Learn: Adobe Workfront First Quarter 2025 Release Webinar

Adobe Workfront Product and Customer Success – January 9, 2025



Today's Agenda

The first Adobe Workfront product release of 2025 is scheduled to take place next week (January 16, 2025) so use this webinar to help prepare yourself and your team for what's coming, what's changing, and what's potentially getting deprecated.

Start Time	9:30 a.m. PT/12:30 p.m. ET
2 minutes	Welcome & Introductions
45 minutes	1Q Release Enhancements
10 minutes	Q&A
3 minutes	Wrap Up & Survey
End Time	10:30 a.m. PT/1:30 p.m. ET

Introductions

Speakers

Lilit Mkrtchyan, Sr. Product Manager | Adobe Workfront
Vazgen Babayan, Manager, Product Management | Adobe Workfront
Matthew Staples, Manager, Software Development | Adobe Workfront
Jeremy Flores, Sr. Product Manager | Adobe Workfront
Jason Barron, Principal Product Manager | Adobe Workfront

Moderators/Co-Hosts

Cynthia Boon, Scale Customer Success Manager | Adobe Workfront

Nichole Vargas, Sr. Scale Customer Success Manager | Adobe Workfront

January 16, 2025 | First Quarter 2025 Release

The First Quarter 2025 Release is happening next week! Make sure to review the <u>release notes</u> on Experience League so that you're up-to-date on what's coming, what's changing, and what's being deprecated.

Notable Resources:

- The <u>Customer Support</u> team is available 24/7 if you have questions or run into any issues/potential bugs
- Be sure to check the <u>Status</u> site for performance and outages as well as the <u>Known Issues</u> page for identified bugs before reaching out! Bookmark these pages for quicker access.
- You can opt into monthly (fast) releases if you prefer learn more about how to enable that feature here, <u>Enable fast Workfront release cycles</u>
- Watch this short 1-minute video from Monique Evans, an experienced customer and Community Advisor on how to become Workfront release ready

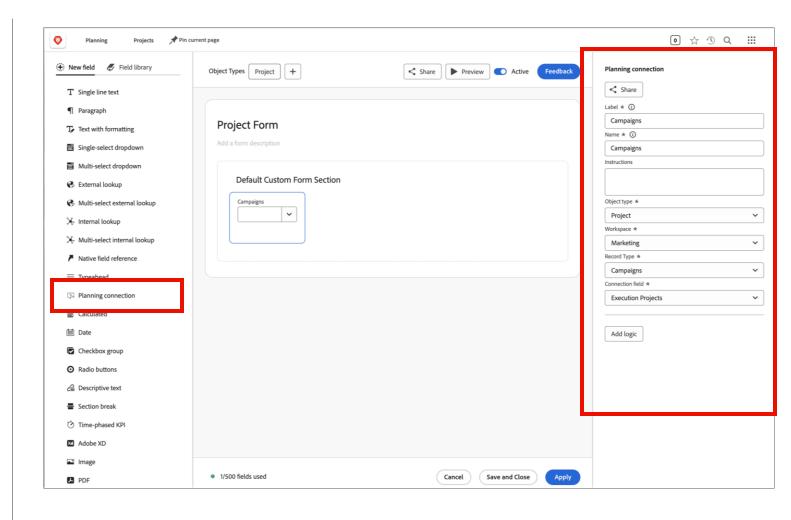
Any roadmap disclosures are for informational purposes only, are not a guarantee of any future feature or functionality and are subject to change at any time.

Workfront Planning Enhancements

Planning connection field type in Workfront forms

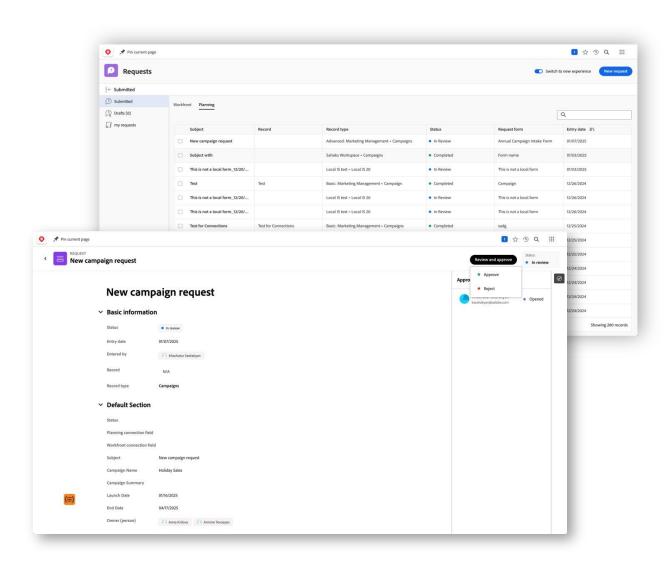
A new field type allows embedding an existing connection between a Planning record type and a Workfront object type in Workfront forms

- Display the connected Planning records in the custom form within the Workfront object
- Connect/disconnect Planning records through this new custom field
- Any changes made to the connected records are reflected in Planning record types



Workfront Planning Requests/Intake

- Single-stage approvals and notifications for Planning request forms
- Added support for using People and
 Connection field types in request forms
- A list of submitted Planning requests in Requests area
- Details page for submitted Planning requests in Requests area

