

End User Communications Cookbook



How should Adobe Workfront System Admins communicate with their end users?

We interviewed a number of Workfront System Admins to learn how they communicate with their end users and, not surprisingly, confirmed that there really isn't a "one size fits all" approach.

Some Admins talk regularly with their end users, some only communicate when there are major changes. Some engage directly with end users, while others go through Group Admins or SMEs.

This cookbook is intended to show real examples of how, when, and why your peers are communicating with users so you can create your own unique recipes without having to start from scratch. Inside you'll find 10 communications examples to explore – from how to share new features and enhancements with users, to enablement on basic processes, and more. While certainly not an exhaustive list of all types of communications, it's a great place to start.

As with all the cookbooks in this series, they're meant to be modified – take the recipes and customize them to make them your own! If you find something that works, share what you've learned with your fellow work management experts on the [Adobe Workfront Community](#).

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Share a Curated List of Workfront Resources

Submitted by: Lyndsy Denk, IDEXX



Prep Time

2-5 hours to build an initial resources site (depending on your savvy!), and approximately 1 hour per month to maintain and keep context fresh.



Audience Served

The site is intended for all users, but with clear navigation based on user type.

Description: Give users a more visual, curated collection of resources for your specific instance of Workfront: training, events, news, and tips. While it can be valuable and efficient to point directly to the source (i.e. Experience League), your audience will appreciate resources in the context of how they use Workfront.

Note: While this example includes instructions specific to Microsoft Teams and SharePoint, you should use whatever intranet or shared documentation resource that works best at your organization.

Ingredients (what is included in the communication):

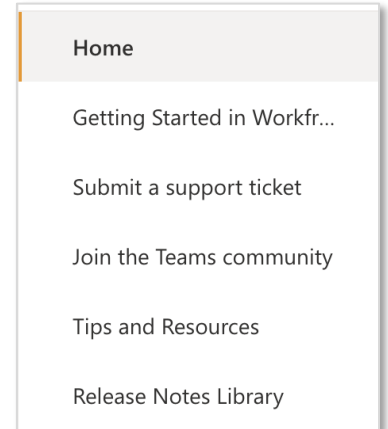
- Support resources
- Training resources
- Tips & tricks
- And anything else you want!

Detailed Instructions:

- **Step 1: Create your site.** If you are using Microsoft Teams, consider using the SharePoint site that is already associated with your Team.
- **Step 2: Build your home page.** If you do nothing else, design your home page to include essential information like:
 - Text introduction that draws people in and makes it clear information they can find here

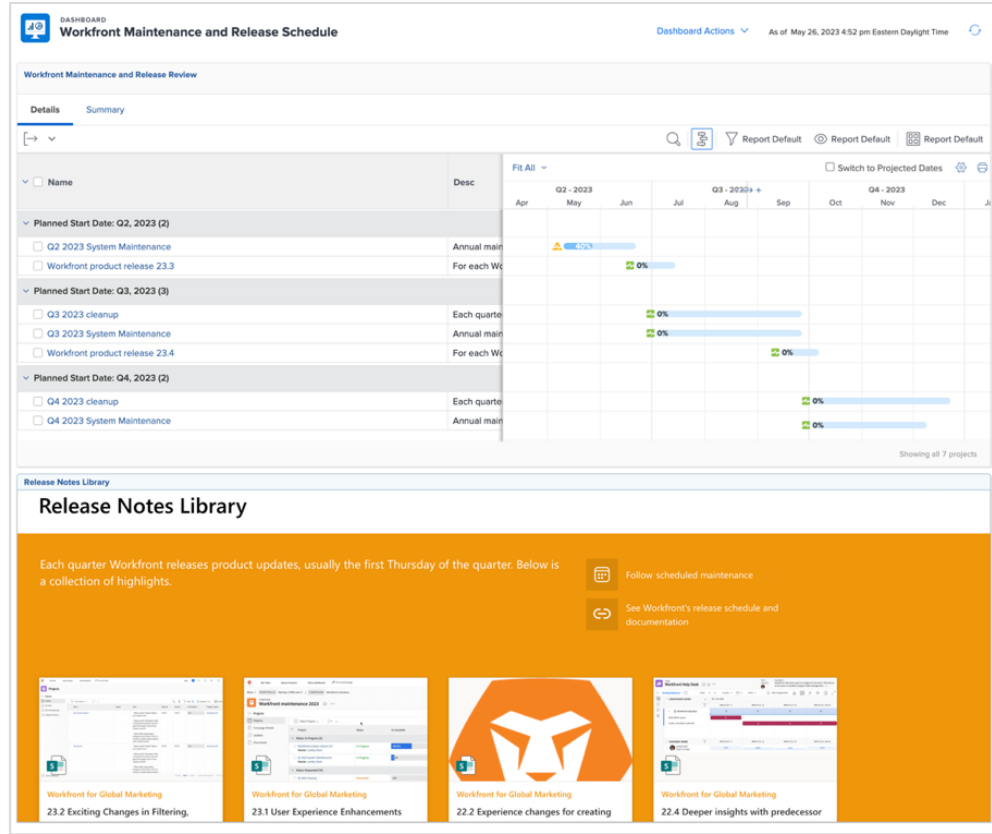
- Create an intuitive site menu to ensure visitors can find what they need. Here are some ideas:

(SharePoint tip: In your SharePoint Site Contents, add a “Choice” column where you can tag content and pull that content into pages automatically. Tags might include things like Resources, News, Tips, Release Notes, Archive, etc.)

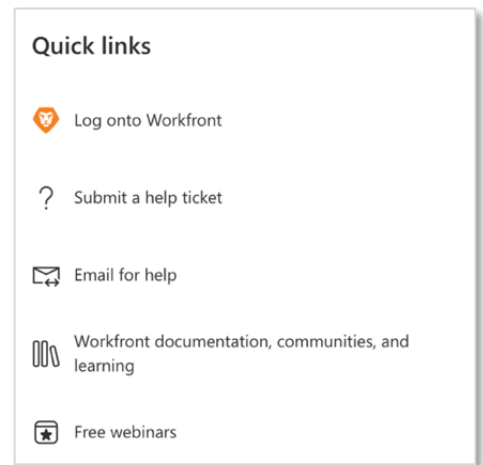


- Recommended Training – Curate a list of recommended training on Experience League. Be sure to break this down by user type to make it easier for people to find what they need. You can use Quick Links or even a List present this information.
- Tips & Resources - Collect tips and resources to that will help answer common questions for new or infrequent users, or to help experienced users advance their usage. (Using the tip above, you can use SharePoint’s “Highlighted Content” web part to display items that have been tagged as “Tip.”)
- Group Calendar – It’s helpful to have a link to the SharePoint Team calendar to show upcoming events you have scheduled.
- Release Notes - Collect relevant items from Workfront’s release notes and tag to appear on your Release Notes page. We also link to a Workfront dashboard that shows the schedule of upcoming releases and system maintenance. (Tip: In your dashboard, you can embed and link back to your Release Notes page!)





