



# Getting Started with Resource Management in Adobe Workfront

Customer Success Event – May 18, 2023



# Agenda

**Start 9:00am MT / 11:00am ET**

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5 minutes

Welcome & Introductions

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5 minutes

Defining Your Resource Management Journey

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15 minutes

Global Settings & Users

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15 minutes

Projects & Templates

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5 minutes

Campaigns & Yearly Work

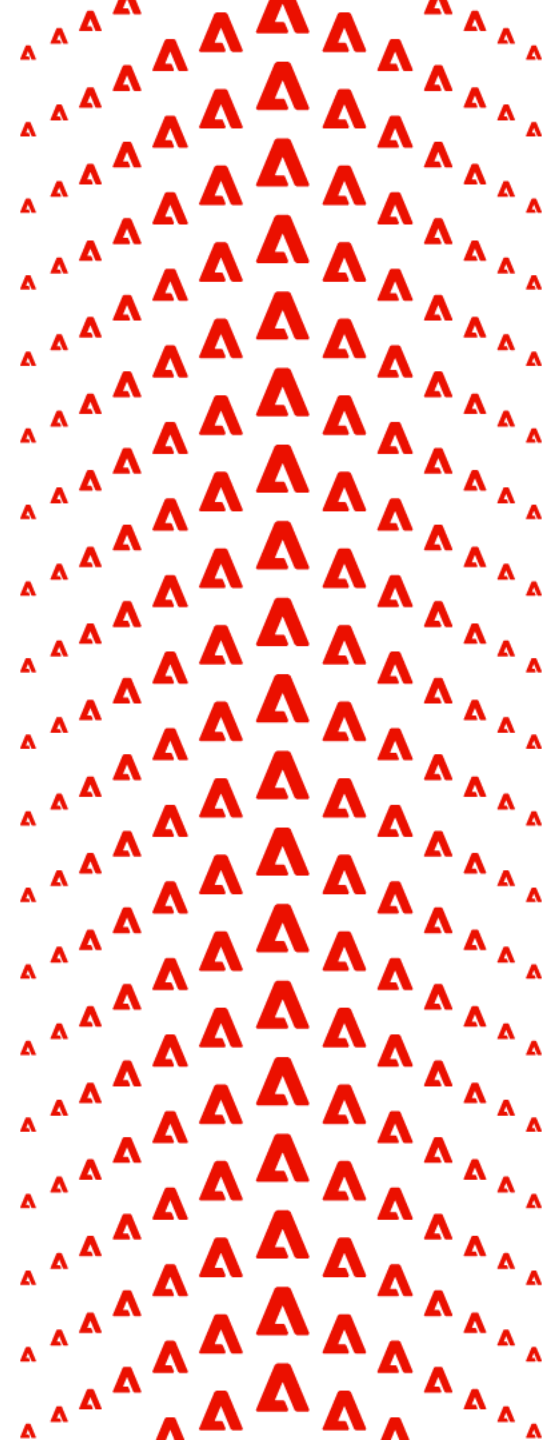
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15 minutes

Open Q&A

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**End 10:00am MT / 12:00pm ET**



# Meet the Team – Introduce Yourself



**Nichole Vargas**

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## **Introduce Yourself!**

- Name and Company
- Where you're located
- How long you've been a Workfront Sys Admin
- What are you hoping to get out of today's session?



# Resource Management Journey

Let's take a few minutes to talk about the Resource Management journey we are embarking on!

The purpose of this presentation is to help you prepare to use the Resource Management tools. We'll walk through the best practices for setting up each area of the system to get the most accurate data in the Resource Management tools.



# Defining Your Resource Management Goals

“ My leadership wants to understand the capacity of our teams. ”

“ I need to understand if we have enough resources to complete the work we have planned next quarter. ”

“ My leadership is asking for a utilization report. ”

“ Our team leads want to know the bandwidth of their team members to make assignments. ”

# The Tools Have Different Uses

Depending on what you're trying to accomplish, one tool may be more suited to help you achieve your goal.

## Resource Planner

- Allows you to forecast the gap between future capacity and demand so that actions can be taken well ahead of time.
- Gives you the confidence to commit to new work and prioritize your resources to align with critical business objectives first.
- Allows you to consider the upcoming budget and available resources to meet commitments.
- Enables you to make data-driven hiring decisions.