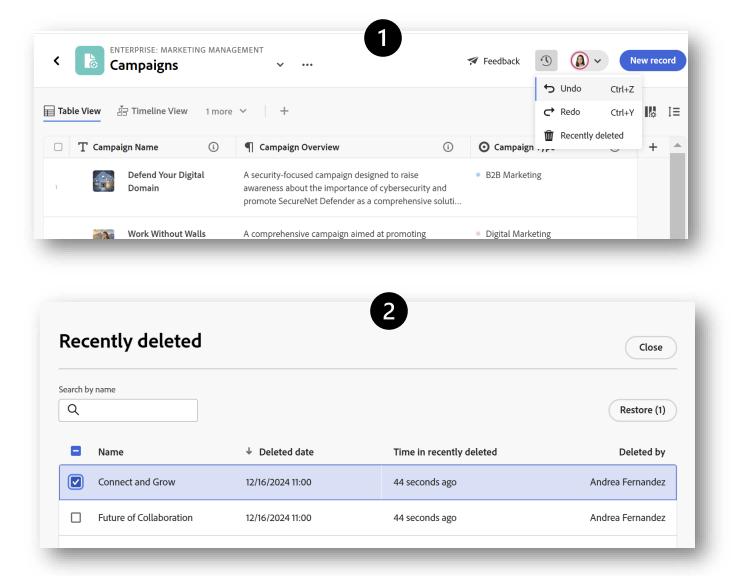


Restore deleted records

After records are deleted, they are now temporarily moved to a Recently deleted section.

Workspace managers can restore records from the trash bin for up to 30 days after the deletion. Connected records and their field information is also restored.

For more information, see <u>Restore deleted</u> <u>records</u>.

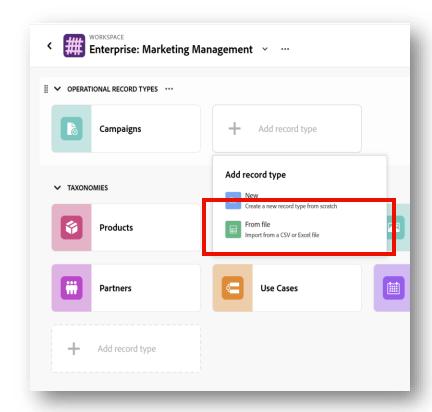


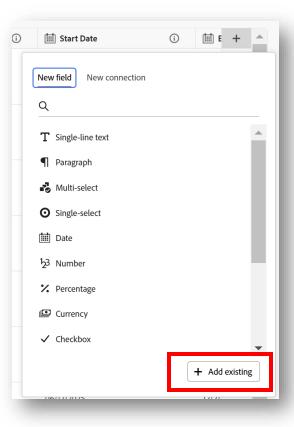


Import record types, fields and records

Now you can save time and effort while configuring your record types, as well as transfer information from external systems into Planning:

- Import CSV/Excel files to create record types along with all their fields and any existing records
- Copy existing Workfront fields into
 Planning record types through New field
 window





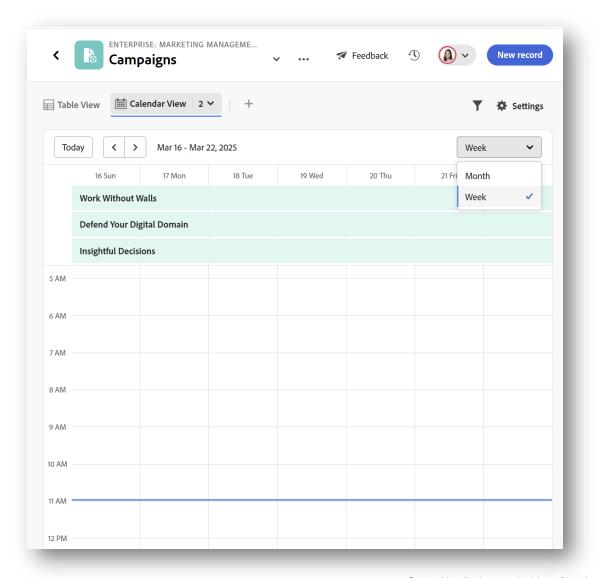
For more information, review the following article(s):

- Create record types
- Import fields from Adobe Workfront

Display records in the calendar view by week

You can now display records in the calendar view by week. Prior to this enhancement, you could display the calendar view only by month.

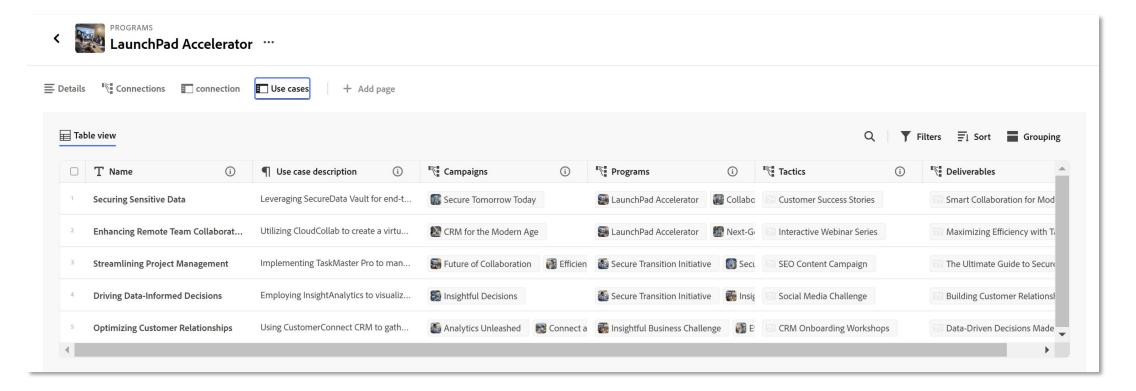
For information, see <u>Manage the calendar view</u>.



Add Connection view pages to a record's page to display connected records in a table view

You can **add pages** to a record's details area to display connected records in a table view. You can add one page per connected record. The added pages are read-only.

For information, see Manage the record page layout.