- Quick links to places such as:
 - Workfront login page
 - How to request support (a Workfront Help Desk request queue)
 - Documentation
 - Link to Experience League
 - Etc.
- Meet the Team – Include names and photos of your Workfront champions
- News – This feature in Teams will automatically list pages that are promoted as “News”

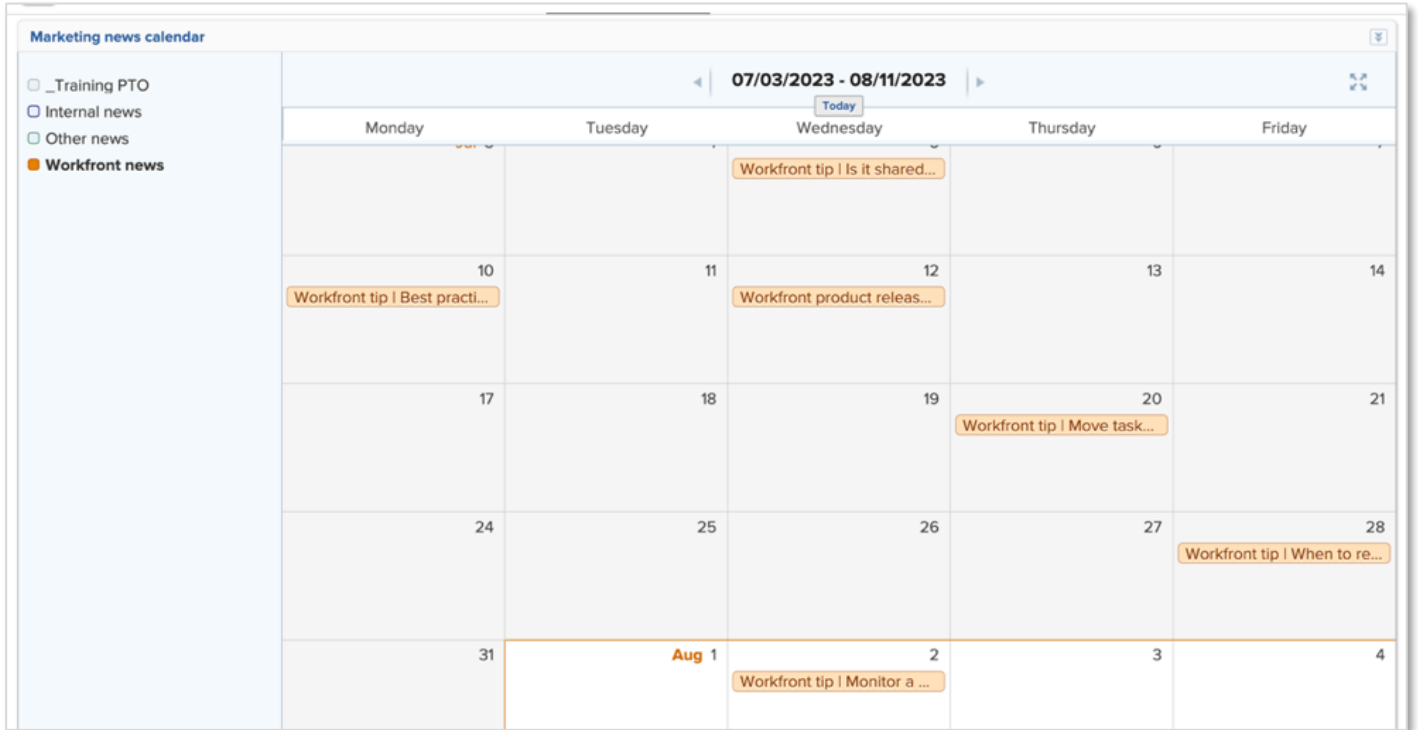


- **Step 3: Maintain your content.** While most of the site setup will be done up front, be sure to carve out time to add to – and update! – your content. You will find that over time, you collect new, helpful tips to publish, or launch or optimize processes.



Sweet Tip: Track your content ideas in a Workfront project. You can build a Workfront calendar that plots the milestone task for when you are scheduled to publish new content!

Example of Workfront Content Calendar



Monthly Newsletter of Enhancements and Benefits

Submitted by: Ellen Saltmarsh, Synchrony



Prep Time
1-1.5 hours per month



Audience Served
Active, Internal Workfront Users

Description: A monthly newsletter to our active, internal Workfront users with a high-level summary of enhancement impacts and benefits. This format allows users to quickly review and understand what changes have been implemented and how each one affects their daily work.

Ingredients (what is included in the communication):

- Top 5 highlights from our latest Workfront/IT release. Topics vary depending upon the enhancements within each of our releases.
- Synchrony Job Aids, Guides, and Tutorial Videos are linked, as applicable.

Detailed Instructions:

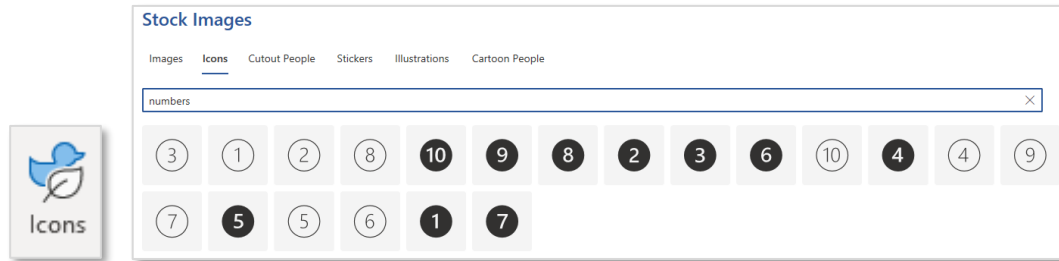
- **Step 1: Begin a new email in Outlook.** We use a Table in the body of the email to keep the formatting in place. In this sample, you'll notice that after the initial header rows the columns are split in two. You may split or merge columns as desired. The two-column layout provides a newsletter appearance and keeps more content above the fold for faster viewing.

Tip: Customize the content and number of cells and sections in your newsletter to fit your needs each month. This format is meant to be flexible!

- **Step 2: Add content and format, as needed. Some formatting tips:**
 - **Banner.** If you'd like to use a header banner across the top, simply copy and paste the image into the top row and adjust the size appropriately.
 - **Links.** Include hyperlinks to content where additional information or context is required. You don't have to include everything in the email!
 - **Section Headlines.** To visually separate the different sections of your newsletter – Enhancements, Coming Soon, etc. – add section headers. One easy way to do this in a table is to simply make one row of your table a different color to help it stand out.

- Number icons. We use number icons to highlight the Top 5 tips. No need to make these from scratch, within Outlook, simply click on 'Insert' tab > 'Icons' and search for numbers > select desired icon > click Insert.

