Getting Started with Resource Management in Adobe Workfront

Customer Success Event – May 18, 2023

Agenda

Start 9:00am MT / 11:00am ET	
5 minutes	Welcome & Introductions
5 minutes	Defining Your Resource Management Journey
15 minutes	Global Settings & Users
15 minutes	Projects &Templates
5 minutes	Campaigns & Yearly Work
15 minutes	Open Q&A
End 10:00am MT / 12:00pm ET	

Meet the Team – Introduce Yourself

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Adobe Workfront

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Adobe Workfront

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Adobe Workfront

Nevada City, CA

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?

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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.

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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.

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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.

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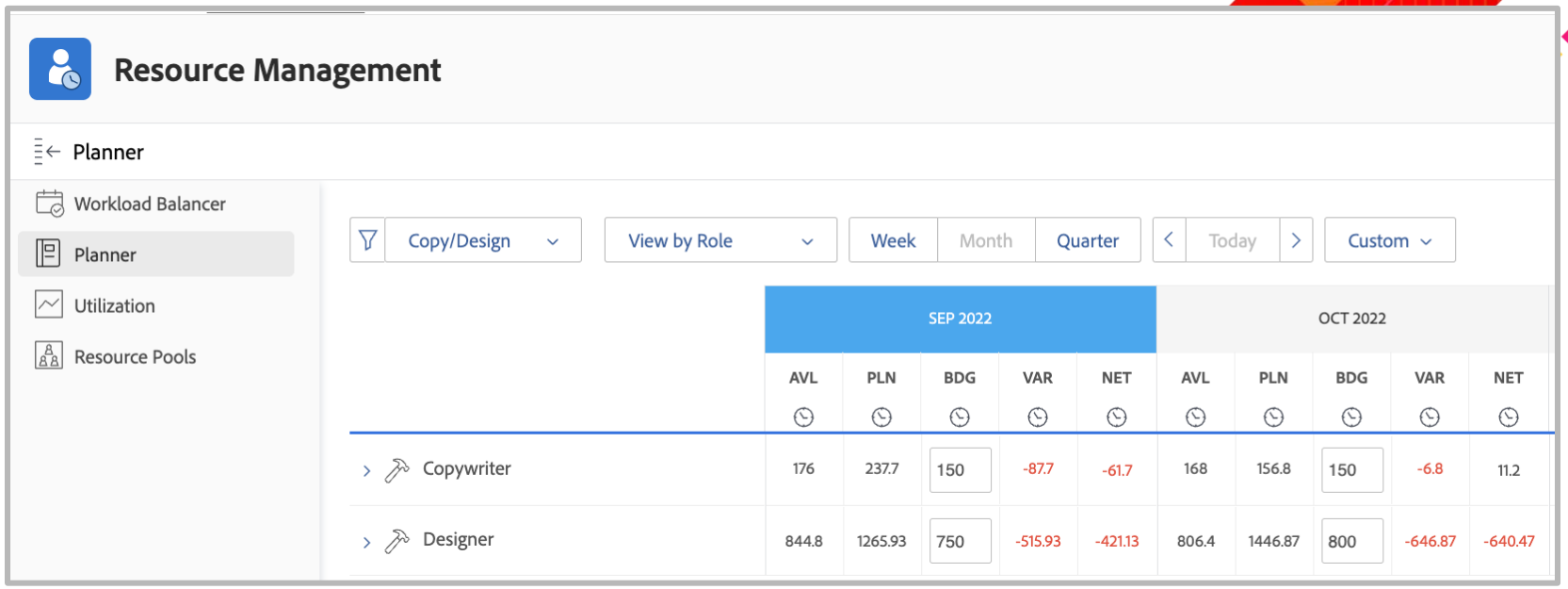
What is Resource Planner?

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.



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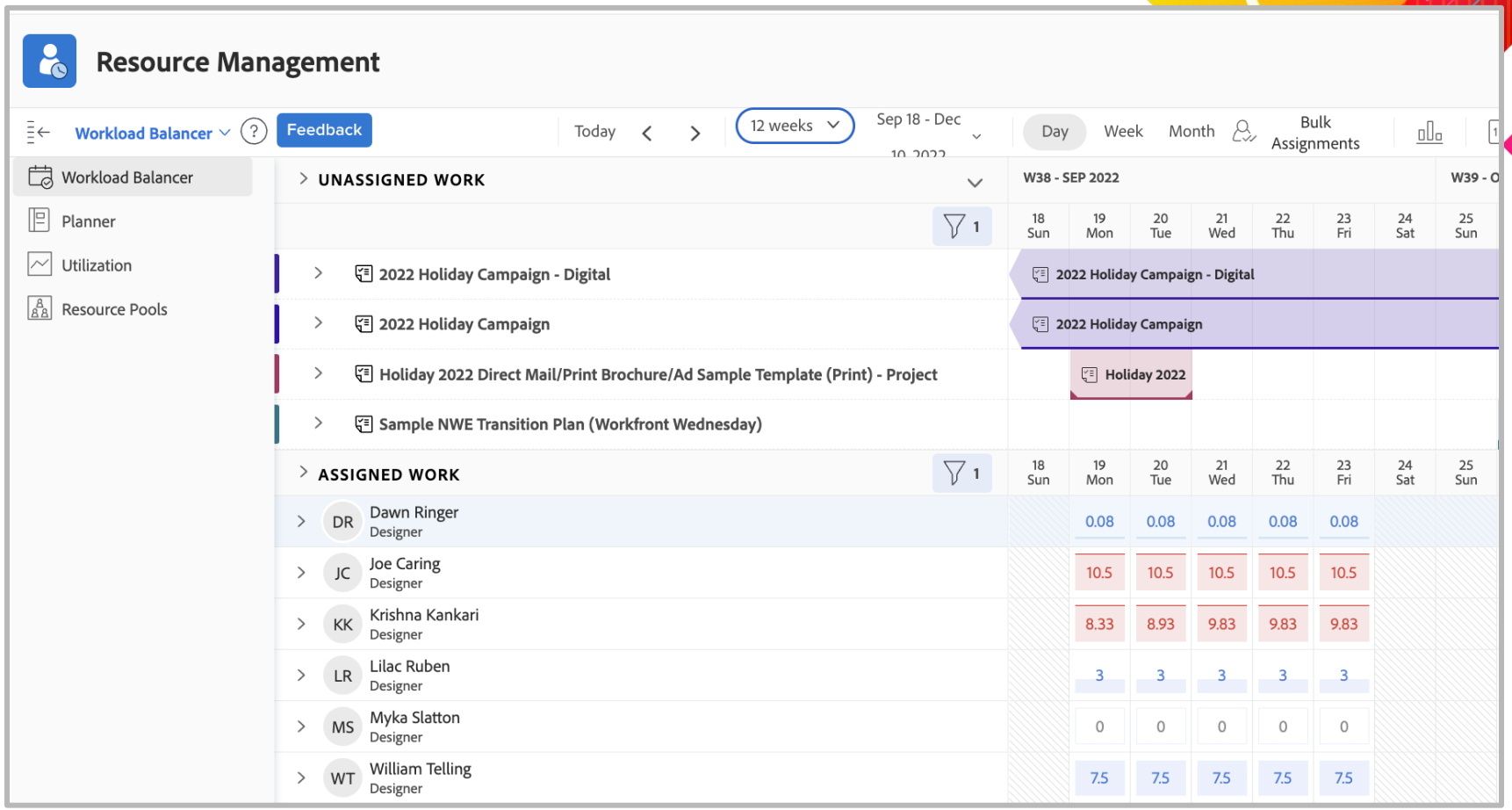
What is Workload Balancer?