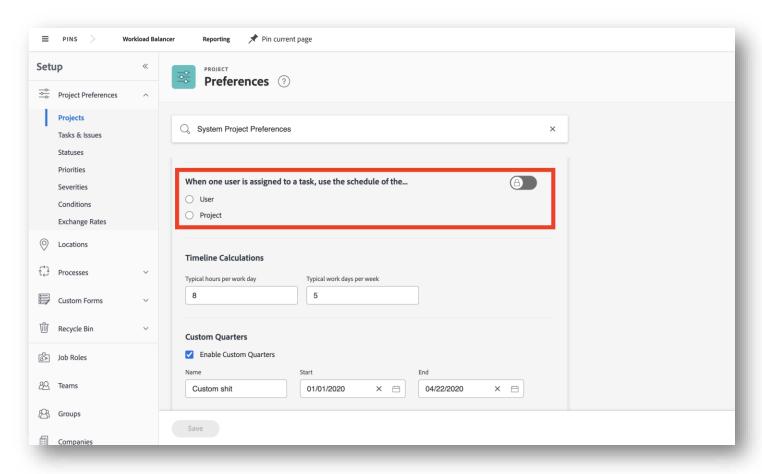




Administrator Enhancements

Use the Project Schedule for all tasks

Users can now set projects to only refer to project schedules for timeline calculations so that user assignments don't change the project plan, and the tasks can still if predecessor tasks are updated.



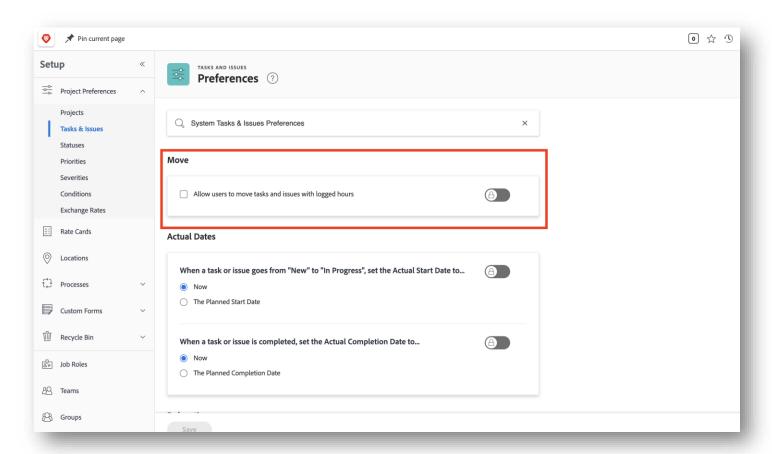
For more information, review the following article(s):

Configure system-wide project preferences

Prevent moving tasks to other projects if there are hours logged

Users can now block the move of tasks that have hours logged on them.

Moving tasks within the same project is still possible.



For more information, review the following article(s):

Configure system-wide task and issue preferences

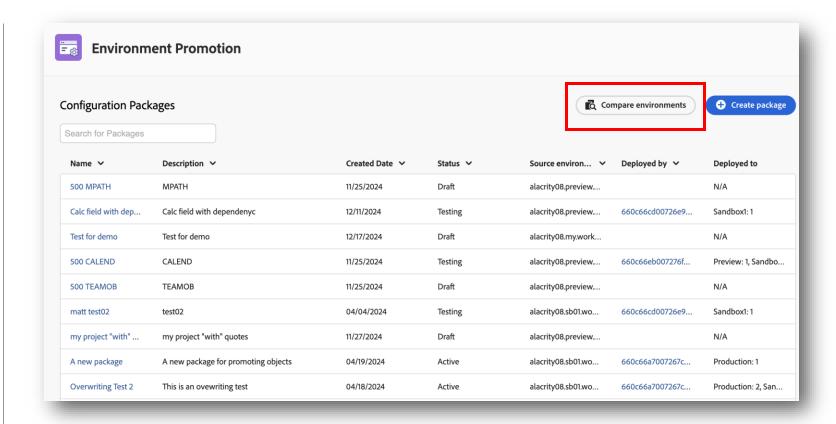


Compare objects across two (2) Workfront environments

Users can now compare objects between environments to ensure that their environment promotion packages contain the objects that they need.

- Select the environments and types of objects to compare.
- Workfront compares all objects of the selected types in both environments and presents data regarding the object differences.

Prerequisites: Workfront instance and users must be onboarded to the Adobe Business Platform (ABP).



For more information, review the following article(s):

Compare objects between environments



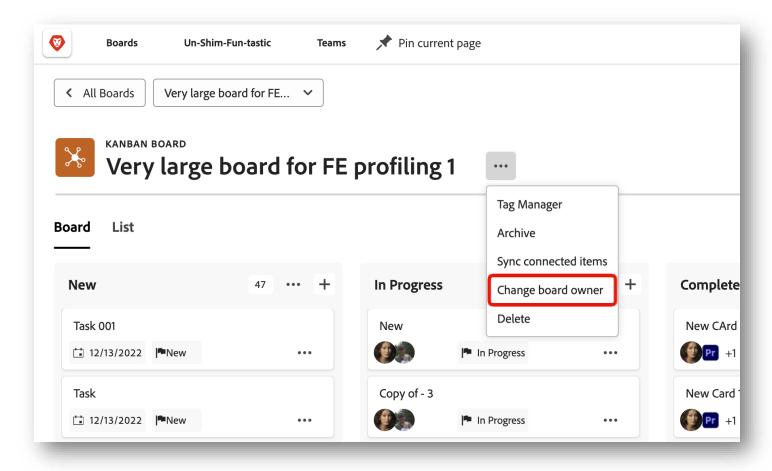
Boards Enhancements

Ability to Change Owner of Board

The creator of a board is the owner by default. The board owner is the only person who can delete that board or update its filters in the Configure panel.

Functionality has been added to allow Workfront system administrators to **change the owner of a board.** The current owner of a board can also change the owner of that specific board.

System admins now can delete any Board.



