5 Key Areas to Address in Your Workfront Implementation

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Adobe Summit

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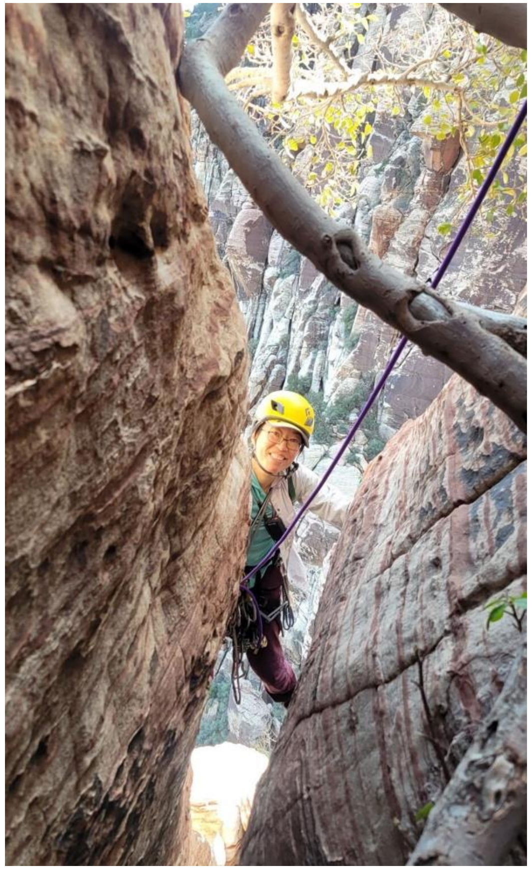
A little about me…

- Countries: 5; Accents: at least 3
- Workfront nerd since 2014; climbing nerd since 2015
- Community advocate:
  - Adobe Community Advisor since 2022,
  - Community Member of the Year (2024; 2025),
  - 2025-26 Community Captain,
  - 2025-26 Adobe Workfront Champion
- System admin / product owner for 4 companies in Washington state (300-5,000 users)
  Current occupation: Lead Functional Architect for Merkle (dentsu) 🎉
- https://www.linkedin.com/in/skyehansen/



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A little about you…

🤚 New to Workfront?

🤚 Just inherited (new job, existing instance)?

🤚 Analysis Paralysis ("*what happens when I press this button?*")?

🤚 Ongoing maintenance burden (system drift, uncontrolled user activity)?

You are not alone.

0 | Let’s Get Started

The Problem...

- Unbridled flexibility
- Breaks at scale
- Paradox of choice

The Stakes...

- Siloed workflows; fragmented data
- Reporting credibility erodes
- Admin time increases
- Integrations become fragile
- Adoption plateaus

The Response...

Goals: Integrity, Adoption, Scalability

FRAMEWORK:

Governance

Without it,
no one owns
the system

Documentation

Without it,
you can't maintain
what you built

User Experience

Without it,
users work around
the system

Maintenance

Without it,
debt accumulates
silently

Reporting

Without it,
you're guessing

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Quick glossary

Workflow: a team's process represented in terms of Workfront's basic building blocks. E.g.:

- **Custom forms**: the collection of information needed for the team to perform the work
- **Request queues**: a way to standardize and collect work requests
- **Project templates**: how the team intends to perform the work
- **Reports**: the overview of what's going on
- **Roles**: types of people needed to complete the work
- **Teams**: how work is assigned, routed, and notified [think **operational**]
- **Groups**: how the organization's structure is reflected in the system [think **administrative**]

Disclaimer + acknowledgements

- No instances harmed
  - All screenshots created in a test drive
- These patterns are real
  - Drawn from community posts and implementations across many organizations – *we’ve all been here*
- Built on shared knowledge
  - Practices and solutions from the community, refined through collective experience

Yes, we'll provide the slide deck.

1 | Setup Toolkit

Setup | The friction

You inherit a system (or build one over time):

- Dozens of custom forms
  - What do they do?
- Hundreds of fields
  - Who are the stakeholders?
- Teams, roles, groups…
  - Why do they exist?

Maintenance requests come in… what are the dependencies?

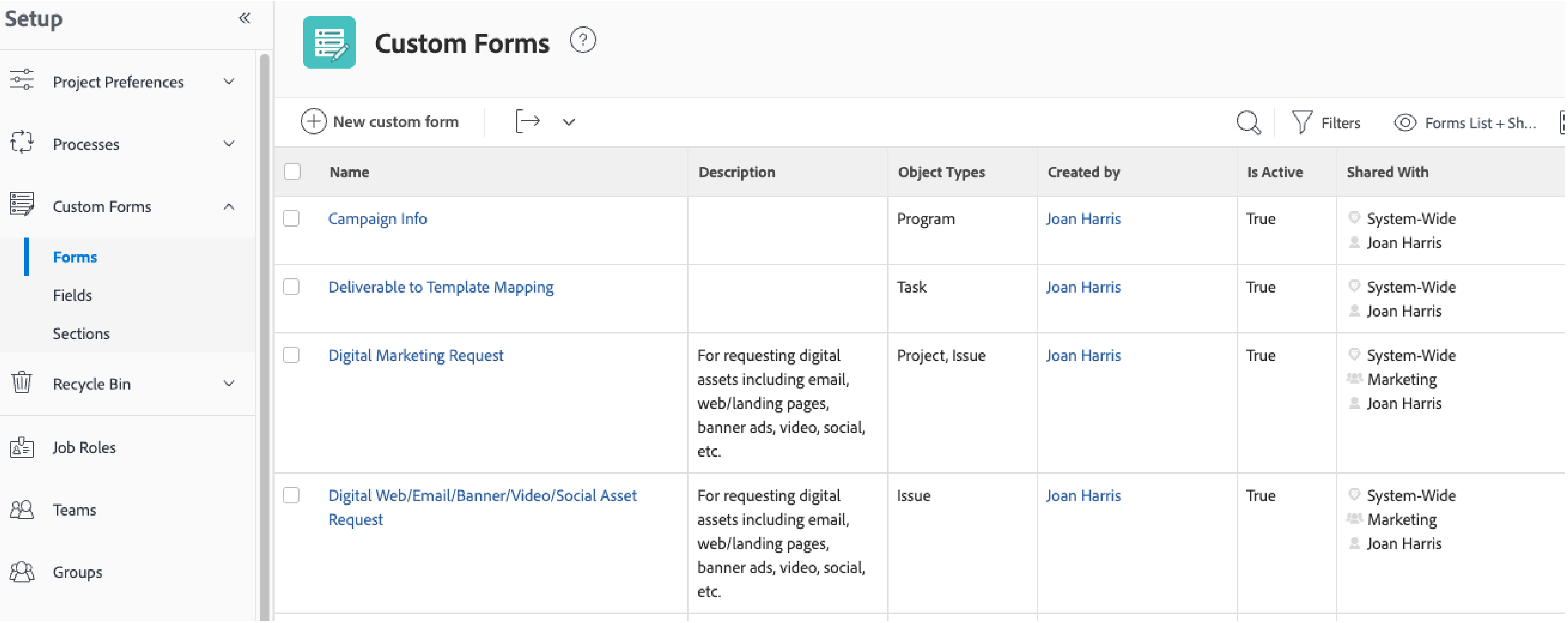
Custom forms

Example 1 of 3

Custom forms are how teams capture the information they need to do their work.

What happens when there are dozens of them and none of them explain themselves?

Setup | Custom Forms (before)



Setup | Custom Forms (before)

What is this? (who or what is using this?)

Why is Marketing able to attach?

What is the difference here?