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.



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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

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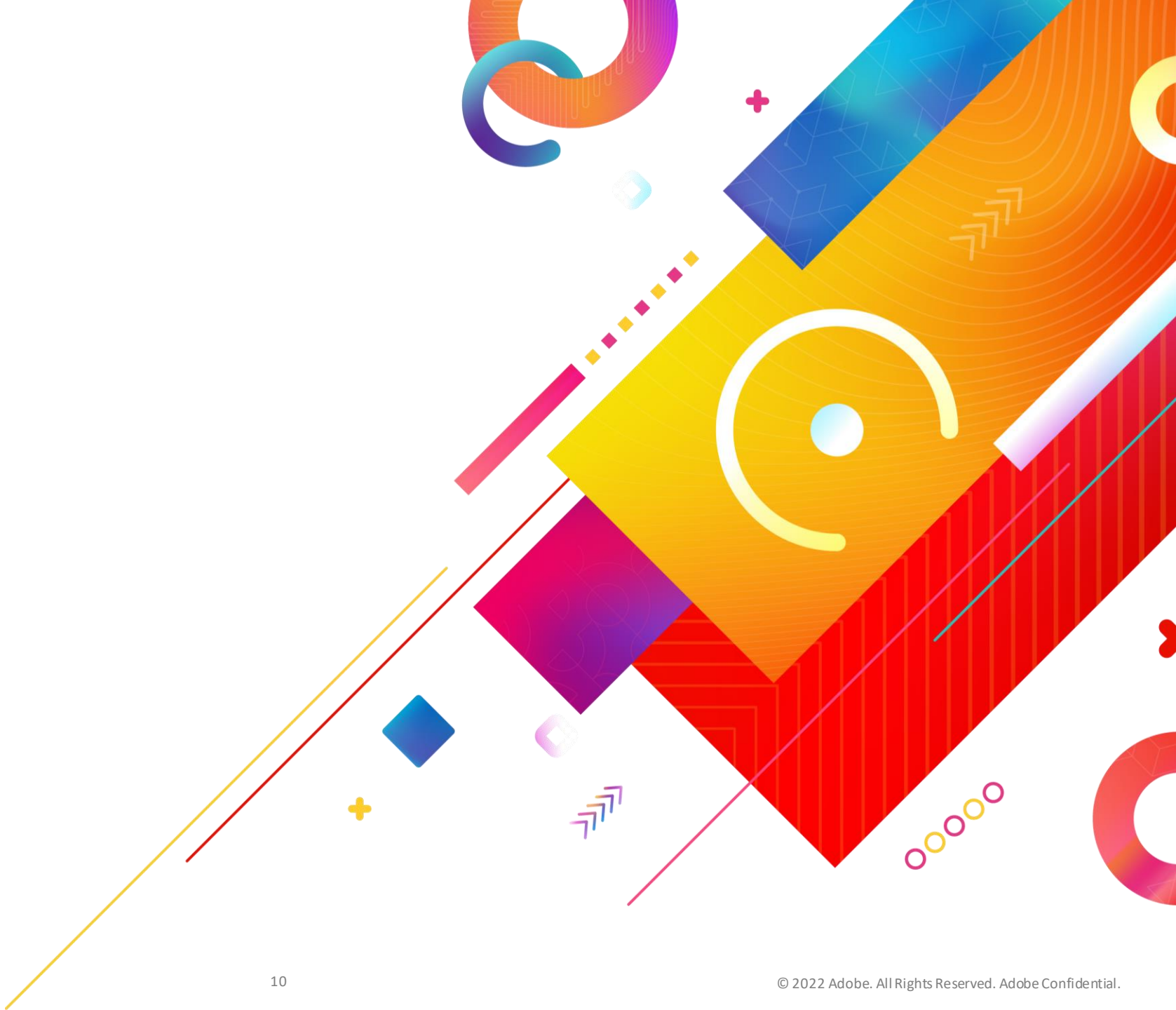
Global Settings



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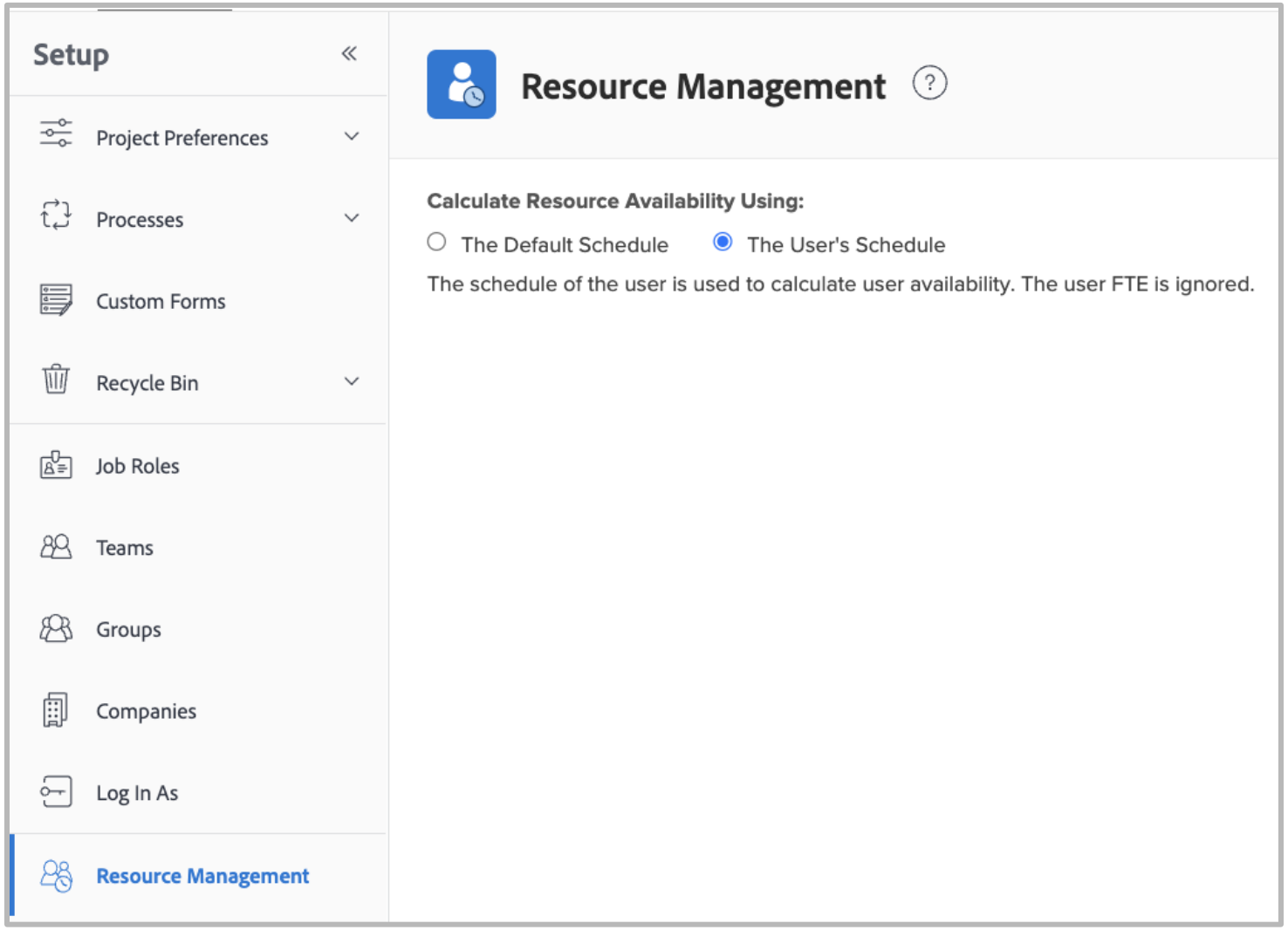
How to Prepare – Global Settings