## Workload Balancer

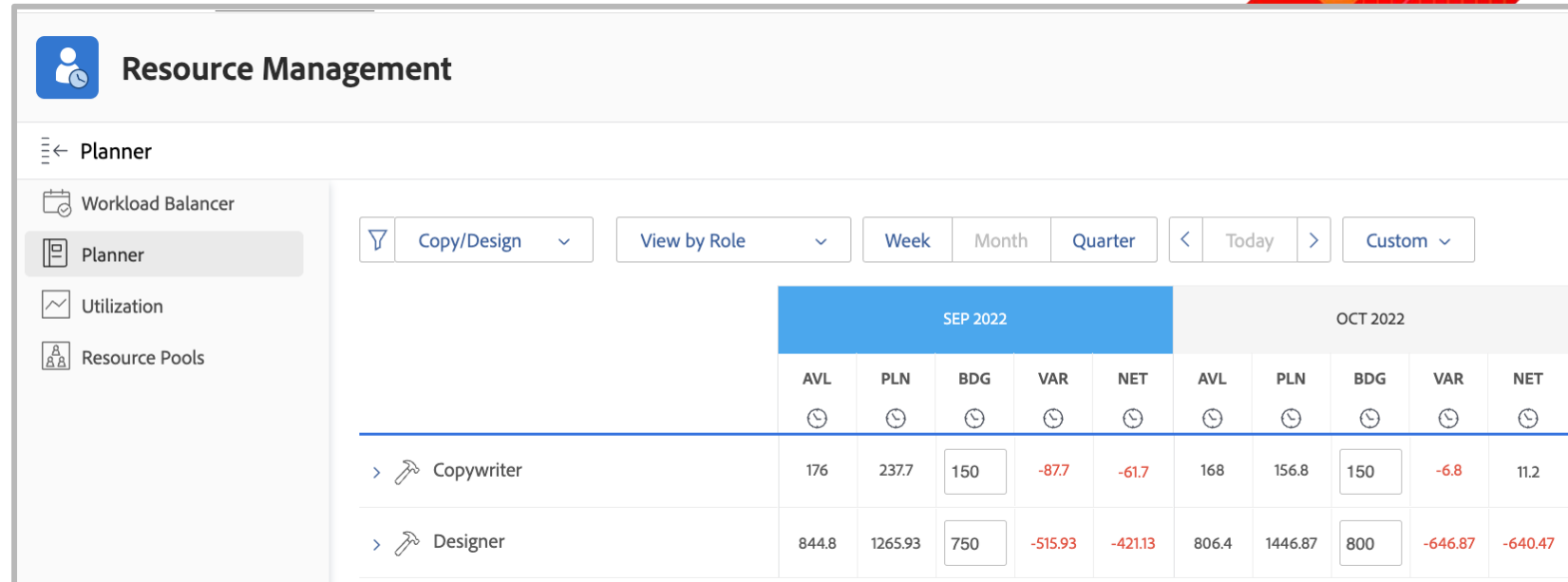
- Provides visibility into who's available to do what and when.
- Ensures teams and individuals are not over or under-allocated to avoid burn out and under-utilization.
- Easily assign users to planned and unplanned work (tasks and issues).
- Proactively provide coverage when users will be out-of-office.



# What is Resource Planner?

**Resource Planner allows you to estimate and budget the allocation of your resources and forecast their availability for future work. It helps you:**

- Forecast the resources you'll need and compare that against the available resources.
- Aggregate both the assigned and unassigned work so you can understand your true capacity.
- Put estimates of the resources you'll need in a Budgeted Hours column.
- Prioritize projects and make sure they're resourced first.



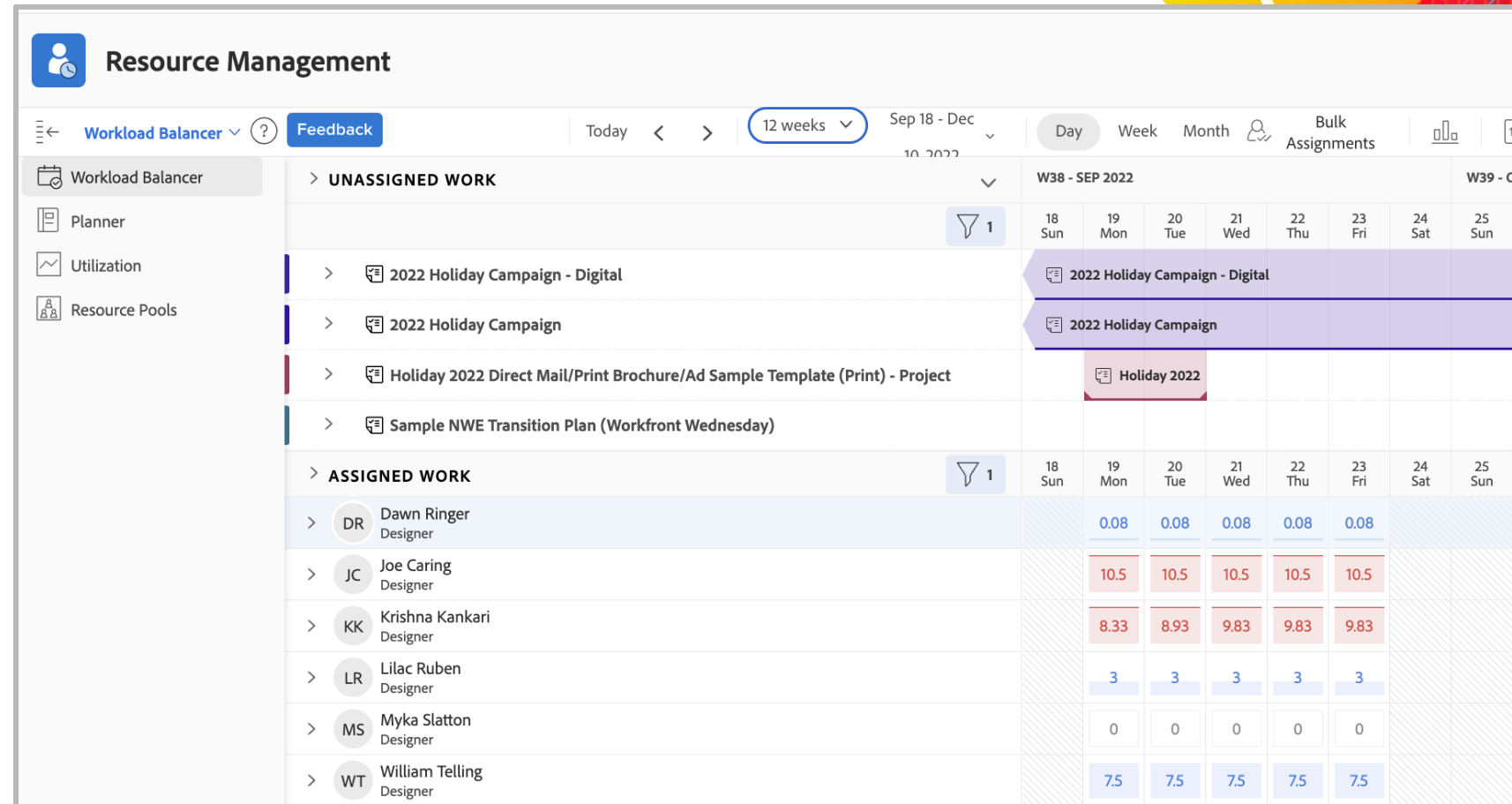
The screenshot displays the Adobe Resource Management interface. The main heading is "Resource Management". Below it, there's a "Planner" section with a left-hand navigation menu containing "Workload Balancer", "Planner" (selected), "Utilization", and "Resource Pools". The main content area shows a filter for "Copy/Design", a "View by Role" dropdown, and time period options: "Week", "Month", "Quarter", "Today", and "Custom". The data is presented in a table with columns for "AVL", "PLN", "BDG", "VAR", and "NET" for both "SEP 2022" and "OCT 2022".

