Boredom vs. Burnout: Managing Your Team's Workload

Hope you enjoyed Leap 2018! We know we covered a lot of ground in a short amount of time. A review of the key takeaways and processes you learned from the Workfront Training team can be found in this reference packet. We hope you picked up some new skills and information to help you tackle and tame your work chaos.

We would love to stay in contact! Email us at **training@workfront.com** with any questions or feedback.

Hope to see you at Leap 2019!

Sincerely,
The Training Team

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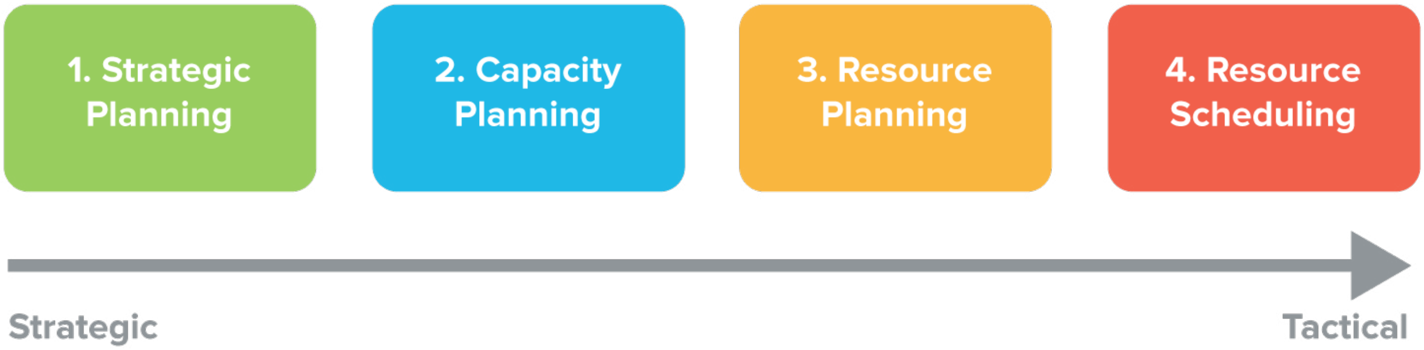
TRAINING

Introduction to Workfront's Solutions for Better People Management

Successfully managing the time, talent, and energy of your people is critical to successful people management and executing business objectives. Workfront's resource management solutions enable you to clearly understand where and how your people resources are being used. These four components help you manage resources from strategic planning to tactical planning.



Strategic Planning

The first step in resource management is about your business plan and prioritizing initiatives for the year.

Leverage the portfolio optimization tool in Workfront portfolios to analyze value against a portfolio's objectives, enabling better strategic planning.

Capacity Planning and Resource Planning

These two components are all about answering the question: "Do I have enough people (supply) to deliver against my priorities (demand)?"

The resource planner allows for basic capacity planning, giving you a clear view of projects and how your workforce stacks up to execute them. The planner works top-down to show availability and how allocating resources impacts availability on lower-priority projects.

If project managers give a simple estimate of what resources they'll need via the project business case, that resource budgeting information rolls up to the resource planner. These tools allow you both a high-level or a granular view of what it will take to get the work done.

Resource Scheduling

The resource scheduling tool helps you ensure the right people are doing the right work at the right time.

Use filters to view priority projects. Then see when resources are available for work, before you start making assignments. Workfront's AI-capabilities make assignments even easier and faster.

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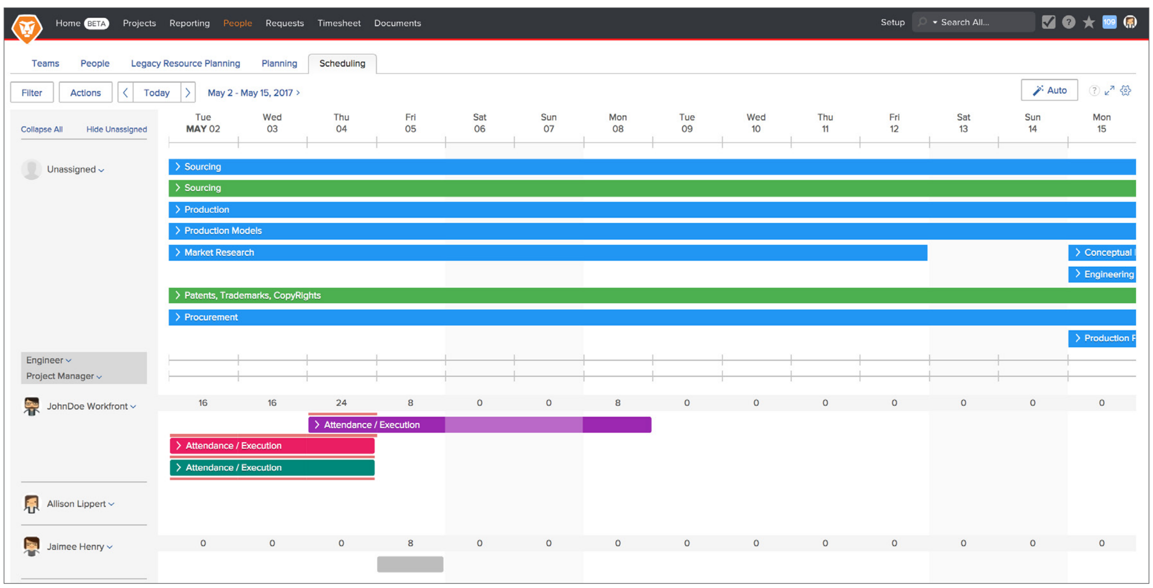
Resource Scheduling Prerequisites

