

EDUCATION SESSION

Using Workfront to Create Meeting Agendas

Session Speaker

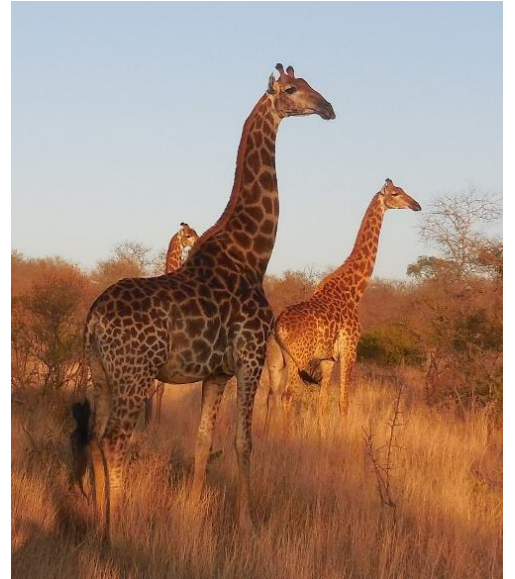
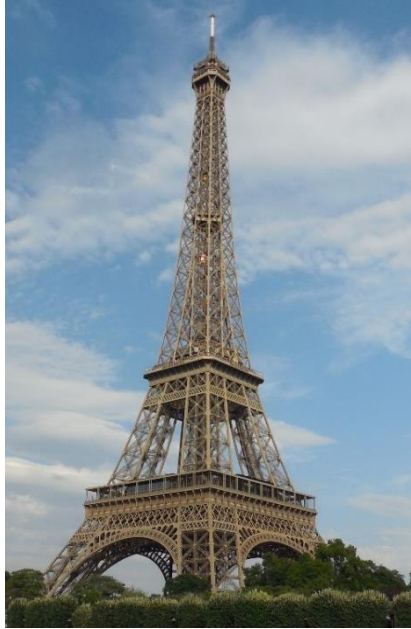


Alison Wells

Senior Business Analyst
Community Medical Centers
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About Alison

- Hates talking about herself... like, a lot. 😞
- Senior Business Analyst who has been with Community Medical Centers for more than 20 years, in various roles. Yes, she is old. 🧪
- Holds a BS in Business Administration and an MBA from California State University, Fresno. B.S., M.B.A., if you're into letters. 🎓
- Loves to solve problems for customers. 💣
- Workfront System Administrator since 2015. 🦁
- When not working, she loves to travel. This year – Egypt! 🏺



About Community

Profile

- Community Medical Centers is the leading healthcare provider in the Central San Joaquin Valley, California.
- Community is private, not-for-profit and the largest healthcare network and private employer in Central California.
- Community's Mission: To improve the health status of the community and promote medical education.
- Based in Fresno, Community operates four area hospitals and is the only Level 1 trauma center between Los Angeles and Sacramento.
- 300+ Physicians, Residents and Fellows are trained annually through Community's teaching affiliation with the University of California, San Francisco.
- Workfront customer since 2015.



Statistics

- 1,117 licensed beds.
- More than 175,000 ED visits, 56,000 admissions and 10,100 births in fiscal year 2017.
- Community's dedicated workforce is comprised of 8,400 employees, including 3,100 nurses; 1,400 affiliated Physicians; and 970 volunteers.
- 360 active Workfront users, representing more than 10 departments.