Select how availability will be calculated.

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



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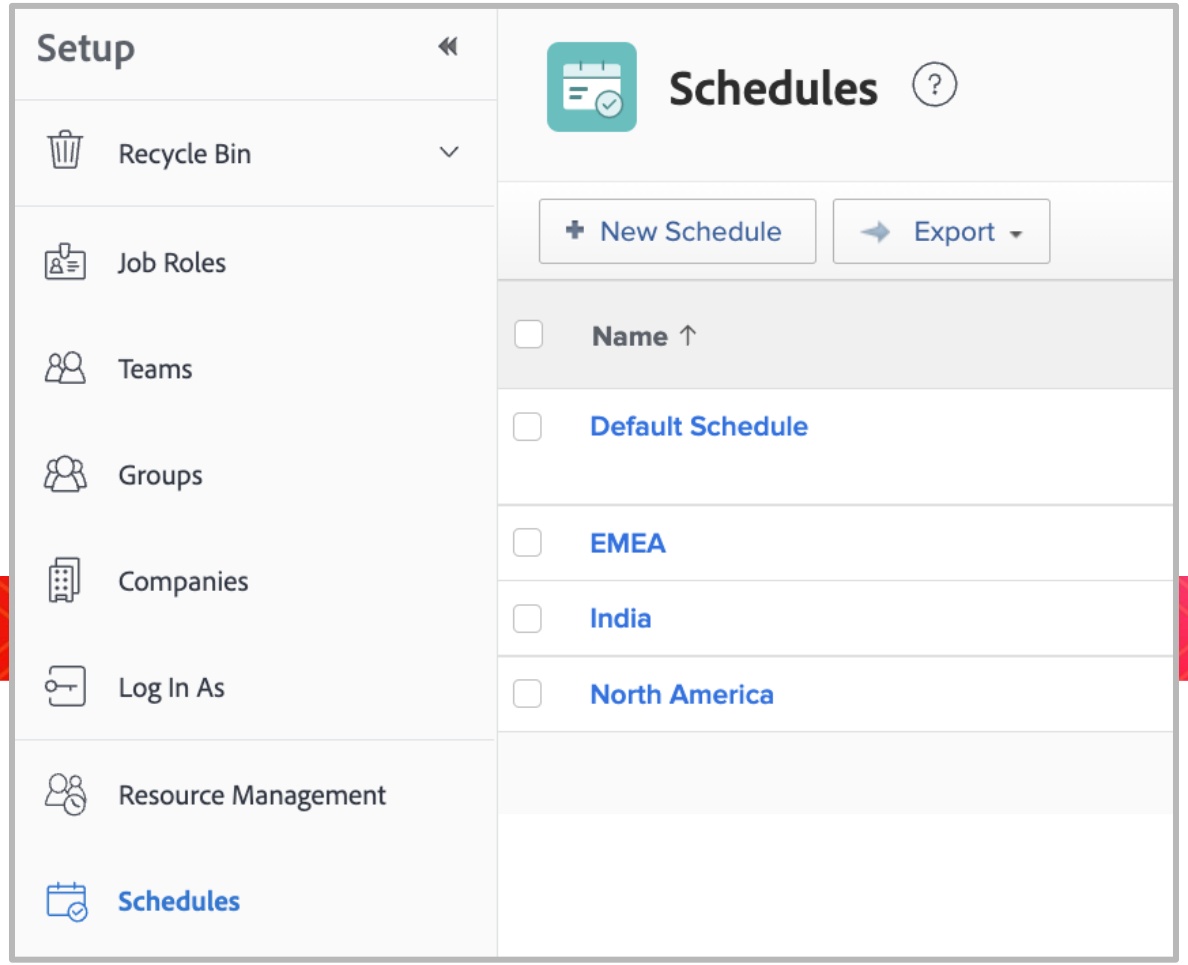
How to Prepare – Global Settings

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.

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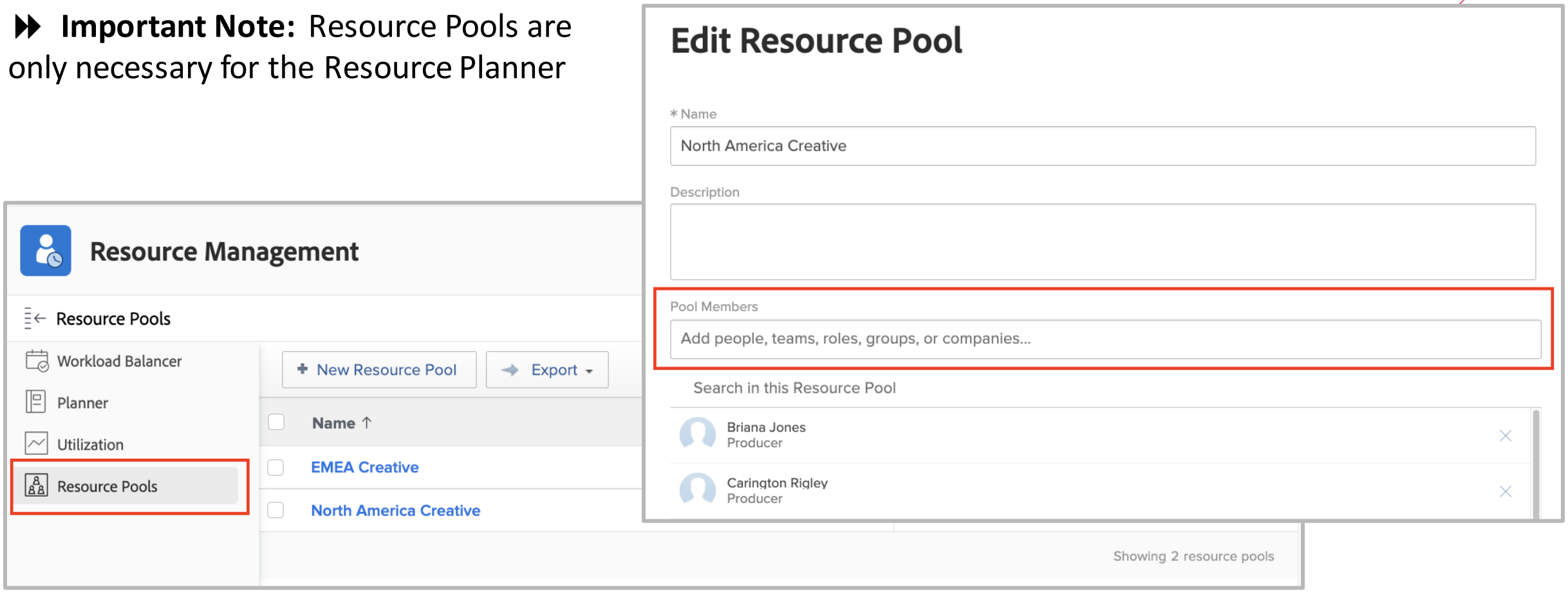
How to Prepare – Global Settings