Resource scheduling in Workfront allows resource managers to easily assign tasks and issues to the right users. The timeline provides visibility into which users are capable of completing the work, taking into consideration both their job role and availability.



User prerequisites

You can use the resource scheduling tools from the Scheduling tab, the Staffing tab, or the Working On tab when these conditions are met:

- You are designated as a resource manager on the projects for which you want to manage resources.
- You have a Plan license.

When scheduling from the Staffing tab in a project:

- You are a member of the project team.

When scheduling from the team Working On tab:

- You are a member of the team.

Project prerequisites

These requirements apply when working from the Scheduling tab.

- The project must be in the Planning, Current, or Approved status (or an equivalent).

Task and issue prerequisites

To be the most effective when managing resources, ensure tasks and issues have the following:

- Duration
- Planned Start Date
- Planned Hours
- Job role assignment

Resource Management

The Workfront Help website has a wealth of articles about resource management. Click the blue hyperlinked text to access these recommended articles. Many articles contain links to related topics, so be sure to check those articles out, too.

PORTFOLIO OPTIMIZER

Understanding the Portfolio Optimizer

The portfolio optimizer is used for project evaluation and comparison.

Understanding the Portfolio Optimizer Score and Optimizing in the Portfolio Optimizer

Use the alignment score and the portfolio optimizer score to help rank projects.

Prioritizing Projects in the Portfolio Optimizer

Complete projects in the order established to ensure your portfolio is optimized.

Applying a Scorecard to a Project and Generating an Alignment Score

A scorecard is used to measure how well a project aligns with portfolio criteria.

RESOURCE SCHEDULER

Getting Started with Resource Scheduling

Review the setups and prerequisites needed to effectively use the resource scheduling timeline.

Scheduling Resources for an Individual Project

The scheduling timeline functionality is available on individual projects.

Managing User Allocations

Determine how planned hours should be spread over the duration of a task for your users.

Filtering Content when Scheduling Resources

Avoid being overwhelmed with unassigned work by using filters to focus on priority work.

RESOURCE PLANNER

Planning in the Resource Planner

Understand the prerequisites for using the resource planner and what it can do.

Calculating Hours and FTE for Users and Roles in the Resource Planner

Display allocation and availability of your resources in hours, FTE, or cost.

Understanding the Areas of the Resource Planner

Each part of the resource planner offers valuable information as you manage your user's time.

RESOURCE POOLS

Working with Resource Pools

Resource pools are collections of users needed at the same time for completion of a project.

RESOURCE BUDGETING

Budgeting Project Resources in the Business Case

You can associate resource pools with a project as part of completing the business case.

Creating a Business Case

Use the business case to help prioritize projects and allocate resources.

