



workfront®

Manage a project: Troubleshooting

Once your project is up and running, it's unlikely you'll just turn it loose and hope everything works out. Your main job as a project manager is to...manage the project. Don't worry if you encounter some bumps along the way. Use these tips to help keep everything on track.

TARGETED LEARNING GUIDE

Need more information.

Problem: You're having problems finding the information you need when looking at the task list. The side summary is great, but you're still clicking into tasks to get information.

Solution

Build Filters, Views, and Groupings so you can easily see the information you need.

Many organizations build and share specific Views as part of the implementation process, so when Workfront launches, every project manager has access.

For example, one customer's Views were numbered in the order they'd use them.

- 1-Set up project
- 2-Review project
- 3-Enter hours

Each View contained the columns the project managers needed to complete that phase of the work.

If your organization is using custom forms, make that information easy to see and edit by including it in a View.

Views control the columns of information you see when looking at the task list.

Filters allow you to see tasks based on certain criteria.

#	Name	Project	Pin Comp	Proj Comp	% Complete	Status	Flags
1	Create Copy & Layout	Seasonal Sale	2/13/20	2/28/20	100%	Complete	
2	Create Layout	Seasonal Sale	2/4/20	3/21/19	100%	Complete	
3	Final Layout	Seasonal Sale	2/6/20	2/28/20	100%	Complete	
4	Initial Copy	Seasonal Sale	2/10/20	2/24/20	100%	Complete	
5	Final Copy	Seasonal Sale	2/12/20	2/24/20	100%	Complete	
6	Proofread Copy	Seasonal Sale	2/13/20	2/28/20	100%	Complete	
7	Creative	Seasonal Sale	2/20/20	2/28/20	100%	Complete	
8	Create Assets	Seasonal Sale	2/14/20	2/24/20	100%	Complete	

Groupings organize tasks by a common criteria.

Learn more about [Filters, Views, and Groupings](https://one.workfront.com) at one.workfront.com.

Trending in the right direction.

Problem: You think everything on the project is going OK, but you're not sure. How can you make sure your project is trending in the right direction?

Solution 1

Look at the condition—On Time, At Risk, In Trouble. This easy-to-see piece of information serves as a health check of the project schedule.



A number of things factor into the condition—such as task status, planned dates, and critical path—so keep that in mind when using condition.

Many organizations prefer Workfront to configure the condition automatically. But some prefer to let the project manager be the judge of how the project is going, so they set the condition manually. The ability to do this is controlled by the Condition Type in the project details.

Learn more about [project condition](https://one.workfront.com) at one.workfront.com.

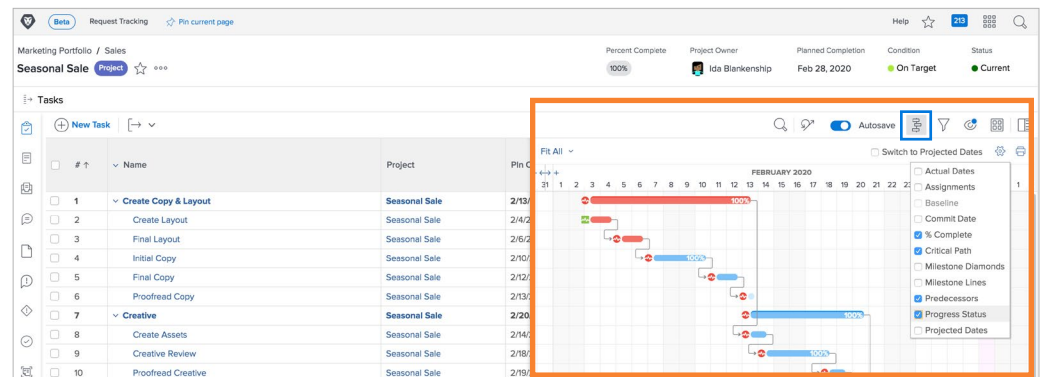
Solution 2

Take a quick look at the Gantt chart, turning on “progress status” in the settings.

Icons by each task bar signify the progress status.

- Green rectangle = On Time
- Yellow triangle = Behind
- Blue diamond = At Risk
- Red dot = Late

If you see tasks with a Late icon, then you know quite a few tasks haven't started on time. Use an update to communicate with the team member to ask if there's anything blocking them from starting work or if they need help.



Learn more about the [Gantt chart](https://one.workfront.com) at one.workfront.com.

Timeline updates.

Problem: The project has already kicked off and work has started. On occasion, you need to make timeline updates in the least disruptive way possible.

Solution 1

Before you start making changes to the project timeline, either switch the project status to Planning or switch to Manual save under the Plan Mode icon.

Both of these options prevent Workfront from sending out notifications as you're making changes.

