingly
- Use report groupings to group the hours in different ways:
  - By Project Type
  - By Business Unit/Client
  - By anything you have fields for…



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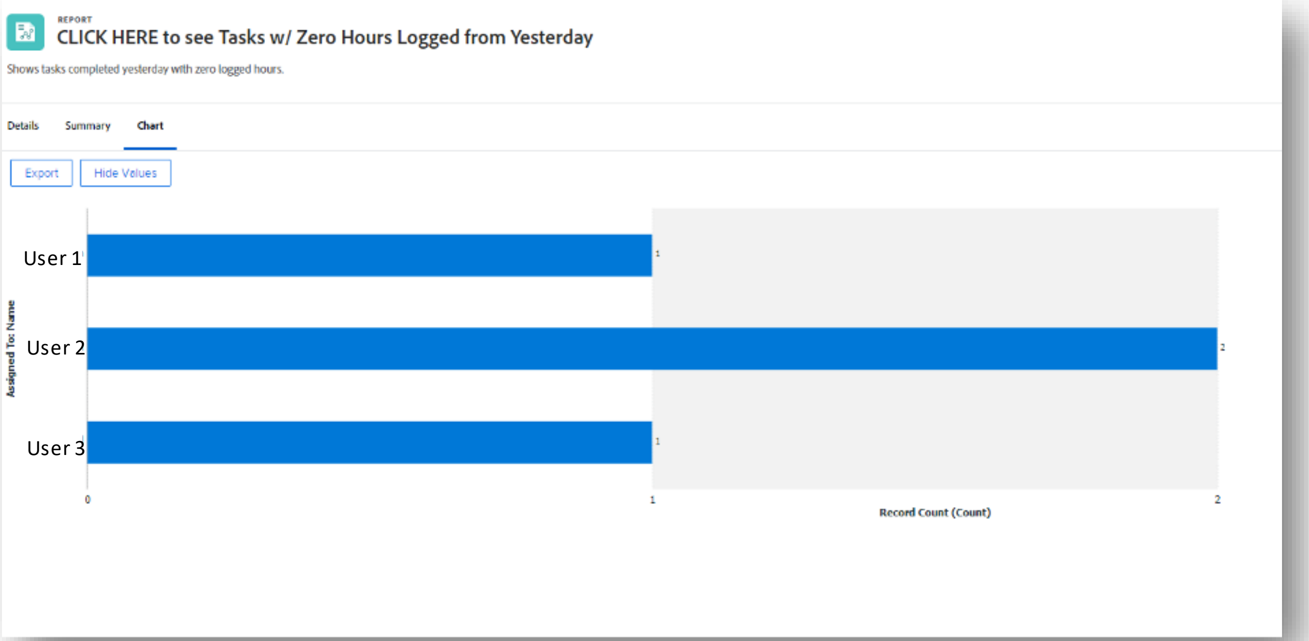
Sample Report #1 – Hours Reminder (tasks with 0 actual hours)

This report is sent to all users on a specific team every day. It shows them any tasks that people on their team completed yesterday that don't have time logged. Users can click on their section and open the tasks to log time. It helps drive accountability for each other as they can see each other's items.

- Report type: Task Report
- Add the **filters** for
  - Task Actual Hours > Equal > 0H
  - Task Actual Completion Date > Equal > $$TODAY-1d
  - Task is Complete > Equal > True
  - Assignment Users Home Team ID > Equal > (Insert Home Team)
- Add the grouping for Assigned to > Name
- Edit your columns (view) to the following:
  - Actual Completion Date - sort by this column first, Ascending
  - Project Name
  - Task Name
  - Task Description
  - Planned Hours
  - Task ID - rename to "TIP >>>" and add a column rule that says, "If Task ID is not blank, display text: Click the second icon to the right to log time via updates."
  - Task Status Icons