Setup

- Project Preferences
- Processes
- Custom Forms
  - Forms
  - Fields
  - Sections
- Recycle Bin
- Job Roles
- Teams
- Groups

Custom Forms

New custom form

Name	Description	Object Types	Created by	Is Active	Shared With
Campaign Info		Program	Joan Harris	True	System-Wide Joan Harris
Deliverable to Template Mapping		Task	Joan Harris	True	System-Wide Joan Harris
Digital Marketing Request	For requesting digital assets including email, web/landing pages, banner ads, video, social, etc.	Project, Issue	Joan Harris	True	System-Wide Marketing Joan Harris
Digital Web/Email/Banner/Video/Social Asset Request	For requesting digital assets including email, web/landing pages, banner ads, video, social, etc.	Issue	Joan Harris	True	System-Wide Marketing Joan Harris

Setup | Custom Forms (after)

Custom Forms

New custom form | a0 | Filters | Forms List + Sh... | Nothi

Name	Description ↑	Object Types	Created by	Is Active	Shared With
Digital Marketing Request	Workflow ID: A01.1.1 Leadership: John Smith Description: For requesting digital assets including email, web/landing pages, banne ads, video, social, etc. Notes: [there are two separate queue topics for digital marketing assets vs digital assets] Audited: 1/28/26 Display Order: 2 Integrations: Keywords: # Governance Code: #A01	Project, Issue	Joan Harris	True	System-Wide Marketing Joan Harris
Digital Web/Email/Banner/Video/Social Asset Request	Workflow ID: A01.1.2 Leadership: Alexis Jones Description: For requesting digital assets including email, web/landing pages, banner ads, video, social, etc. Notes: [there are two separate queue topics for digital marketing assets vs digital assets] Audited: 1/28/26 Display Order: 2 Integrations: Keywords: # Governance Code: #A01	Issue			
Digital Web/Email/Banner/Video/Social Asset Request (Project)	Workflow ID: A01.1.3 Leadership: Alexis Jones Description: Copy of digital web/landing pages, email, banner ads, video, social, request form to serve as container for project information. Notes: [ ] Audited: 1/28/26 Display Order: 2 Integrations: Keywords: # Governance Code: #A01	Project			

Workflow ID: A01.1.1
Leadership: John Smith
Description: For requesting digital assets including email, web/landing pages, banner ads, video, social, etc.

Notes: [there are two separate queue topics for digital marketing assets vs digital assets]
Audited: 1/28/26
Display Order: 2
Integrations:
Keywords: #
Governance Code: #A01

Setup | Custom Forms (take away)

The description area is a good place to store quick reference items that admins might EITHER find handy to either keep top of mind, OR use as a filter in a quick filter or report filter. Some suggestions we've come up with:

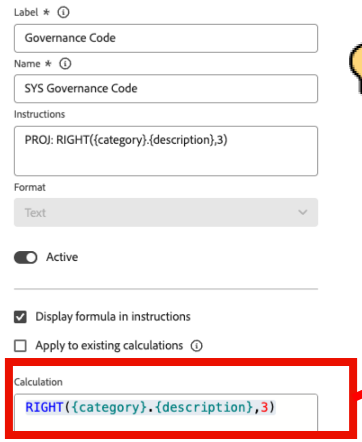
- Governance Code: Which org unit [VP?] owns this workflow
- Workflow ID: Link related forms together
- Leadership: Who owns this department's process
- Display order: For troubleshooting when you use multiple forms on one object
- Integrations: Fusion, AEM, Snowflake/Power BI dependencies
- Keywords: is the form used by a different org? (additional governance codes)

WHY IT MATTERS: Make forms findable, traceable, and safer to maintain.

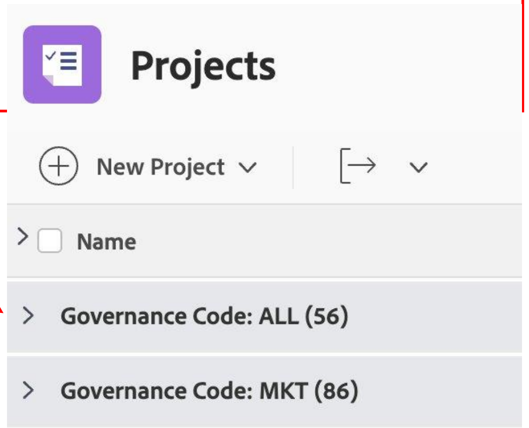
Setup | Custom Forms (take away)

NOTE

Governance code: Positioned on the final line to unlock the ability to categorize workflows broadly (e.g. All projects in the system charted by finance, legal, marketing rather than by custom form).



Pro-tip – provide a calculated field in your custom form to record the governance code so you can chart work by gov code.



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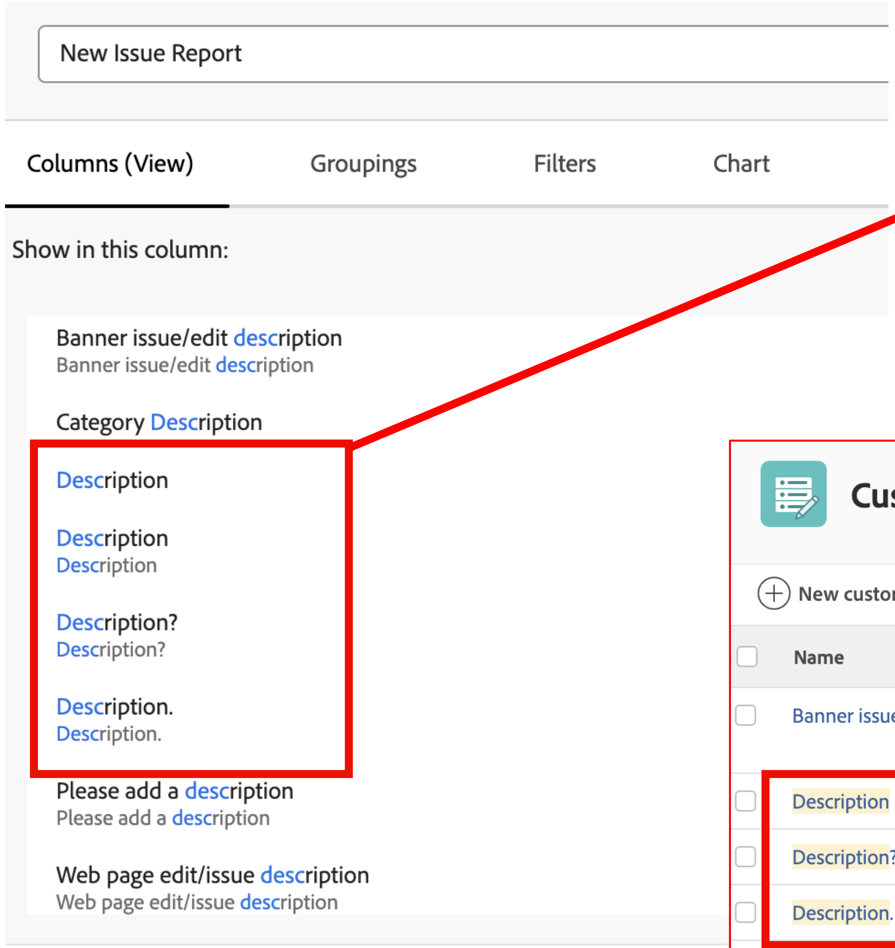
Custom fields