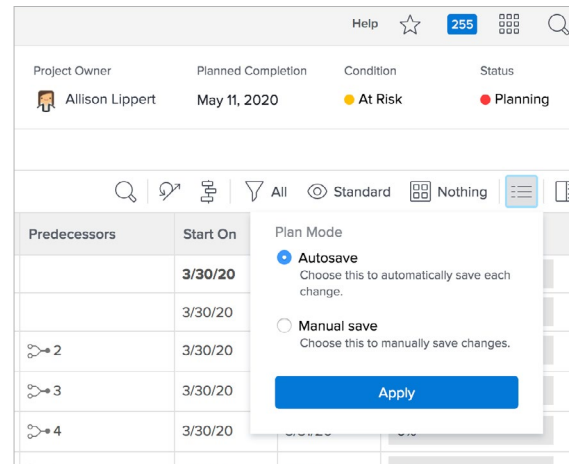
Once you change the project status back to Current or click Save while in Manual mode, Workfront sends out any automatic notifications.

It doesn't hurt to also post an update on the project to let team members know that changes were made. You can do that quickly using the Update All option in the People section of the project.

Learn more about editing tasks and the [Plan Mode options](#) at [one.workfront.com](#).

Pro tip

If you find yourself switching the status or using Manual Save multiple times during the lifetime of a project, that's a good indication to review how that project is set up. Make the changes to the template, so any project going forward requires fewer manual changes.



Solution 2

If a task is no longer needed, set the status to Cancelled rather than deleting the task.

Deleting the task removes it from the project timeline, which ultimately affects the project's planned dates and, possibly, the completion date.

For example, if a task for "Review the design" was slated for 3 days and that is deleted from the project plan, then everything else in the project moves 3 days earlier.

By cancelling the task, you're simply saying "not going to do that one" and the timeline stays the same.

Solution 3

Workfront recommends that timeline adjustments be made by adjusting the durations and predecessors of the tasks in the project.

Add lag and dependency types with the predecessors to fine-tune the project timeline. This allows you to build extra space into the timeline by putting gaps between tasks or setting tasks so they can be worked on concurrently, rather than consecutively.

Learn more about [durations](#), [dependency types](#), and [lag](#) at [one.workfront.com](#).

The screenshot shows a project timeline for 'Spring colors palette' with a 0% completion rate. The project is owned by Allison Lippert and is planned for completion on May 11, 2020. The status is 'At Risk' and 'Planning'. The tasks are as follows:

#	Task Name	Assignments	Duration	Pin Hrs	Predecessors	Start On	Due On	% Complete
1	Create Copy & Layout		2 Days	68 Hours		3/30/20	3/31/20	0%
2	Create Layout and Overall Design	Designer	2 Days	16 Hours		3/30/20	3/31/20	0%
3	Final Layout	Designer	2 Days	16 Hours		3/30/20	3/31/20	0%
4	Initial Copy	Copywriter	2 Days	16 Hours	3-1d	3/30/20	3/31/20	0.00
5	Final Copy	Copywriter	2 Days	16 Hours	>= 4	3/30/20	3/31/20	0%

The screenshot shows a project timeline for 'Spring colors palette' with a 0% completion rate. The project is owned by Allison Lippert and is planned for completion on May 11, 2020. The status is 'At Risk' and 'Planning'. The tasks are as follows:

Pin Hrs	Predecessors	Start On	Due On	% Complete
68 Hours		3/30/20	3/31/20	0%
16 Hours		3/30/20	3/31/20	0%
16 Hours	>= 2	3/30/20	3/31/20	0.00
16 Hours	>= 3			
16 Hours	>= 4			
4 Hours	>= 5			
44 Hours				
8 Hours	>= 1			
16 Hours	>= 8			
8 Hours	>= 9			
12 Hours	>= 10	3/30/20	3/31/20	0%

A calendar pop-up is shown for the date 3/30/20, highlighting the date 24.

However, Workfront recognizes this isn't always practical. Sometimes it might work best to just select a date using the pop-up calendar on the timeline. Just remember, this changes the task constraint, which can affect how the dates adjust in the rest of the timeline. You will likely want to expose the task constraint in a View to manage this effectively.

For example, there's a project at Workfront that began several months ago and some of the work was completed. The project got put on hold, then was picked back up. So rather than trying to adjust durations to account for the two-month gap, the project manager just found the task where the work needed to pick up and clicked into the start date field to set the start date. Because predecessors and durations for the remaining tasks were established, the date changes cascaded through the project.

Things are slipping.

Problem: The project schedule is about to slip. How could you have anticipated this better?

As the project manager, you've learned to expect surprises. Unfortunately, you're not able to predict everything that could go wrong. After all, some things are beyond your control.

