

Project Time 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

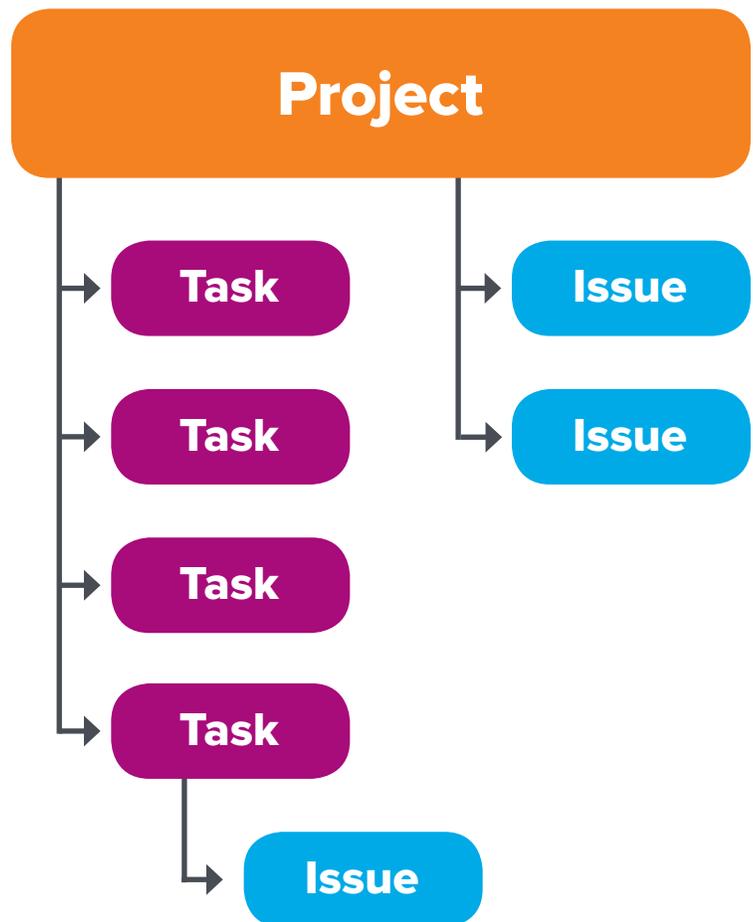




Work Structure in Workfront

When we talk about “work” in Workfront, we’re normally talking about projects, tasks, and issues. The illustration (below right) shows how the three can be structured.

	PROJECT
Projects are a collection of work items that need to be completed to accomplish a specific goal.	
	TASK
Tasks are planned work items that may be part of a larger project or initiative. Tasks can also be ad-hoc items that aren't associated with a larger project. Tasks are assigned to users or teams to complete.	
	ISSUE
Issues are unplanned work items in Workfront. They may be problems that occur during the course of a project, or they may be requests that are submitted through a request queue. Issues are assigned to users or teams for resolution.	
All issues logged on a project must be resolved before a project can be marked as complete.	





Project Planning: Duration & Planned Hours

Using durations and planned hours when planning your project timeline provides flexibility should dates need to change, work fall behind, etc.



DURATION

The window of time or opportunity during which a task should be completed. Establishes the amount of time between the Planned Start Date and the Planned Completion Date for the task.



PLANNED HOURS

The number of man hours (or amount of effort) required to accomplish the task. The Planned Hours will occur during the Duration timespan.

<p>Duration saves the full expression.</p> <p>2 minutes 2 hours 2 days 2 weeks 2 months</p>	<div style="border: 1px solid orange; border-radius: 10px; padding: 10px; display: inline-block;"> <p>2m</p> <p>2h</p> <p>2d</p> <p>2w</p> <p>2mo</p> </div>	<p>Planned Hours saves as hours.</p> <p>.03 hours 2 hours 16 hours 80 hours 320 hours</p>
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Duration and Planned Hours can be entered using the in-line editing feature on the task list.

Both can be expressed in minutes, hours, days, weeks, or months.

Planned Hours always saves and displays as hours, regardless of the time format used when entered.