www.communitymedical.org



<https://www.facebook.com/communitymedicalcenters>



<https://twitter.com/CommunityMed>

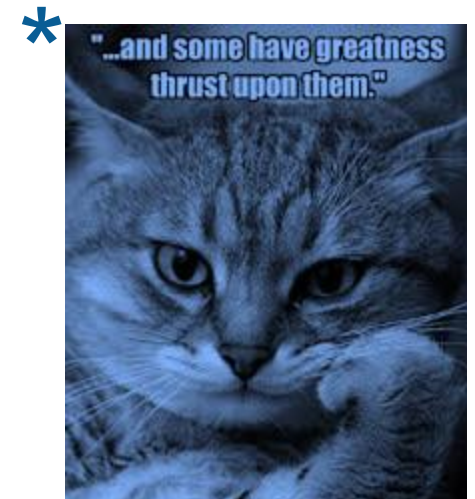
INTRODUCTION

Using Workfront to Create Meeting Agendas

- Your projects are in Workfront.
- Your tasks are in Workfront.
- Your work is in Workfront.
- Why are you creating meeting agendas in Word to review Workfront work?
- QuickAgenda is one way to eliminate this extra effort and create agendas using information already in Workfront.

Community's Business Need

- As a recent adopter of Workfront, Projects and Tasks are getting created (great!). But Project Managers are reviewing Workfront Projects and then creating meeting agendas in Word (bad!).
- Why is that bad? Notes are taken, decisions made, new tasks identified, and assignments determined during the meeting and recorded on those Word documents. Now, they need to be transcribed back into the Workfront Project, taking extra time and effort.
- Our leadership insisted* we figure out a way to start using Workfront for meeting agendas in order to take advantage of data that already existed, increase adoption and reduce rework.
- After some trial and error, QuickAgenda was the final product.



A person is writing the word "Agenda" in white marker on a whiteboard. The person is wearing a dark shirt and is holding a white marker. The whiteboard has horizontal lines. The background is a blue-tinted image of the person writing.

Agenda

Let's Demo

QuickAgenda



Requirement: All agenda items must be in one Project



How: "Select" Tasks/Issues to be on the agenda.



Done: Create the agenda.



Live Demo of QuickAgenda from our system

MC PCI Renewal

Project Details Updates Documents (35) Issues (1) QuickAgenda More

Task Name	Note Entry Date	Last Note	QuickAgenda
Infrastructure Team Assignments			Yes
Validate CDE	5/31/17	Connected with Dana, Marketing and finally BlueSpire to verify how the donation page was presented on our website. Code was provided showing that they are providing Blackbeud's page in an iframe. This confirms no storage or really even transmission. Documented.	Yes
Security Policies			Yes

Task Name	Issue Name	Owner: Name	Entry Date	Note Text
resource constraints to meet PCI timelines		Jamie Franklin	12/16/18 3:16 PM	The item we are down to on PCI is Security Policies. There are two items: <ol style="list-style-type: none">1. We need a formal incident response plan in the event of a breach or compromise.2. Security training for employees.

We will create an agenda, view it for a meeting, take notes and create minutes

QuickAgenda Minutes

Task Name	Issue Name	Owner: Name	Entry Date	Note Text
resource constraints to meet PCI timelines		Jamie Franklin	12/16/18 3:16 PM	The item we are down to on PCI is Security Policies. There are two items: <ol style="list-style-type: none">1. We need a formal incident response plan in the event of a breach or compromise.2. Security training for employees.

Mechanics...

What you need under the hood



- Custom form(s)
- Custom view
- QuickAgenda task report
- QuickAgenda issue report
- Minutes report
- QuickAgenda dashboard
- Modify layout template



Custom Form(s)

Create Custom Form(s)

- One custom form for each object (task and/or issue)
- Just one field is required for QuickAgenda as demonstrated.

CMC - Meeting Agenda Builder Task

CMC - Meeting Name 

Select...

Displaying 21 of 29 choices. To see all use preview mode.