For more information, review the following article(s):

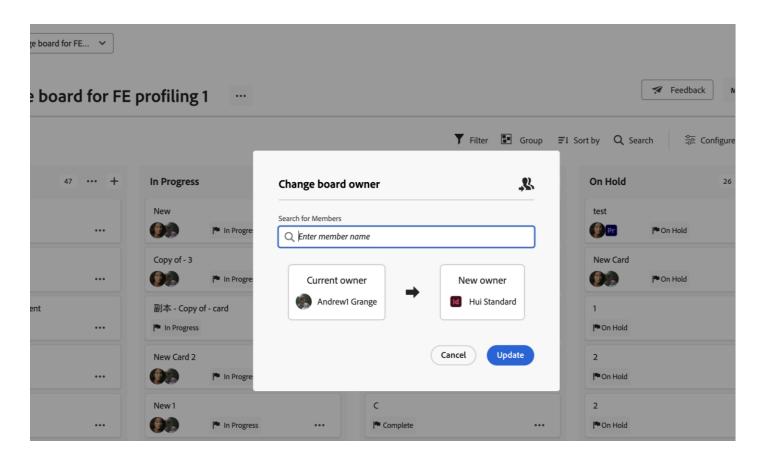
• Add or remove members from a board

Ability to Change Owner of Board (continued)

You can't search for users who are already members on the board. To make an existing member the owner, you must first remove them from the board. Making a user the board owner adds them to the board.

Keep in mind that **only users**, not teams, can be the board owner.

Change owner feature is enabled for all Boards types except Dynamic boards.

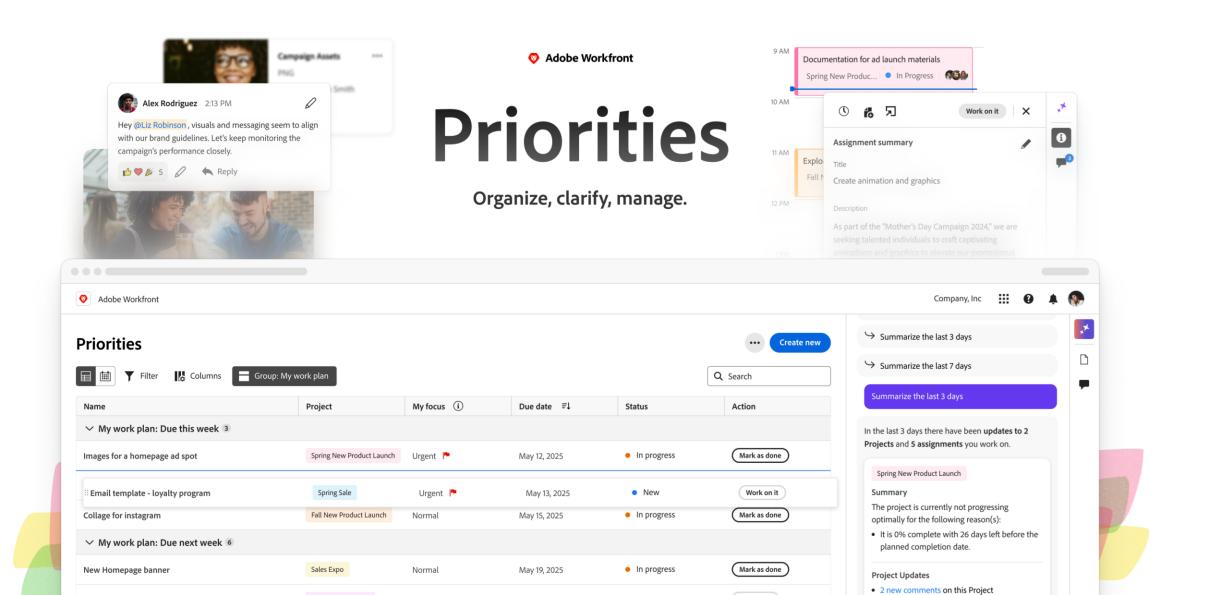


For more information, review the following article(s):

