



Navigating the Resource Management Toolset

Adobe Workfront Customer Success – March 2, 2023



Agenda

Start, 1:00pm MT

5 minutes Welcome & Introductions

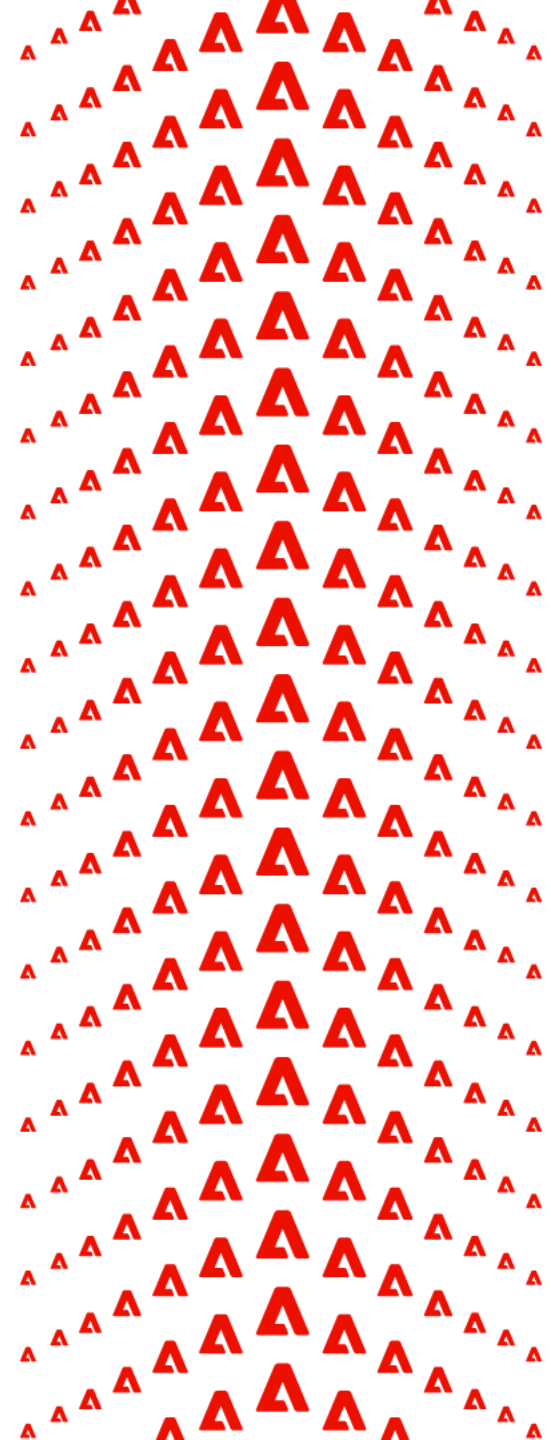
10 minutes Overview of the Resource Management Toolset

50 minutes Live Demo

20 minutes Open Q/A

5 minutes Resources & Upcoming Events

Finish, 2:30pm MT



Introductions



Corinna Jevons

Team Lead, Customer Success
Architects, Adobe Workfront

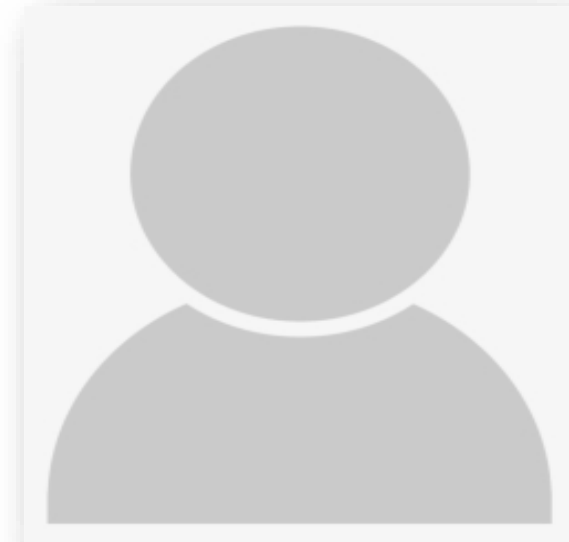
[Connect on LinkedIn](#)



Nichole Vargas

Scale Customer Success
Manager, Adobe Workfront

[Connect on LinkedIn](#)



Tell us more about you!

