Workfront General Use

Contents

Projects

Update the Project Status

1. From the project, click the **Updates** tab.
2. Under **Update Status**, click the text box.
3. Input any comments or updates pertaining to the project.
4. *To change the condition*: click the menu above the **Update** button and select **going smoothly**, **at risk**, or **in trouble**.
5. *To change the status*: click the menu next to the **Condition** menu and select a status.

   For more information about statuses, see the document on *Statuses* on page 14.
6. Click **Update**.

Log Time on a Project

1. From the project, click the **Updates** tab.
2. Click **Log Time**.
3. Input time (as measured in hours).
4. Click the **Log Time** button.

Add a Risk to a Project

1. From the project, click the **Risks** tab.
2. Click the **New Risk** button.
3. Input **Description**.
4. Select **Risk Type**.

   For more information on Risk Types, see the document *Risk Types* on page 17.
5. Input **Probability**.
6. Input **Potential Cost**.
7. Input **Mitigation Cost**.
8. Input **Actual Cost**.
9. Input **Mitigation Plan**.
10. Click the **Save** button.

Add an Issue to a Project

1. From the project, click the **Issues** tab.
2. Click the **New Issue** button.
3. Input an **Issue Name** and **Description**.
4. Select the **Priority**.

   For more information on priorities, please see *Priorities* on page 17.
5. If there are documents to add, click the **Add Documents** button.
6. Click the **Save New Issue** button.

Add Task to a Project

1. From the project, click the **Tasks** tab.
2. Click the **New Task** button.
3. Fill out the form.

   For more information on the available fields, please see *Task Details* on page 15.
4. Click the **Save Task** button.

Update a Risk on a Project

1. From the project, click the **Risks** tab.
2. Click in the field that needs updating

   For more information on the available fields, see *Add a Risk to a Project* on page 4. For more information on the available statuses, see *Statuses* on page 14.
3. Input the new value.
4. Click anywhere outside the field.

Baselines

A baseline takes a snapshot of a project at the time the baseline is taken.

ABC Supply has utilized existing Workfront APIs to initiate an automatic baseline creation every Monday at 1:30 AM CT. This process identifies any active project and creates a baseline with a standard naming convention (see below), and sets the current baseline as the default baseline.

To create additional baselines:

1. From the project, click **More** > **Baselines**.
2. Click **New Baseline**.
3. In the **Name** field, input the name of the Baseline in the format **ProjectName_yyyymmdd**.
4. Select **is Default**.
5. Click the **Save** button.

People

Add a New User

1. From the top navigation bar, click **People**.
2. Click the **People** tab.
3. Click the **New Person** button.
4. Input **First Name**, **Last Name**, **Email Address**, and **Federation ID**.
5. Select **Send an invite email to this person**.
6. Select **Only Allow SAML 2.0 Authentication**.
7. In the **Access Level** menu, select the access level.
8. Click **Add This Person**.
9. On the User's profile, click **Edit [User's] info**.

10. Ensure the fields within **Basic Info** are filled.
11. Under **Job Info**, input the User's **Title**.
12. Under **Contact Info**, input the User's **Phone Number**.
13. Under **Profile Photo**, click **Upload Photo** (if a photo is available).
14. Under **Preferences**, in the **When I login, show** menu, select **My Work (Default Page)**.
15. In the **Time Zone** menu, select **Central Standard Time (US & Canada)**.
16. In the locale menu, select **English (United States)**.
17. Select **Show percent complete on update status**.
18. Select **Send work I assign to myself to my Working On tab**.
19. Click the **Save Changes** button.

Requests

Submit a New Request

1. From the main header, click **Requests**.
2. Click the **New Request** button.
3. From the **Select a Request Type** menu, select either **Business Request** or **Data Management Request**.

   Business Requests are used to report bug, problem, or enhancement request to IT. **Data Management Requests** are used to request assistance from the Data Management IT team.
4. Fill out the **Subject** and **Description**.
5. Select the **Priority**.