Example 2 of 3

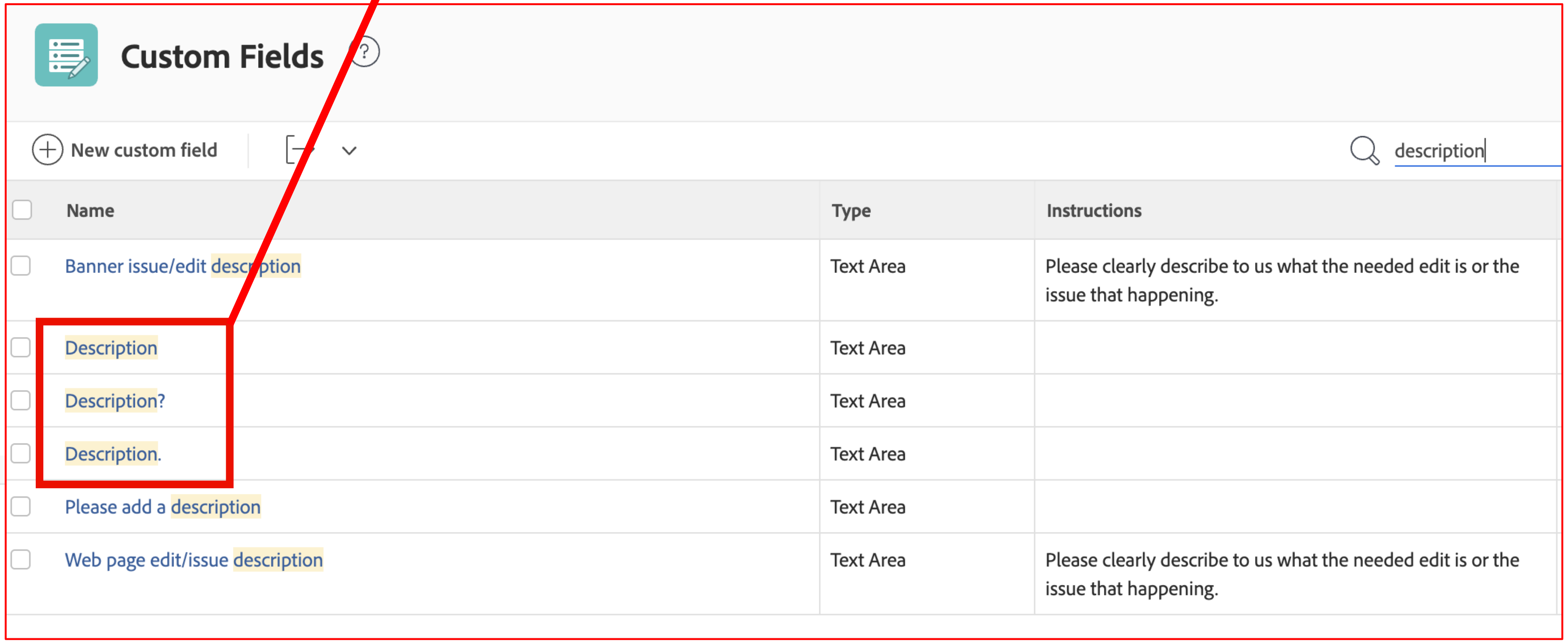
Custom fields are the building blocks of your forms and the columns in your reports — the same object, seen from two very different angles.

What happens when those building blocks have no labels, no ownership, and no context?

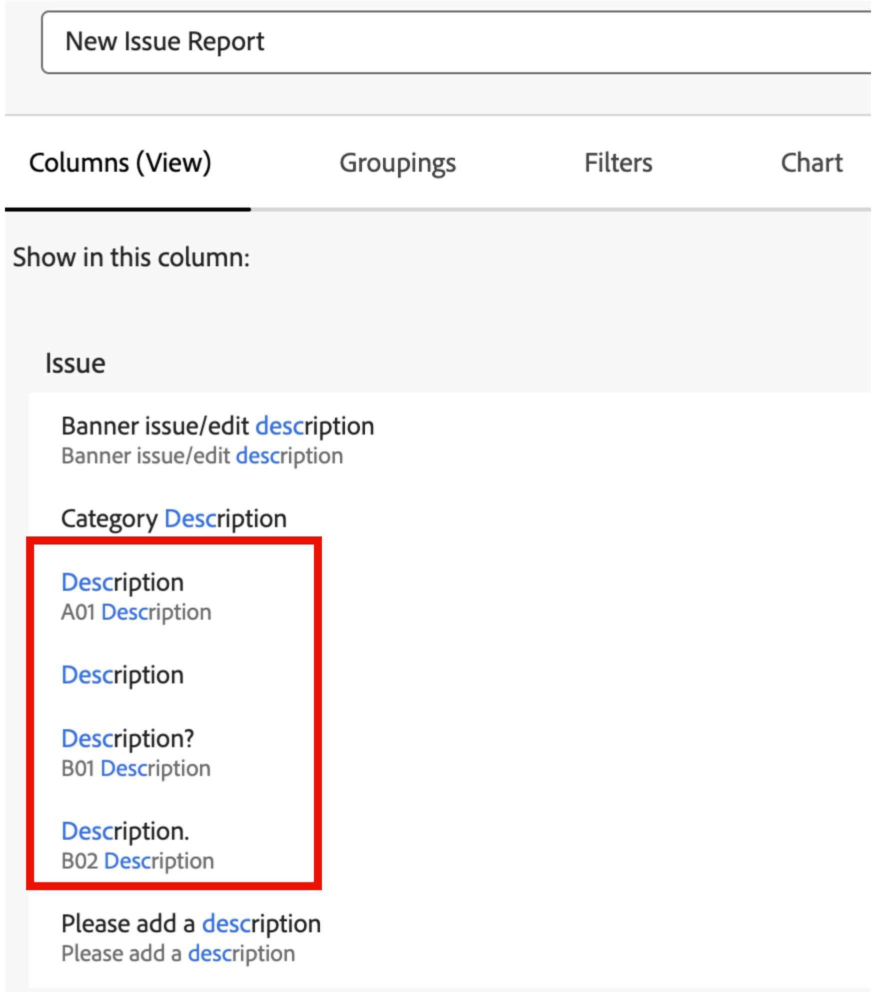
Setup | Custom Fields (before)



- 🚩 Users don't know which field to use in reports.
  - They'll just guess, and if they have elevated permissions, they'll end up attaching a different form.
- 🚩 Admins don't know which field to use in new forms (and might end up making a new field)



Setup | Custom Fields (after)



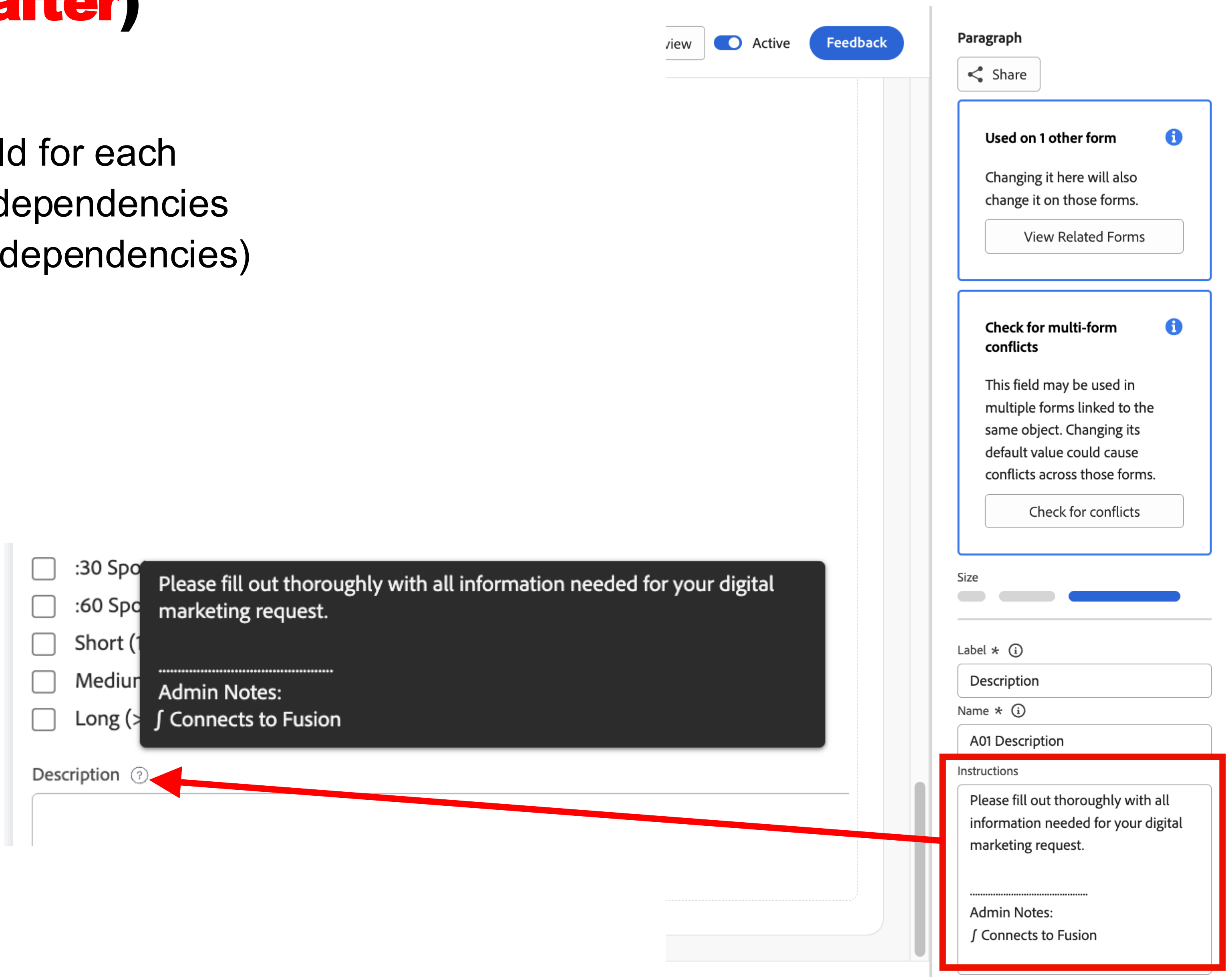
Result:

- Report builders no longer have to guess which fields to use.