Create Resource Pool(s) and add Users

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



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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.

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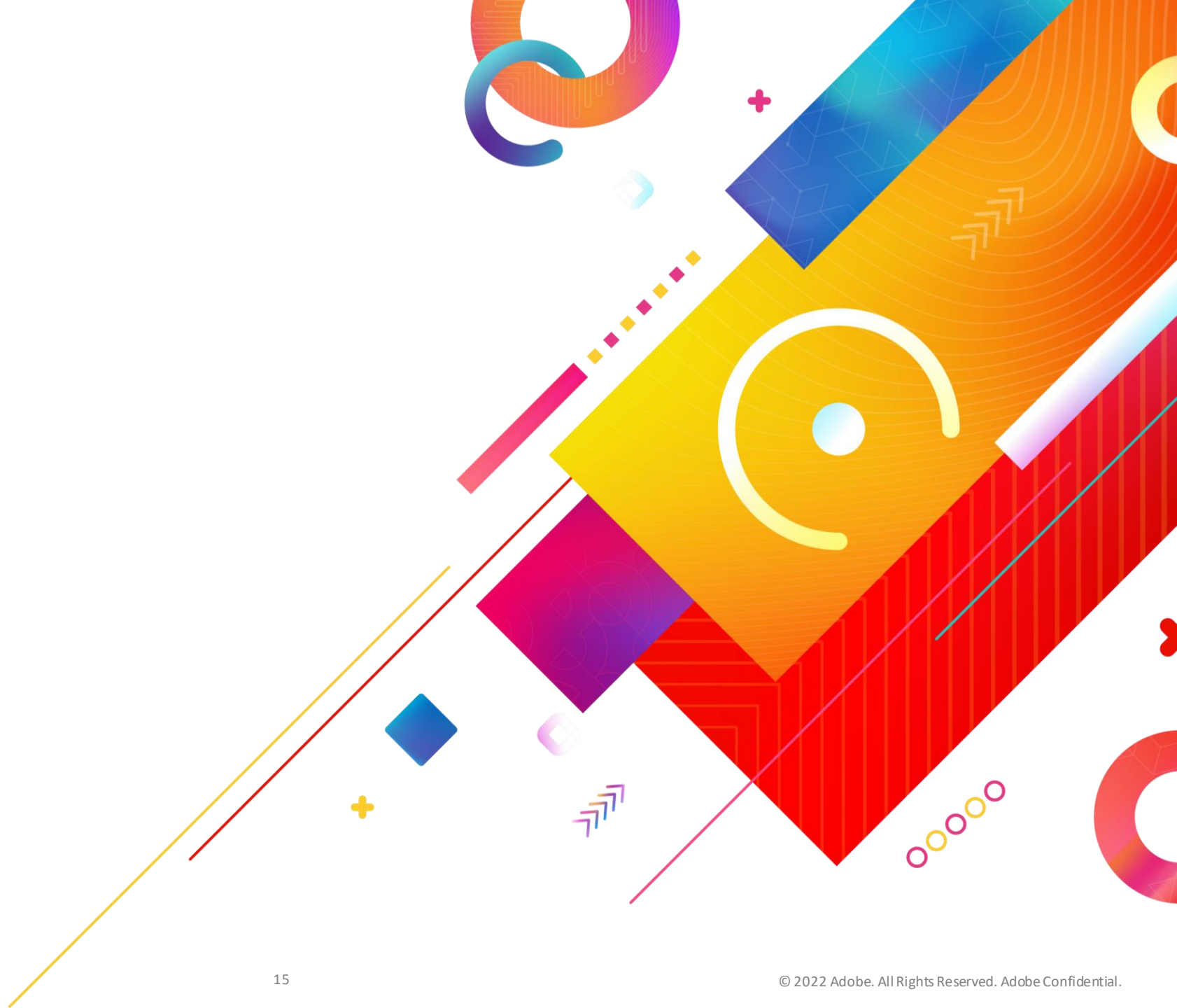
Users