Add or remove members from a board



Priorities Enhancements



New

In progress

Work on it

Mark as done



Email template - loyalty program

Banner ad: 5 sizes

Summer Campaign

Treat Yourself Program

High

Normal

May 22, 2025

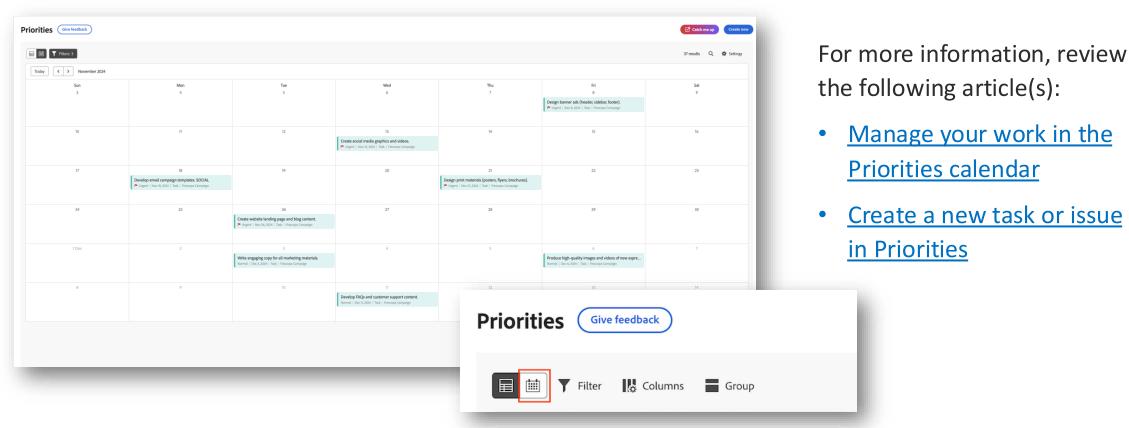
May 23, 2025

The status of this project is Not started
1 pending approval from Sharon Lee

Calendar

Visualize your assigned work

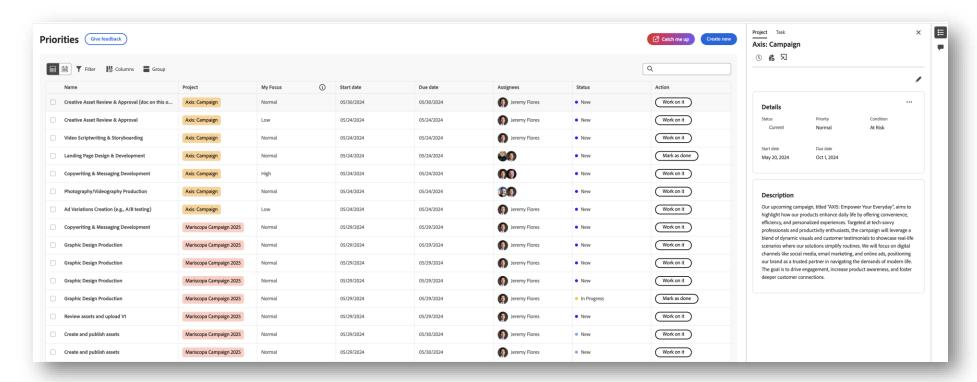
- Month view for due dates: easily track work deadlines with a clear, visual calendar
- Customizable styling: apply colors and labels for quick prioritization and clarity.



Project Rail

Delivering project information

- Easy access to project information: click on the project column to bring project information into focus
 through a right rail
- Link back to the project: go to the full project plan as needed

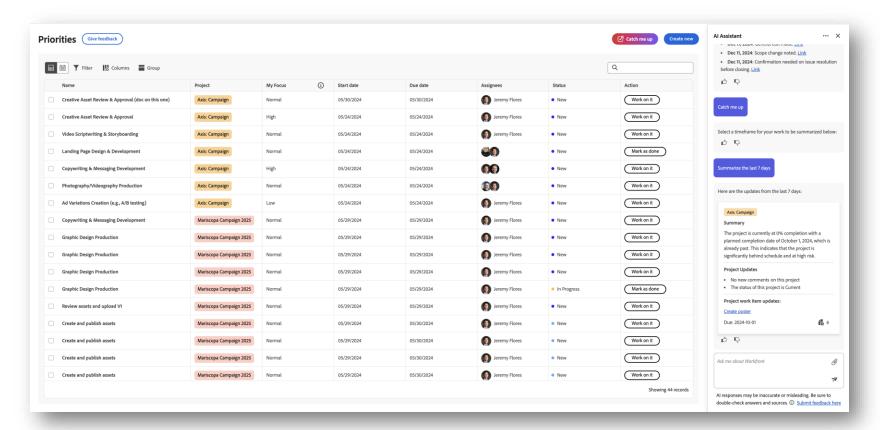




Catch Me Up

Surface relevant information

- Project summaries at a glance: focus on actionable updates from your active projects.
- Relevant insights: no more sifting get the updates that matter most to you.

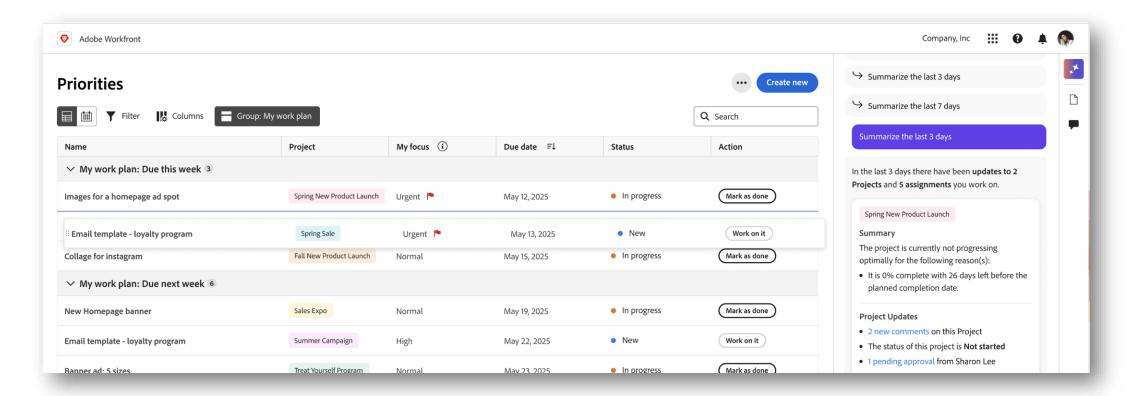




Prioritization Buckets

Flexibility & personal prioritization

- Drag and Drop Prioritization: easily reorder tasks by Priority and Status between groupings
- Streamlined interface: new filter and view options on left, plus expanded search bar on right

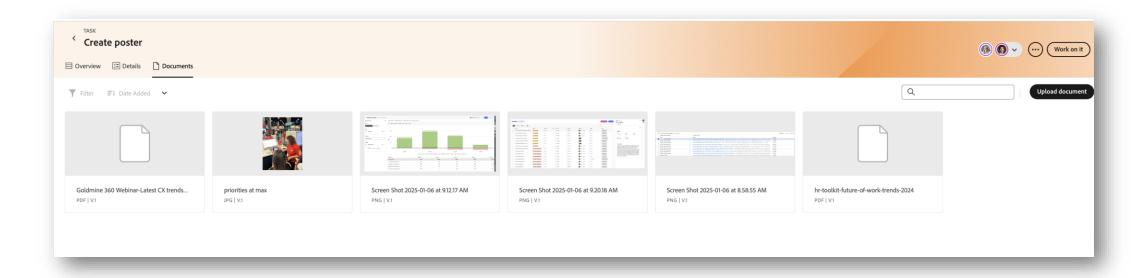




Documents and Real-Time Presence

Upload and view proofs or docs

- Seamless document management: upload, access, and proof docs directly from Priorities
- Advanced file handling supports large uploads and filtering for effortless organization
- Instant updates: see task changes live no refresh needed
- Stay synced: real time indicators keep teams aligned and workflows smooth