- Org units should use the same field (universal reporting and governance across org).

Setup | Custom Fields (after)

Result: Admins can use the correct field for each workflow, and additionally track extra dependencies (there's no down side to users seeing dependencies)



Setup | Custom Fields (take away)

Key practices:

Add governance codes to your field NAMEs without impacting your field LABEL (what users see).

Avoid duplicating Workfront default field names, since this will result in duplicate field names on the reporting interface

Use description [instructions] area for:

- Integration flags (Fusion, AEM, Power BI)
- Calculations (easy copy/paste across forms)

WHY IT MATTERS: Report builders can identify their fields, admins can trace integration impacts.

Teams

Example 3 of 3

Teams in Workfront control how work gets assigned, routed, and notified.

What happens when no one can tell what a team is for — or who it's for?

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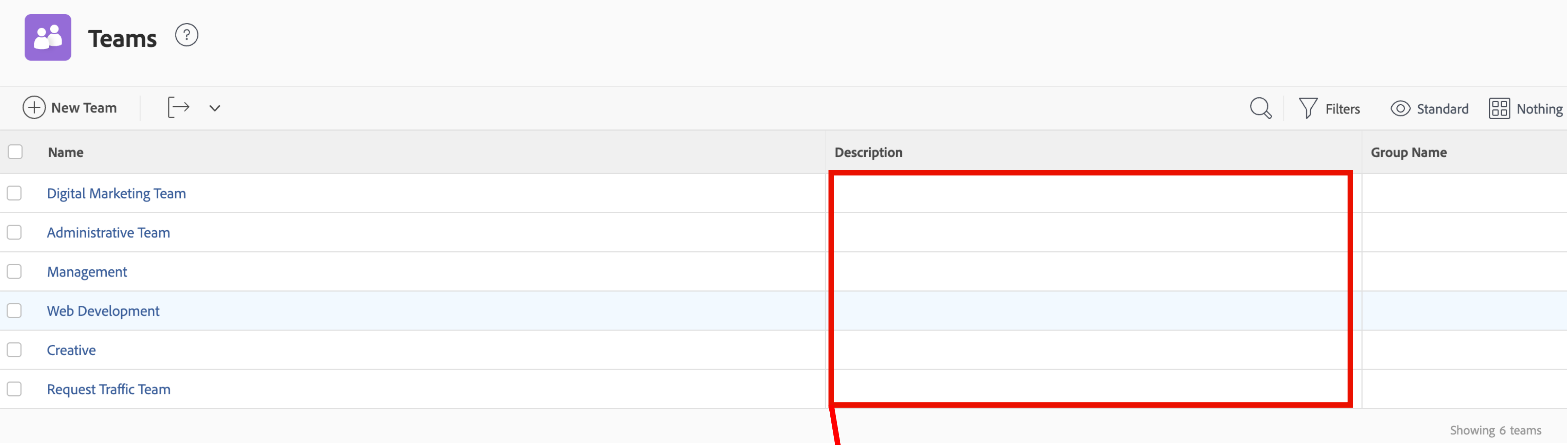
Setup | Teams (before)



🚩 What are these teams for? Which one do I need?

Setup | Teams (after)

Teams

New Team | Filters | TMPR | Nothing

Name	Description	Group Name	ID
Creative	#ROU #A02 #MGT assigned to template tasks		e67cf0a434d34657b6fcde4e 0fadcf61
Request Traffic Team	#ROU #A03 assigned to queues		995dce9e52d94eca9676da3 7135e2746
Management	#NSH #A01 shared to templates and portfolios		d30a4542ac2f4d7584ea1617 c3bda333
Web Development	#NSH #B01 assigned to queues and template tasks		1368956d88004ddfa067a114 490a6b23
Digital Marketing Team	#ROU #A01 #RPT assigned to queues and template tasks, used in reporting		352b1e65c3aa429080dc7017 b8da261f
Administrative Team	#NSH #ROU #SYS system admin team, assigned to the workfront queue, used for sharing views, filters and groupings		409226af163d4835ba00499 e338a1330

Showing 6 teams

Description
#ROU #A02 #MGT assigned to template tasks

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Setup | Teams (take away)

Key practice: use team description as a quick reference guide and dependencies reminder

- Add governance code to team description to unlock additional reporting opportunity.

- Develop and stack purpose codes e.g.
    - #ROU – Assigned work (template, queue, approvals)
    - #NSH – Notification/tagging (and sharing e.g. views or filters)
    - #MGT – Manager oversight
    - #RPT – Reporting filter
    - #VEN – Vendor/agency team

WHY IT MATTERS: Teams with clear purpose reduce audit burden and assignment errors

1 | Setup Toolkit – Roundup

ACHIEVEMENT UNLOCKED:

Clear documentation and traceability give admins efficiency in daily maintenance and confidence to evolve safely – protecting data integrity while enabling scalability

Pillars addressed:

Governance

Governance codes: traceability and ownership

Documentation Maintenance

Description fields: your maintenance playbook

Reporting

Governance becomes query-able

2 | User Experience

UX | The principle

User experience improves when you deliberately constrain choices. (Think about protecting clarity, data integrity, and scale)

- More options ≠ better experience
- Education is always key but hardly ever consistently applied over the long term