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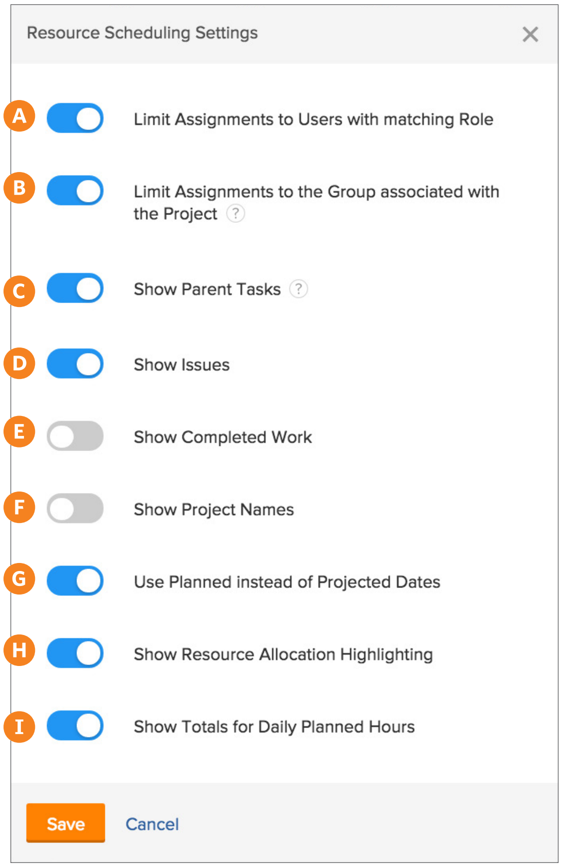
Resource Scheduling Settings

The settings on the resource scheduling timeline determine what information displays on the timeline. Open the Settings window by clicking the gear icon in the upper-right corner of the scheduling window.



A By default, this setting is turned on so that assignments can be made only to a person who has the job role that matches the job role assigned to the task or issue. Turning this off allows you to assign tasks or issues to any user, but it also removes the original job role assignment from the work item. For more information, see **Allowing Assignments to Users Regardless of Role**.

B Only members of the group associated with the project (through the project details) can receive assignments when this option is turned on. This is the default setting. For more information, see **Allowing Assignments to Users Regardless of Group Membership**.

C Parent tasks can be displayed on the timeline, dependent on a project setting called Summary Completion Mode. For detailed information about this setting, see **Configuring Whether Parent Tasks are Displayed on the Scheduling Timeline**.

D Only tasks are shown on the timelines by default. Turn this on to also see unassigned issues.

E When viewing work assignments, the timelines show only uncompleted work for each person. You also can choose to see work that has been marked as complete to get a better overall view of a person’s workload.

F By default, the bars show only the task or issue name. Turning this on makes the bar a bit deeper so the project name is also visible.

G The scheduling timeline uses the project’s Planned dates by default. Turn on this setting to use the Projected dates.

H This option makes the planned hour allocation available on each task. It also puts shading on the task bar, as explained in **Understanding User Allocations**.

I A line next to each team member shows the amount of time (in hours) he/she has already allocated to assignments in Workfront for each day. The line shows the total hours. Red lines in between the task bars indicate the team member is over-allocated.

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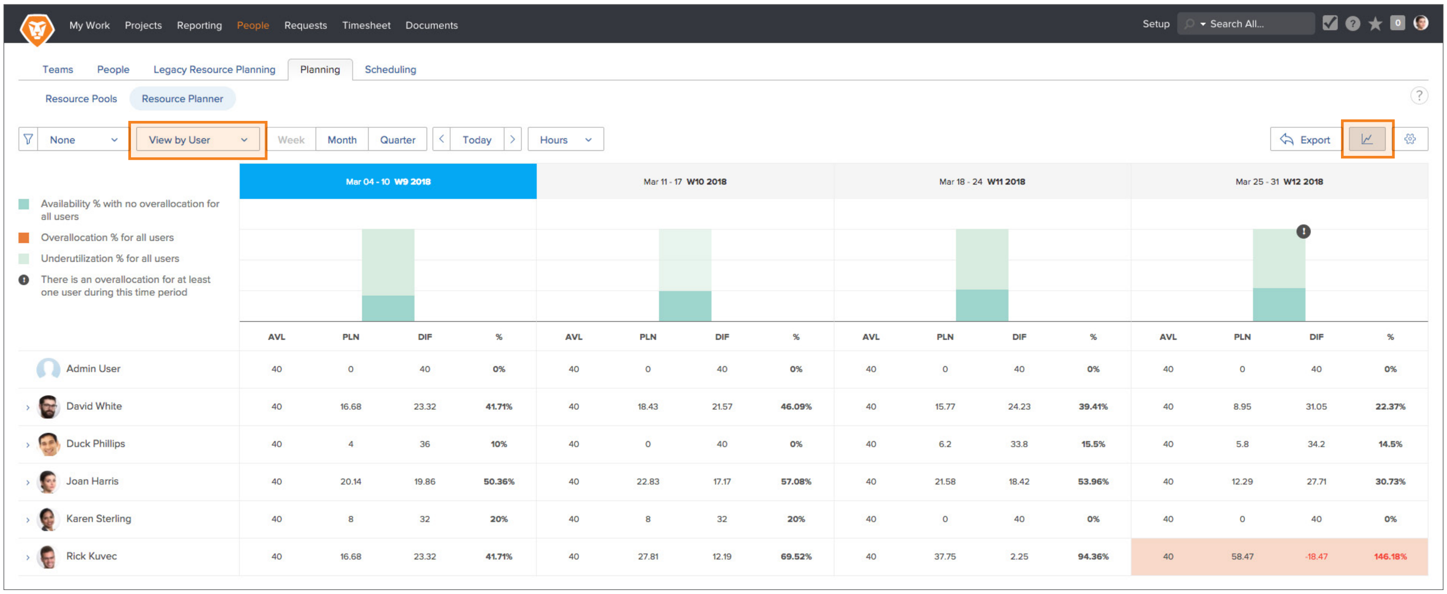
User Allocation Chart