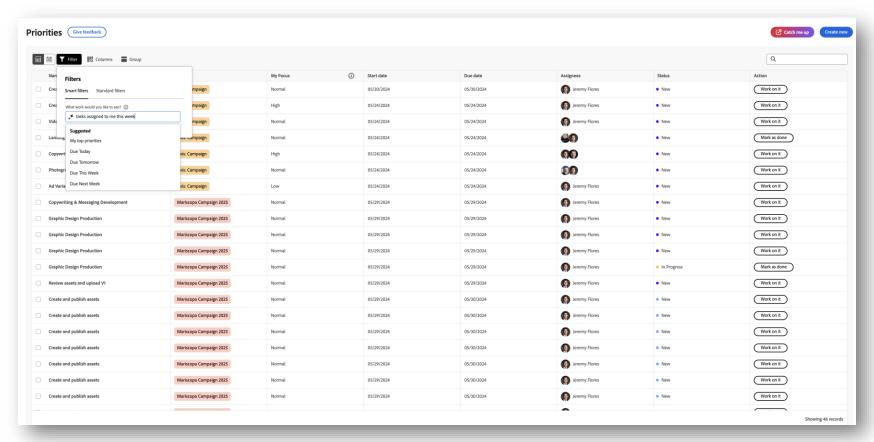




Smart Filters

Find specifics without hassle

- Intuitive search: use natural language to filter tasks effortlessly (e.g. "Show Late tasks")
- No complexity: get results fast no need for advanced filter writing skills

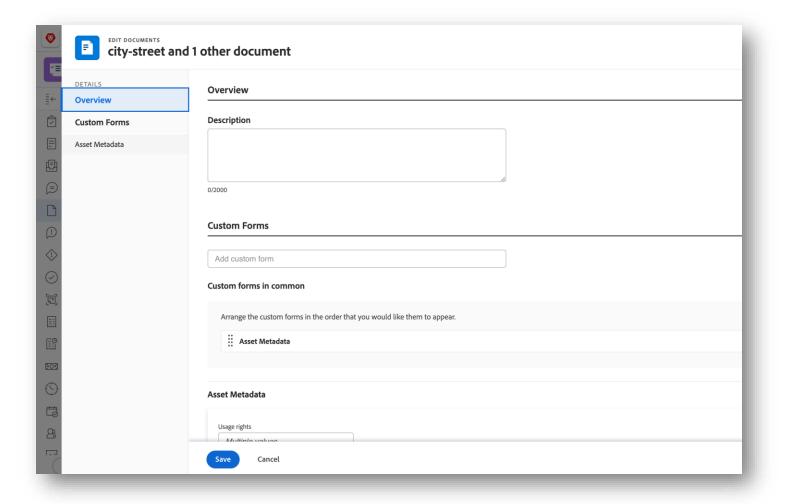




Document Management Enhancements

Document Bulk Editing

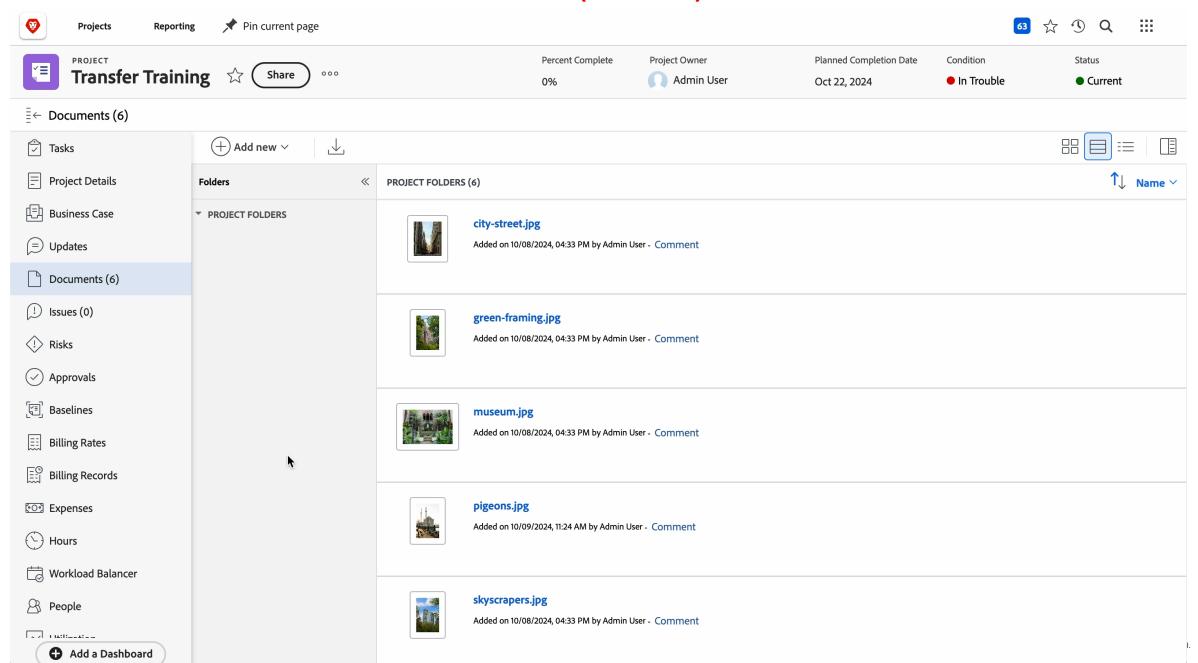
Efficiently edit multiple documents simultaneously, including custom forms, streamlining your workflow, saving you time and increasing productivity.