	SEP 2022					OCT 2022				
	AVL	PLN	BDG	VAR	NET	AVL	PLN	BDG	VAR	NET
> Copywriter	176	237.7	150	-87.7	-61.7	168	156.8	150	-6.8	11.2
> Designer	844.8	1265.93	750	-515.93	-421.13	806.4	1446.87	800	-646.87	-640.47

# What is 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 work items in bulk.
- Reassign work or reprioritize work based on availability.
- Edit the hours that users work on tasks each day.





# How should you prepare?

The good news is when you prepare to use one tool, you prepare for both.



## 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)

## Users

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

## Projects & Templates

- ✓ Project Templates created (best practice)
- ✓ Task Durations Set
- ✓ Task Planned Hours Set
- ✓ Job Roles Assigned to Tasks
- ✓ Resource Manager(s) assigned
- ✓ Resource Pool assigned

## Campaigns & Yearly Work

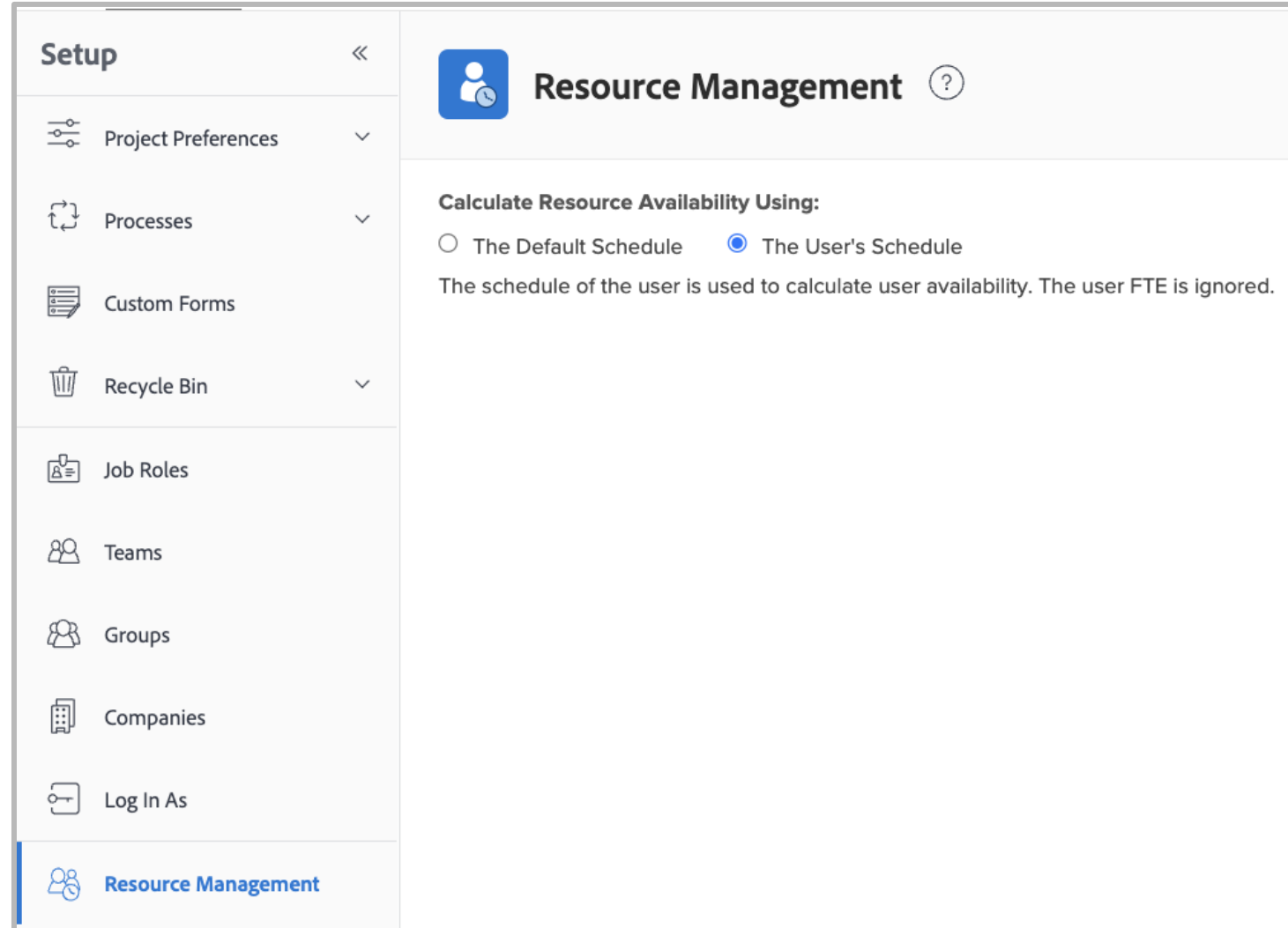
- ✓ Add projects/campaigns planned for the year ahead