Tip: Use 'Square' or 'In Line with Text' option for images/icons for best alignment



- Add text and images. To make the content visually appealing, insert images that pertain to the topic/enhancement. We center our image w/in the cell. Add bullet points under the image to explain, at a high level, what the enhancement is and the benefit to users.
- Optional "Indicators." This example contains colored circles that act as indicators that take which stakeholders are impacted for the change. For example, a dark blue circle indicates this change will impact our Client Marketing team, and an orange circle indicates our Account Management team. The actual making of the circular indicators can be a little tedious, but once they're made, they can be reused easily for future communications.

Tip: Use a blank PowerPoint page to create the colored indicators with the appropriate user role for your company. Screen shot them and insert them into your email as an image.



- Job Aids & Videos. When a job aid, video, or other link is required, we add an icon for the job aid and link it to the resource using the 'Link' button. Our users now know to look for these icons in our newsletters.



- Preheader / Preview Text (Optional). Above our table, we add a bit of text that is formatted as white, so it essentially becomes invisible. While you don't see this text in the email itself unless you select and highlight it, it essentially gives your readers a pre-header under the Subject Line when they view the email in their inbox.

Without that, the pre-header would be the first line of text in the table, which in our case is “COSMOS Log-in | COSMOS New User Registration” – not very intriguing, right? We all get too many emails every day, so give yourself every advantage when trying to reach your target audience. Use a strong/clear Subject Line and Pre-header.



Sweet Tip: Be sure to test your communication by sending it to yourself and colleagues for formatting and content review. Don't forget to test on a mobile device as well!



Example of Monthly Newsletter

SAMPLE --- COSMOS Newsletter - January 2023

SE Saltmarsh, Ellen (Synchrony) <Ellen.Saltmarsh@syf.com> Friday, June 9, 2023 at 4:44 PM
To: Saltmarsh, Ellen (Synchrony)

COSMOS Log-in | COSMOS New User Registration January 30, 2023

Greetings Marketing,

The first COSMOS release of 2023 kicks off with BANG as we simplify the user experience through new enhancements and pave the way for further advancement opportunities - like the segmentation matrix rebuild, reimagined data requirements, fair lending tollgate process, new digital capabilities, and the launch of Agile Boards. Read on to learn more about new and upcoming enhancements.

Start the year off right with a refresh on learning resources and training: the tools you need are just a click away!

- Save the [COSMOS site](#) as a favorite in your browser - quickly access job aids
- View the [L&D Training Calendar](#) and add sessions to your schedule

NEW ENHANCEMENTS
NOW LIVE

1 Offer Tollgate Task Realignment for Email

- Email projects now have two ORB TGF2 tasks - one for data and one for creative. This aligns with the existing direct mail review process for greater consistency.
- ORB review of data files will occur earlier so live data can be released and used in test emails. Fewer friendly file requests increases data team's bandwidth.
- Less data file re-work close to launch dates means fewer delays for in-market deployment

[Job Aid](#)

[Client workbooks](#) [Training pages](#) [COPD Teams](#) [ORB Teams](#) [Campaign projects](#)

2 Insert Your Title Here

- Description of the change of enhancement should be provided here in terms that are clear to the end user/target audience
- Description of the change of enhancement should be provided here in terms that are clear to the end user/target audience
- Explain the key benefit of this enhancement so your audience knows why this is important to them

[Job Aid](#)

[Client workbooks](#) [COPD Teams](#)

3 Insert Your Title Here

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- Explain the key benefit of this enhancement so your audience knows why this is important to them

[Job Aid](#)

[Client workbooks](#) [COPD Teams](#)

4 Personalized Marketing Videos with SundaySky

Task Number	Name	Assignments
1	SundaySky	SUN DAY SKY
2	Landing Page Build	Mobile Ink Team 3 Days
3	Build Sunday Sky Components	Mobile Ink Team 3 Days

- SundaySky offers an interactive and personalized landing page and video experience for marketing campaigns
- Select SundaySky in "Creative Only Pre-Project Brief" to incorporate necessary tasks which engage the personalization team on video and landing page creation
- Energize your marketing campaigns by incorporating attention-grabbing, real-time rendering videos and boost cardholder engagement!

[Job Aid](#)

[Client workbooks](#) [Training pages](#)

5 Easy-fill Mobile Marketing Messaging Form

- Mobile messaging intake form now incorporated into Workfront under production requirements
- Eliminates the need to download/upload external documents to outline mobile message marketing details
- Visual examples easily guide users through the completion of the form

[Job Aid](#)

[Client workbooks](#) [Training pages](#)

COMING SOON...

Under Construction: BETA Segmentation Matrix

The Segmentation Matrix rebuild is underway! New features will include:

- 2-Way Copy and Paste from Excel
- Multi-Level Grouping for easier viewing
- Quick Filter to display specific sections while working
- Rearrange Columns to custom layout

Continue using the current Segmentation Matrix for the time being

Projected launch: End of March

Agile Boards

Boards is a flexible, Kanban-style tool integrated in Workfront

Click the image to learn more about Boards

Boards is currently being piloted with several teams and will be available to additional users this quarter. Look for more communications coming soon!

JumpSeat NextGen: On-Screen Guides Inside Workfront
February CONTEST begins 2/1!

Complete a few of our step-by-step guides for a chance to win STARS

Look for additional contest details coming soon

JumpSeat offers on-demand role-based training guides and a new user interface. Access step-by-step instructions while working INSIDE of Workfront. Have a need for a team-specific guide? Let us know so we can help.

Curious to learn more?
[View all January 2023 Enhancements](#)

Visit our [COSMOS Team Site](#) for Learning Content & Job Aids

2023 Roadmap Summary
[Click here for our COSMOS Roadmap](#)

Questions? Contact your PUG Member!

Create a Community of Users (Microsoft Teams)

Submitted by: Lyndsy Denk, IDEXX



Prep Time

1 hour to create the Team, and 1-6 hours per month to maintain and foster engagement



Audience Served


All Workfront users

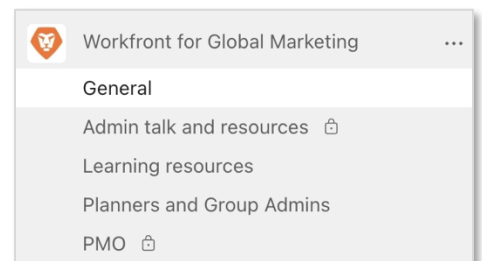
Description: We created a Microsoft Team to be the central location of communication for all our Workfront users. Not all users spend their entire day in Workfront, but many have Teams running constantly, so this was a great way for us to reach *everyone*.