   For more information on the available **Priority** selections, please see the document on *Priorities* on page 17.
6. Click **Submit Request**.

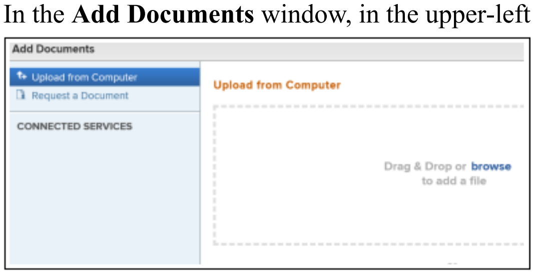
In the Requests window, click the **Requests I’ve Submitted** tab in order to see the submitted request.

Documents

Add Documents to a Project, Task, or Issue

Documents may be added directly from a file or requested from another associate.

1. From the Project, Task or Issue, click the **Documents** tab.
2. Click **Add Documents**.
3. In the **Add Documents** window, in the upper-left corner, select **Upload from Computer**.



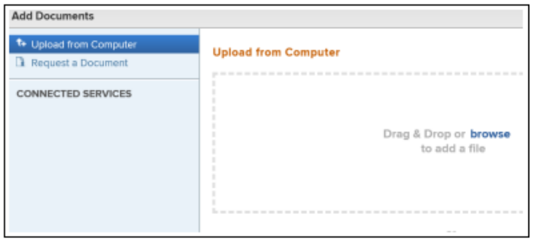
4. Click **Browse**.
5. Find the file to be added and click **Open**.

6. Repeat this procedure until all of the documents to be added appear in the **Documents to Add** panel.
7. Click **Add Items**.

Request a Document for a Project, Task, or Issue

Documents may be added directly from a file or requested from another associate.

1. From the Project, Task, or Issue, click the **Documents** tab.
2. Click **Add Documents**.
3. In the **Add Documents** window, in the upper-left corner, select **Request a Document**.



4. In the **Who are requesting it from?** field, type the name of the associate to provide the document.
5. In the **Tell them what you're requesting** field, describe the document you're requesting.
6. Click **Send Request**.

Check Out and In a Document for a Project, Task, or Issue

If a document that is already associated to a project, task or issue needs to be updated or changed, the file can be checked out, updated, and checked back in. The **Check Out** function locks the document from being updated again to prevent multiple updates clashing on the same document.

1. Navigate to the **Documents** area that contains the document needing to be checked out.
2. Select the document to be checked out (*Note: Clicking the document file link will download the file*.).
3. On the **Details** tab in the right column, in the **Check In/Out** section, confirm the document is **Available for check out**.
4. Click the **Check Out** link.
5. On the **Details** tab, click **Download**.
6. Navigate to and update the document.
7. From **Workfront**, navigate to the **Documents** area that contains the document to be checked in
8. Refresh the page and select the document.
9. On the **Details** tab in the right column, click **Check In**.
10. From the **Documents** tab, with the document still selected, click **More** > **New Version** > **Upload from Computer**.
11. Locate the file and click **Open**.
12. In the right column, click the **Updates** tab.
13. Find the newly-uploaded version and click the **Comment** link.
14. Leave a short comment detailing your changes.

Move a Document

1. From the **Documents** tab (within the project, issue, or task to which it's attached), select the document to be moved.
2. Click **Details**.

3. Navigate **Document Actions** > **Move**.
4. In the **Move Document** window, within the **Move** menu, select where the document will move.
5. In the field, input the name of the project, issue, or task to which the document will move. *Note*: This field will be labeled **Project, Issue,** or **Task** depending on what was selected in the previous step.
6. Click **Finish**.

Change the Name and Edit Details of a Document

1. From the **Documents** tab (within the project, issue, or task to which it's attached), select the document to be edited.
2. Click **Details**.
3. Navigate **Document Actions** > **Edit Details**.
4. In the **Name** field, edit the name.
5. In the **Description** field, edit the description.
6. Click **Save**.