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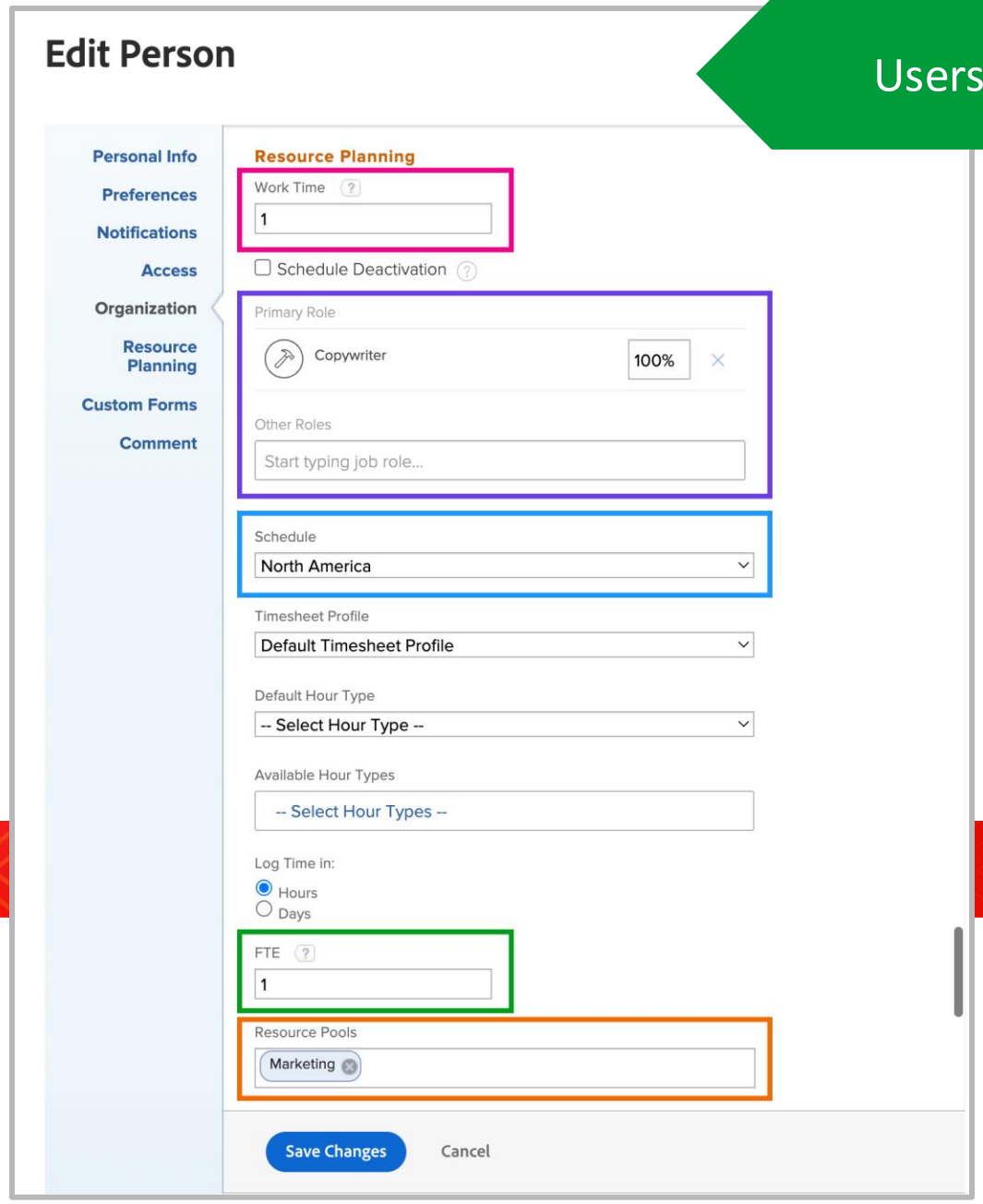
How to Prepare – Users

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.

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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

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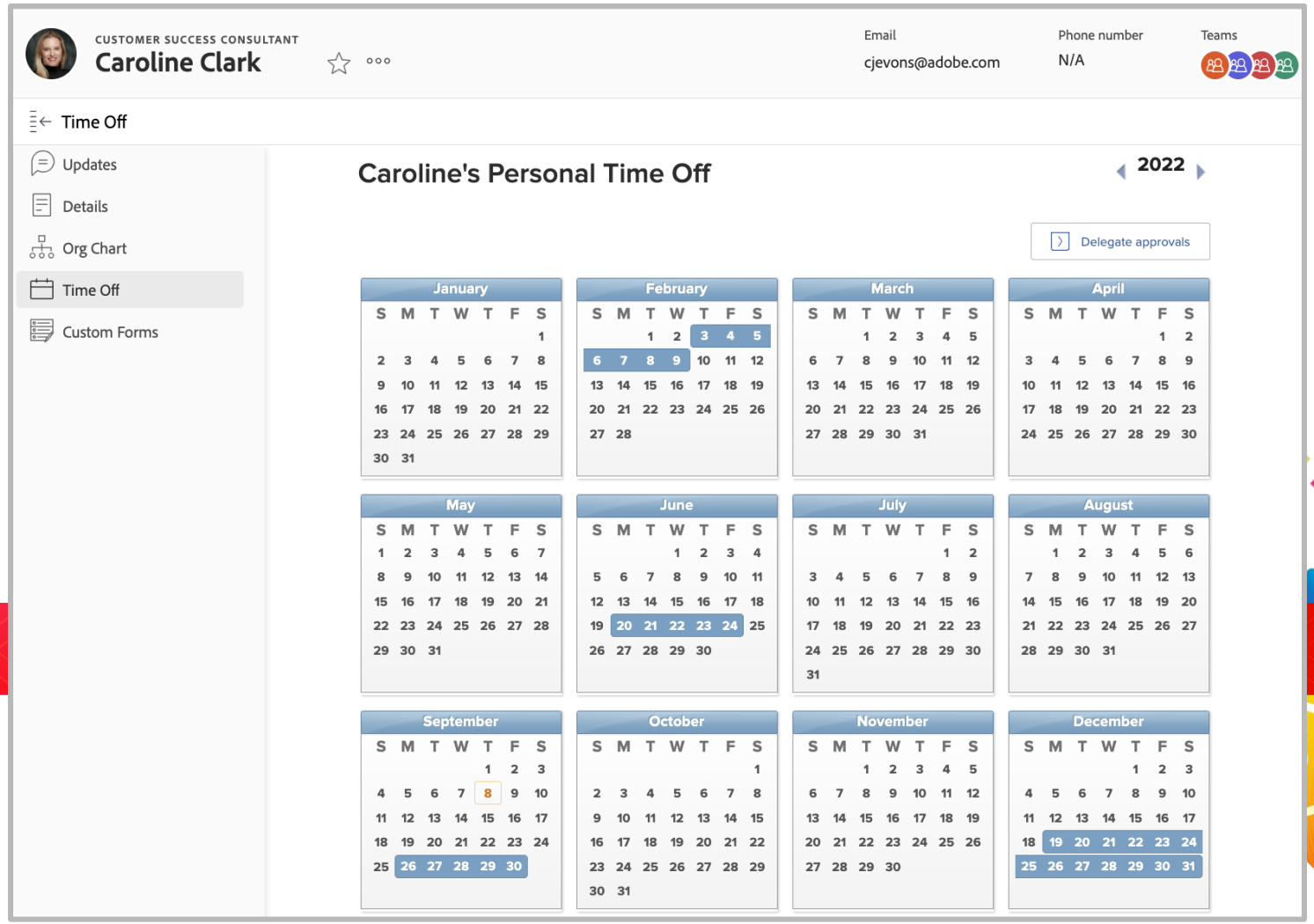
How to Prepare – Users

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.

