

Moving from Legacy to New Resource Management Solutions

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.



Legacy Resource Tools to New Solutions

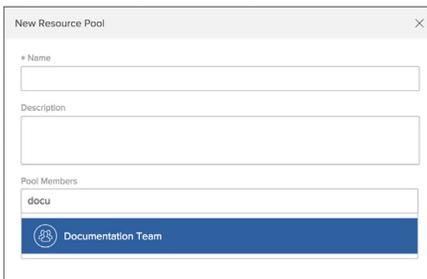
Workfront has all-new, streamlined resource management tools that have been released over the past few software releases. These tools make sure you have all the information you need for strategic and tactical resource planning. In addition, Workfront is deprecating the Flash-based tools by the end of 2018. So we suggest you start making the transition to the new offerings.

IF YOU WERE USING ...		WE RECOMMEND ...	
Legacy Resource Pools	Resource pools had a 1:1 relationship with a project, meaning only one pool could be assigned to a project. This limited your ability to manage resources.	Resource Pools	Multiple resource pools can be assigned to projects, giving you full control of how your people are allocated to key initiatives across your organization.
Resource Budget Manager	This allowed you to budget job roles across resource pools. This was a manual process and added an extra step to sharing users' time across the organization's projects.	Resource Planner	The new resource pool capabilities eliminate the need for the resource budget manager because the pools aren't limited to a 1:1 relationship with the project.
Capacity Planner	The capacity planner is a Flash-based tool. It was restricted to the resources of a single resource pool.	Resource Planner	This planner provides visibility beyond one resource pool, plus allows you to prioritize projects.
Resource Estimates	This part of the business case communicated the project's resource needs by job role. The Flash-based tool limited you to one resource pool; you had to add job roles manually and enter estimates; and it didn't provide insight into availability.	Resource Budgeting	Still a part of the business case, the resource budgeting area lets you select multiple resource pools. Plus, it gives visibility into job role and user availability. Essentially a resource planner for a specific project. You can view data in hours, cost, or FTE, and see variance and net remaining availability. Changes made here show up in the resource planner
User Utilization and the Resource Grid	The legacy utilization report had basic filters and limited visibility into what a user was actually doing.	Resource Planner and Utilization Reports	The resource planner lets you see user-specific data, from high-level allocation to project-specific data.



Resource Pools

Resource pools are collections of users whose time and talents are shared across projects. Multiple **resource pools** can be assigned to a project, allowing you to increase the supply of available resources to meet the demands of your project. Think of how the pools will be used before creating them so you can ensure the proper structure. Resource pools are optional, but they are an extremely helpful tool for resource management in Workfront.



New Resource Pool

* Name

Description

Pool Members

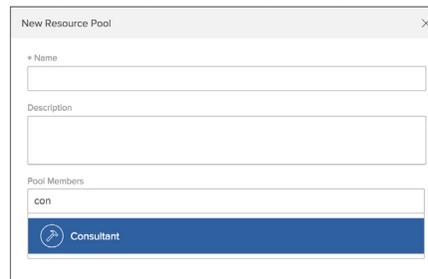
docu

Documentation Team

Team

All users in the resource pool belong to the same team.

Example — You need all members of the marketing team available for projects. Create a resource pool and select the marketing team from the dropdown. This adds all members of the team to the pool, so you don't have to add them individually. You can remove users, if needed.



New Resource Pool

* Name

Description

Pool Members

con

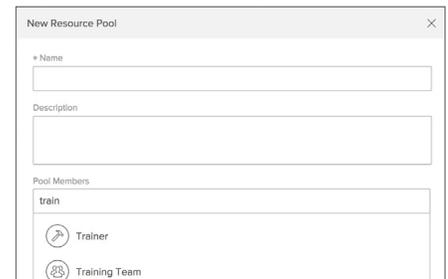
Consultant

Job Role

All users in the resource pool fulfill similar job roles. This is useful when job roles are in high demand and must be budgeted separately.

Example — You have external resources who work as consultants. You want these external resources available for the occasional project to work alongside your internal consultants. You can create two pools — one for internal consultants and one for external consultants. Then you can attach both pools to your project.

This method also works well when you have users with multiple job roles. Workfront user settings allow you to allocate a user's time to the different job roles they're assigned.



New Resource Pool

* Name

Description

Pool Members

train

Trainer

Training Team

Department/Cost Center

If your organization prefers, you can create resource pools by department or cost center.

CONSIDERATIONS

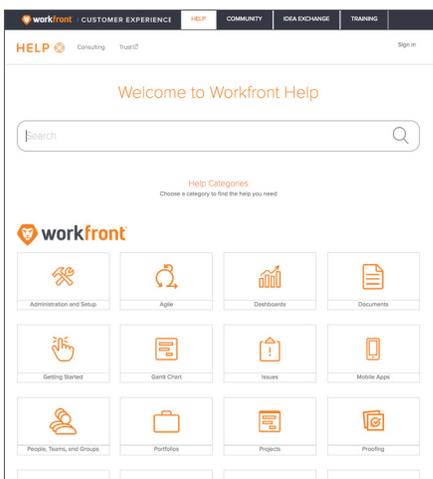
If the resource pool structure you created using the legacy tools works well, then keep that going. If not, then review your processes and examine the suggestions provided.

Another consideration is data visibility and accuracy in the resource management tools. Who is assigned to a resource pool attached to a project affects the users and job roles that appear in the resource planner.



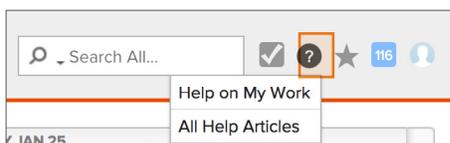
Workfront Help & Training

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

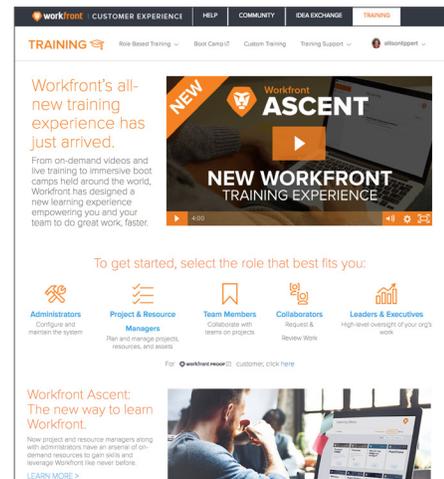


Workfront Help website support.workfront.com

- 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.