Create a New Version of a Document

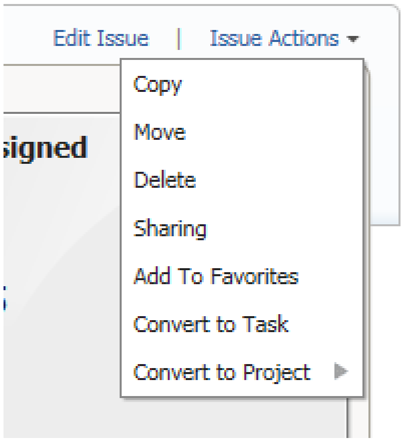
1. From the **Documents** tab (within the project, issue, or task to which it's attached), select the document.
2. Click **Details**.
3. If the document is checked out, navigate **Document Actions** > **Check In**.
4. Click the **All Versions** tab.
5. Click **New Version**.
6. Browse to the new version and click **Open**.
7. Click the **Updates** tab.
8. Under the newest version, click **Comment**.
9. Leave a short statement as to what has changed in this most recent version.

Issues

Convert an Issue to a Task

1. From the project (to which the issue is attached), click the issue.

2. From **Issue Actions**, select **Convert to Task**.



3. In the **Project** field, input the project attached to this task.
4. Click **Finish and Move Issue**.

Convert an Issue to a Project

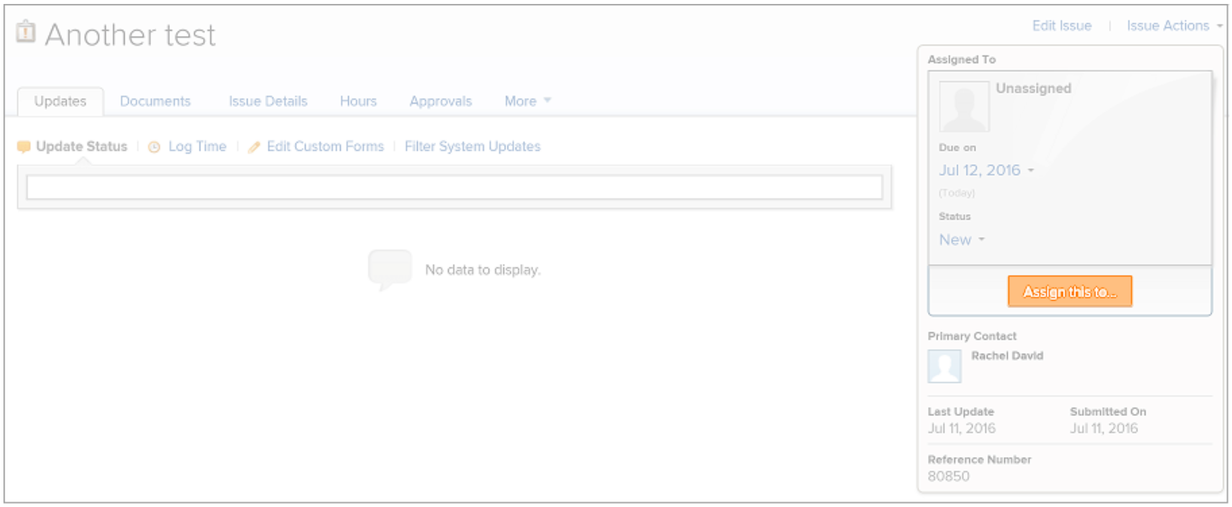
1. From the project to which the issue is attached, click the issue.
2. From **Issue Actions**, navigate **Convert to Project** > **New Project** or **New from Template**.
3. If the **Conversion Details** window pops up, click **Continue**.
4. In the **Convert to Project** window, edit the project details.
5. Click **Save Changes**.