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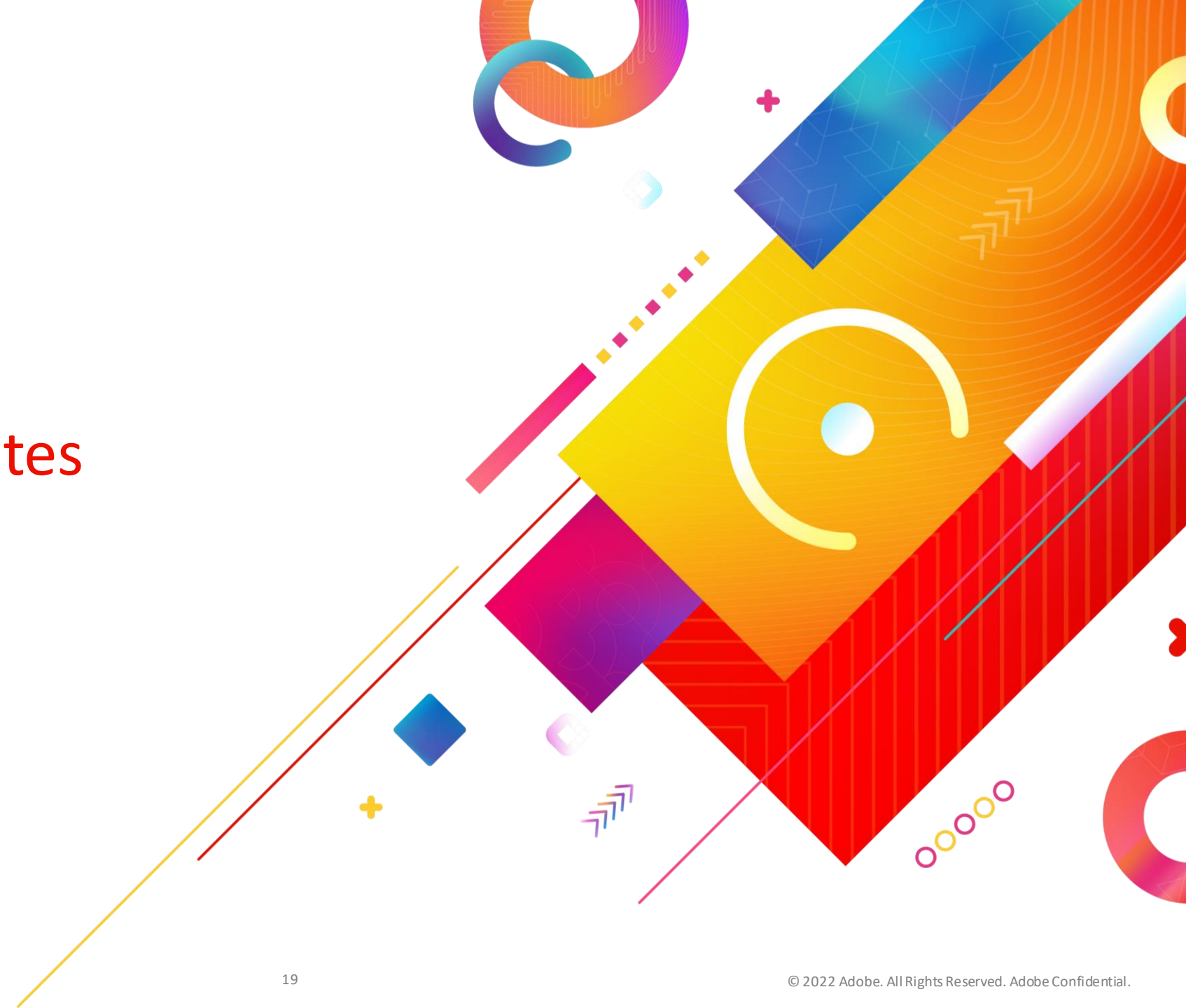
Projects & Templates



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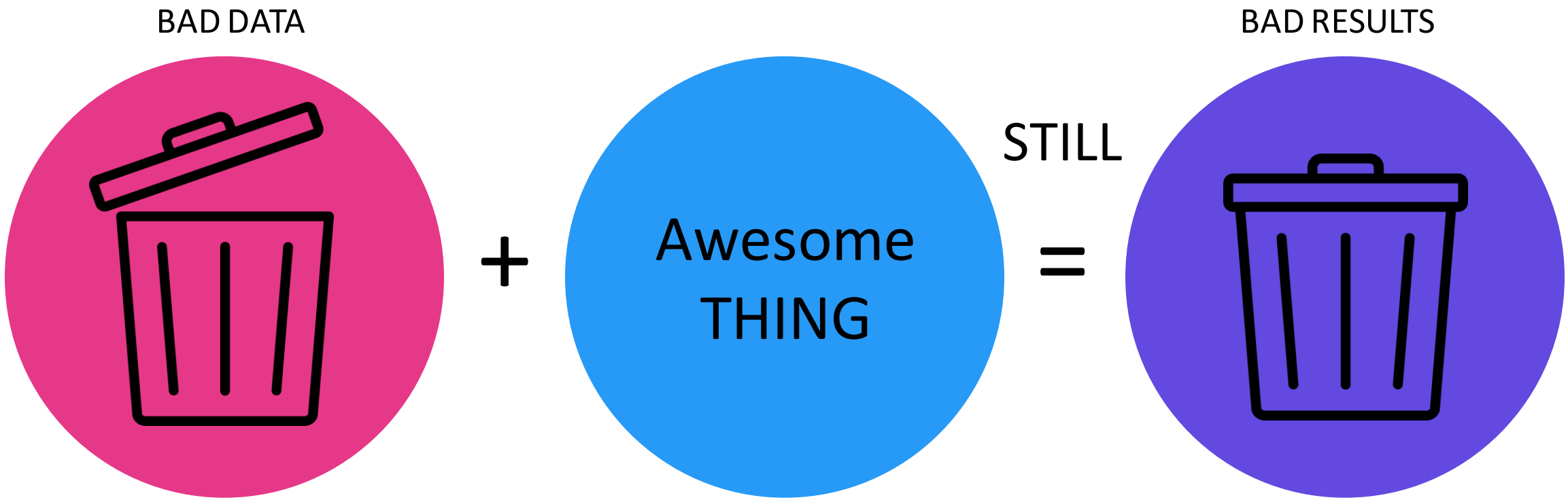
How to Prepare – Projects & Templates

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.



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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.