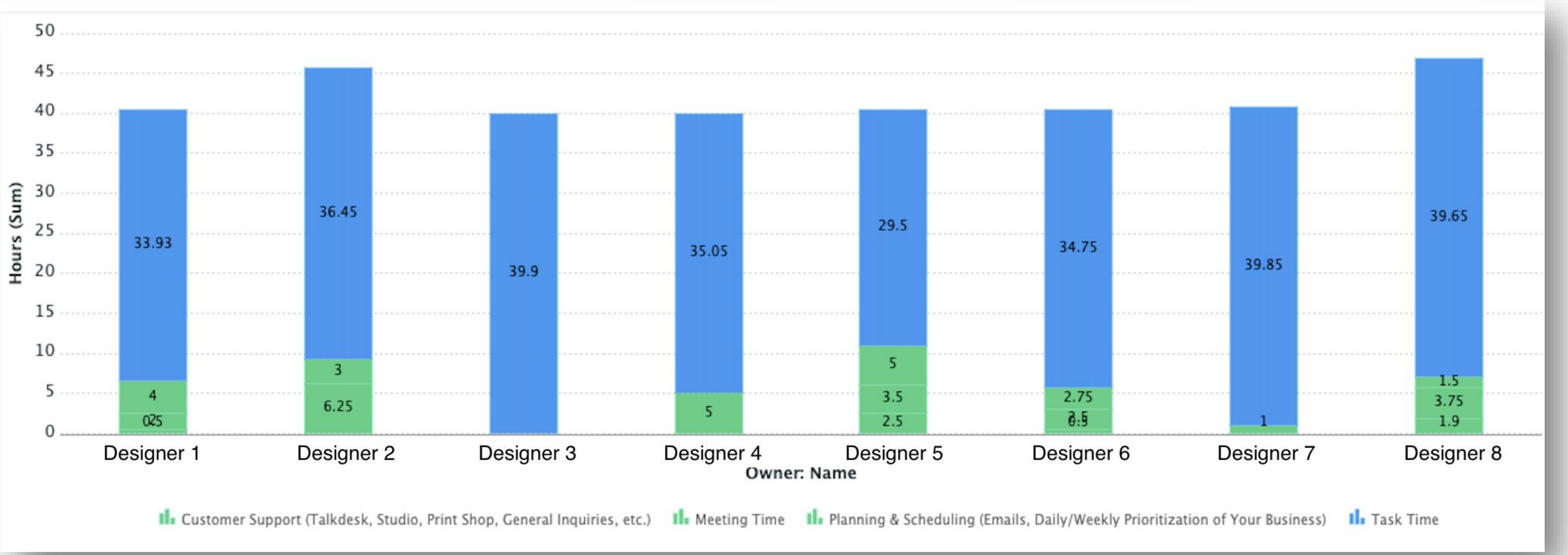
- Schedule repeating report delivery for every day (M-F)
- Email subject: **Click here** to see Tasks w/ Zero Hours Logged from Yesterday
- Email message: If you have a task that was completed yesterday and there are zero logged hours, please click into the task and enter the appropriate time logged.



Sample Report #2 – Hours Logged Last Week by User and Type

This report helps managers or admins self-assess how much time users from a specific team are putting in and spot check if anyone has excessive or questionable times in any buckets (against pre-stated expectations).

- Report type: Hour Report
- Add the **filters** for
  - Hour Entry Date > Between > $$TODAYb-1w and $$TODAYe-1w
  - Owner Home Team ID > Equal > $$USER.homeTeamID
- Add the grouping for Owner > Name followed by Hour > Type
- Data is based on hours logged the previous week
- Added to weekly team huddle dashboard for review
- Visibility for all users on the team – hold each other accountable