- Name and Company
- How long you've been a Workfront Sys Admin
- *Are you currently leveraging the Resource Management tools in Workfront?*

What is your WHY for Resource Management?

Leadership Visibility

"My boss has asked for our team's workload for the next three quarters?"

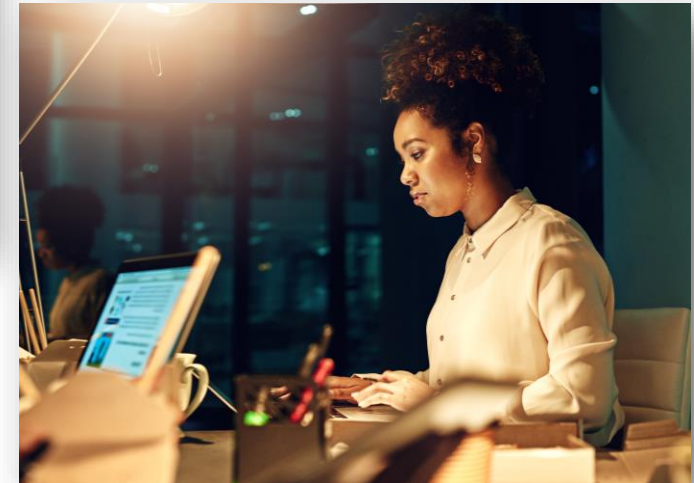


Team Bandwidth

"I want to ensure my team isn't working 12-hour days when they should be working 8."

Capacity Planning

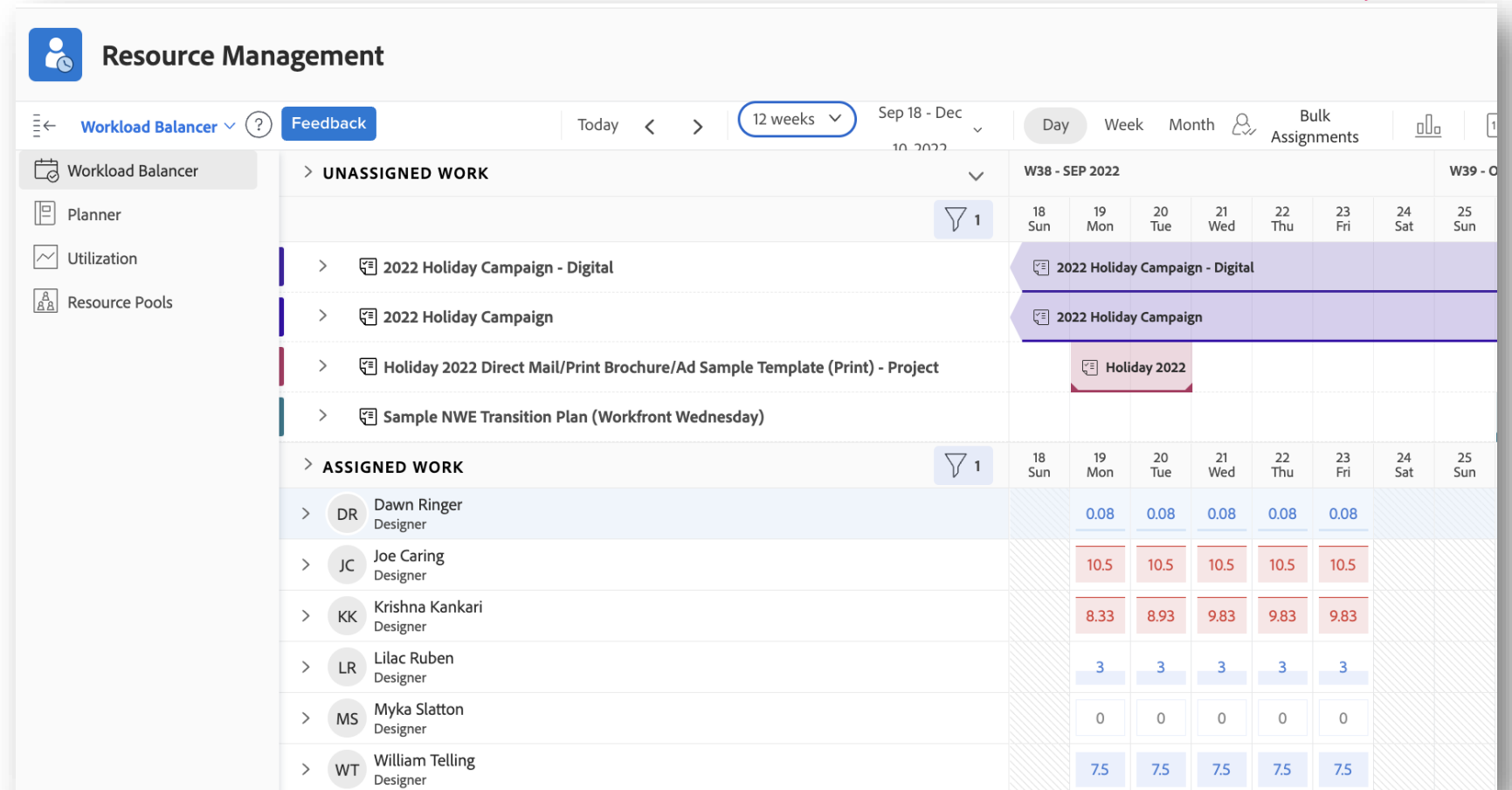
"I need to ensure we have the correct people available to execute all of the work in our pipeline."