Vanity Configuration

Example 1 of 3

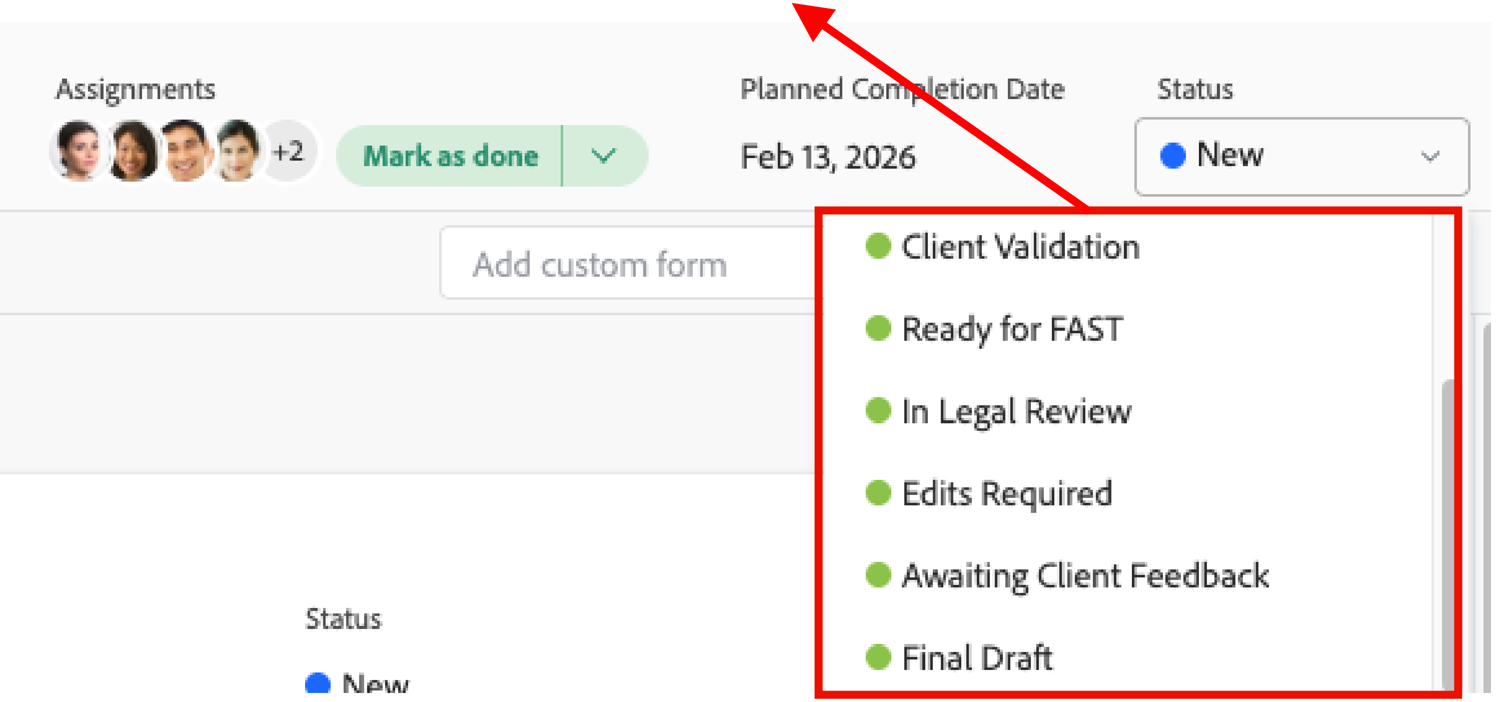
Workfront lets you create custom statuses and job roles to match your organization's language.

What happens when that flexibility gets used for preference rather than function?

UX | Vanity configuration 1

🚩 Cluttered task status (or issue status) dropdown list

- Risk of selecting the wrong status
- Plausible statuses get inconsistently adopted
- Sets a precedent that everyone can have “their” status – as a way to communicate where they are in the process (storytelling)



System impact:
Inconsistent status usage and too many statuses fragments reporting and distorts throughput metrics.

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UX | Vanity configuration 2

🚩 Roles that are not being assigned to tasks or template tasks

- Increased risk of selecting the wrong role or defaulting to named users
- Encourages the idea that every job title needs representation in Workfront

Job Roles

New Job Role

Name	Description
Art Director	#ROU
Consultant	Consultant #AUD: No existing assignments / template assignments
Contractor	#AUD: No existing assignments / template assignments
Copywriter	#ROU
Creative Director	A Creative Director leads the artistic vision and execution of branding, marketing campaigns, and media projects, ensuring consistency and innovation across all creative assets. #AUD: - No existing assignments / template assignments - Note - I see 2 "Creative Director" approvals -- one that is connected with a user name rather than a role, and one connected with Art Director role.

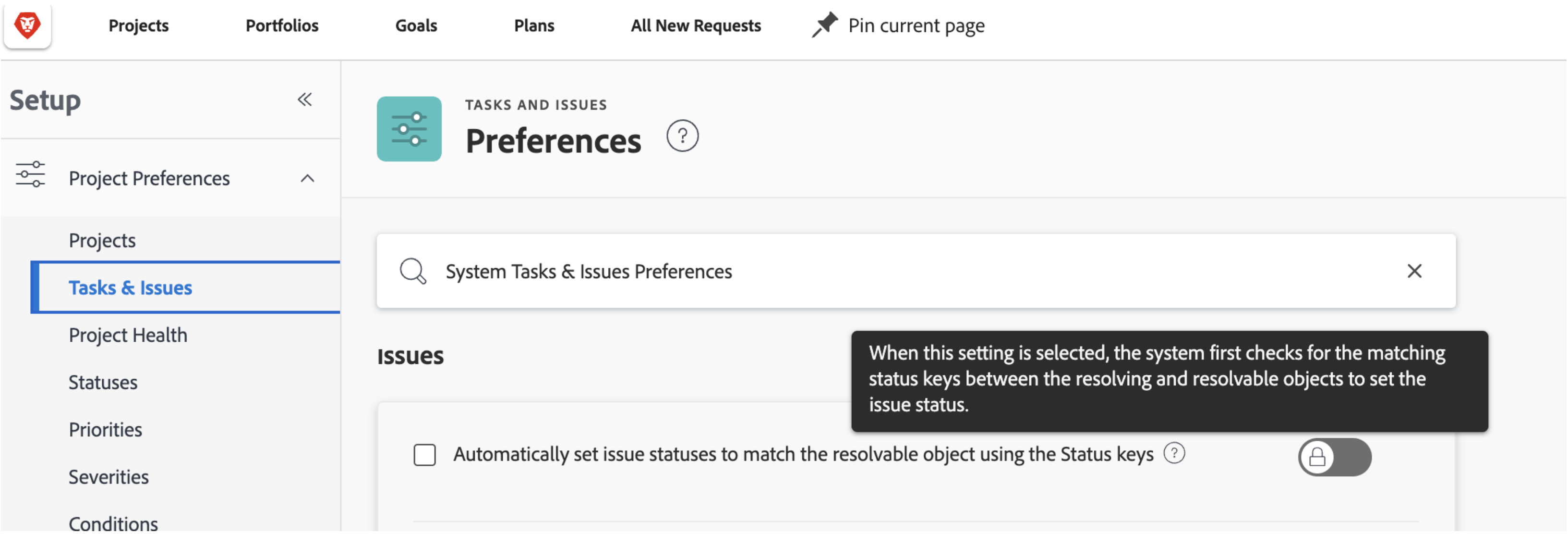
System impact:
Role sprawl weakens capacity planning, inflates reporting complexity, and shifts work from roles to individuals.

UX | Vanity configuration (after)

Workflow-specific process milestones/storytelling may show up as part of a custom form on a project, task, or issue

- Custom statuses have a specific system function (for example, to connect resolving projects and converted issues) *(see screenshot for reminder on configuration)*

Roles are well documented and are the go-to for being used as placeholders for template task/approval assignments



Form Permissions

Example 2 of 3

Form "sharing" (permissions) controls who can see, fill out, and attach forms to objects in Workfront.

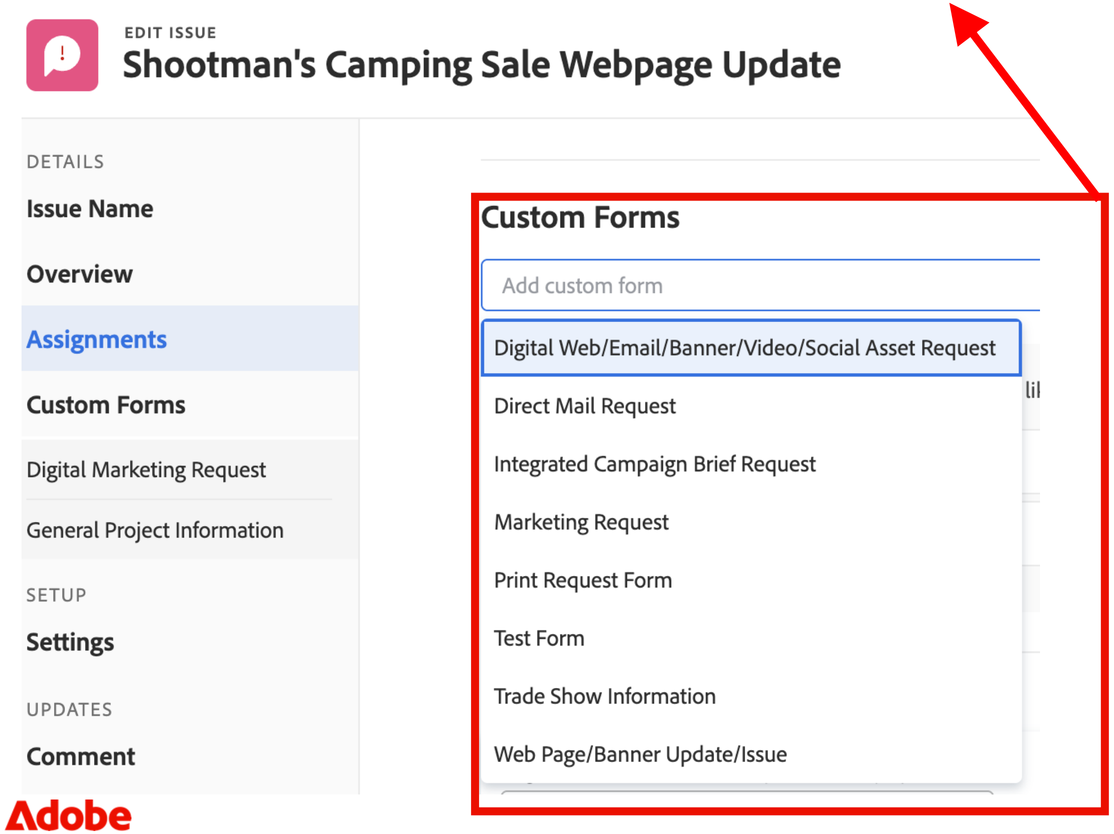
What happens when those permissions are broader than they need to be?

