

Get Strategic with People Management

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





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.

1. Strategic Planning

2. Capacity Planning

3. Resource Planning

4. Resource Scheduling

Strategic

Tactical

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 and 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.



Resource Planner Basics

The resource planner gives a view of all projects and a real-time look at how your workforce stacks up to execute them, allowing for basic capacity planning. Before you dive in, get familiar with some of the basics.



Supply and demand

As you learn about Workfront's resource management solutions, you'll hear us refer to "supply and demand."

- Supply — Your users' available hours (when people can work).
- Demand — What work needs to be done and when (what's been planned for project work).



System setups

For the resource management solutions to work properly, certain Workfront setups are required. You'll want to follow the recommendations in [Setting Up Workfront for Better People Management](#), available as an on-demand course in Workfront Ascent.

For more information about Ascent, Workfront's online training platform, go to training.workfront.com



Prerequisites

In order to have access to the resource planner, the following prerequisites must be met:

- Users must have a Plan license to use the resource planner.
- Users must be assigned as the resource manager in the project details.
- Projects should have planned hours, durations, and job roles assigned to tasks.



Resource Management Terminology

Workfront's resource management tools help you easily and appropriately allocate resources to ensure the most important and most valuable projects are given the attention they need. Understanding the terminology will help you accurately juggle the backlog of work.

Resource Manager

A resource manager at your organization is someone who is responsible for managing the assignments given to each member of a team, department, etc. The person who performs these duties could have a variety of job titles, such as resource manager, traffic manager, team lead, etc.

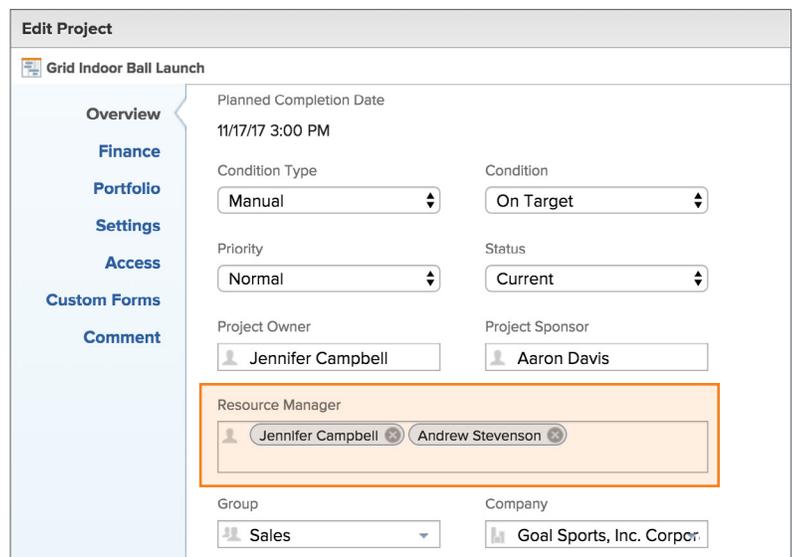
In Workfront, a resource manager is a user whose name is entered in the Resource Manager field in the project details. This allows that person to use the various resource management tools to resource or staff that project.

Job Role

Job roles in Workfront describe the type of job duties a user might perform. Job role names do not necessarily align with job titles. A job role(s) is assigned to a user by the system administrator when the user's Workfront login is created.

A user is assigned a primary job role that reflects the majority of the work they do. But secondary job roles can be assigned to reflect other job duties the user performs. The resource tools recognize all assigned job roles, allowing the user to be assigned to a variety of tasks.

Job roles are assigned to tasks and issues as placeholders, until a specific user is assigned. For Workfront's resource tools to work, job roles must be assigned to users. A percentage associated to the job role represents how much of the user's time can be spent working in that role.



Edit Project

Grid Indoor Ball Launch

Overview | Finance | Portfolio | Settings | Access | Custom Forms | Comment

Planned Completion Date: 11/17/17 3:00 PM

Condition Type: Manual | Condition: On Target

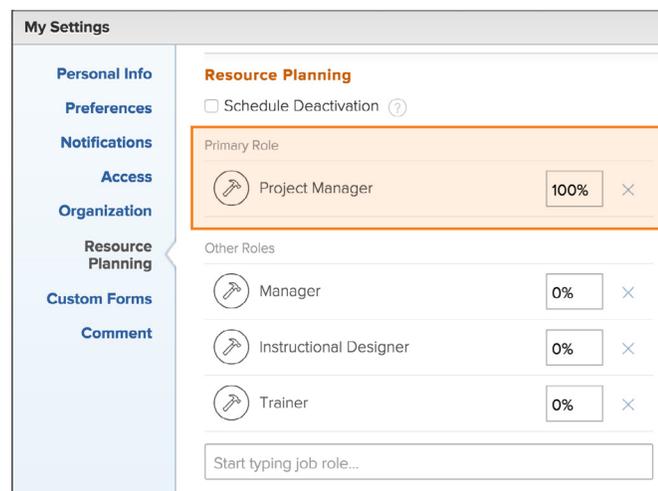
Priority: Normal | Status: Current

Project Owner: Jennifer Campbell | Project Sponsor: Aaron Davis

Resource Manager

Jennifer Campbell | Andrew Stevenson

Group: Sales | Company: Goal Sports, Inc. Corpor.