Ingredients (what is included in the communication):

- A Microsoft Team
- All the news that's fit to post, for example:
 - Alerts from [Adobe System Status](#) (usually only shared where there is a major issue)
 - Release notes, focused on your specific audience.
 - Optimizations about dashboards, request queues, ways of working

Detailed Instructions:

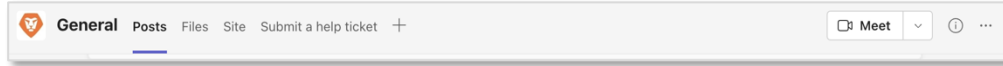
- **Step 1: Create a public Team.** Making it public allows anyone in our company to join, however we proactively add users if they work in key functional groups.
- **Step 2: Build channels as needed.** For our Team, we have the following channels and governance:
 - General (default) – Intended for major announcements and system alerts.
 - Admin talk and resources  – A private channel for only System Admins. Governance documentation is also stored in the Files area of this channel
 - Learning resources – This channel includes a calendar where I schedule all open-registration events like office hours and general training.
 - Planners – This is where we post tips and host chat threads for users at the Plan level.



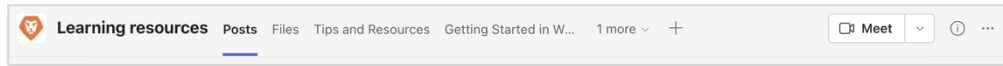
- Other / Private channels by key user group – These channels are for select groups of users to have more focused conversation and collaboration (for example, our PMO team). We usually create one of these when onboarding a new group into Workfront.

- **Step 3: Add tabs to essential resources.**

- General channel - In the General channel, we have one tab pointing to the SharePoint site home page. More importantly, there is a tab linking directly to our Workfront Help Desk request queue.

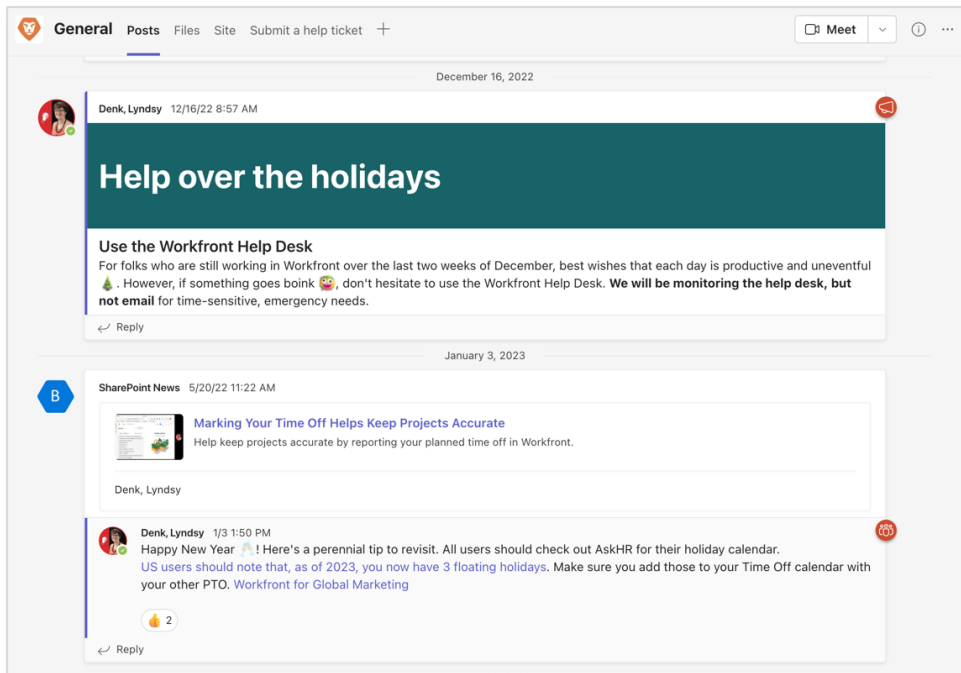


- Learning Resources channel – This channel includes a tab pointing to the SharePoint pages where we collect tips and resources, training links, and the channel calendar where I schedule open-registration event.

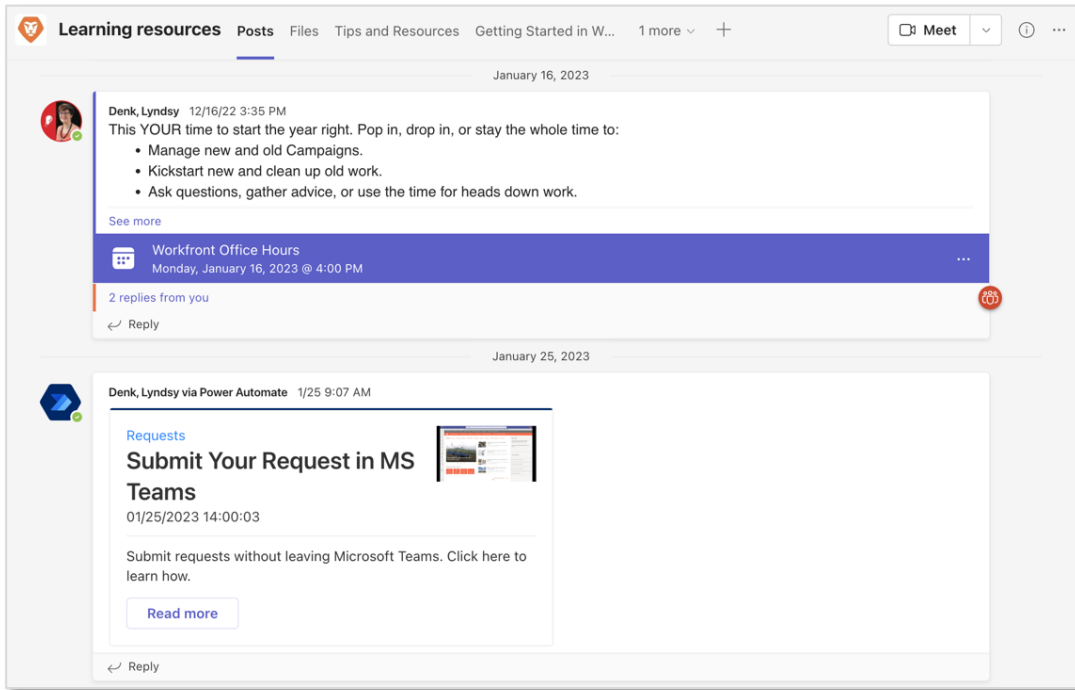


- **Step 4: Start posting content and conversation based on channel topics.**
Here are some examples based on the channel.

Example of General channel:



Example of Learning Resources channel:



Sweet Tip: Not all your users will be in Workfront all day. Find ways to answer questions and gather feedback that feels natural to how they like to work (Teams / Slack channels, regular Office Hours, etc.)



Drive user adoption with a Workfront FAQs project

Submitted by: Adobe Workfront Customer Success Team



Prep Time

3-4 hours to create the initial project,
plus ~1-2 hours monthly to maintain



Audience Served

All Workfront Users

Description: Create a Workfront project to house frequently asked questions, answers, and additional resources. Not only is this an easy and organized way to share solutions to common challenges with users, it can also make a big difference with training and adoption.