UX | Form permissions – Risk 1

🚩 Why can I see so many forms?

For new users:

- Training gap/original intent is not obvious
- May add a form “just because it was possible”

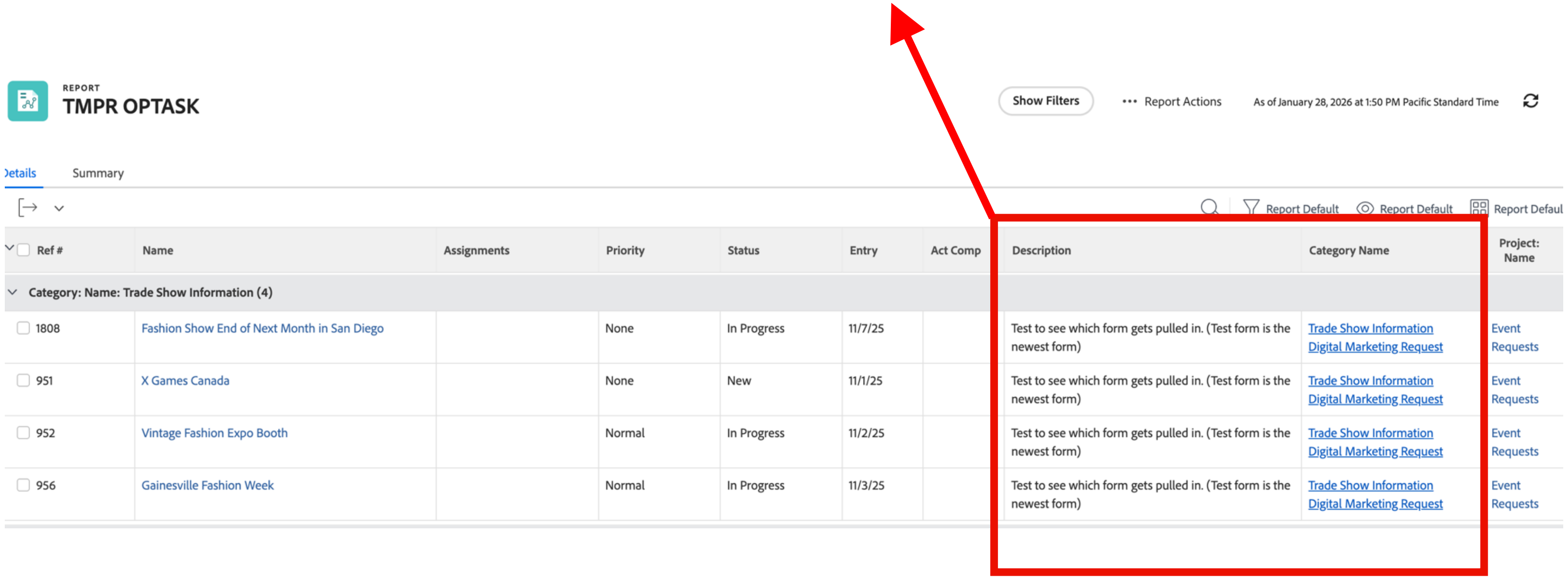


System impact:
Required data becomes tribal knowledge instead of embedded governance

UX | Form permissions – Risk 2

🚩 If you can see a form you can attach it via inline editing a custom field

- Risk of adding the wrong form via using the wrong field or using a field that occurs on both forms (oldest form gets added)
- Required fields suddenly appear mid-lifecycle or reporting now includes incorrect objects
- Regular cleanup suddenly needed because there is a report perpetuating this error repeatedly



Ref #	Name	Assignments	Priority	Status	Entry	Act Comp	Description	Category Name	Project: Name
1808	Fashion Show End of Next Month in San Diego		None	In Progress	11/7/25		Test to see which form gets pulled in. (Test form is the newest form)	Trade Show Information Digital Marketing Request	Event Requests
951	X Games Canada		None	New	11/1/25		Test to see which form gets pulled in. (Test form is the newest form)	Trade Show Information Digital Marketing Request	Event Requests
952	Vintage Fashion Expo Booth		Normal	In Progress	11/2/25		Test to see which form gets pulled in. (Test form is the newest form)	Trade Show Information Digital Marketing Request	Event Requests
956	Gainesville Fashion Week		Normal	In Progress	11/3/25		Test to see which form gets pulled in. (Test form is the newest form)	Trade Show Information Digital Marketing Request	Event Requests

System impact:
Objects collect inconsistent data, workflow integrity weakens

UX | Form permissions (after)

Attaching a form is primarily governed through use of project templates and template tasks, issue queue topics, default task custom forms and Fusion automation where necessary for uploaded files (documents).

Form sharing rules are understood.

- Forms shared systemwide so that users may see and fill out. (Being able to see form contents should be first be controlled through sharing the object. Removing system-wide access should be the last resort.)
- More specific sharing should be for users to attach and reasons should be documented on form description.

Any forms needing to be manually attached undergo a form / field review to understand probability of accidentally attaching the wrong form.

Default Navigation

Example 3 of 3

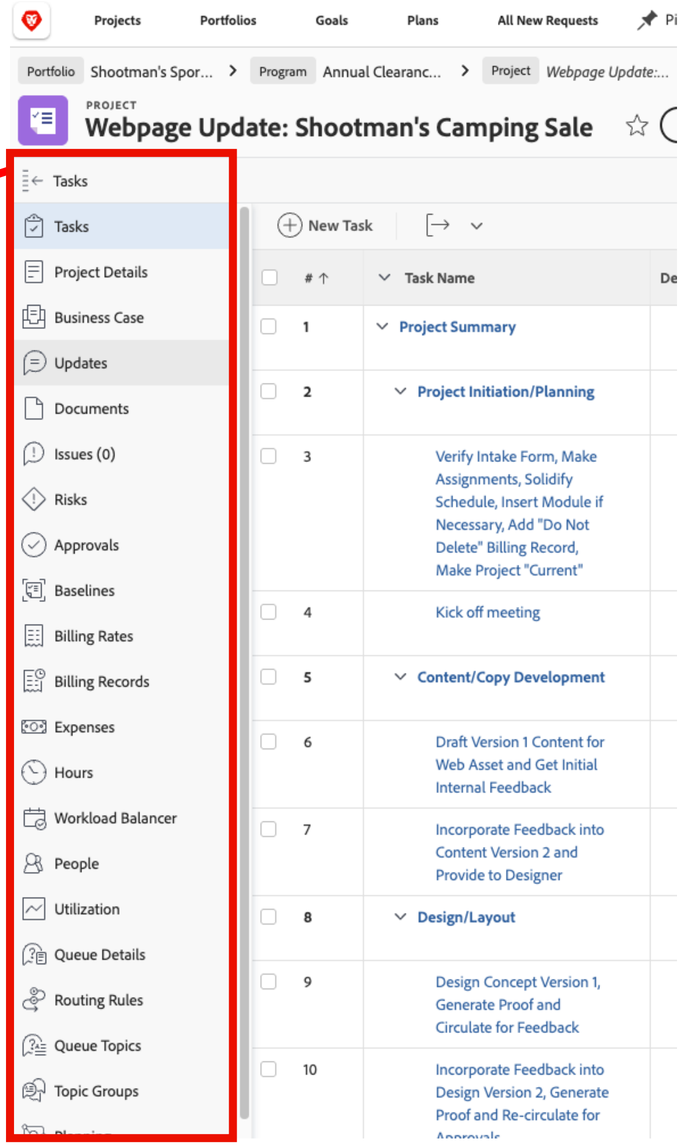
Out of the box, Workfront shows users every section of every object.