My Settings

Personal Info | Preferences | Notifications | Access | Organization | Resource Planning | Custom Forms | Comment

Resource Planning

Schedule Deactivation ?

Primary Role

Project Manager 100% ×

Other Roles

Manager 0% ×

Instructional Designer 0% ×

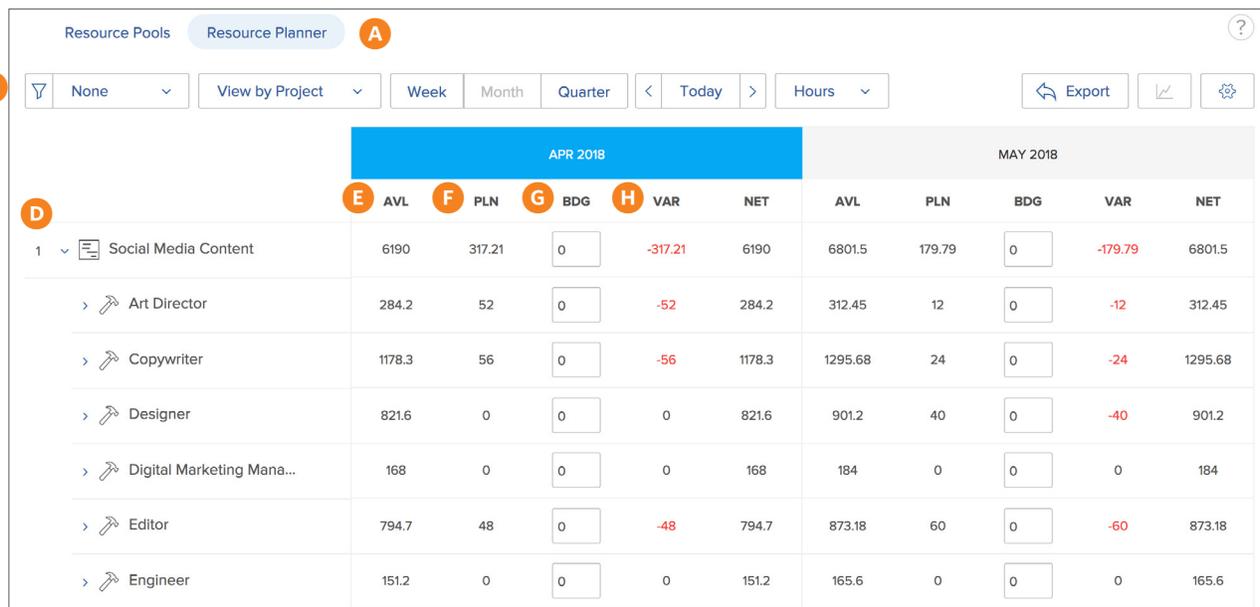
Trainer 0% ×

Start typing job role...



Resource Planner Overview

The resource planner will give you numbers on total available resource supply, individual project demand, the difference between the two, and what's left over.



		APR 2018					MAY 2018				
		AVL	PLN	BDG	VAR	NET	AVL	PLN	BDG	VAR	NET
1	Social Media Content	6190	317.21	0	-317.21	6190	6801.5	179.79	0	-179.79	6801.5
>	Art Director	284.2	52	0	-52	284.2	312.45	12	0	-12	312.45
>	Copywriter	1178.3	56	0	-56	1178.3	1295.68	24	0	-24	1295.68
>	Designer	821.6	0	0	0	821.6	901.2	40	0	-40	901.2
>	Digital Marketing Mana...	168	0	0	0	168	184	0	0	0	184
>	Editor	794.7	48	0	-48	794.7	873.18	60	0	-60	873.18
>	Engineer	151.2	0	0	0	151.2	165.6	0	0	0	165.6

A Open the resource planner by going to People in the global navigation bar, the Planning tab, and then the Resource Planner subtab.

B Use the filters to change what you're focusing on (project, role, user); change the timeline (week, month, quarter); and view your resources in hours, FTE, or cost.

C Recommended setting: Turn on Include Hours from Issues to get a more accurate view of the total available resource hours.

D Prioritize projects by changing the number beside each project name to ensure your resources go to the most important projects.

E The Available (AVL) column shows the total available hours based on schedules and budgeted work. Use this as your guide to making resource decisions.

F When project managers create project plans with durations, job roles, and planned hours, that information carries over into the resource planner and into the Planned (PLN) column. A single number shows the total hours needed for the project.