Display the planned allocation of users against their availability using the chart feature in the resource planner. For more information about the planner, see **Understanding the Areas of the Resource Planner** on the Workfront Help wesbite.



	Mar 04 - 10 W9 2018				Mar 11 - 17 W10 2018				Mar 18 - 24 W11 2018				Mar 25 - 31 W12 2018			
	AVL	PLN	DIF	%	AVL	PLN	DIF	%	AVL	PLN	DIF	%	AVL	PLN	DIF	%
Admin User	40	0	40	0%	40	0	40	0%	40	0	40	0%	40	0	40	0%
David White	40	16.68	23.32	41.71%	40	18.43	21.57	46.09%	40	15.77	24.23	39.41%	40	8.95	31.05	22.37%
Duck Phillips	40	4	36	10%	40	0	40	0%	40	6.2	33.8	15.5%	40	5.8	34.2	14.5%
Joan Harris	40	20.14	19.86	50.36%	40	22.83	17.17	57.08%	40	21.58	18.42	53.96%	40	12.29	27.71	30.73%
Karen Sterling	40	8	32	20%	40	8	32	20%	40	0	40	0%	40	0	40	0%
Rick Kuvec	40	16.68	23.32	41.71%	40	27.81	12.19	69.52%	40	37.75	2.25	94.36%	40	58.47	-18.47	146.18%

1. Click People in the global navigation bar, then the Planning tab.
2. Click the Resource Planner subtab.
3. Select the View by User option.
   - You cannot view the user allocation chart when you select View by Project or View by Role.
4. Click the user allocation chart icon at the top-right corner of the planner.

What do the bars mean?

Pale green shading — Represents the total number of hours available for users in the given time period. Click to show users who are assigned less than 100% of their available hours.

Dark green shading — Indicates the overall time that has been planned.

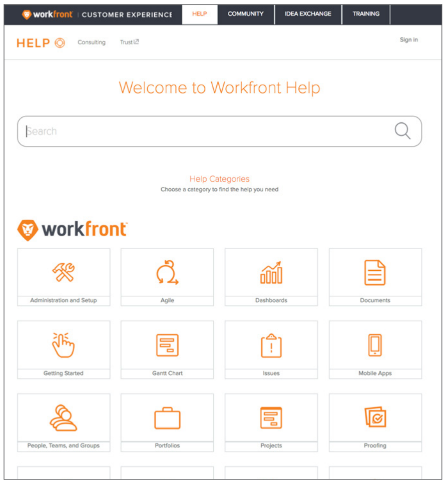
Exclamation point icon — Represents overallocation for at least one user. Click to see who is overallocated.

Orange shading — When planned time exceeds the total time available, the bar continues to grow with an area shaded orange to illustration overallocation.

TRAINING

Workfront Help & Training

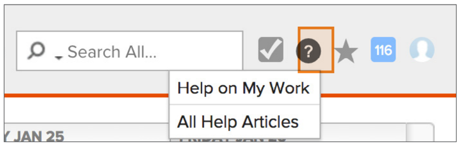
Find answers to software questions on the Workfront Help website. Complete self-paced training in Workfront Ascent and the Workfront Training Center.



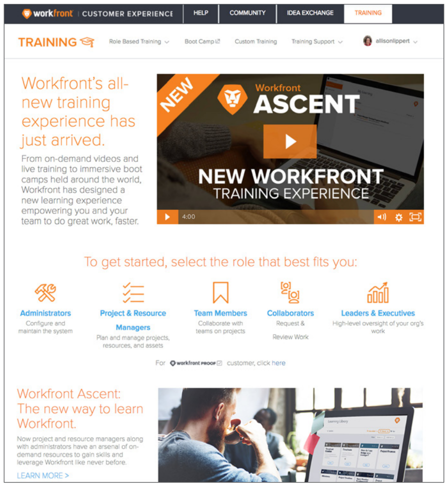
Workfront Help website

support.workfront.com

- Search for articles about Workfront software features
- View collections of articles about specific topics with the Help Categories
- Keep up with new product features in the Product Announcements area (bottom of the window)



- Click the Help icon in the global navigation bar inside Workfront to view Help articles specific to the Workfront area you're on or to access the overall Help website.