CMC - Add to Mtg Agenda

Yes No

CMC - Agenda Order

CMC - Date On Agenda

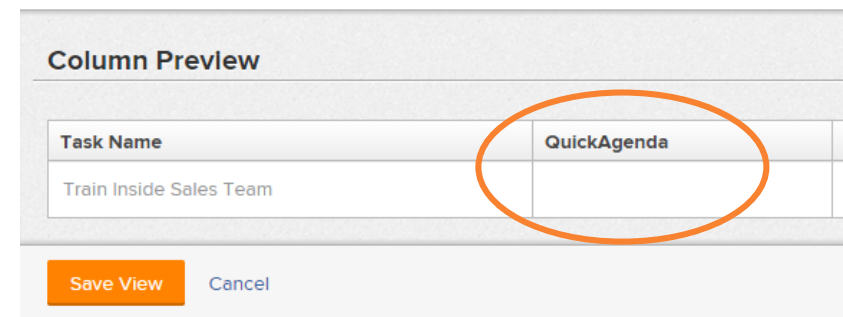
QuickAgenda

Yes

Custom View

Create View

- This is technically optional
- Views are a great way to easily add and update custom forms and data.



Reports

Create Reports

- Create Reports for the objects you are including on your Agenda (Tasks and/or Issues).
 - Because you are using a Dashboard within a Project, the only filter you need is QuickAgenda = Yes.
- Create a Report for Minutes (Note Report).
 - By using a Notes report, you can include both Tasks and Issues.
 - Include Prompts for Project and Entry Date.

Set Filter Rules for your Report

Only show me Tasks in which the...

Task » QuickAgenda Equal Yes

Add another Filter Rule

Only show me Issues in which the...

Issue » QuickAgenda Equal Yes

Add another Filter Rule

Set Filter Rules for your Report

Only show me Notes in which the...

Issue » QuickAgenda Equal Yes

Add another Filter Rule

OR

Task » QuickAgenda Equal Yes

Add another Filter Rule

Report Options

Report Prompts

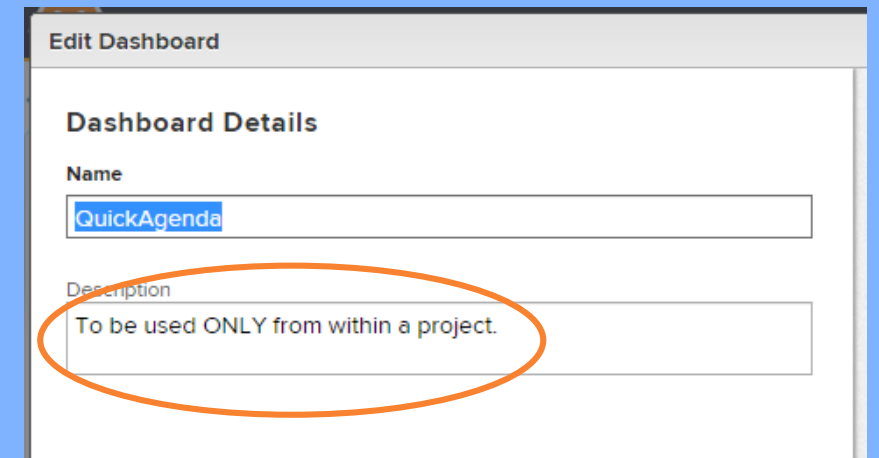
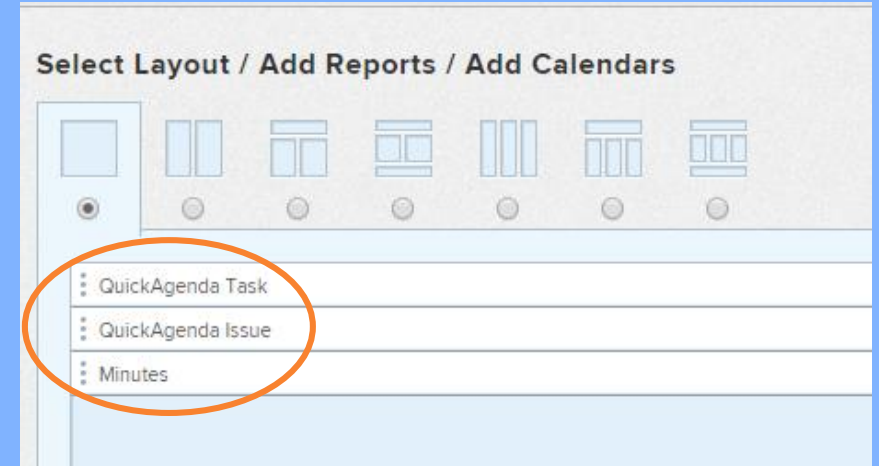
Note » Project ID