Resource Management | The Workload Balancer

Workload Balancer is a resource scheduling tool that allows you to:

- Visualize user bandwidth and make assignments based on availability
- See when users will be out of office, as well as holidays
- Assign, reassign and unassign work items in bulk



Live Demo – Resource Management Toolset

Please feel free to come OFF MUTE and ask questions in the chat as we go!



Additional Resources



Digital Resources – Documentation, Guides, Tutorials and More

Video Resources for RM Setup

[Resource Management settings for users](#)

[Resource Management settings for projects](#)

Documentation for RM Setup

[Getting Started with Resource Management](#)

[Configure Resource Management Preference](#)

[Resource Planner Overview](#)

[Overview of the Workload Balancer](#)

[Create Resource Pools](#)

Digital Resources – Documentation, Guides, Tutorials and More

Additional Resource Management Resources

[Filter the Unassigned and Assigned work area](#)

[Manage filters in the Workload Balancer](#)

[Settings to consider for the Workload Balancer](#)

[View user allocations in the Workload Balancer](#)

[Access needed to budget resources in Adobe Workfront](#)

[Filter Information in the Resource Planner](#)

[Overview of calculating hours and FTE for the users and roles in the Resource Planner](#)

Coming Soon: Getting Started with Resource Management

Checklist: Prep Items for Using Resource Management



Global Settings

- Resource Management Calculation setting in Setup
- Create/Update Schedules to Include Time Zone, Workday Hours, Regional Holidays
- Create Resource Pools (for Resource Planner)



User Management

- Schedule Assigned
- Resource Pool Assigned
- Job Role(s) Assigned
- FTE Value Assigned
- Logging Time Off



Projects/ Templates

- Project Templates created
- Task Durations Set
- Task Planned Hours Set
- Job Roles Assigned to Tasks
- Resource Managers Assigned
- Resource Pool Assigned



Forecasting/ Work Planning

- Annual projects
- Annual run work
- Scenario planning

Connect and Collaborate with other Sys Admins

- Workfront Tutorials – review the curated learning experiences to empower your users to do their best work
- Workfront Community – ask questions and get answers, ideas and best practice recommendations from other like-minded System Admins

Get the most out of Experience League with **THIS NEW GUIDE!**

- **Register** for hot-topic webinars, interactive workshops and open Ask the Expert office hours on the Events page
- Stay in the know! If you aren't receiving the monthly Workfront customer newsletter, sign up here
- Post product improvement suggestions to the Ideas tab and upvote other enhancements (must be logged in and designated as an Authorized Support Contact)

- Keep an eye out for a NEW Announcement Center message with a calendar of events for the upcoming month
- Mark your calendars for quarterly releases and review product release notes to see what changes are coming
- Leverage the Customer Support team for technical questions and troubleshooting
- Access hands-on training through Adobe Digital Learning Services (ADLS) - required a paid subscription

Upcoming Events for System Admins



March 13 at 7am MT
Connect: Strategic Admin
Chat



March 15 at 9am MT
Webinar, System Admin
Essentials: Improving the
User Experience with
Interface Design



March 21 – 23
Adobe Summit, LIVE
in Las Vegas



March 28 at 9am MT
Ask the Experts: Agile
in Workfront

Register for all upcoming sessions via the [Events](#) page on Experience League.

Final Q&A / Discussion

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