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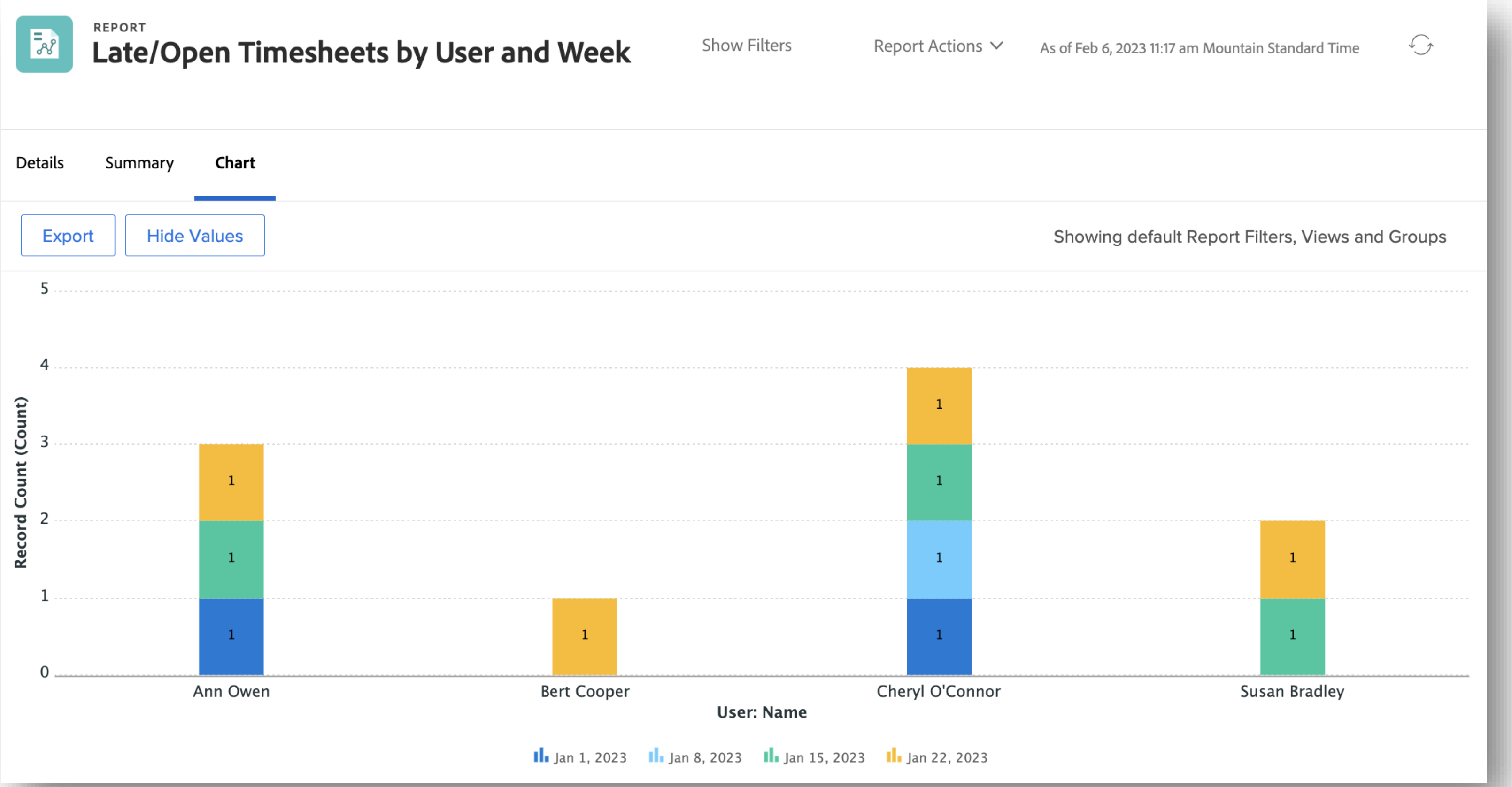
Sample Report #3 – Late/Open Timesheets by User and Week

This report is designed for timesheet approvers or team managers to quickly see who has not yet submitted their timesheet from the past or current month. Keep in mind that this report leverages a wildcard filter for approvers, so you will only see timesheets that you personally need to approve.

- Report type: Timesheet Report
- Add the **filters** for
  - Timesheet Status > Not Equal > Closed
  - Timesheet End Date > This/Last Month
  - Timesheet Approvers > Equal > $$USER.ID
- Add the groupings for
  - User > Name
  - Timesheet End Date (week)
- Keep your columns (view) as is but consider adding a column rule to the Total Hours column
  - If Total Hours > Less Than > 40 (or choose a number that makes sense for your organization), add a red background
- Add this report to a team lead / manager dashboard for easy access