Workfront Training Center

training.workfront.com

- Project managers can find additional training in Workfront Ascent. Click the Project & Resource Managers icon to sign in.
- Team members and collaborators (request and review users) can find training through the Workfront Training Center. Click the appropriate icon to access short videos.
- Click the Training Support link at the top of the window to access a variety of articles about Workfront's training program, including a list of all courses offered.

TRAINING

Workfront Training PDU Credits

Many of the Workfront Training courses offered at Leap count toward PDUs (Professional Development Units) at PMI (Project Management Institute). Project Manager Fundamentals is a prerequisite for all PDU-eligible courses.

WORKFRONT COURSE NAME	PDUs	ACTIVITY CODE
Boredom vs. Burnout: Managing Your Team's Workload	1	W-009
Driving User Adoption	1	W-013
Essential Skills for Getting Stuff Done	1	W-012
Get Strategic with People Management	1	W-008
Helpful Reports to Get You from Demand to Delivery	1	W-019
Introduction to Agile Work Management	1	W-014
Manage Reviews & Approvals in Workfront	1	W-017
Moving from Legacy to New Resource Management Solutions	1	W-011
Project Time Management	1	W-016
Queue Management	1	W-018
Review & Approval Administration, Part 1	1	000-039
Review & Approval Administration, Part 2	1	000-040
Scrum and Kanban in Workfront	1	W-015
Setting Up Workfront for Better People Management	1	W-010

Claim your PDUs

Occasionally Workfront will retire course codes at PMI. Activity codes for Leap courses will expire at the end of 2018, so be sure to claim them before then. To verify an activity code is still active or claim a credit, go to:

http://www.pmi.org/ > Certifications > Maintain Certification > Visit CCRs > Search Activities > Search for Workfront

Workfront Training

Ensuring users receive thorough and appropriate training on how to use Workfront is a vital part of a successful implementation and continued adoption. The Workfront Training team offers a variety of training options to fit your organization's needs throughout your Workfront experience.

THE WORKFRONT TRAINING CENTER

Team members and collaborators can access sessions in the Workfront Training Center to prepare for launch. Anyone who will be using Workfront needs to attend training.

- Included with your Workfront purchase
- No registration or login required for Workfront Training Center
- Training available for Work license users (team members, executives/ leaders), Collaborator license users, and Workfront Proof users
- Online learning and live courses available
- Print-ready resources for review and additional learning

Get started at **training.workfront.com**

WORKFRONT ASCENT

Your core team can prepare for your Workfront implementation by taking training through Workfront Ascent.

- Included with your Workfront purchase
- Online, self-paced learning focuses on the needs of project managers, resource managers, system administrators, and others with Plan licenses
- Option to take live courses to supplement online learning
- Print-ready resources for review and additional learning

Get started at **training.workfront.com/ascent**

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TRAINING

SYSTEM ADMINISTRATOR BOOT CAMP

New and beginner-level Workfront system administrators are invited to spend time at Workfront headquarters in Lehi, Utah. Or join us at varying locations across the country.

- Administrator-specific standard training courses
- Courses designed specifically for the system administrators attending Boot Camp, based on pre-session surveys and phone calls
- Not intended for experienced, long-time Workfront system administrators or back-end developers

For dates of upcoming sessions or to register, visit the **Boot Camp** webpage

CUSTOM TRAINING

Custom Training is a collaborative process between your organization’s core team and the Workfront Training team. Our goal is to empower users with the knowledge, skills, and resources they need to get the most value from Workfront.

This collaboration leads to successful training and development of custom documentation — and ultimately a successful Workfront launch.

Dedicated Standard Course

- Dedicated course date/time for users
- Virtual or on-site course delivery
- No content customization
- Course taught with Workfront test drives

Dedicated Custom Course

- Dedicated course date/time for users
- Virtual or on-site course delivery
- Course topic selection; customer workflows can be incorporated
- Course taught using customer’s live or sandbox environment

Custom Documentation

- Documentation captures your processes and workflows within Workfront’s feature functionality
- Custom documentation can be added to custom training purchase or purchased separately

Train the Trainer

- Training consultation and/or working session with Workfront trainer
- Customized course training outline for team members or project managers
- Customer delivers training to end-users

Contact your Workfront sales representative for details.