G Enter the resources to allocate to the project in the Budgeted (BDG) column. If there are already numbers in the column, these came from the resource budget section in the project business case.

H The Variance (VAR) column compares the planned and budgeted columns. If you budget for less than was planned for, the negative number appears in red. If you budget more hours than were planned for, the variance is a positive number in black.



Two Ways to Budget

Project managers indicate their resource needs in different ways. Some will provide a rough estimate of the resources they need, while others will provide a detailed project plan. Either way, the information they provide feeds into the resource planner to help you make informed decisions.

Resource Budgeting
This is the Labor Cost of the resources budgeted in the Resource Planner

Resource Pools
Testing Pool x

Apply

Week Month Quarter < Today > Hours v Export

	APR 2018					MAY 2018				
	AVL	PLN	BDG	VAR	NET	AVL	PLN	BDG	VAR	NET
Campaign XYZ Email Blast						1104	199.67	0	-199.67	1104
Copy Editor						-	4	-	-	-
Copywriter						-	32	-	-	-
Designer						-	60	-	-	-
E-Learning Designer						-	3.67	-	-	-
Project Manager						-	1	-	-	-

Resource Budgeting

The business case gives project managers a chance to put their ideas into numbers, including their rough estimates of what the project will entail — dates, skill sets, total hours, etc.

Before they build out a project, the best way for project managers to communicate their resource needs is through the Resource Budgeting section.

Project managers can enter the overall resources they think they need and when they need them.

This information automatically updates to the budgeted (BDG) column in the resource planner. When numbers are updated there, the business case numbers update. Then project managers can use these numbers to plan their projects in detail.

Campaign XYZ Email Blast

Project Owner: Allison Lippert (Admin User)
Planned Completion: Jun 7, 2018
Status: Current
Condition: At Risk
Percent Complete: 28%

Tasks Project Details Updates Documents Issues Risks More

+ New Task Export Filter All View Standard Grouping Nothing

#	Task Name	Assignments	Duration	Pin Hrs	Predecessors	Start On	Due On	% Complete
1	Create Copy & Layout		18.5 Days	68 Hours		5/4/18	5/31/18	21.62%
2	Create Layout	Designer	4 Days	16 Hours		5/4/18	5/9/18	100%
3	Final Layout	Designer	10 Days	16 Hours	2	5/10/18	5/23/18	0%
4	Initial Copy	Copywriter	2 Days	16 Hours	3	5/24/18	5/25/18	0%
5	Final Copy	Copywriter	2 Days	16 Hours	4	5/29/18	5/30/18	0%
6	Proofread Copy	Copy Editor	0.5 Days	4 Hours	5	5/31/18	5/31/18	0%
7	Creative		5.5 Days	44 Hours		5/31/18	6/7/18	0%

Detailed project plan

If the project manager has already filled out the project timeline with job roles, durations, and planned hours, this provides more information for making resource decisions.

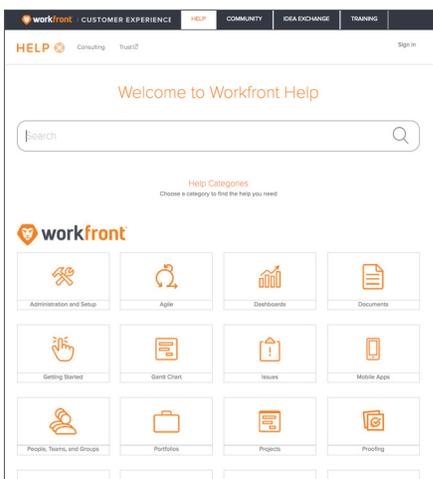
All of this information carries over to the resource planner and into the planned (PLN) column. It displays the total hours needed for the project as a single number.

Compare the demand (planned hours) to the supply (available hours) in the resource planner to decide if you can give project managers the resources they've asked and planned for, based on what is available.



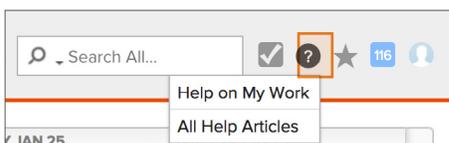
Workfront Help & Training

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

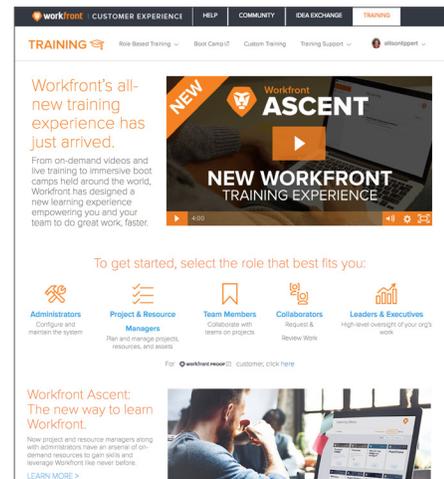


Workfront Help website support.workfront.com

- 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.



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

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.