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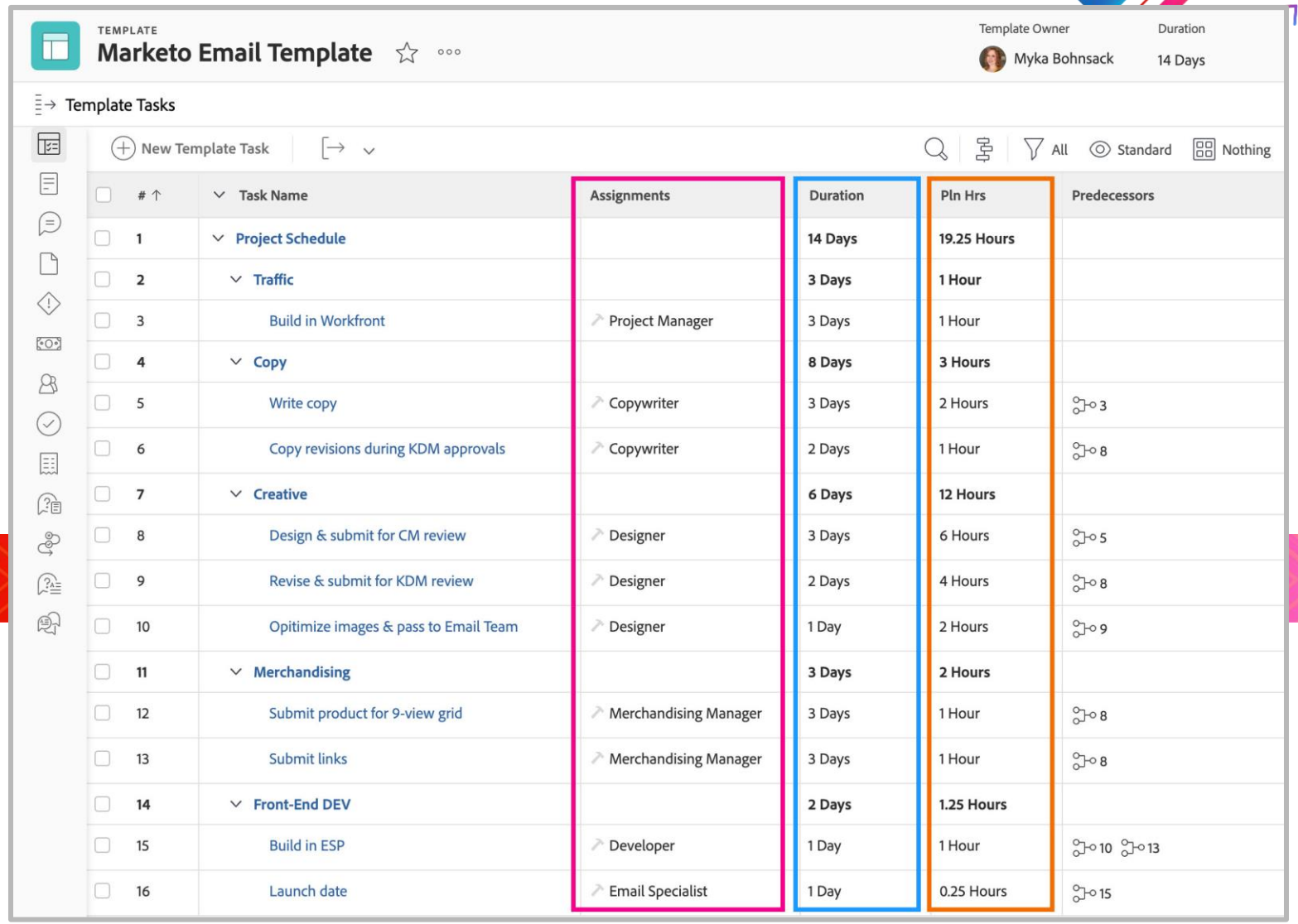
Use Project Templates for More Consistent Data

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)



TEMPLATE
Marketo Email Template

Template Owner: Myka Bohnsack
Duration: 14 Days

Template Tasks

New Template Task | All | Standard | Nothing

#	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	Opitimize 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

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.

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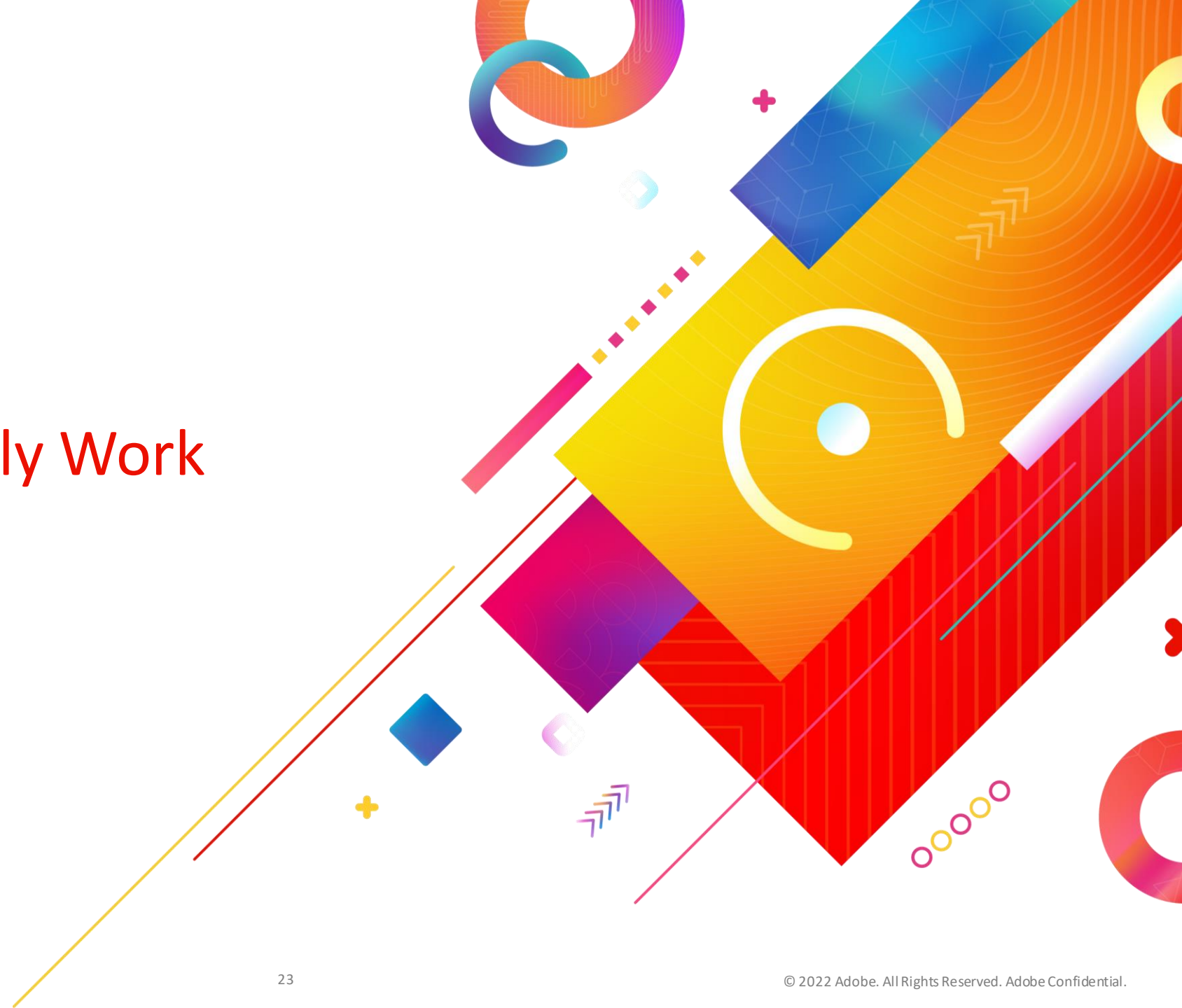
Campaigns & Yearly Work