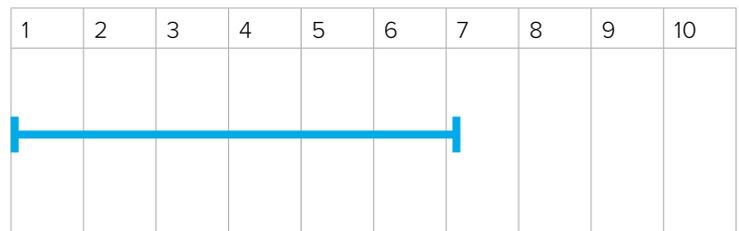


Date Types

The date types in Workfront give you a good picture of how work is progressing on a task or project. Comparing these dates lets project managers know if work is progressing in line with planned dates or not.

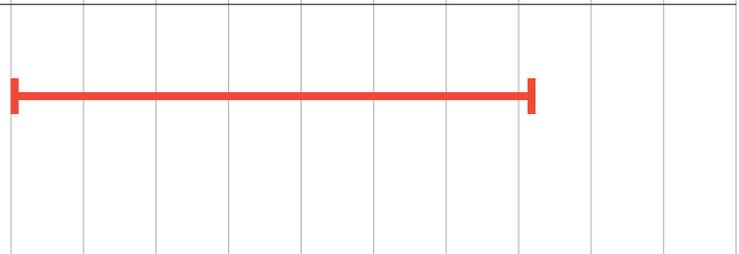
Planned

Start and completion dates for a task were set by the project manager while defining the project timeline. This task is scheduled to start on the 1st and be done on the 6th.



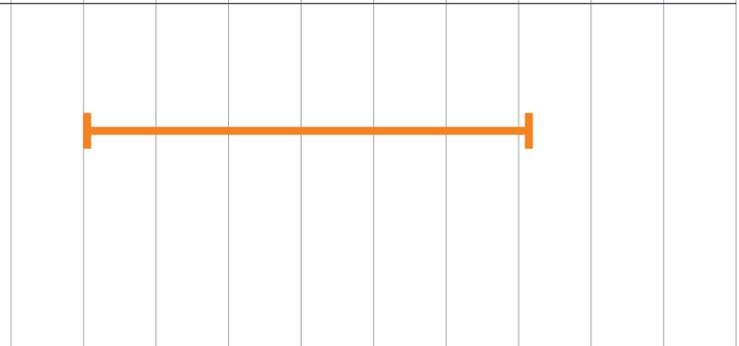
Commit

Date the task assignee gives as their commitment of when they will have the task completed. With this task, the assignee asked for a different Commit Date, due to the amount of work that needed to be done.



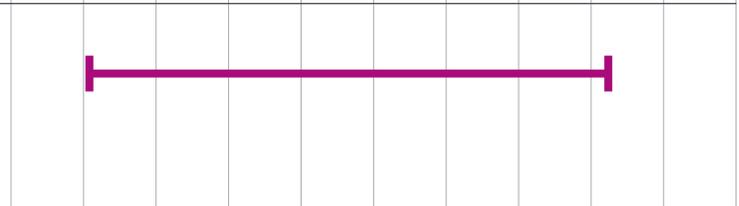
Projected

“Real time” view of the expected start/completion date. Calculated by Workfront based on work completed and work remaining in the project. Because the assignee suggested a Commit Date, the Projected Completion Date is set to match. However, Workfront pushed the Projected Start Date back based on the predecessors, durations, and work completed on the preceding tasks.



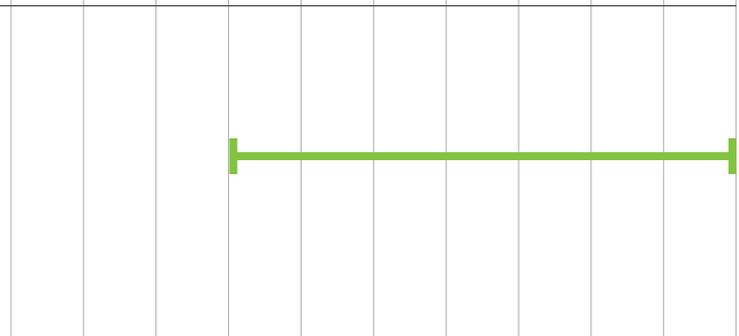
Estimated

The same as Projected dates but does not factor in task constraints or Commit Date. The system gives a true estimation of when it thinks the task will start and end, regardless of the task constraint.



Actual

Date and time the work is actually started or completed. Changing the status “timestamps” the project, task, or issue with the actual date/time. The assignee wasn’t able to start the task on time and ended up finishing later than the Commit Date. Because the work wasn’t done on time, Projected dates on future tasks throughout the project will be affected.





