

Manage Reviews & Approvals in Workfront

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





Tips & Tricks for Uploading Proofs

Files go through a variety of processing steps while the proof is being generated. Many things factor into the amount of time it takes a proof to generate, including file size, number of pages, type of file, content of the file, etc. To optimize proofing times, Workfront offers the following tips.

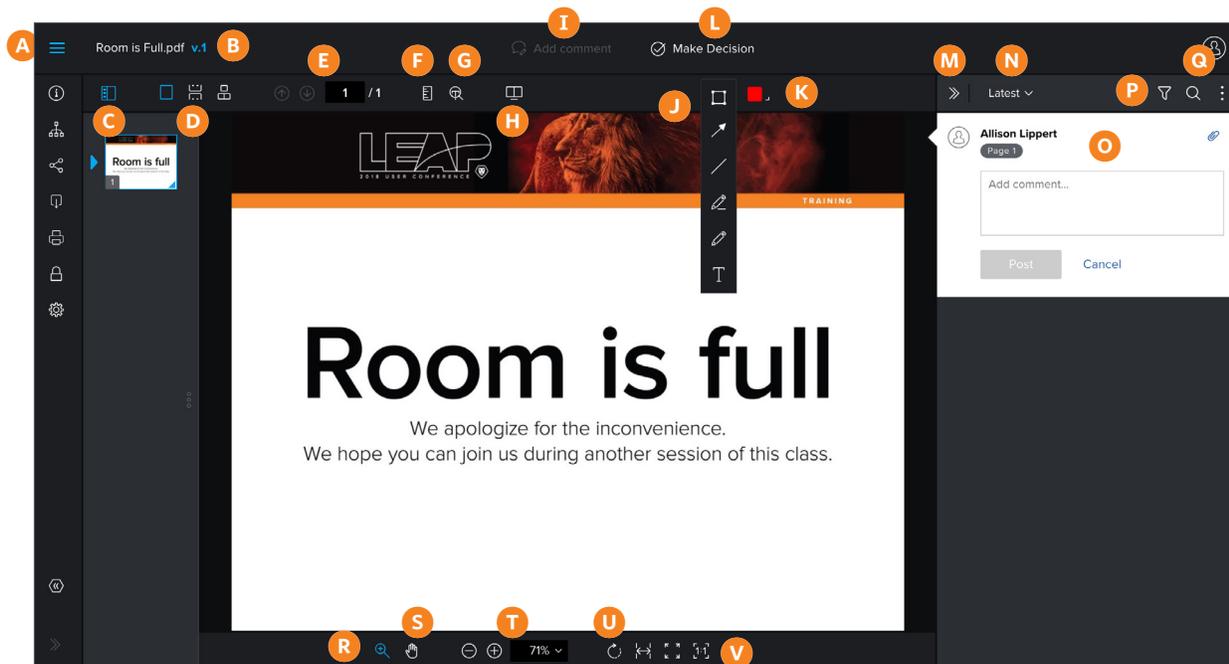
- Use the latest version of the software used to produce your documents.
- If you're not sure which settings to use when saving or exporting files, use the default settings.
- Embed fonts in the file.
- Place text elements in the top layer of your design.
- Make sure color settings are consistent throughout the document.
- Place all images and elements inside your document. If images are linked to an outside source (e.g., on your computer), they won't show up on other machines. Plus, the processing tools that create the proofs won't be able to reach them.
- Run preflight check software to see if there are any warnings for your document.
- Text is extracted from PDFs, Microsoft Office, Adobe Photoshop and Adobe Illustrator files during proof processing. This allows you to use the text tool while doing markups on the proof. The file must have an extension (e.g., .pdf, .psd, etc.) or Workfront won't recognize the file type and won't extract the text. Text included as images or curves will not be extracted.





Using the Proof Viewer

The Workfront proof viewer is used to comment on print documents, web pages, video, and more. You also can approve or reject proofs through the proof viewer.



- A** Hide/display the toolbar on the left.
- B** Access previous versions of the proof.
- C** Hide/display the thumbnail view panel.
- D** Choose between single-page display, continuous scroll, or magazine layout.
- E** Navigate through pages of the proof.
- F** Measure an area of the proof.
- G** Search the text of the proof (available for specific file types).
- H** Compare versions of the proof.
- I** Add a comment and/or markup.
- J** Markup tools are available after clicking Add comment.
- K** Change the color of your proof markup.
- L** If you're a proof approver, make your decision on the proof (approve, reject, etc.).
- M** Collapse comments column. Click View comments link to display the column again.
- N** Sort comments.
- O** Make a comment, reply to a comment, attach a file to a comment, etc.
- P** Filter comments.
- Q** Search comments.
- R** Zoom in/out on the proof.
- S** Move the proof around within the window.
- T** Change zoom percentage of the proof.
- U** Rotate the proof.
- V** Options for fitting proof within the proof viewer window.