Ingredients (what is included in the communication):

- Questions
- Answers
- Related resources or URLs
- Link to submit feedback / ask for help via request queue
- Reminder about Office Hours

Detailed Instructions:

- **Step 1: Create a new project in Workfront.** Choose an appropriate name for your project – Workfront FAQs, for example. Adjust the sharing settings so that it is visible system-wide to ensure that all users have access.
- **Step 2: Create a custom view for this project.** The view should include the fields for Task Name, Task Description, and Task URL. Feel free to include any other relevant fields.
- **Step 3: Start building the library.** Add common questions as the task name, answers to the questions as the task description, and any relevant URLs – these could be links to an internal site or trainings on Experience League, for example. Depending on how many questions and answers are included, consider adding parent tasks as themed sections to help with organization.

Example FAQ project:

PROJECT		Percent Complete	Project Owner	Planned Completion Date	Condition	Status																
Workfront - FAQ & Resources ☆ ○○○		0%	 Kristin Farwell	Sep 20, 2023	● On Target	● Current																
Tasks																						
<div style="display: flex; justify-content: space-between; align-items: center;"> + New Task → 🔍 🔄 Gantt Filter FAQ View Nothing </div> <table border="1"> <thead> <tr> <th># ↑</th> <th>Task Name</th> <th>Description</th> <th>URL</th> </tr> </thead> <tbody> <tr> <td>2</td> <td>How do I log time off (PTO) in Workfront?</td> <td> <p>Click the Main Menu icon in the upper-right corner of Adobe Workfront, then click your username next to your profile picture.</p> <p>In the left panel, click Time Off. Select the desired date for your personal time off. Select All day, if you are taking a full day off. Leave it unselected if you are taking less than a full day off and indicate the start and end times of your time off. Click Save.</p> <p>(See job aid attached to this task for screenshots and step-by-step instructions.)</p> </td> <td>https://experienceleague.adobe.com/docs/workfront/using/basics/manage-account-profile/configure-user-profile/personal-time-overview.html?lang=en#~:~:text=Configure%20personal%20time%20off%20in%20Workfront,taking%20a%20full%20day%20off</td> </tr> <tr> <td>3</td> <td>In my task list, the buttons to "Insert task above" and "Insert task below" are missing along with the option to indent a task. How do I get those options back?</td> <td>If the task list is sorted by any column other than Task Number, the button to add a task above, below or indent disappear. To fix this, click on the task number (#) column so that the tasks are now sorted in numerical order.</td> <td>N/A</td> </tr> <tr> <td>4</td> <td>I accidentally deleted a project / issue / report, how do I get it back?</td> <td>Only certain objects can be restored from the recycle bin in Workfront. Please reach out to the System Administrator and provide the name of the object, the type of object, and the date in which it was deleted. Please know that this process can take up to 5 business days, so if there is an immediate need for this object to be restored, submit a high-priority request and include your manager.</td> <td>https://experienceleague.adobe.com/docs/workfront-learn/tutorials-workfront/administration-and-setup/manage-deleted-items/restore-objects-from-the-recycle-bin.html?lang=en</td> </tr> </tbody> </table>							# ↑	Task Name	Description	URL	2	How do I log time off (PTO) in Workfront?	<p>Click the Main Menu icon in the upper-right corner of Adobe Workfront, then click your username next to your profile picture.</p> <p>In the left panel, click Time Off. Select the desired date for your personal time off. Select All day, if you are taking a full day off. Leave it unselected if you are taking less than a full day off and indicate the start and end times of your time off. Click Save.</p> <p>(See job aid attached to this task for screenshots and step-by-step instructions.)</p>	https://experienceleague.adobe.com/docs/workfront/using/basics/manage-account-profile/configure-user-profile/personal-time-overview.html?lang=en#~:~:text=Configure%20personal%20time%20off%20in%20Workfront,taking%20a%20full%20day%20off	3	In my task list, the buttons to "Insert task above" and "Insert task below" are missing along with the option to indent a task. How do I get those options back?	If the task list is sorted by any column other than Task Number, the button to add a task above, below or indent disappear. To fix this, click on the task number (#) column so that the tasks are now sorted in numerical order.	N/A	4	I accidentally deleted a project / issue / report, how do I get it back?	Only certain objects can be restored from the recycle bin in Workfront. Please reach out to the System Administrator and provide the name of the object, the type of object, and the date in which it was deleted. Please know that this process can take up to 5 business days, so if there is an immediate need for this object to be restored, submit a high-priority request and include your manager.	https://experienceleague.adobe.com/docs/workfront-learn/tutorials-workfront/administration-and-setup/manage-deleted-items/restore-objects-from-the-recycle-bin.html?lang=en
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- **Step 4: Gather feedback from your users.** If you don't already host Workfront-related Office Hours, consider hosting them on a regular basis (monthly) to provide a safe space for users to join, ask questions and learn more about Workfront. If this already exists, be sure to add this as a task to the project so users know when / how to attend.
- **Step 5: Link to the System Administrator Request Queue.** For users who prefer to ask questions via email, create a System Administrator Request Queue. Here, users can submit Workfront related questions, and you'll be able to easily copy/paste those into your FAQ project. Keep the queue setup simple so it's not a huge lift for someone to submit! Link to this direct queue in your FAQ project.
- **Step 6: Add this project as a pin to every layout template so that users can easily access it.** Be sure to send a communication to your users letting them know of this new project, detailed instructions for how to use it, and encourage them to continue asking questions to build upon the FAQ library.



Sweet Tip: Create your own personal project to capture tips, tricks, or examples you don't want to forget! Great tip on the Community? Add it there. Helpful screenshot from a webinar? Add it as a document!

Notify Users of a Process Update

Submitted by: Kiersten Kollins, DSW



Prep Time
30-minutes



Audience Served
All Workfront Users, sent out via an internal email

Description: Whenever there are changes in Workfront (adding, removing, updating of things), we find it helpful to send a communication to the impacted users. In the email, we provide examples of what will look different in the tool, when the change is effective, which users are impacted, any action needed, and context as to why we are making the change.

We find this communication removes potential confusion when there is a change and promotes adoption of the new update if our users know the “why” behind it.

Ingredients (what is included in the communication):

- Effective date for the change
- Users impacted
- Point of contact leading the change
- What exactly is changing in Workfront
- Action needed from impacted users (if any)
- Why we are making the change

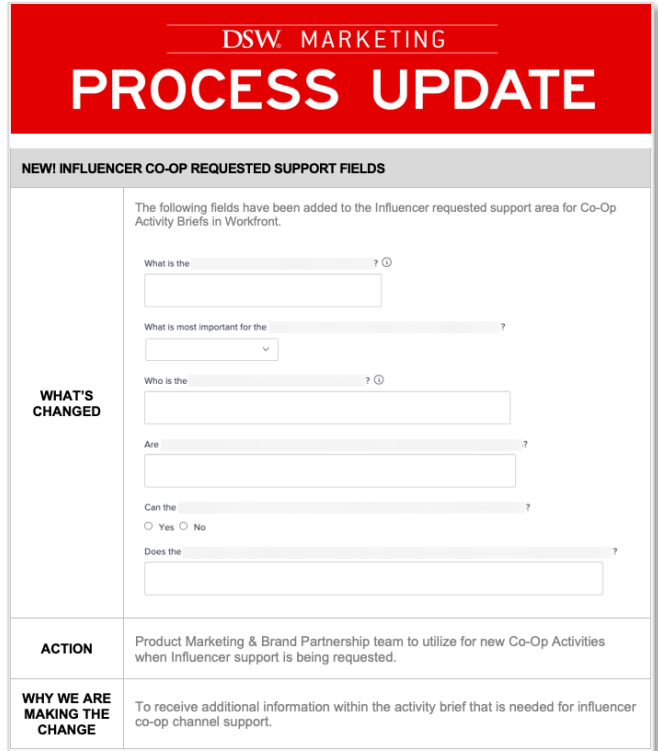
Detailed Instructions:

- **Step 1: Write the “Process Update” communication.** Consider using or creating a template if this will be an ongoing or regular communication for your team.
- **Step 2: Review.** Have a team member review the “Process Update” communication to ensure accuracy and clarity before sending to users.
- **Step 3: Create and send the email to your users!** Be sure to include all relevant information in the body of the email and attach additional screenshots or resources that might be helpful.

Example email to impacted users:



Example PDF attachment in email:



Sweet Tip: If updates like this are frequent, test different formats to ensure the emails stand out in your users' inboxes and don't get overlooked.



“Workfront Wednesday” Quick Tips (Slack)

Submitted by: Kimberly Trask, Adobe Workfront



Prep Time
30-minutes or less



Audience Served
New or casual users of Workfront who need a refresher of the “basics”.

Description: Share quick, easy to digest tips to make day-to-day use of Workfront easier for users. We use the phrase “Workfront Wednesday” so it’s fun, repeatable and gets users used to the idea of ongoing education and resources.

Ingredients (what is included in the communication):

- Answers to common questions
- Tips and tricks to make navigation easier
- Guidance for troubleshooting
- And more!

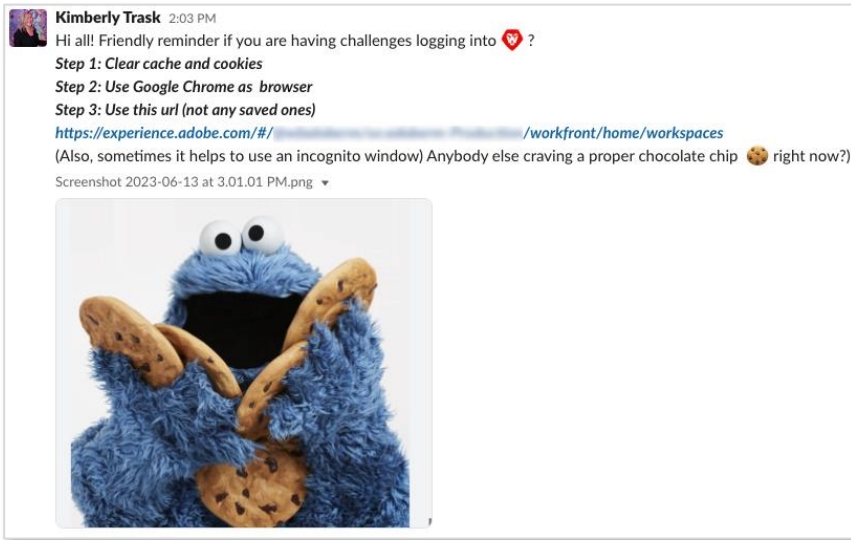
Detailed Instructions:

- **Step 1: Determine common roadblocks.** Review System Admin request queue submissions to find questions commonly asked by new users. What are the trends? Where do new or casual users typically have questions?
- **Step 2: Draft a list of common questions and answers.** For your own records, keep your questions and answers in a simple document (Excel, Word, Workfront, etc.)
- **Step 3: Post it!** Post where users can easily find it. In our case, it’s Slack, but you might use Teams, SharePoint, email, etc. We also like to have a bit of fun with ours, but do what feels right for your company culture.



Sweet Tip: Keep the answers simple. We find if our posts are getting too long, we should break them into multiple tips over a few days or weeks.

Example Quick Tip in Slack:



Sweet Tip: Requests coming from all directions? Set up a [System Admin request queue](#) ASAP. This allows you to easily track the volume, source, and type of requests right in Workfront!



“Coming Soon!” Feature Teaser

Submitted by: Monique Evans, Stanley Black & Decker, Inc.



Prep Time
Less than 10 minutes



Audience Served
Creatives with a Work or Plan license sent via Microsoft Teams to their Channel

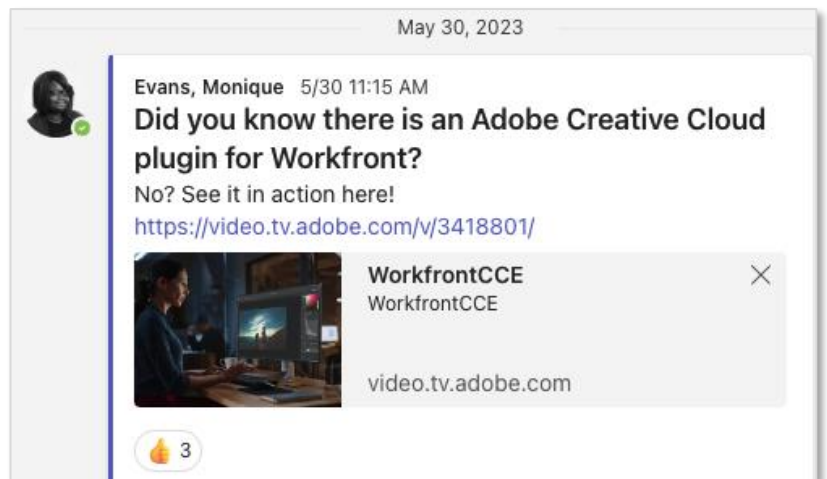
Description: When you need to give a certain audience a heads up about a new feature, keep it short and simple. In this example, we wanted to give our Creative team a heads up that they can now access their Workfront tasks directly in their Creative Cloud apps (Adobe Photoshop, InDesign, Illustrator, Premiere Pro and After Effects). They can view and comment on tasks, access creative briefs, upload Proofs to kick off the review and approval cycles, log time, and more, without having to leave their creative application.

Ingredients (what is included in the communication):

- A catchy header and a link to Experience League

Detailed Instructions:

- **Step 1: Draft post.** Don't reinvent the wheel – search Experience League or Workfront announcements/emails to find helpful text and a video link you can easily share.
- **Step 2: Post!** Publish the new feature teaser to a Channel people frequent. In our case, we use a Channel in Microsoft Teams.



Sweet Tip: Need quick ideas to share with your users? Sign up for the monthly [Workfront Customer Newsletter](#) to stay up-to-date on new product release information, Community highlights, and more.

Regular Release Newsletter

Submitted by: Monique Evans, Stanley Black & Decker, Inc.