# Global Settings

# How to Prepare – Global Settings

Select how availability will be calculated.

**Please note:** When you select *The User's Schedule*, the FTE value will be **ignored**.



**Setup** <<

- Project Preferences
- Processes
- Custom Forms
- Recycle Bin
- Job Roles
- Teams
- Groups
- Companies
- Log In As
- Resource Management**

## Resource Management ?

**Calculate Resource Availability Using:**

The Default Schedule     The User's Schedule

The schedule of the user is used to calculate user availability. The user FTE is ignored.

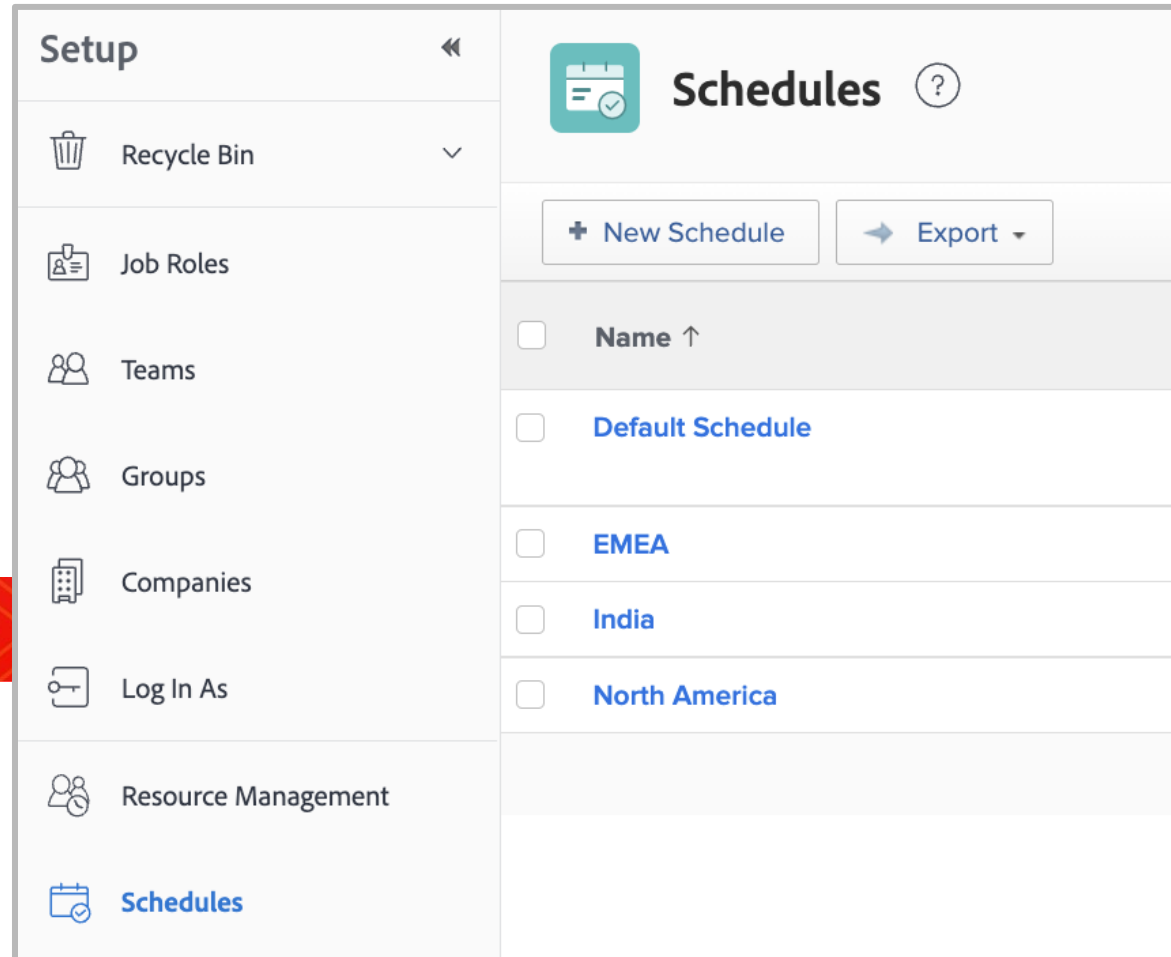
# How to Prepare – Global Settings

Create Schedules to reflect different regions with different holidays, work hours, and time zones.

