

# Enhance the User Experience with Dashboards & Layout Templates

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](mailto:training@workfront.com) with any questions or feedback.

Hope to see you at Leap 2019!

Sincerely,  
The Training Team





# Dashboards Increase Work Visibility

Organizing reports into **dashboards** puts information at users' fingertips — even more so if you put the dashboard on a custom tab or include the dashboard in a layout template.

Here are some ideas of reports you could include in dashboards for several job roles.

## **Executives, directors, portfolio/program managers**

- Project requests assigned to me or my team
- Active projects by program or portfolio
- Active projects by owner and condition
- Actual vs. planned labor costs
- Actual vs. planned hours
- New projects by week or month
- Revenue by group
- Portfolio or program cost and revenue
- Hours logged by vendors, freelancers, etc.

## **Resource managers, traffic coordinators, portfolio/program managers, etc.**

- New project requests
- Requests that have been converted to projects or tasks
- Projects that were created by converting a request
- Requests that will be handled ad hoc (not converted, left as an issue)
- All tasks from all projects assigned to a team
- Resource managers can also take advantage of the resource management tools built into Workfront: resource planner, resource budgeting, utilization reports, etc.

## **Project managers**

- Requested projects in the project manager's program or portfolio
- Recently closed tasks
- Late tasks
- Recently completed projects
- Hours logged by week
- Project overview
- Total project hours
- At risk projects
- Open issues
- Projects, tasks, issues, documents, or proofs that need approval

## **Team members**

- Active tasks
- Upcoming tasks
- Late tasks
- Tasks awaiting predecessor completion



# Layout Template Best Practices

Layout templates define the user interface in Workfront, allowing system administrators to minimize and streamline the features available to users. The goal of a **layout template** is to put the right information in front of the right people and make that information easily accessible. Keep these best practices in mind when developing layout templates.

## 1 Simplify

- Make sure users land on the proper Workfront homepage for their job roles.
- Remove unused menu items from the Global Navigation Bar.
- Customize tabs on the global Workfront pages and project, task, or issue landing pages.
  - › Put tabs in order of importance from left to right. The left-most tab is the tab that opens by default when you go to that page.
  - › Hide tabs that aren't necessary to your workflow.
  - › Move infrequently used tabs to the More dropdown.
- Reduce confusion about which filters, views, and groupings to use by removing unused options from the lists.
- Customize the My Work area (or the new Home page) with fields that put information in front of team members — deadlines, descriptions, priority, job numbers, etc. — so they don't have to dive into the landing page of each work assignment.
- Don't go overboard creating layout templates. The more you make, the more you have to maintain.

## 2 Put dashboards on custom tabs

- **Custom tabs** make dashboards easily accessible.
- Dashboards are more visible when on custom tabs, reminding users to check reports for current work status, incoming issues, etc.
- Place dashboards on project landing pages to see data relevant to that specific project.
- Make sure Dashboards contain reports that are applicable and useful to the user.

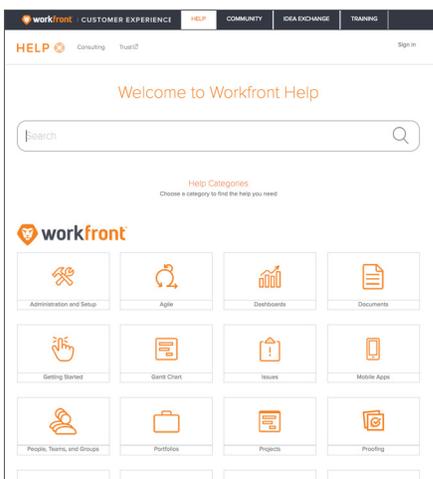
## 3 Assign layout templates for most, if not all, users

- Use Layout Templates for any job role, team, or user that needs one.
- Assign Layout Templates by individual user, team, or job role.
  - › Typically you want to assign a Layout Template to multiple people or teams at the same time. This ensures everyone is viewing the same Workfront layout, which makes training and support easier.



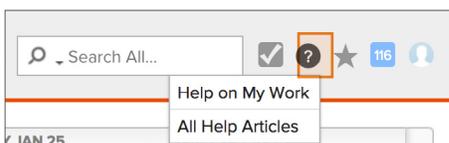
# Workfront Help & Training

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

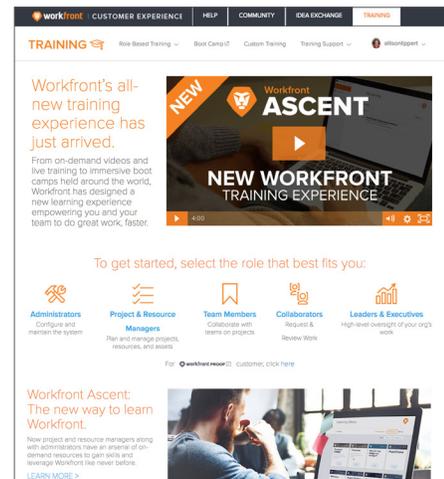


## Workfront Help website [support.workfront.com](https://support.workfront.com)

- 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](https://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.



# 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](https://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](https://training.workfront.com/ascent)

## 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.