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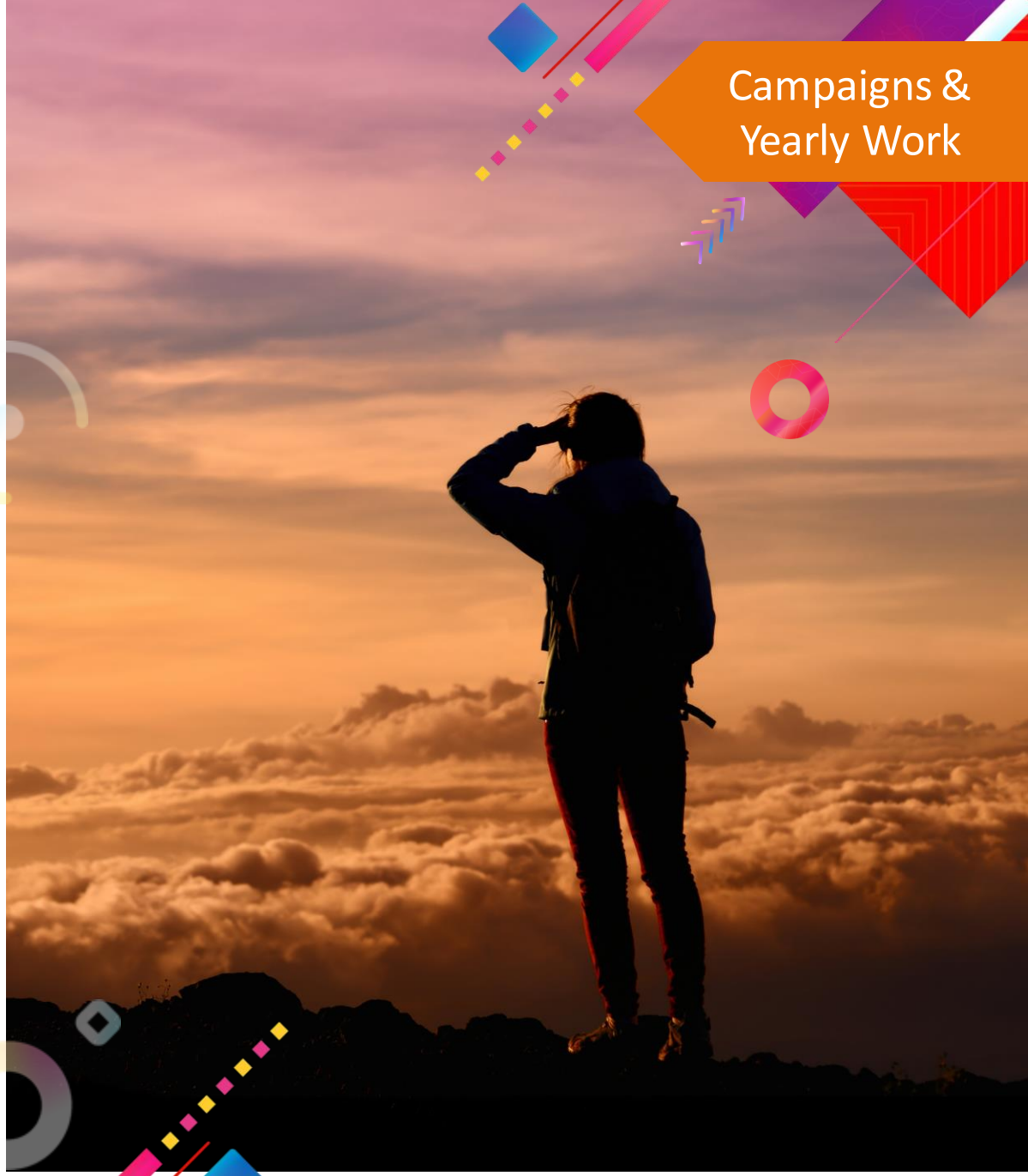
How to Prepare – Getting Future Work in Workfront

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***.



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Campaigns & Yearly Work

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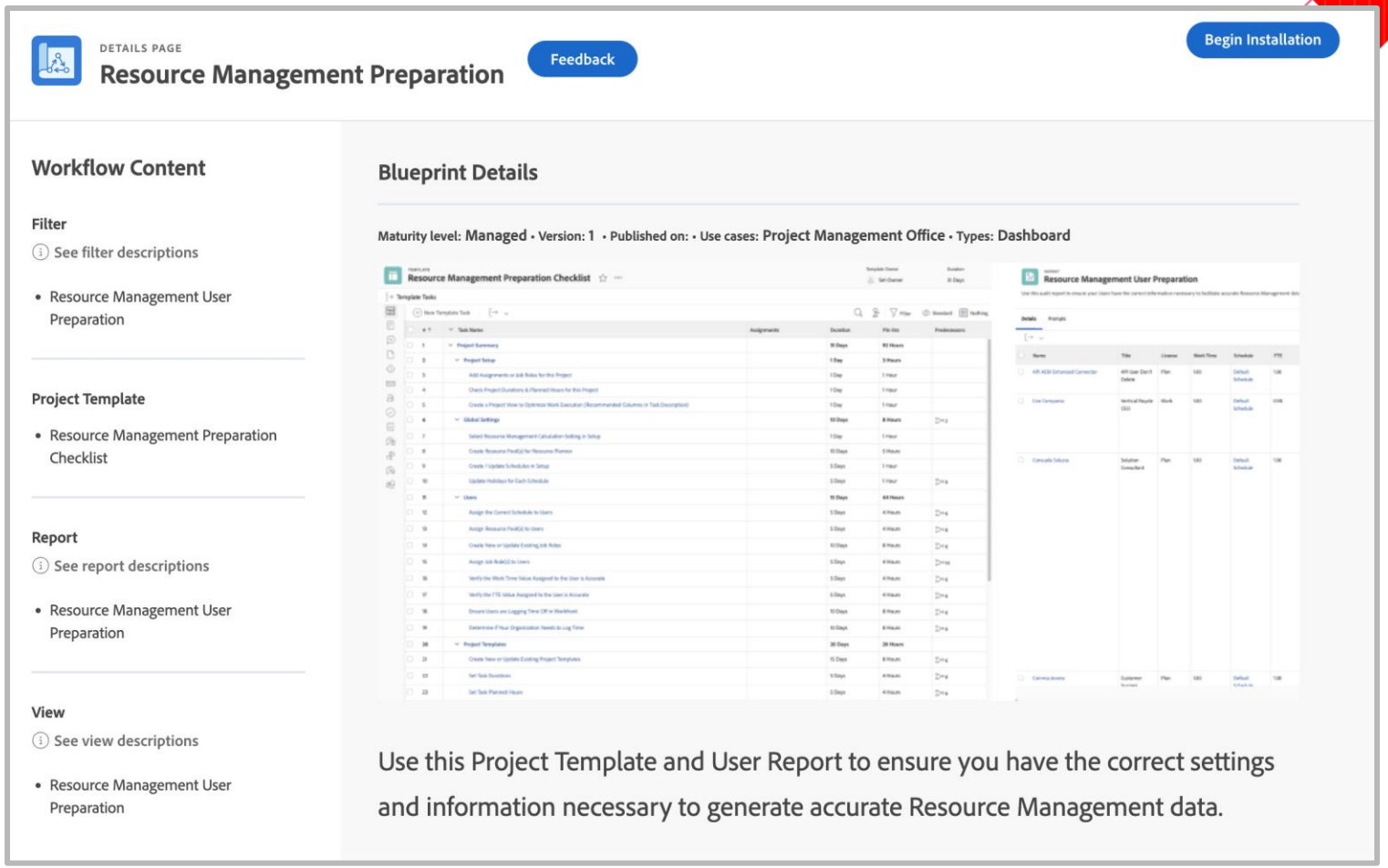
Blueprint – Resource Management Preparation

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!



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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.

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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.

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Thank you!

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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

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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

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