Note » Entry Date

Dashboard

Create Dashboard

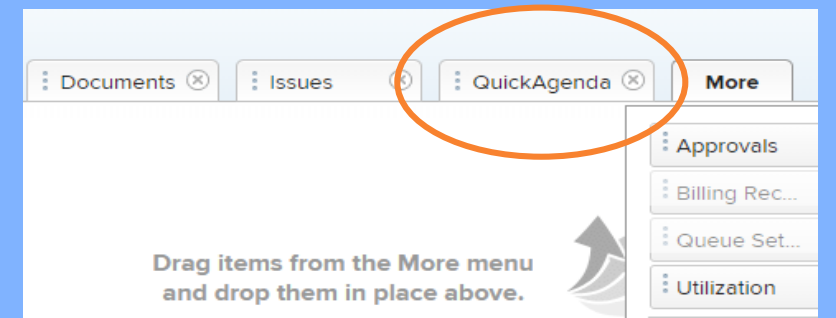
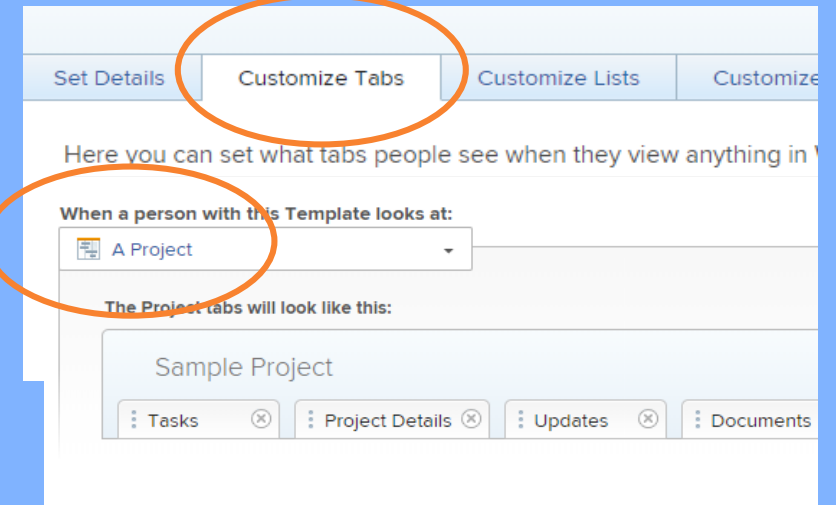
- Create a Dashboard to house your Reports.
- Only a Dashboard can be linked to a Tab in a Layout Template.
- Recommend a warning in the Description. Since there are no filters on these reports, if run by itself it will pull all QuickAgenda items from all Projects in the system (that the user has rights to see).



Layout Template

Modify Layout Template(s)