Using Task Constraints

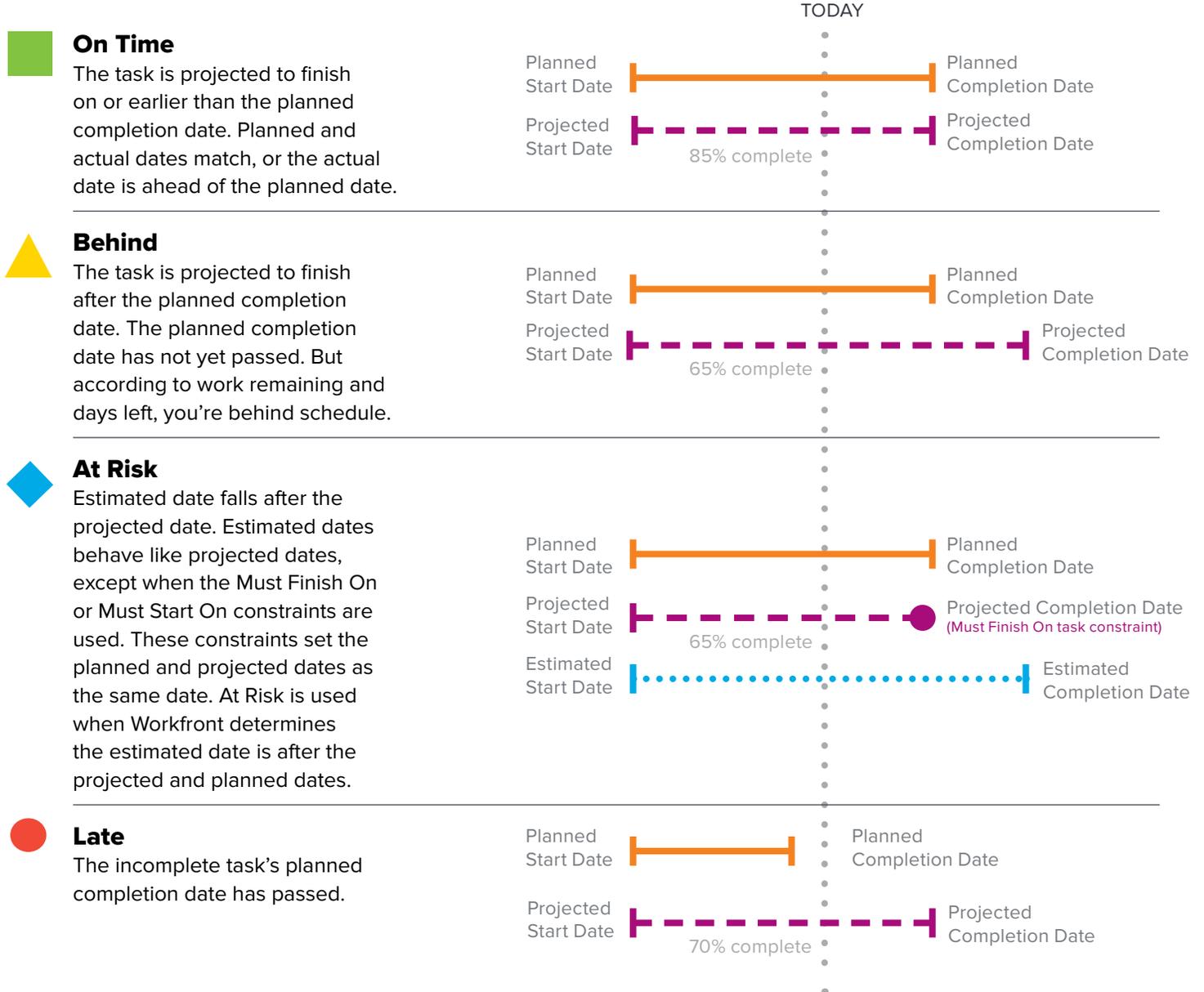
Task constraints determine the placement of tasks within the timeframe of the project. Depending on the constraint used, the project manager may have to select a start date, finish date, both dates, or no dates at all.