Experience League Links:

[Schedule overview](#)

[Create a schedule](#)



## PRO TIP:



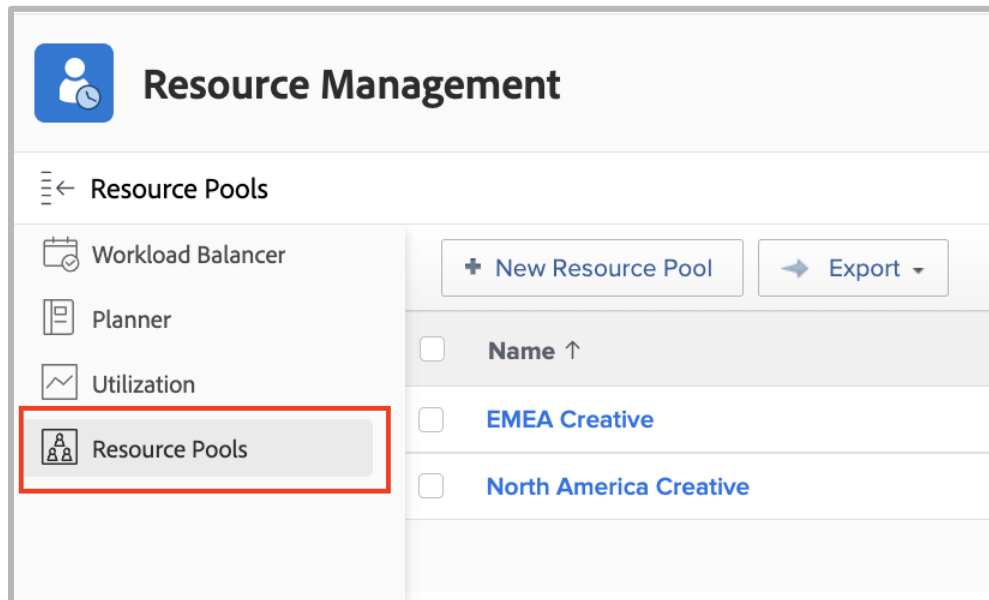
Update schedules on an annual basis with the upcoming year’s holidays and/or organizational dates of note.