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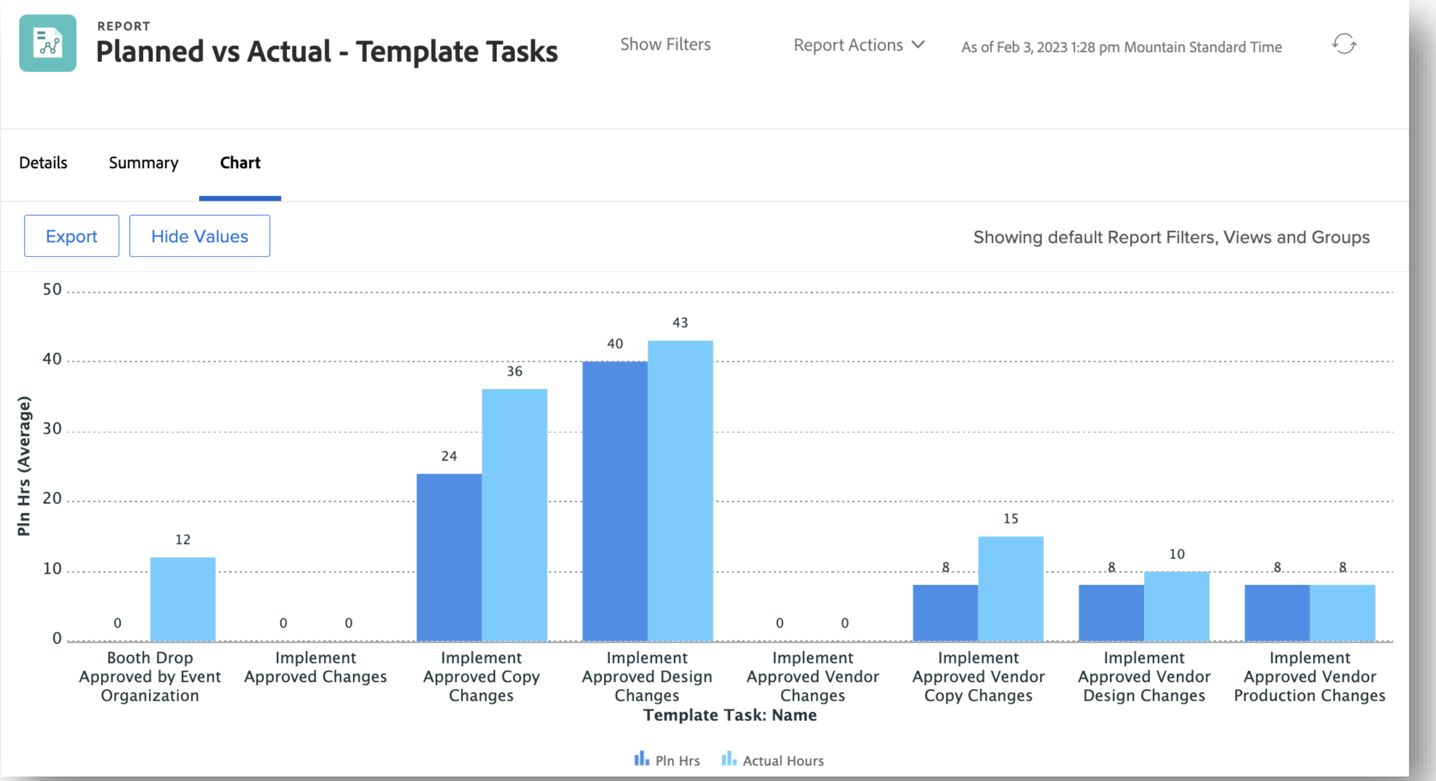
Sample Report #4 – Actual vs Planned Hours by Template Task

This report provides visibility into hours associated with template tasks. System Administrators can view this report and quickly see which template tasks need to be updated in terms of planned hours for better, more accurate forecasting in the future. Ideally, this would be reviewed on a regular cadence (ex: every 6 months).

- Report type: Task Report
- Add the **filters** for
  - Template Task ID > Is Not Blank
  - Task Status > Equal > Complete
- Add the grouping for Template Task > Name
- Edit your columns (view) to include the following:
  - Task Name
  - Planned Hours, summarize by Average
  - Actual Hours, summarize by Average
- Adjust your chart to include both planned and actual hours
  - Left axis – Planned Hours (Average)
  - Bottom axis – Template Task Name
  - Add a combination column chart – Task Actual. Hours (Average)



Upcoming Events for Sys Admins

February 13 at 7:00am MT
Connect: Workfront Strategic Chat (Open Office Hours)

February 15 at 9:00am MT
Webinar: System Admin Essentials - Tips for Taking Over an Existing Workfront Instance

February 28 at 2:00pm MT
Learn: Making the Case for a Full-Time Sys Admin

March 3 at 10:00am MT
Connect: Admin Chat for Marketing & Creative

Register for all upcoming workshops and Q&A sessions on the Events page on Adobe Experience League.

Open Q&A / Discussion

if you don't have any for me, I have some for you!

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