Move an Issue to Another Project

1. From the project to which the issue is attached, click the issue.
2. From **Issue Actions**, select **Move**.
3. In the **Move Issue** window, under **Select Destination Project**, input the name of the new project in the **Project** field.
4. Click **Finish and Move Issue**.

Assign an Issue

1. From the **Issue**, under **Assigned to**, click **Assign this to...**.



2. Input the assignment name.
3. Select the name of the assignment.
4. Click **Assign**.

Update Assignment Information on an Issue

1. From the issue, under **Assigned To**, select **Edit Assignment**.
2. In the **Reassign this to...** field, select the new assignment and click **Assign**.
3. Click **make Advanced Assignments** to assign multiple Assignees' roles, allocations, and to designate an issue owner.
4. *To change the date*: Select a new date under **This will be done by**.
5. *To change the status*: Select a new status under **Status**.

   For more information about Statuses, see the document on *Statuses* on page 14.

Tasks

Assign a Task

1. From the **Task**, under **Assigned to**, click **Assign this to...**.
2. Input the assignment name.
3. Select the name of the assignment.
4. Click **Assign**.

Update Assignment Information on a Task

1. From the task, under **Assigned To**, select **Edit Assignment**.
2. In the **Reassign this to...** field, select the new assignment and click **Assign**.
3. Click **make Advanced Assignments** to assign multiple Assignees' roles, allocations, and to designate an owner.
4. *To change the date*: Select a new date under **This will be done by**.
5. *To change the status*: Select a new status under **Status**.

   For more information about Statuses, see the document on *Statuses* on page 14.

Update a Task Status

1. From the project, click the task.
2. From the task, click the **Updates** tab.
3. Under **Update Status**, click the text box. Input the task's status.
4. Under the text box, in the date menu, select the this task is due to complete.
5. In the **How's this going?** menu, select **going smoothly**, **some concerns**, or **major roadblocks**.
6. In the status menu, select a **Status**.

   For more information about statuses, see *Statuses* on page 14.
7. Click **Update**.

Log Time on a Task

1. From the project, click the task.
2. From the task, click the **Updates** tab.
3. Click **Log Time**.
4. In the field under the day the time was spent, input the amount of time.
5. Click **Log Time**.

Edit Details for a Task

Option One: Edit Overview

1. From the task, click the **Task Details** tab.
2. Click **Edit Overview**.
3. See *Task Details* on page 15.

Option Two: Edit Task

1. From the task heading bar, click **Edit Task**.
2. From the **Edit Task** window, make changes to the details.
3. See *Task Details* on page 15.

Troubleshooting

If a field cannot be found with **Option One**, try **Option Two**.

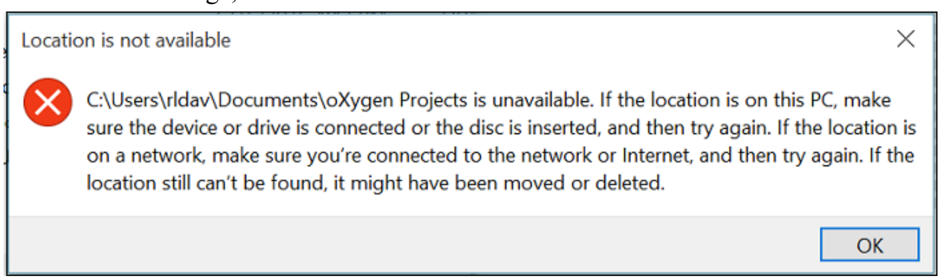
Troubleshooting

'Location is Not Available' Error

"Location is not available" error displays when uploading a document to Workfront

The following error displays: `Location is not available: [Location] is unavailable. If the location is on this PC, make sure the device or drive is connected or the disc is inserted, and then try again. If the location is on a network, make sure you're connected to the network or Internet, and then try again. If the location still can't be found, it might have been moved or deleted.`

On the error message, click **OK**.