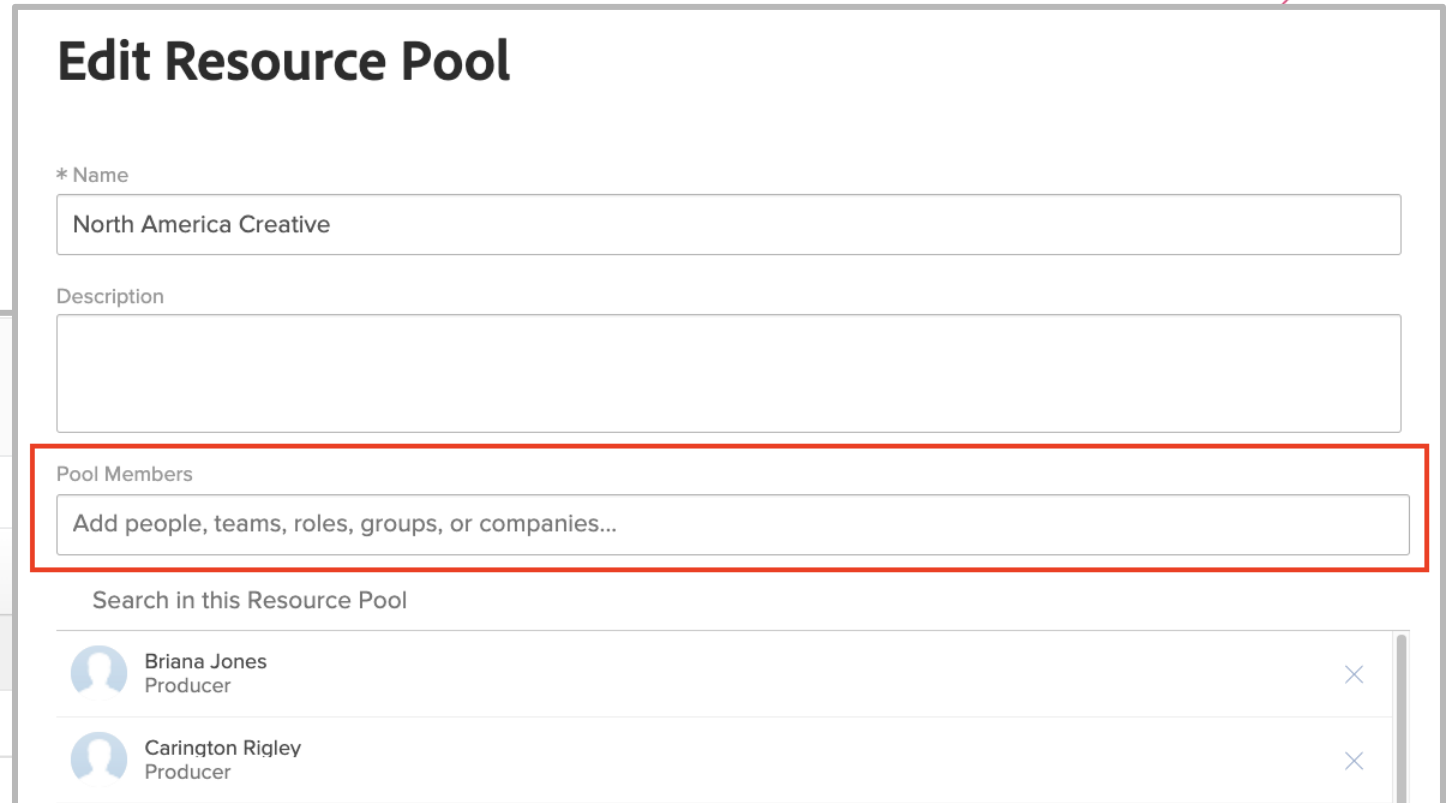
# How to Prepare – Global Settings

## Create Resource Pool(s) and add Users

►► **Important Note:** Resource Pools are only necessary for the Resource Planner



The screenshot shows the Adobe Resource Management interface. The 'Resource Management' header is at the top left. Below it, a navigation menu includes 'Resource Pools', 'Workload Balancer', 'Planner', and 'Utilization'. The 'Resource Pools' option is highlighted with a red box. To the right, there are buttons for '+ New Resource Pool' and 'Export'. Below these, a list of resource pools is shown with checkboxes: 'Name ↑', 'EMEA Creative', and 'North America Creative'.



The 'Edit Resource Pool' dialog box is shown. It has a title 'Edit Resource Pool'. Below the title, there is a field for '\* Name' containing 'North America Creative'. Below that is a 'Description' field. The 'Pool Members' field is highlighted with a red box and contains the text 'Add people, teams, roles, groups, or companies...'. Below this field is a search bar 'Search in this Resource Pool' and a list of members: 'Briana Jones Producer' and 'Carington Rigley Producer', each with a close button (X).

# How to Prepare – Global Settings

**Q** How should I structure my Resource Pools?

**A** Most of the time, Resource Pools will align with your department or Home Group.

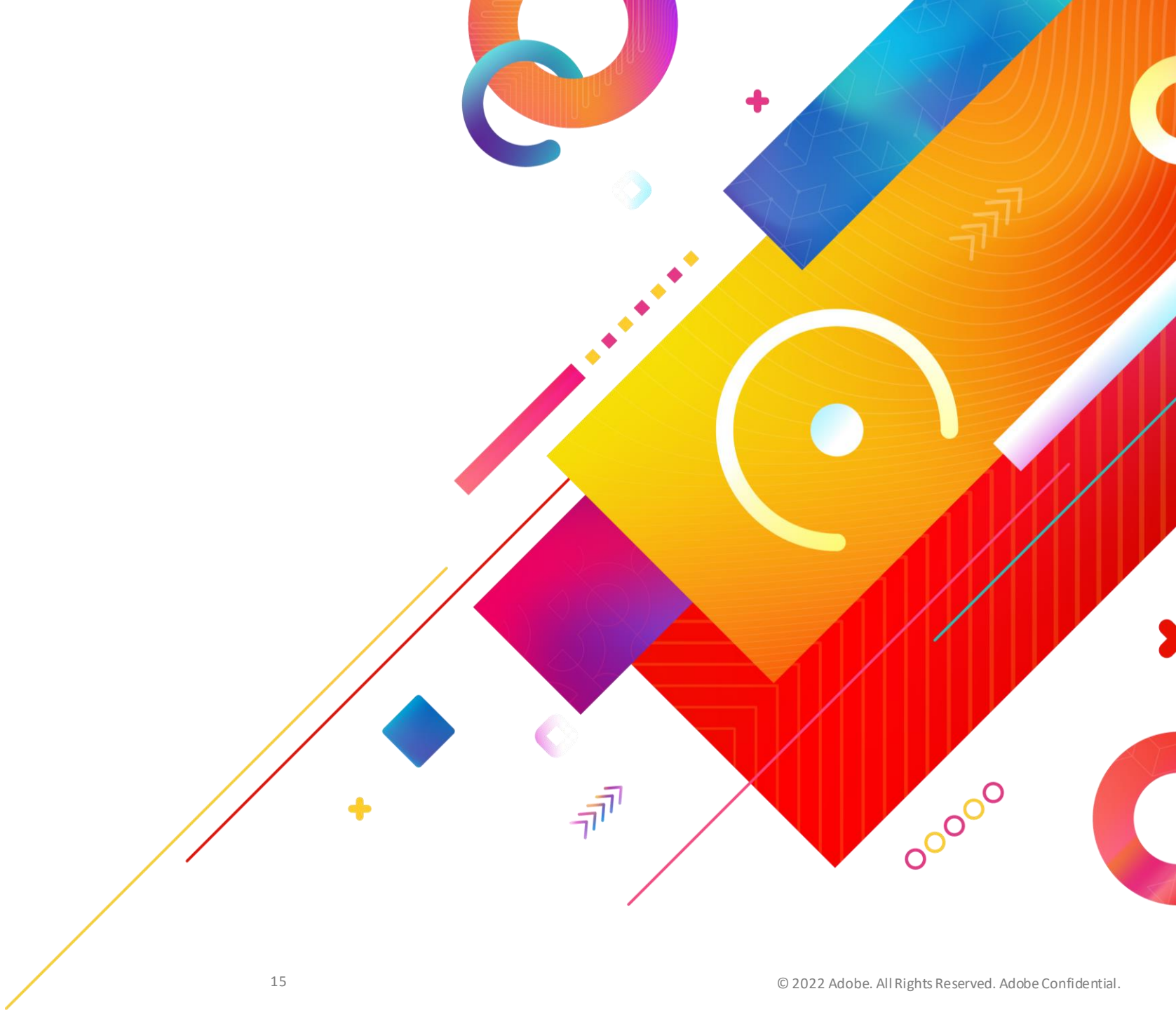
**Q** Is there a limit to how many users I can put into a Resource Pool?