TASK CONSTRAINTS	
AS SOON AS POSSIBLE	Places the start date and time of the task at the planned start date of the project. When a predecessor is used, the task start date is placed as close to the project planned start date as possible. This is the default constraint if a project uses a schedule mode of Schedule from Start Date.
AS LATE AS POSSIBLE	Places the finish date and time of the task at the planned completion date of the project. When a predecessor is used, the task finish date is placed as close to the project planned completion date as possible. This is the default constraint if a project uses the Schedule From option of Completion Date.
EARLIEST AVAILABLE TIME	This constraint acts just like the As Soon As Possible option; therefore, we recommend using As Soon As Possible instead.
LATEST AVAILABLE TIME	This constraint acts just like the As Late As Possible option; therefore, we recommend using As Late As Possible instead.
START NO EARLIER THAN	The task is scheduled to start at any time AFTER the date that you specify. So if you pick April 15 as a constraint date, the task needs to start any time after April 15.
START NO LATER THAN	The task is scheduled to start at any time BEFORE the date that you specify. So if you pick April 15 as a constraint date, the task needs to start any time before April 15.
FINISH NO EARLIER THAN	The task is scheduled to finish at any time AFTER the date that you specify. So if you pick May 20 as a constraint date, the task needs to finish any time after May 20.
FINISH NO LATER THAN	The task is scheduled to finish at any time BEFORE the date that you specify. So if you pick May 20 as a constraint date, the task needs to finish any time before May 20.
MUST START ON	The task must start exactly at the time and date that you specify. The duration of the task determines the Planned Completion Date.
MUST FINISH ON	The task must finish exactly at the time and date that you specify. The duration of the task determines the Planned Start Date.
FIXED DATES	You specify the exact start and end dates in the Planned Start Date and Planned Completion Date fields. This selection determines the duration of the task.



Task Progress Status

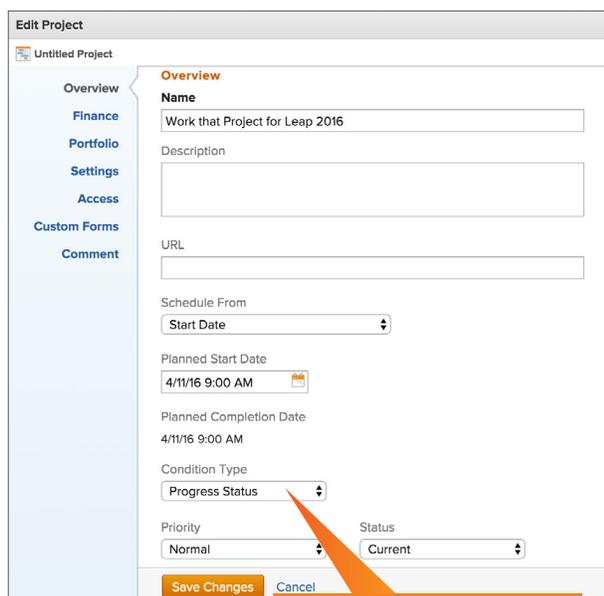
A task's progress status lets you know if the task is on time, behind, at risk, or late. Workfront uses a variety of date types when configuring the progress status information.





Project Condition

The **project condition** is used to indicate the project's overall health. Condition can be set manually (in the project details), but then project managers must remember to change the Condition to reflect the latest project health. Selecting the Progress Status option looks at the progress status of each task and configures an overall project Condition automatically.



✓ Progress Status
Manual

Project Conditions

- **On Target** — The Progress Status of tasks on the critical path are on time.
Note: Projects in the Idea, Requested, Approved, or Rejected project statuses will always have an On Target project Condition, no matter the dates and how late the tasks are.
- **At Risk** — The Projected End Date of tasks on the critical path is later than the Planned Completion Date of those tasks.
- **In Trouble** — The Projected End Date of tasks on the critical path is later than today's date.

Critical Path

The **critical path** outlines a sequence of crucial stages within a project. It includes the earliest and latest each activity can start and finish without making the project longer. Any delay of an activity on the critical path directly impacts the Planned Completion Date.



Best Practices for Project Planning and Project Execution

You spend a lot of time planning and executing your projects. Implement some of these best practices when building a timeline and monitoring project work.



Project Templates

- Create project templates to capture repeatable processes.
- Use project templates to standardize project plans and save time when creating projects.
- Use Duration, Planned Hours, and Predecessors when planning your project timeline on the template. Manipulate these settings to adjust the project timeline.
 - » A project template should also include milestones, approval processes, task assignments to job roles, custom forms, and more.
- Keep project templates up to date to reflect any changes to the process.



