overview

1. INTRODUCTION TO WORKFRONT ......................................................................................... 3
   Welcome to Workfront!

2. SUBMITTING A WORK REQUEST ..................................................................................... 4

3. TRACKING YOUR PROJECT .................................................................................................. 7

4. COMMUNICATING ABOUT YOUR PROJECT ......................................................................... 9
   • Submit an update to a project
   • Email notifications
   • Approvals

5. WORKFRONT DASHBOARD .................................................................................................. 11
   • Search
   • Workfront Help
   • Notifications
   • My Settings
Welcome to Workfront!

With this new, web-based project management system, you can track your projects from start to finish. It’s easy to use and will allow you to:

• Submit your project
• Check the status of your project
• Communicate about your project
• Provide feedback and approvals in one single place
• Make updates, tag people, and comment (similar to Facebook)
Submitting a work request
SUBMITTING A WORK REQUEST

Login to Workfront

Accessing Workfront is easy - Just login using your UCR credentials.

URL
GO.UCR.EDU/WORKFRONT

Submit a new request

A  Go to the “New Request” tab.

B  Select “SAMC Mktg & Comm Request” from the drop-down menu.

C  Select the type of request from the drop-down menu.
Fill out the form completely. Fields shown in “BOLD” are **REQUIRED FIELDS**

**Subject** – Name the project.

**Description** – Provide details regarding the project, as well as people to include in the meeting.

**URL** – Provide a link to the resource/department webpage.

**Primary Contact** – By submitting a request, you will be the primary contact. You can assign another staff member if needed.

**Documents** – You can drag/drop attachments that are relevant to the project.

**Supported file formats:** .jpg, .png, .gif, .doc, .xlsx, .ppt, and .pdf

**Student Wellness Partners** – Please indicate if your department is a Student Wellness Partner. If you click yes, a menu of wellness categories will appear. Select the appropriate categories that apply to your event.

Submit your request – You will receive an email confirmation that your request has been received.

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Before your project is scheduled for production, we’ll schedule a meeting with you to discuss it.
Tracking your project
TRACKING YOUR PROJECT

View requests you’ve submitted

When you first login to Workfront, this will be your default view.

This view will give you an overview of the status of the projects that you’ve submitted or have been shared with you.

If you want to view details of a project, click on the title of the project.

**View Project Details** — In this view you will see the different tasks associated with the project, who they are assigned to, start and due date, status, and planned completion date.
Communicating on your project
Submit an update to a project

A When you first login, locate the project and click on the title.

• Navigate to the “Updates” tab.
• Enter your message.
• Click on the “People Icon” and enter the staff member you want to notify.

B Similar to an email, please start your message with the name of the staff member that the message is intended for. Include those who need to be CC’d by tagging them.

Note: If you do not tag the person, they will not get notified.

Email notifications

Reply to a Project Update – When you receive a Workfront email notification from a staff member working on your project, you are able to comment back by clicking the “Comment” button. The link will take you directly to the comment section of that specific project. Remember to tag the recipient(s).
COMMUNICATING ABOUT YOUR PROJECT

**Approvals**

A *Feedback/Approval* – You will receive an email notification from Workfront when a staff member submits an approval for a project.

Hi Allisa,

Johnny Lam asked you to approve *My_New_Project_Client_Proof.pdf*:

Johnny Lam
Thu, Jun 25, 2015 9:00 AM

B Download the file and provide feedback by clicking on the “Approve” or “Changes” button.

If you have small changes, click on the “Changes” button and enter your edits in the message box.

If the changes are extensive, make your edits on the document, upload the file to the project’s Document tab with an update, and tag the staff member.
Workfront Dashboard
Overview of Navigation Bar

Search – Workfront’s quick search helps you find a project or document by making recommendations based on your viewing history. Press enter and Workfront will take you into the project or document. Refine your search further by using the filter.

Notifications – The icon will illuminate orange with a number indicating how many notifications you have. You will receive notifications that include conversations you are included in or updates to a project.

Workfront Help – If you have a question about Workfront, call Susana Roddy at 2-5694, or Luis Bravo at 2-2780. You are also welcome to explore any topics using the search box.

My Settings – Modify your settings, change your avatar, and update email notifications and profile details here.