**A** There are no formal limits on the number of users that can be added to a Resource Pool, but it's good to test to make sure there are no performance issues with large pools.

**Q** Do my Resource Pools need to align with my Job Roles?

**A** No. Resource Pools typically have users with different jobs roles.

Users



# How to Prepare – Users

- Make sure the Work Time field is accurate
- Make sure the job role(s) are accurate
- Make sure the job role percentages are accurate
- Make sure Schedule is accurate
- Make sure the FTE value is accurate
- Make sure Resource Pool is accurate

**Please note:** Users don't need to log their time in Workfront to use the RM tools

## PRO TIP:



Conduct a “user audit” and make sure all the users you want to view in the RM tools have accurate data by creating a user report with columns for Job Role, Schedule, FTE value, and Resource Pool.

### Edit Person

Users

- Personal Info
- Preferences
- Notifications
- Access
- Organization
- Resource Planning**
- Custom Forms
- Comment

#### Resource Planning

Work Time ?

Schedule Deactivation ?

Primary Role

Other Roles

Schedule

Timesheet Profile

Default Hour Type

Available Hour Types

Log Time in:  
 Hours  
 Days

FTE ?

Resource Pools



## How to Prepare – Users

It's very important for some organizations to adjust their users' capacity. The best way to do that is with Work Time field.

### EXAMPLE :

**A user that can only devote 30 hours per week to project work out of a 40-hour work week, would have a Work Time value of .75**

User availability for project work = 30 hours

Work week = 40 hours

**>>>> Work Time value = .75 <<<<**

# How to Prepare – Users

## Log Time Off in Workfront:

To get the most accurate data, it's important to see users' time off.

### PRO TIP:



Users can easily see who is out-of-office when making assignments by the airplane icon.

**Caroline's Personal Time Off** 2022

Delegate approvals

Month	Time Off Dates
January	None
February	Feb 3, 4, 5, 6, 7, 8, 9
March	None
April	None
May	None
June	None
July	None
August	None
September	None
October	None
November	None
December	Dec 18, 19, 20, 21, 22, 23, 24, 25, 26, 27, 28, 29, 30, 31

# Projects & Templates

# How to Prepare – Projects & Templates

**As the old, adage goes... bad data in, bad data out.**

Having accurate dates, planned hours, and assignments in your project tasks is **critical** to having accurate data in the resource management tools.

BAD DATA



+

Awesome  
THING

STILL

=

BAD RESULTS





## How to Prepare – Projects & Templates

**If you want work to be accounted for in Workfront’s resource management tools, the following things must be in place:**

- Task or Issue Durations are greater than zero – your best estimate
- Task or Issue Planned Hours are greater than zero – your best estimate
- Tasks or Issues are assigned to a job role or a user with a job role
- Make all assignments on child tasks
- Resource Pool(s) and Resource Manager(s) assigned to projects

The best way to do this is to create project templates with this data preset and to create all your projects from templates.

# Use Project Templates for More Consistent Data

## Project Templates

- Job Roles assigned to child tasks
- Designate Durations on each task (greater than zero)
- Designate Planned Hours on each task (greater than zero)

### PRO TIP:



If your tasks are assigned to more than one role, you can preset your hour allocations by using a Simple duration type on your templates.

#	Task Name	Assignments	Duration	Pln Hrs	Predecessors
1	Project Schedule		14 Days	19.25 Hours	
2	Traffic		3 Days	1 Hour	
3	Build in Workfront	Project Manager	3 Days	1 Hour	
4	Copy		8 Days	3 Hours	
5	Write copy	Copywriter	3 Days	2 Hours	3
6	Copy revisions during KDM approvals	Copywriter	2 Days	1 Hour	8
7	Creative		6 Days	12 Hours	
8	Design & submit for CM review	Designer	3 Days	6 Hours	5
9	Revise & submit for KDM review	Designer	2 Days	4 Hours	8
10	Optimize images & pass to Email Team	Designer	1 Day	2 Hours	9
11	Merchandising		3 Days	2 Hours	
12	Submit product for 9-view grid	Merchandising Manager	3 Days	1 Hour	8
13	Submit links	Merchandising Manager	3 Days	1 Hour	8
14	Front-End DEV		2 Days	1.25 Hours	
15	Build in ESP	Developer	1 Day	1 Hour	10 13
16	Launch date	Email Specialist	1 Day	0.25 Hours	15

# Campaigns & Yearly Work

# How to Prepare – Getting Future Work in Workfront

## Things to consider:

The RM tools can only give you data for work that is in Workfront.