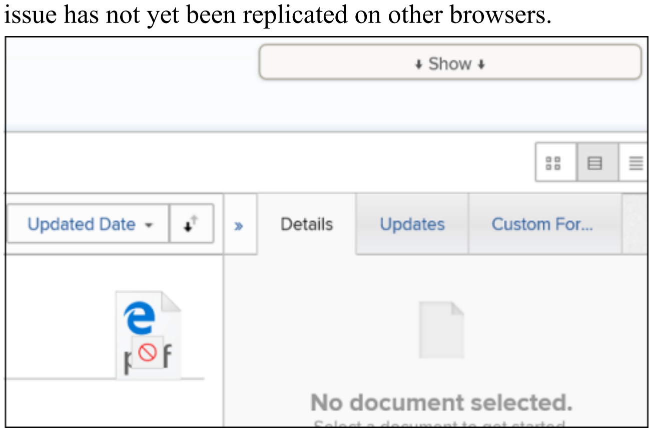
There was likely a change since the last time you uploaded. Browse to the location you normally save your files and search for the desired file. *Note: If you've downloaded a file for editing as part of the* ***check out*** *process, be sure to check your* ***Downloads*** *folder.*

The 'No' Sign Displays When Dragging a Document in MS Edge

When accessing **Workfront** using Microsoft Edge, attempting to drag and drop a document results in a red "no" symbol.

After a document has been checked back in, a user can upload the most recent version by dragging the document to the window and dropping the document. **Microsoft Edge** requires navigation through menus.

1. Check the right column (**Details** > **Check In/Out**) for **Available for check out**.
2. If the document is checked out, check it back in and try again.
3. If you see this "no" symbol when trying to drag and drop, try Chrome, Firefox, Internet Explorer, or Safari. This issue has not yet been replicated on other browsers.

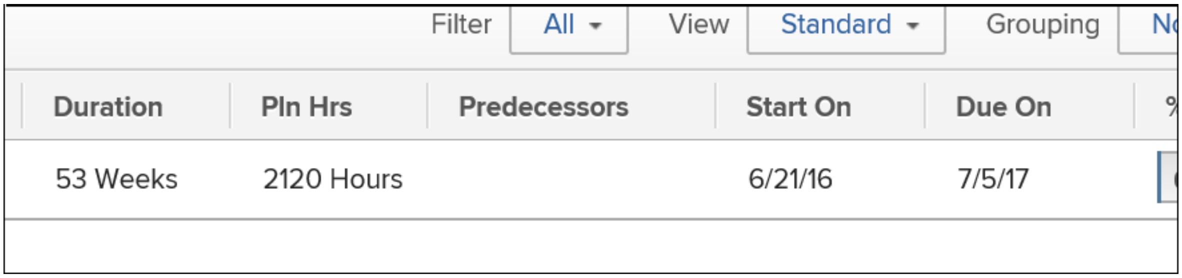


'One Year Is Not a Valid Duration' Message

"1 Year is not a valid duration" message displays in Workfront.

`1 Year is not a valid duration` message displays when attempting to set the task duration to 1 year.

1. Erase the **1 Year** input.
2. State the duration in a matter of weeks.



'Planned Start Date of [Task Name] Is Earlier...' Message

"Planned start date of [Project Name] is earlier..." message appears in Workfront when attempting to set the start date prior to today's date.

The following message displays when trying to set the date of a task earlier than today's date: `Planned start date of [task name] is earlier than the start date for the project (planned for (mm/dd/yy). Please adjust the date accordingly.`

This message has yet to be duplicated.

'Cannot add new version' message

"Cannot add new version to a checked out document/directory: [document name]" message displays in Workfront

The message `Cannot add new version to a checked out document/directory: [document name]` displays when the document is checked out to the user, and the user is trying to create a new version.

1. Check in that document.
2. Create a new version using the instructions from *Create a New Version of a Document* on page 8.

Updates Tab not Updating with Most Current Version

On the **Updates** tab of a document, the newest document version does not appear.