What happens when "they might need it someday" becomes the governing principle?

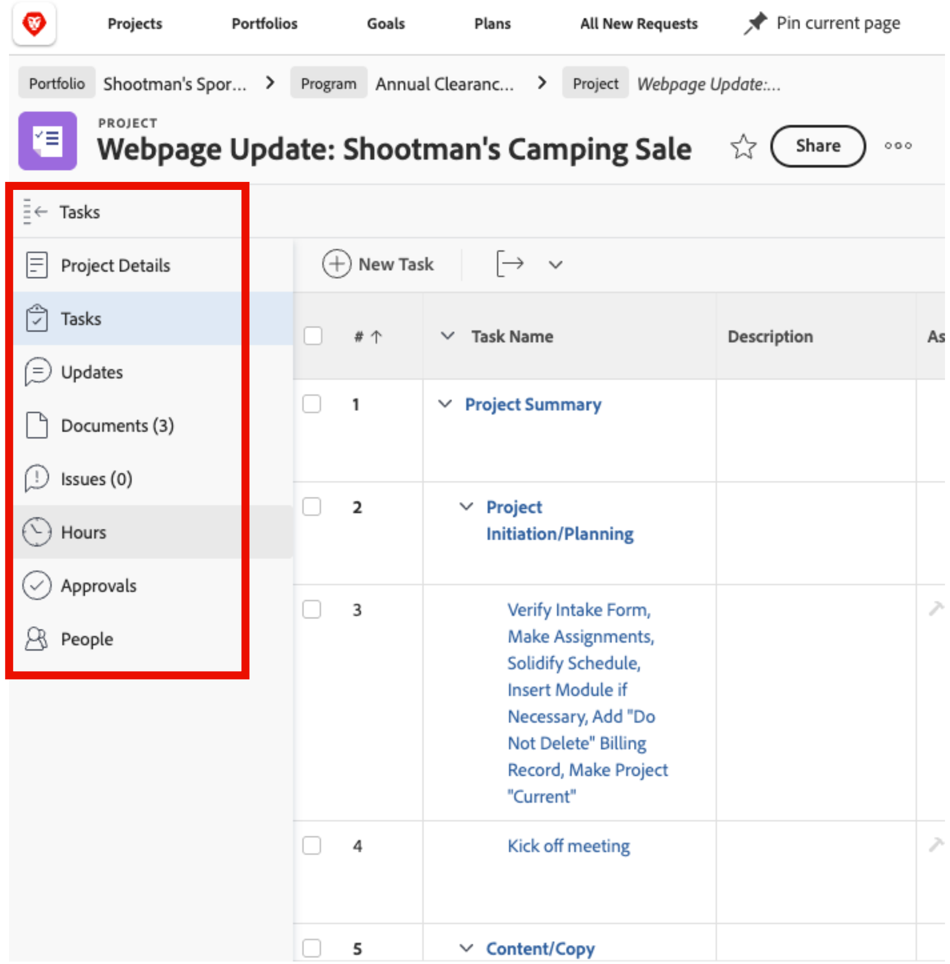
UX | Visibility design

🚩 New users may be overwhelmed by choice or may start clicking into sections assuming they have the ability to utilize functionality

- Inefficient work practices (may take longer to do something)
- Uneven usage (e.g. within the same team, one user may utilize risks and approvals, another user might utilize expenses and billing records)



UX | Visibility design (after)



Sections that aren't needed for a particular set of users are hidden.

Sections that are needed are organized in the order that they are most frequently accessed.

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2 | User Experience – Roundup

ACHIEVEMENT UNLOCKED:

Clean user experience; reduced ”configuration drift”; fewer “mutations”; stronger reporting consistency

Pillars addressed:

Governance

Use permissions and templates to enforce design intent

User Experience

Reduce cognitive load

Maintenance

Fewer mutations to discover and troubleshoot

Reporting

Protect data integrity

3 | Admin Evolution

Admin | The principle

- Reactive governance means admin work expands to fill the gap
- Admins are often handed responsibility without authority
- Leverage lives at the moment of creation or change, not in the cleanup after

When you govern what enters the system rather than what accumulates in it, the nature of the work changes.

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System Maintenance

Example 1 of 2

Ask any Workfront admin what system maintenance looks like, and you'll get roughly the same answer.

What if that answer is the problem?

Admin | Reactive Posture (system "maintenance")

DETAILS PAGE

System Administrator Maintenance Dashboard

Workflow Content

Dashboard

ⓘ See dashboard descriptions

- System Admin Maintenance Dashboard

Report

ⓘ See report descriptions

- Abandoned Request Queues
- Active User Audit
- Any Active Project Custom Forms No Longer In Use
- Number of Projects by Template
- Outstanding Proof Approvals Older Than Three Months
- Overdue Tasks not Updated in 1+ Weeks
- Pending Document Approvals by Request Date
- Project Audit
- Projects 0% Complete - Not Updated in 3 Months
- Projects 100% Complete but NOT in Complete Status
- Projects in Planning Status - Not Updated in One Year
- Projects in Portfolios by Status
- Projects in Programs by Status
- Request Queue Issues by Queue Topic
- Search Projects Associated with Custom Forms
- Template Audit
- Unregistered Users (Have Not Logged In)
- Unused Custom Fields Report - For System Admin Use Only
- Usage of Task Constraints
- Users & Associated Layout Templates

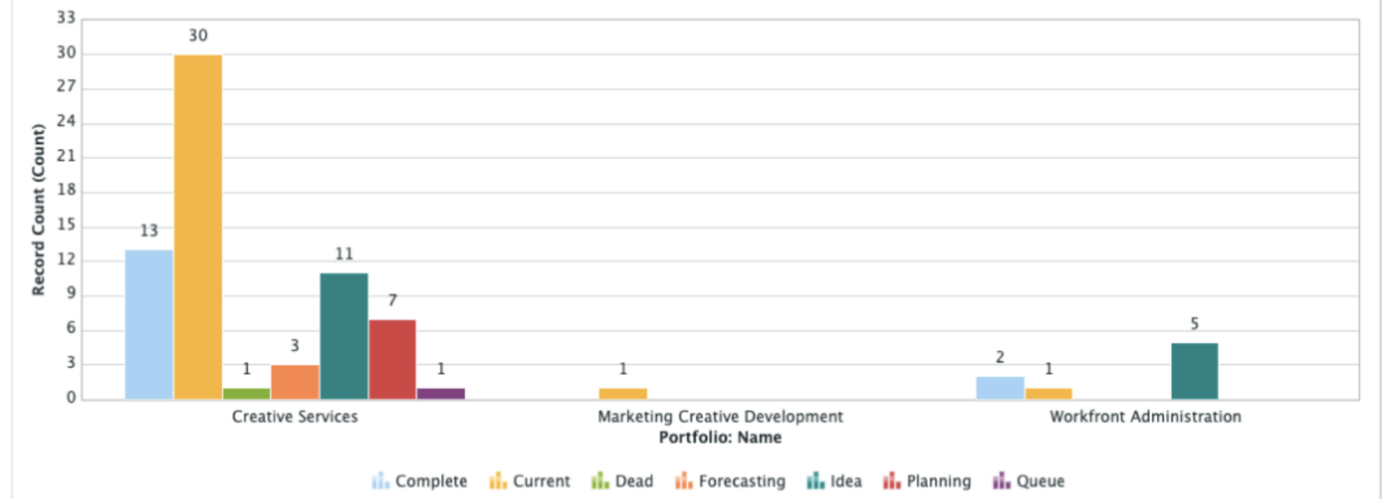
Grouping

ⓘ See grouping descriptions

- Number of Projects by Template
- Outstanding Proof Approvals Older Than Three Months
- Overdue Tasks not Updated in 1+ Weeks
- Pending Document Approvals by Request Date

Blueprint Details

Maturity level: Managed • Version: 1 • Published on: 10/5/2022 • Use cases: Project Management Office • New Product Development • Finance • Information Technology • Marketing • Human Resources • Professional Services • Types: Dashboard



This blueprint contains a single dashboard to assist system administrators in maintaining and cleaning up the system periodically from miscellaneous clutter that might build up over time.