Prep Time

3 hours (includes time to watch the Quarterly Release Webinar)



Audience Served

All paid Workfront users

Description: We send a newsletter to all our paid Workfront users on a regular basis (quarterly, or as-needed) with highlights from the most recent Workfront release that pertain to them. This helps users understand upcoming changes and generates excitement for the things that will hopefully make their jobs better / easier.

Ingredients (what is included in the communication):

- Top 5 takeaways from the latest release notes and/or admin updates
- Highlights of event dates to bookmark
- Links to internal wiki


Detailed Instructions:

- **Step 1: Watch release webinar (and/or read release notes).** Take screenshots of anything you might want to highlight in your newsletter.
- **Step 2: Create the email in your platform of choice.** We use an Email Service Provider (ESP) to track views and clicks, and avoid limits our company has in place for large internal sends.
- **Step 4: Draft the newsletter content.** Leverage the [Release Notes page on Experience League](#) and the screenshots you took from the webinar to create a short blurb for each feature you'd like to highlight. Most email platforms have templates for these types of emails to make formatting very easy.
- **Step 3: Create your distribution list and send.** Run report in Workfront to find email addresses of all users you want to receive the newsletter. Create a distribution list and send!

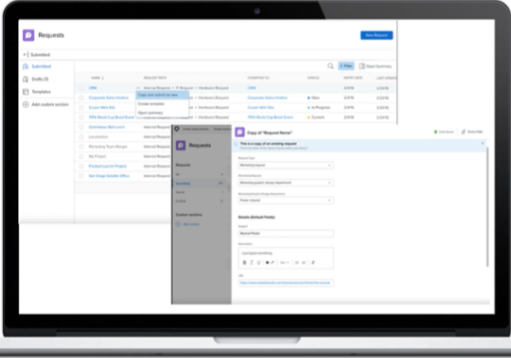


Sweet Tip: If you have the time, host a training session the following week to demonstrate the new features live and answer any questions your users may have.

Example of Quarterly Release Newsletter




You can finally copy requests



Anyone who has ever had to submit multiple requests in Workfront knows the pain of filling in the same information over and over again. With this latest update, you can now copy existing requests and use that as a template for your new request submission. This should save each of you a significant amount of time moving forward as well as limit the possibility of user error.

Save and enter timesheet data more easily

Workfront has improved the timesheets interface to now highlight the entry row while editing, as well as placing the save/submit/cancel buttons on a sticky footer. There is also a warning message for unsaved changes to prevent you from losing information. And best of all, when you select Timesheets from the waffle menu it will default to the current week's timesheet saving you more clicks; meaning there's no longer a need to pin your timesheet to the top navigation every week saving you valuable space!




Introducing My Updates

When you open the My Updates area, you will quickly find any approvals awaiting your decision with decision buttons. This area will also show any recent comments where you've been tagged.



The Creative Ops team has partnered with Corporate IT to now synchronize Workfront with Active Directory. Moving forward your profile will automatically update and reflect any name, email, phone number, or title changes. If you ever wish to edit these attributes you can submit a "Modify Network Account" request to ServiceNow.

This update also gives our non-GCX collaborators like Sales, Product, Channel, and Engineering to log in to Workfront without you first submitting a request to create their account. Meaning a process that used to take three to four days can happen in a matter of minutes!



The first 2022 Workfront Wednesday session will be on January 26th at 11 am Eastern

Want to learn even more? Visit the [Workfront Release Overview Link](#) to see the full list, read descriptions, and watch video walk-throughs. If you have any questions, comments, or ideas, please reach out to the Creative Ops team! We love to hear your thoughts!

 Workfront Workplace Group  Workfront Training

Notification of a Potential Issue

Submitted by: Karlton Harrison, Truist



Prep Time

Approx. 15-minutes, depending on your familiarity with Fusion



Audience Served

All impacted Workfront users

Description: Send a notification to Workfront users when a potential issue or challenge has been observed – either from your own internal processes or with the platform itself. The goal is to alert that you are aware of the problem, steps for resolution and timing.

Ingredients (what is included in the communication):

- Issue or challenge identified
- Cause of issue and steps to resolve
- Timing of resolution

Detailed Instructions:

- **Step 1: Craft the communication.** Keep the update as concise as possible, including only what do people need to know. We include a description of the issue or challenge, steps we're taking to resolve, and expected timing. Challenges might include things like a disruption with a project workflow, notice of new mandatory questions on a form, a new queue topic, new report/dashboard, etc.
- **Step 2: Determine your channel.** You could send something manually to a specific list via Outlook/Gmail, Announcement Center, or Teams/Slack. We typically use Workfront's native [Announcement Center](#) and depending on the issue, we may take it one step farther and leverage [Adobe Workfront Fusion](#) to automate the audience we're notifying.
- **Step 3: Determine your audience.** If the update is minor and only going to a few users, you can manually select those individuals for your notification. In our case, we often want to notify users based their Workfront usage, for example, anyone who has logged in to Workfront in the last 3 months. This is where we leverage Fusion to save time vs. pulling manual reports.
- **Step 3: Send communication.** Depending on your channel, this may mean sending via email or clicking "Run" on your Fusion Scenario after it has been updated with the appropriate notification text and audience criteria.

Example Fusion Module Configuration

Record Type map:

User

Result set map:

All Matching Records

Maximal

2000

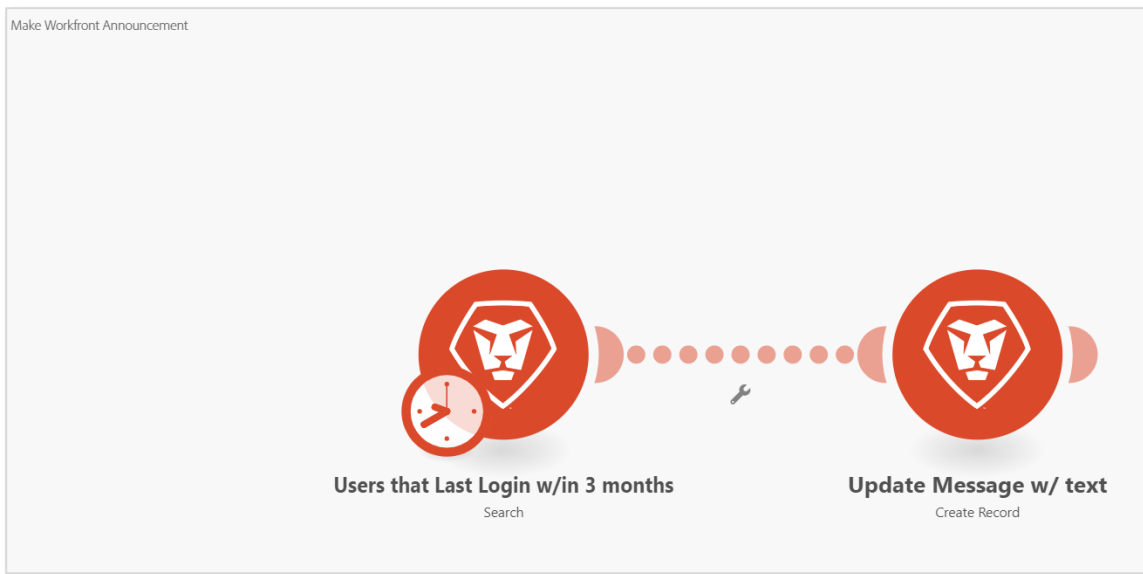
Search criteria

License Equal to (case insensitive) E or T

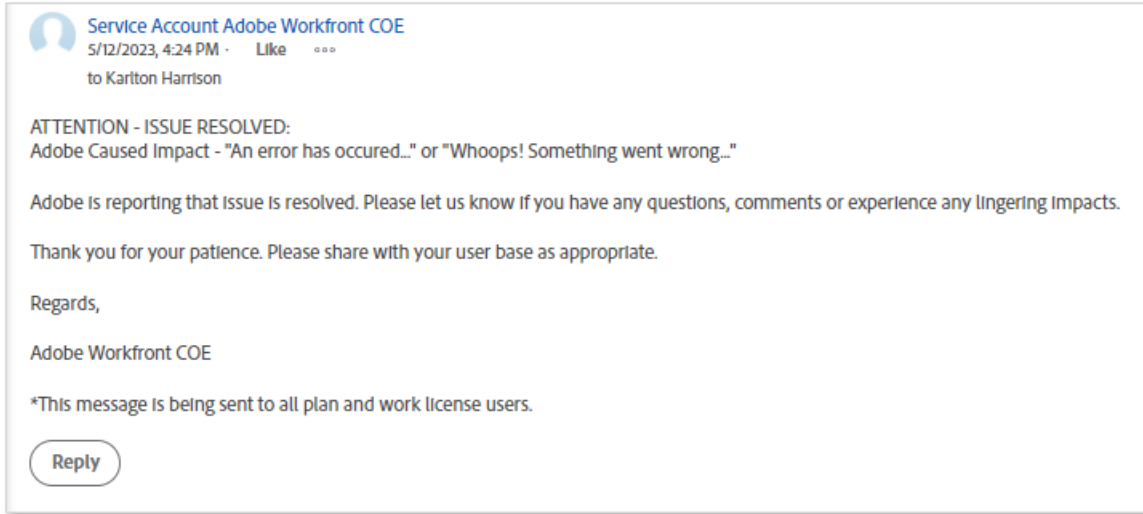
and

Last Login Date Greater than addMonths(now ; -3)

Example Fusion Scenario Steps:



Example Message Triggered by Fusion:



Sweet Tip: New to Fusion? Check out the [Workfront Fusion group on the Experience League Community](#) to connect with experts and peers.

Communicate Your Workfront Vision

Submitted by: Neal Gardner, Mattel



Prep Time

2-4 hours to draft, plus additional time to review with stakeholders to gain alignment.



Audience Served

Leadership and Workfront End Users

Description:

As your maturity and usage with Workfront grows, you'll want to consider creating a Workfront Center of Excellence (CoE) to align things like governance, best practices, and organizational structure to scale your strategy and initiatives. A critical step in the success of your CoE is to draft and align on a vision statement to clearly articulate your purpose, goals and differentiators.

In our case, this vision provides important value to two main audiences – Leadership and End Users. Leadership in our organization is a non-technical audience who understands the high-level initiatives; therefore our vision document provides an overview of our CoE in a language which invokes *aspiration*. They often reference the vision document in presentations, to pull quotes, etc. In contrast, our End Users are a diverse audience of Planners, Workers, Requesters, and Reviewers, and while they may not reference this document regularly, it does illustrate a level of professionalism, service and commitment far beyond reactive support.

Ingredients (what is included in the communication):

- A brief introduction to your Workfront CoE
- The CoE's goals, purpose and value
- What the audience (Leadership or End Users) can expect – i.e. what's in it for them

Detailed Instructions:

- **Step 1: Draft your vision.** We recommend drafting this in partnership with key stakeholders and/or members of your CoE, but depending on time, resources, and organizational structure, you might need to take the first pass. Keep it short, focused, and inspiring. Don't let being perfect get in the way of progress. You can always iterate this vision as you go!

In our case, we use phrases such as “partner with staff”, “gain trust,” and “support innovation” to keep the door open for continuous improvement.

- **Step 2: Align and Refine.** Once you have a draft, now is the time to align and refine. Consider having members of your stakeholder group (Leadership, End Users, etc.) review it and provide feedback. Is it clear what the vision is and what it means for them?
- **Step 3: Publish.** Publish your vision in a central location where everyone can access it. If you have a SharePoint or intranet site for Workfront, that is a great place to publish it. Once it's published, reference it, use it, share it.
- **Step 4: Review and Iterate.** Schedule time periodically to review and iterate. This won't happen often, but at least once a year or if anything major changes with your organizational structure, processes, or strategy.



Sweet Tip: New to governance and Centers of Excellence? [Watch this on-demand Webinar](#) where Neal Gardner from Mattel walks through his journey and what advice he has for those starting out.

Example Center of Excellence Vision Statement

Workfront Marketing Center of Excellence (CoE)

Our Vision

The Workfront Marketing Center of Excellence (WF Mktg CoE) is a group with a shared area of focus and subject matter expertise used to support our teams, by providing tips, insights, and training for Workfront. We work to standardize best practices for department-wide adoption and offer advice on strategic planning, decision-making, and execution.

The role of WF Mktg CoE will support conversations about Marketing data fidelity and report-ability by providing visibility into the current state asset production tracked in Workfront. This will drive executive reporting needs and awareness.

As a Workfront subject matter expert, WF Mktg CoE will identify areas for opportunity to further educate staff on role-specific processes as they exist in the Workfront environment.

Partnering with staff, WF Mktg CoE will refine production schedule workflows and metadata capture. This will benefit asset stakeholders to work with greater efficiency.

Workfront is a technology, but it cannot thrive until the solution reaches full adoption. WF Mktg CoE needs to gain trust in staff that the technology *simply works*.

Establishing a strong, lasting Workfront Governance framework is one of the primary goals of the Center of Excellence. Governance will support innovation. It will promote Continuous Improvement, a business philosophy which promotes incremental, small-scale changes driven by empowered, engaged staff.

With a thoughtful, meaningful approach to business goals, Mktg CoE will review the current state for growth opportunities. WF Mktg CoE will forecast the future state to the best of the collective's governance ability. Leveraging leadership's holistic perspectives, and WF Mktg CoE Workfront subject matter experts' focused view on process, will foster growth and success.

The Workfront Marketing Center of Excellence will foster a climate of success by introducing processes around the how: thoughtful business analysis, agile project management, thorough QA and impactful communication, and Continuous Improvement.

Now it's your turn.

Happy cooking!

Need resources or want to join more conversations about communicating the value and vision of Workfront with end users? Join us on the [Adobe Workfront community](#) on Experience League.