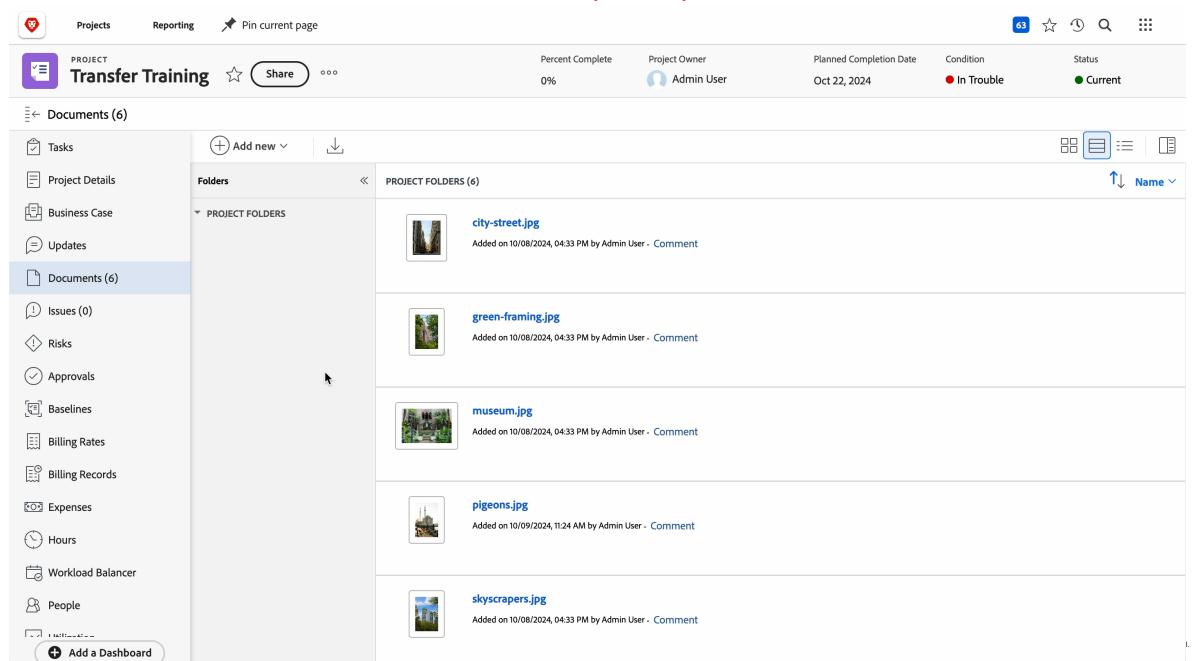
For more information, review the following article(s):

• Edit documents in bulk

Demo (Before)



Demo (After)

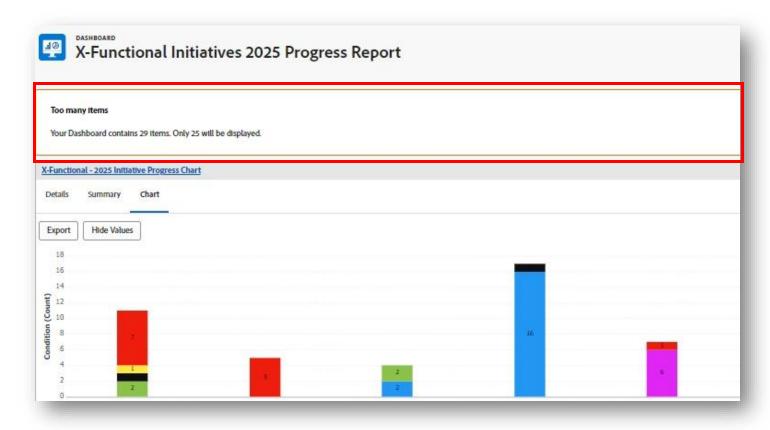


Report & Dashboard Enhancements

25 Object Limit on Dashboards

The total number of reports, external pages, or calendars that can be placed on a **NEW** dashboard is 25.

Existing dashboards that exceed this limit display a warning that only the topmost 25 items are displayed, and once edited the dashboard cannot be saved (Save and Close will be greyed out) until the number of items included is reduced to 25 or fewer.



For more information, review the following article(s):

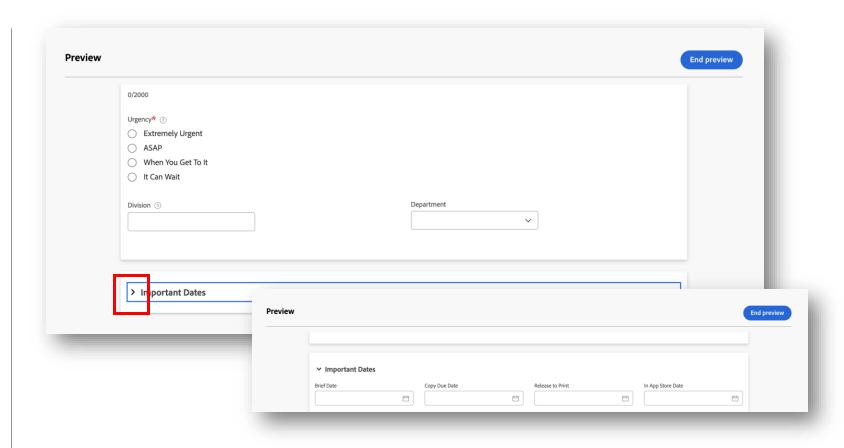
Create a dashboard

Other Enhancements

Collapsible/Expandable Custom Form Sections

When a custom form with multiple sections is attached to an object, you can now collapse and expand all sections except the default section at the top of the form.

System Admins can also see this functionality when previewing the form in the form designer.