- How far in advance do you put work into Workfront?
- How far in advance would you like to forecast your resources?

If the answers to these two questions differ, it may be helpful to form a plan on how to get work into Workfront *earlier*.

# How should you prepare?

The good news is that when you prepare to use one tool, you prepare for both.



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- ✓ Task Planned Hours Set
- ✓ Job Roles Assigned to Tasks
- ✓ Resource Manager(s) assigned
- ✓ Resource Pool assigned

## Campaigns & Yearly Work

- ✓ Add projects/campaigns planned for the year ahead



# Blueprint – Resource Management Preparation

Coming soon! >>>>

- **Project Template** – outlines all the prep work that needs to be completed to generate the most accurate Resource Management data. When you create a Project from this Template, it should essentially serve as your preparation checklist.
- **User Report** – assists you in reviewing your User information to make sure it's accurate and complete.

By using these two assets, you should be ready to launch the Resource Management tools with confidence!

**Workflow Content**

**Filter**

- Resource Management User Preparation

**Project Template**

- Resource Management Preparation Checklist

**Report**

- Resource Management User Preparation

**View**

- Resource Management User Preparation

**Blueprint Details**

Maturity level: Managed • Version: 1 • Published on: • Use cases: Project Management Office • Types: Dashboard

**Resource Management Preparation Checklist**

Task Name	Assignment	Duration	File Size	Progress
Project Summary		10 Days	10 MB	100%
Project Setup		1 Day	1 MB	100%
Add Assignments or Job Roles to the Project		1 Day	1 MB	100%
Check Project Settings & Permissions for the Project		1 Day	1 MB	100%
Check if Project Users to Complete Work Calculation (Recommended Columns in Task Description)		1 Day	1 MB	100%
Global Settings		10 Days	10 MB	100%
Select Resource Management Calculation Settings to Setup		1 Day	1 MB	100%
Create Resource Profile for Resource Planner		10 Days	10 MB	100%
Create Update Schedules in Setup		1 Day	1 MB	100%
Update Holidays for Each Schedule		1 Day	1 MB	100%
Users		10 Days	10 MB	100%
Assign the Correct Schedule to Users		1 Day	1 MB	100%
Assign Resource Profile to Users		1 Day	1 MB	100%
Create New or Update Existing Job Roles		10 Days	10 MB	100%
Assign Job Roles to Users		1 Day	1 MB	100%
Verify the Work Time Values Assigned to the User's Account		1 Day	1 MB	100%
Verify the PTO Values Assigned to the User's Account		1 Day	1 MB	100%
Review Users and Logging Time Off or Headcount		10 Days	10 MB	100%
Experience of Your Organization Needs to Log Time		10 Days	10 MB	100%
Project Templates		10 Days	10 MB	100%
Create New or Update Existing Project Templates		1 Day	1 MB	100%
Set Task Resources		1 Day	1 MB	100%
Set Task Planned Hours		1 Day	1 MB	100%

**Resource Management User Preparation**

Name	Title	License	Work Time	Schedule	PTO
ADD ADD Enhanced Connector	ADD User Search	Plan	100	Default	100
Core Templates	Workload Report	Plan	100	Default	100
Core Templates	Schedule	Plan	100	Default	100
Core Templates	Customer	Plan	100	Default	100

Use this Project Template and User Report to ensure you have the correct settings and information necessary to generate accurate Resource Management data.



# Open Q&A / Discussion

If you don't have any for me, I have some for you. [Take this short \(anonymous\) survey to share feedback from today's session](#)



# [FREE] Upcoming Events for System Administrators



May 23

1:00 – 2:00pm MT

Introduction to  
Scrum with Adobe  
Workfront



May 25

10:30 – 11:30am MT

[Office Hours]  
Resource  
Management



June 2

10:00 – 11:00am MT

Admin Chat for  
Marketing & Creative



June 8

**10:30 – 11:30am MT**

Ask the Experts: No-Cost  
Workfront + Creative  
Cloud Integration



June 12

**7:00 – 8:00am MT**

[Open Office Hours]  
Strategic Admin Chat

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

# System Administrator Resources

- Workfront [Training](#) – review the curated learning experiences to empower your users to do their best work
- Ask questions and get answers, ideas, and best practice recommendations from other like-minded System Admins on the Workfront [Community](#)
- **Register** for hot-topic webinars, interactive workshops and open Ask the Expert office hours through the [Events](#) page
- Stay in the know! If you aren't receiving the monthly Workfront customer newsletter, sign up [here](#)
- Post your suggestions for product improvements to the [Ideas tab](#) and "like" others to up-vote. (Must be logged in and designated as an Authorized Support Contact)
- Keep an eye out for a monthly 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 \(ADLS\)](#) - \$\$
- Stay in touch with your Account Executive!
- Answers to your top 5 Experience League questions. [Download the guide.](#)

Thank you!





# Appendix

## 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](#)



# Appendix

## **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](#)