The User navigates to document **Details** > **All Versions** to upload a new version of the document. They click the **Updates** tab to comment on the most recent version, and only the previous version displays.

1. Refresh the page.
2. On the **Updates** tab, under **Update Status**, locate the time stamp on the most recent update.
3. Compare the time stamp to the current time.

Glossary

Statuses

Statuses are updated on many of the objects within Workfront to represent their position in the workflow.

Statuses for Tasks

Status
New
In Progress
In Development
Awaiting Feedback
On Hold
Ready for Deployment
Complete

Statuses for Issues

Status
New
In Progress
Closed
Reopened
Awaiting Feedback
On Hold
Won't Resolve

Statuses for Risks

Status
Identified
Avoided
Mitigated
Occurred

Statuses Specific to QA

Status
Awaiting Test Deployment
Deployed to Test
In Testing
Cannot Duplicate

Status
Won't Resolve
Back to Dev
Verified Production
Deployed to Production
Closed
Reopened

Root Causes

A root cause must be selected before a fix is deployed on an issue.

Root Causes

Root Cause	Explanation
Missing in requirements	A feature was missed during requirements gathering.
Defined requirement missed in design/development	A feature was defined in the requirements, but was overlooked during design and/or development.
Missed in testing	A bug was found after functionality deployed that was in the requirements and was coded, but was missed during testing.
Configuration issue	A bug was caused by a configuration of the software and/or environment.
Other	A bug was caused by a reason not defined above. If this option is selected, the **Other Root Cause Category** field displays, requiring an entry identifying the cause of the Issue.

Task Details

From the project, on the **Tasks** tab, click the individual field to edit. Click the task and select **Edit Task** to edit more details.

Task Tab

Field	Explanation
Task Name	
Assignments	
Duration	
Pln Hours	
Predecessors	
Start On	
Due On	
% Complete	

Edit Task Window

Field	Explanation
Name	The same as the **Task Name** on the **Task** tab.
Description	
URL	
Priority	
Status	See *Statuses* on page 14
Duration Type	*Calculated Assignment, Calculated Work, Effort Driven, Simple.*
Duration	
Planned Duration	Part of new task creation.
Planned Hours	
Recurrence Frequency	Never, Daily, Work Day, Weekly, Monthly.
Task Constraint	*Menu of possible options.*
Planned Start Date	
Actual Start Date	
Planned Completion Date	
Actual Completion Date	
Cost Type	*No Cost, Fixed Hourly, User Hourly, Role Hourly.*
Revenue Type	*Not Billable, User Hourly, Role Hourly, Fixed Hourly, User Hourly w/ Cap, Role Hourly w/ Cap, User Hourly Plus Fixed, Role Hourly Plus Fixed, Fixed Revenue*
Tracking Mode	
Approval Process	
Resource Scope	
Resource Leveling	
Leveling Delay	
Assignee	
Allocation %	
Task Owner	
Assignee's Role	
Custom Forms	
Comment	

Issue Details

Click **Edit Overview** on the **Issue Details** tab to edit Issue details.

Details *Overview*

Field	Description
Name	Name of the Issue
Path	Prefilled. Name of the parent topic.
Description	Describe the issue
URL	
Priority	Select **none**, **trivial**, **minor**, **major**, **critical** or **blocker**.
Severity	Select **cosmetic**, **causes confusion**, **bug with workaround**, **bug with no workaround**, or **fatal error**.
Primary Contact	The person reporting the issue.
Planned Hours	
Actual Hours	Prefilled.
Planned Start Date	
Actual Start Date	
Planned Completion Date	
Actual Completion Date	
Resolved By	Select **project**, **task**, or **issue**.

Priorities

Priorities

Selections
None
Trivial
Minor
Major
Critical
Blocker

Risk Types

List the type of risk when creating a new risk.

Types of Risks

Field
N/A
Schedule

Field
Technical
Deliverables
Costs
Human Resources
Quality
External