For more information, review the following article(s):

Organize and preview a custom form

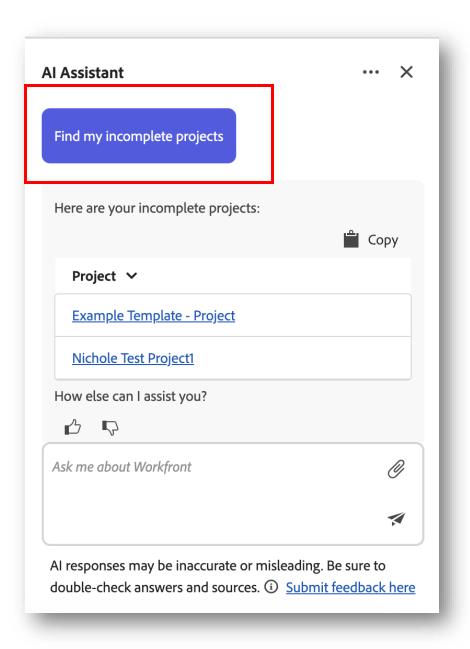
Al Assistant Updates

To make it easier to manage your work items in Workfront, the AI Assistant has been updated to work with projects, tasks, and issues.

Now, AI Assistant can locate projects, tasks, and issues based on criteria you specify, such as "Find my tasks that are due this week."

NOTE: For the full list of AI Assistant prerequisites, review the article, <u>AI Assistant Overview</u>.

For more information, review the article, <u>Use AI to</u> work with projects, tasks, and issues.

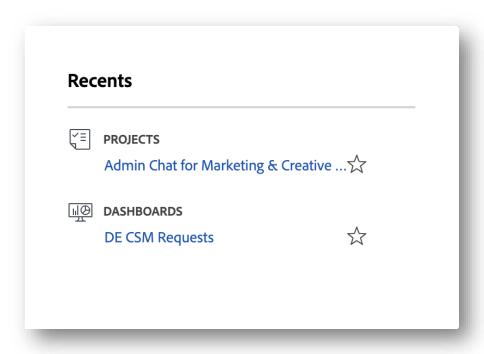




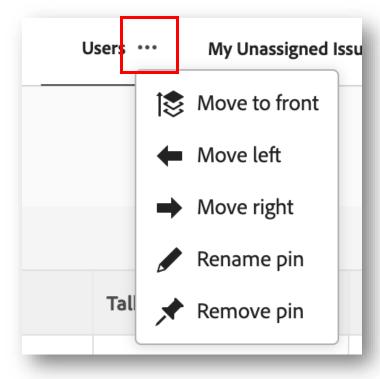
Look and Feel Updates

Favorites, Recents, and Pins

The **Favorites** and **Recents** drop-down screens no longer have a close button. You can simply click away from the screen or press ESC on your keyboard to close it.



You can **no** longer drag-and-drop pinned pages to arrange them. Instead, there is a drop-down menu with buttons that allow you to move your pinned pages.





Q&A

Have a question for the Adobe Workfront Product Management team? Post it in the Q&A pod and we'll ask it live, pending time.

Adobe

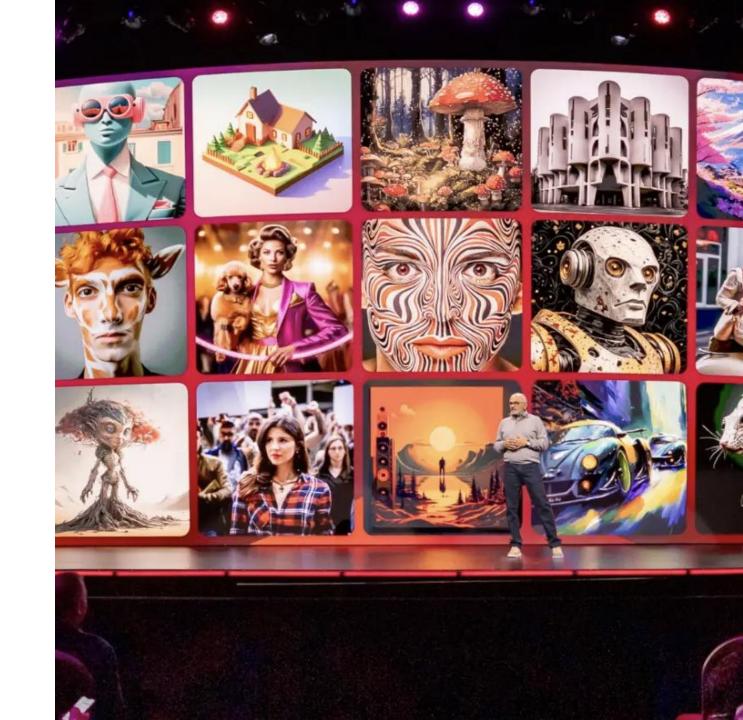
Adobe Summit

March 17-20, 2025 | Las Vegas, NV The Venetian Convention & Expo Center

Save \$100 on an in-person pass when you register by February 13. Register here.

 Want to get a sneak peek of what's coming for Workfront? Attend the session, <u>The Future of Adobe Workfront</u>

Adobe



FREE January Events for Workfront System Administrators

- January 10 at 9:00 a.m. PT <u>Connect: Admin Chat for Marketing & Creative</u>
- January 14 at 8:00 a.m. PT <u>Admin 101 Getting Started with Workfront</u>
- January 21 at 9:00 a.m. PT <u>Learn: 10 Tips to Master Communication In and Out of Workfront</u>
- January 22 at 8:30 a.m. PT <u>Learn: Making the Case for Group Admins</u>
- January 23 at 10:00 a.m. PT Wake up with Workfront: Ask Me Anything!
- January 27 at 6:00 a.m. PT <u>Connect: Workfront Collective</u>
- January 30 at 9:00 a.m. PT <u>Learn: Overcoming Resistance to Change on your Workfront Journey</u>

All events are published to the <u>Events</u> page on Experience League. Check back often for updates and to register.

Webinar Feedback

Please complete <u>this short</u>, <u>5-question survey</u> to share feedback on today's webinar. Responses are anonymous, so transparency and honesty is appreciated!



Thank You!