Learn how this blueprint works

The System Adminisitrator Maintenance Dashboard blueprint helps system administrators stay on top of their maintenance activities. Using this dashboard provides a digest of all the items a typical administrator will need to review to keep Workfornt tidy and clean. End users appreciate this because unnecessary configuration causes confusion and loss of data integrity; not to mention gums up your processes.

In many cases, the reports included on the System Administrator Maintenance Dashboard also provides an administrator the information they need in order to inform other governance stakeholders whether teams or individuals are following a defined process. Though it is common to utilize a separate governance dashboard for this information.

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Admin | Reactive Posture (system "maintenance")

Accumulated system debt	Stalled work	Genuine admin intelligence	Unclear
Template Audit	Projects 0% Complete - Not Updated in 3 Months	Unregistered Users (Have Not Logged In)	Usage of Task Constraints
Project Audit	Projects 100% Complete but NOT in Complete Status	Unused Custom Fields Report	
Active User Audit	Projects in Planning Status - Not Updated in One Year		
Users & Associated Layout Templates	Overdue Tasks not Updated in 1+ Weeks		
	Pending Document Approvals by Request Date		
Orphaned objects	Outstanding Proof Approvals Older Than Three Months		
Abandoned Request Queues			
Request Queue Issues by Queue Topic			
Number of Projects by Template			
Search Projects Associated with Custom Forms			
Any Active Project Custom Forms No Longer In Use			
Projects in Portfolios by Status			
Projects in Programs by Status			

Result:
Admin time spent on consequences rather than work that moves the system forward

Admin | Proactive Posture (weekly "audit")*

Changes to/creation of new:

User experience risk	Data integrity risk	Cascade risk
Ungoverned objects cause confusion, wrong notifications, or misassigned work	Ungoverned objects make reporting unreliable and contaminate workflows	Ungoverned objects propagate misconfiguration across every project or request that follows
Users	Custom forms	Templates
Teams	Custom fields	Layout templates
Groups	Reports and dashboards	Queues
Roles		Portfolios
		Programs

*posted to community later today

Result:
Catch structural changes at the moment they happen, reducing debt and orphans

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User Visibility

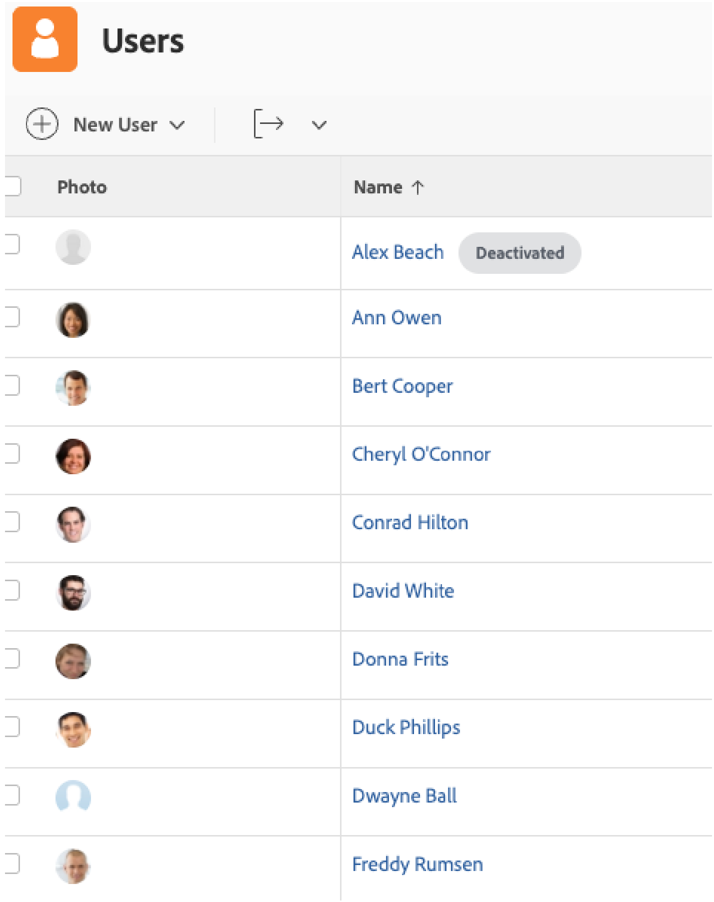
Example 2 of 2

User names appear everywhere in Workfront — assignments, project ownership, comment threads.

What happens when one of those people is gone and the system doesn't reflect it?

Admin | User visibility (before)

- User names appear everywhere — assignments, project ownership, comment threads
- When someone is absent, almost nothing in the system signals it
- Users don't know who to redirect to — and work stalls



Work impact:
Invisible absences create ambiguity — and work stalls waiting for someone to sort it out.

Admin | User visibility (after)

- Rename users to reflect their status — "John Smith, inactive" or "John Smith, on leave”
- Status is now visible everywhere the user's name appears — assignments, project ownership, comments
- Users can self-identify the situation and redirect work without escalating

New Task

	# ↑	Task Name	Assignments	Duration
	2	Create Layout	Joey Baird	5 Days
	3	Final Layout	Joey Baird Ann Owen, on leave until 2027	12 Days
	4	Review Stock Images	Joey Baird Ann Owen, on leave until 2027	2 Days
	5	Initial Copy	Ann Owen, on leave until 2027	5 Days
	6	Final Copy	Ann Owen, on leave until 2027	3 Days
	7	Proofread Copy	Freddy Rumsen, deactivated	2 Days

Pro tip:
Also quite useful with groups, teams, roles and forms

3 | Admin Evolution – Roundup

ACHIEVEMENT UNLOCKED:

Governance at the moment of creation or change reduces the conditions that make reactive cleanup inevitable — creating space for the admin to operate at a higher level

Pillars addressed:

Governance

Intervene at the moment of creation or change, not after the cascade

User Experience

User or object status visibility distributes accountability without admin intervention

Maintenance

Weekly change detection replaces periodic damage assessment

4 | Seeing the light

The connection

Setup Toolkit → **Data Integrity**

Govern what gets built, not just what accumulates

User Experience → **Streamlined UX**

Constrain choices deliberately — clarity drives adoption

Admin Evolution → **Administrative Scalability**

The admin's leverage is upstream, not in the cleanup

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Where to start (homework)

- **Where does your system lack context?**
  (forms, fields, teams with no documentation)

- **Where are users overwhelmed by options?**
  (status lists, form attachments, sharing permissions)

- **Where are you the bottleneck?**
  (what could be caught earlier or delegated with the right guardrails?)

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Adobe Workfront Champion Program

The Workfront Champion Program recognizes top product experts, helping them grow their careers and shape the future of Adobe Workfront.

Applications are now open and about 40 Champions per product are selected for a year-long advocacy cohort.

- Knowledge sharing & networking
- Direct collaboration with Adobe
- Though leadership opportunities
- Recognition & swag
- Champion Forum

Interested in becoming an Adobe Champion? Learn More.

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Adobe Workfront User Groups

Workfront User Groups (WUGs) are customer-led meet ups that bring regional users together in person and/or virtually to create open and inclusive communities to:

- Network with peers
- Collectively problem-solve
- Share ideas and best practices
- Provide ongoing education for skill improvement

Interested in joining or starting a chapter? Learn More.

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