Initiating and Planning a Project

- Schedule a project from a Start Date rather than a Completion Date.
 - » Setting a project from the Completion Date does not allow the task dates to adjust if the project is ahead of schedule.
- If you have a hard project deadline, set the Planned Completion Date on the final task to the “Must Finish On” Task Constraint and select the due date.
- Let Workfront configure the project’s condition by setting it to Progress Status. The system automatically sets the condition based on the progress status of the tasks.
- Use Task Constraints sparingly.
 - » Manually setting a start/end date changes the Task Constraint to “Must Start On” or “Must Finish On.” This affects how the project timeline adjusts when dates change and how Workfront configures Projected and Estimated dates.



Use Views to Help Manage Your Project

- Create a task View that includes the Task Constraints column.
- Create a task View that shows Planned, Projected, and Actual dates.
- Create a task View that includes the Progress Status column.
 - » Use the Progress Status of tasks to keep track of how individual items of work are progressing — on time, behind, at risk, or late.
- Use conditional formatting on Views to highlight information about tasks that is important to your organization.



Working with Dates during Project Execution

- Look at Actual dates to see when work was marked as started or finished (i.e., the status was changed).
- Look at Projected dates to see when Workfront thinks tasks will begin or end, based on the progress and completion of prior tasks. This gives a “real time” view of your project’s progress.
- Review suggested Commit dates from task assignees and decide if the Planned Completion Date should be adjusted on the project timeline.
 - » Remember, when a task assignee suggests a Commit Date, Workfront automatically adjusts the Projected Completion Date to match the Commit Date.
- Estimated and Projected dates are often the same, but Estimated dates take Task Constraints Must Start On and Must Finish On into consideration.



Workfront + Slack Commands

Workfront commands can be typed into any channel in Slack and are visible only to you. Slack commands are case sensitive. Start each command with /workfront or /wf. And remember, the commands only work if you have [the Workfront add-in](#) for Slack.

Log in

/workfront log in

Log out

/workfront logout

List of commands

/workfront help

Favorite items

/workfront favorites

Recently accessed items

/workfront recent

Search

You can search for the following objects: project, task, issue, report, people, template, document, portfolio, program, dashboard, company, note

/workfront search <keyword>

Access your work items

Working On, Work Requests, Approvals
/workfront work

Working On list

/workfront working on

Work Requests list

/workfront work requests

Approvals list

/workfront approvals

Create a task

/workfront add task <task name>

Create an issue

/workfront add issue <issue name>

**Print it,
clip it,
and
post it
at your
desk!**

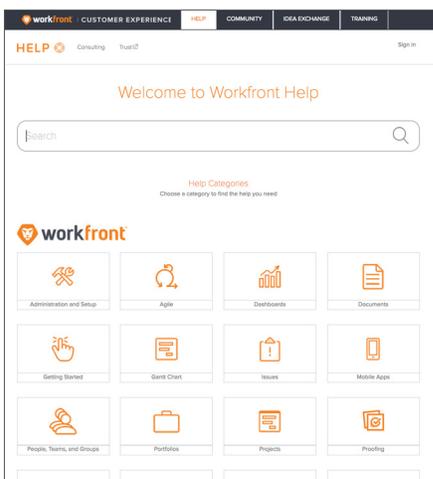
/workfront log in
/workfront logout
/workfront help
/workfront favorites
/workfront recent
/workfront search <keyword>

/workfront work
/workfront working on
/workfront work requests
/workfront approvals
/workfront add task <task name>
/workfront add issue <issue name>



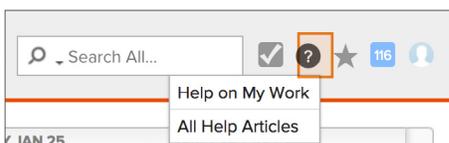
Workfront Help & Training

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

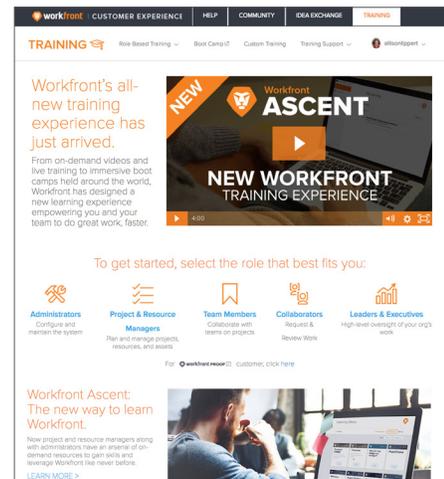


Workfront Help website support.workfront.com

- 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.