Progress Bar and Status

Track the progress of your digital proof through the review and approval workflow using the progress bar. You can see an overview of the progress in the Details tab of the selected document in Workfront, or dig in and see how each reviewer/approver is doing.

Using the progress bar and status

The Proofing section displays a progress bar that represents the overall progress of the document through the workflow. The Proof Status shows the status of the proof in terms of decisions made on the proof. It shows up to the left of the progress bar.

Proofing

10/18/16 Pending **S O C D** [Details](#)

Decoding the progress bar

The progress bar boxes each stand for a step in the document's proofing process.

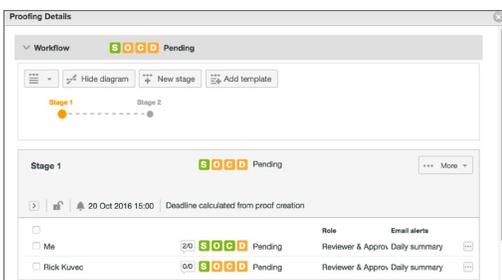
- S — Sent (proof has been sent to reviewers)
- O — Opened (meaning that either the proof details page has been opened or the proof itself has been opened in the proof viewer)
- C — Comments made (meaning that the comments have been made on the proof)
- D — Decision made (meaning that a decision has been made on the proof)

If the C or D is missing from the progress bar, that step is not applicable for the proof.

The colors used in the Progress Bar relate to the deadline on the proof:

- White — step not complete
- Orange — step not complete and deadline is in less than 24 hours
- Red — step not complete and passed deadline
- Green — step is complete

NOTE: The overall progress of the proof is driven by the "worst case" participant. For example, 4 people have been assigned to review and approve the proof. If 3 of them have reviewed and made a decision but the fourth person hasn't, the overall progress will indicate a decision has not been made because the proof is waiting for that final decision.



Tracking individual reviewers

Once you're in the Proofing section, click the Details link. In the proofing details window, you can see each stage of the workflow and each reviewer/approver in each stage. Next to each person's name is the progress bar indicating which step in the workflow that person is at.

The proof status is listed to the right of the progress bar, for both the overall workflows and the individual review workflows.



Proofing a URL in Workfront

Interactive website proofing allows you to review elements of a website that cannot be proofed with a static screen capture, such as animations, embedded videos, user interactions, and widgets. With Workfront's review and approval features, you also can create a static proof of a website.

Generate a URL proof

1. Open the project, task, or issue landing page. Select the Documents tab.
2. Click the Add New button and select Proof.
3. In the green field, enter the URL for the website you want to proof.
 - The URL must be a public-facing URL (not behind a firewall).
4. Hit Return to add the website to the upload queue.
5. Edit information about the URL before uploading by clicking the edit (pencil) icon next to the URL in the upload queue.
6. Rename the proof, if desired. The default name is the URL you entered.
7. Select if you want a screenshot of the website for the proof or an interactive proof.
 - The screenshot will appear in the proof viewer as a static file, such as a PDF.
 - An interactive proof will play animations, view HTML5 images, etc. Interactive proofs must be hosted with a secure protocol (https).

Home BETA Projects Reporting People Requests Timesheet Documents

New proof

Review file TASK

Add files

Drag & drop files here or [browse](#)

[www.workfront.com](#)

0 files (0 proofs)

You haven't added any files yet

Create Proof Cancel

1 file (1 proof) [Delete all](#)

<https://www.workfront.com>
<https://www.workfront.com> 1366 x 768 HD



Proofing a URL in Workfront (continued)