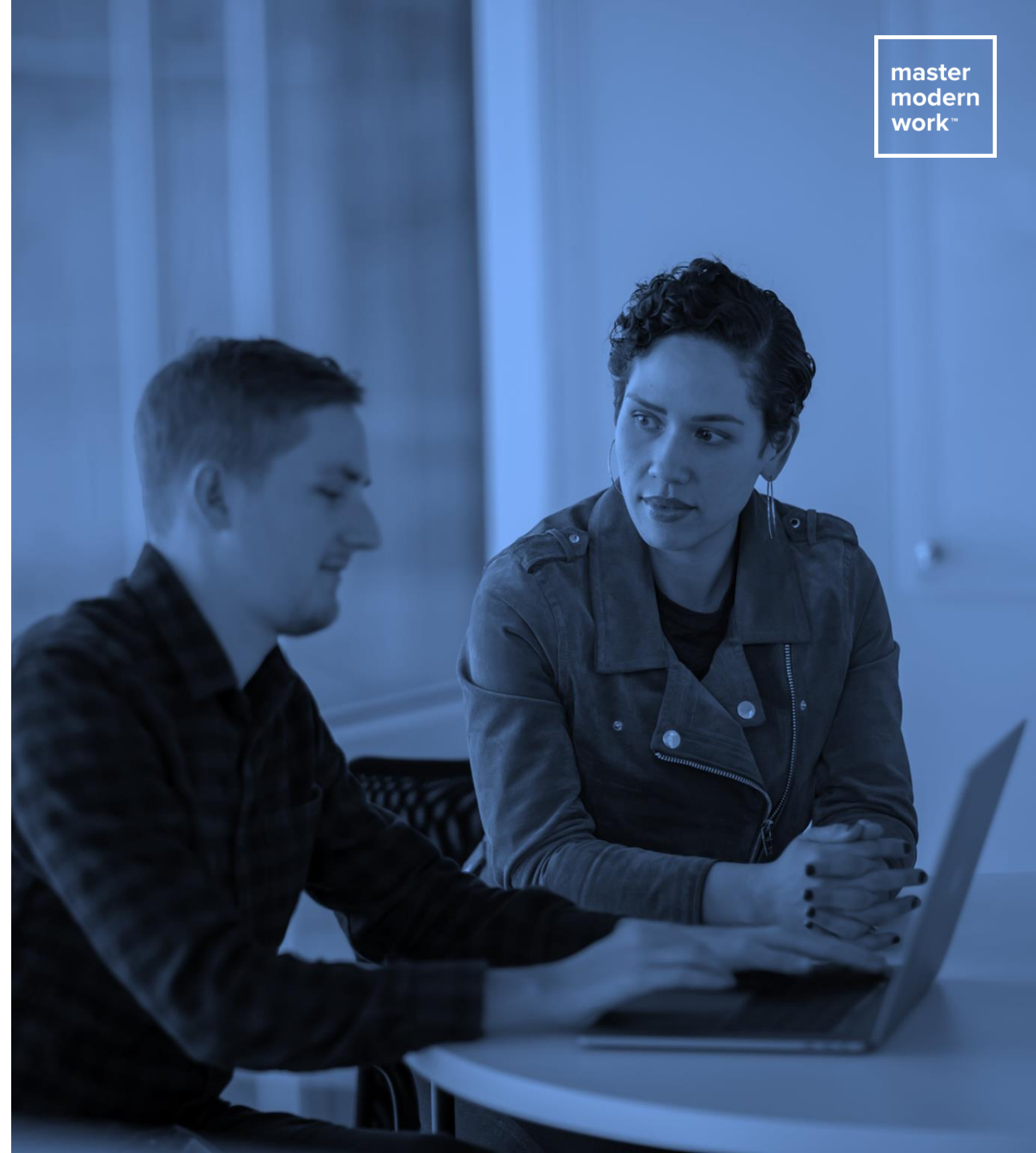
- Be sure to modify all Layout Templates that will need to use the QuickAgenda.
- Customize Tabs for Projects.
- Add the QuickAgenda Dashboard as a Tab.



Agenda Builder

Complex Agendas

- If there is time or interest, we can review Agenda Builder.
- Agenda Builder enables agendas with Tasks & Issues from multiple Projects, as well as entire Projects. All in one Dashboard



Questions?

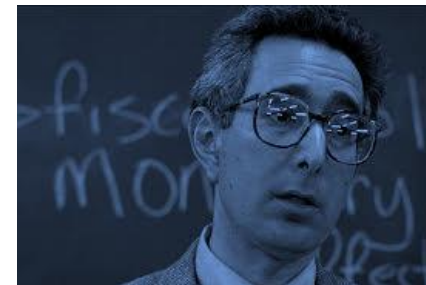
- Got Questions?



- Anyone?



- Bueller?



LEAP