8. Select a resolution, if using the screenshot option.

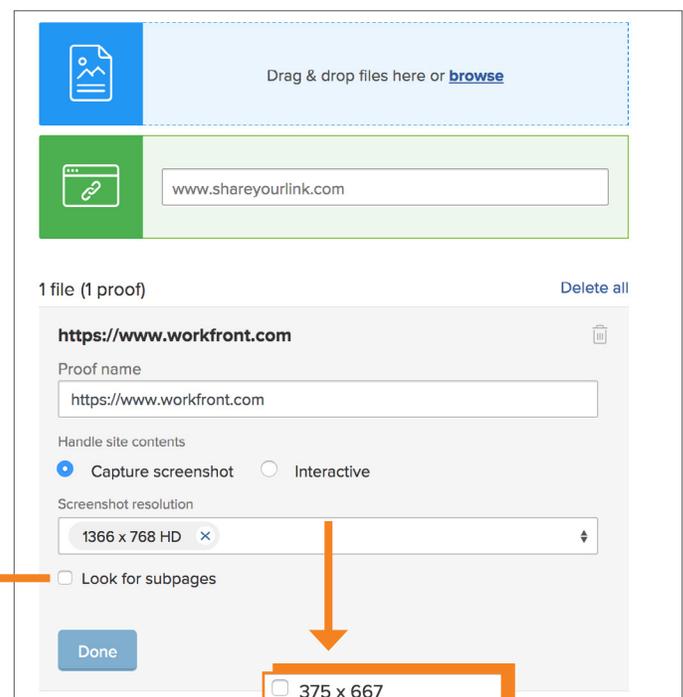
- This allows you to see how the URL would appear on different devices.
- If you select multiple resolutions, a separate proof is created for each resolution.

9. Indicate which subpages to include in the proof, if using the screenshot option.

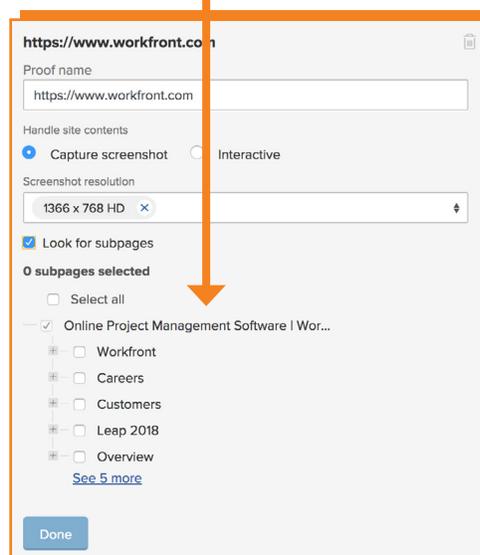
- You can expand the website up to two levels deep from the main page.
- Each subpage you select is generated as an individual proof. Use the combine into a single proof option to combine all selected subpages into a single proof file.

10. Fill in other proof information, such as a proofing workflow, as required by your organization.

11. Click the orange Create Proof button to complete the upload.



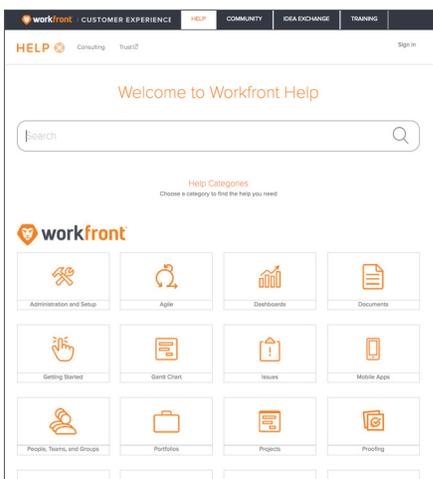
- 375 x 667
- 640 x 1136
- 1024 x 768 XGA, iPad
- 1080 x 1920
- 1280 x 720 WXGA
- 1280 x 800
- 1366 x 768 HD
- 1600 x 1200 UXGA





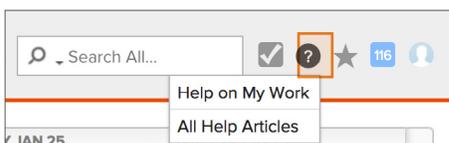
Workfront Help & Training

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

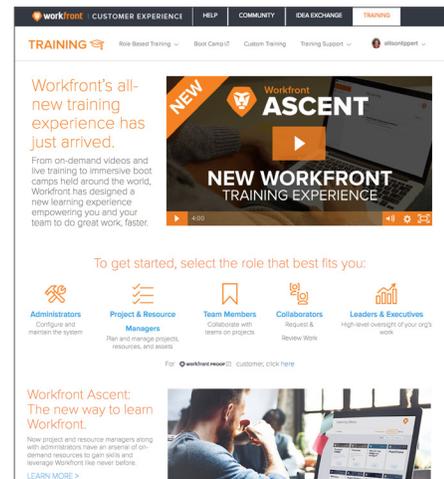


Workfront Help website support.workfront.com

- 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.