Solution 1

Communication plays a big role in preventing project slip. Encourage your team to click the Work On It button on their assignments in Workfront Home. You can run a report on this information to see who has accepted their assignments and who hasn't.



Monitor task progress through the project itself, watching task status, percent complete, or progress status. Or write a custom report to track the status of each task your team is working on.



Solution 2

If the schedule is about to change, assess the effect of this—on the project and the team—ASAP. Look at possible solutions and explore how you can replan the project.

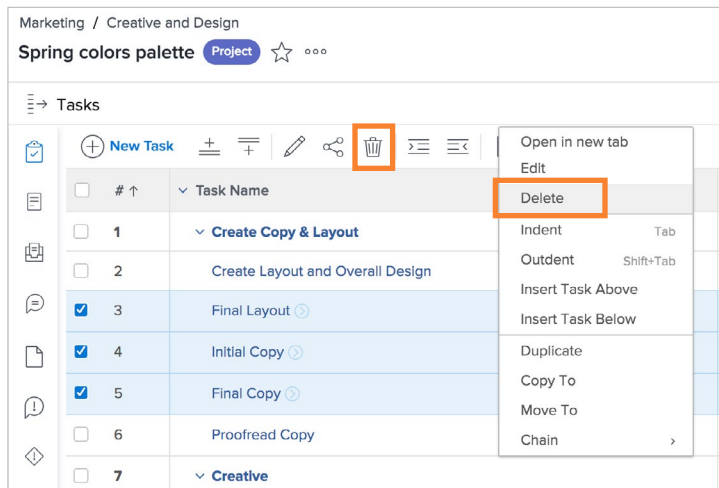
And, of course, communicate. Notify key stakeholders about the problems. You might need their approval before you start changing the project. Don't forget to notify the project team, too!

Project plan changes.

Problem: There's a set of tasks in the project template that aren't needed for this specific project. What's the best way to manage them?

Solution 1

If you're still planning the project, you may want to just delete the unneeded tasks. Deleting tasks will affect the project timeline, so you could end up with a shorter timeline than usual. Make needed adjustments to the timeline using durations and predecessors.



Delete tasks by selecting them and clicking the trash can icon. Or right-click and select Delete.

Pin Comp	Proj Comp	% Complete	Status	Flags
3/31/20	4/3/20	44.44%	In Progress	
3/31/20	3/24/20	100%	Cancelled	
3/31/20	3/24/20	100%	Cancelled	
3/31/20	3/31/20	0.00	New	
3/31/20	4/8/20	0%		
3/30/20	4/9/20	0%		
3/31/20	4/17/20	0%		
3/30/20	4/10/20	0%		
3/31/20	4/14/20	0%		
3/30/20	4/15/20	0%	New	

Solution 2

You can set the Status of the tasks to Cancelled (or an equivalent). This does a couple of things:

- It leaves the project timeline intact, so you don't have to make duration or predecessor adjustments.
- It lets you know which tasks weren't needed for this project, so you can report on it later.

The scope changes.

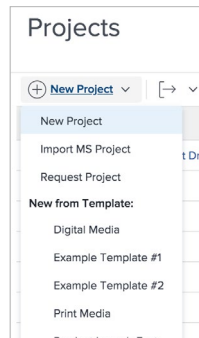
Problem: You were just informed the scope of the project is changing.

Solution 1

The scope of the project should have been clearly defined by key stakeholders before the project was created and kicked off.

If the scope change is due to something unexpected, the project manager should, after consulting with the stakeholders, decide whether to allow the scope change or not. As the project manager, you should understand the consequences of all the options, communicate them clearly to stakeholders, and lead the group to a decision.

Excellent communication is key. Workfront makes communication easy with updates, but it's not automatic. Be proactive and reach out to your team.



Solution 2

Sometimes it's easier to just start a new project to manage the new deliverables because of the scope change. You'll want to make sure you don't double count things like hours, budgets, resources, etc.

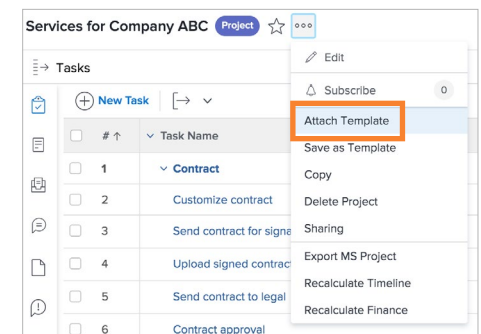
Mark the existing project as Dead, or a similar status, and move any necessary information into a new project during the planning phase. You'll want to make sure to keep any information needed for reporting purposes.

Solution 3

If the scope changes include additional deliverables being added to the project, you can manually add more tasks or attach an additional template to the project.

Make sure you know if the project deadline has been extended to accommodate the extra work so you can adjust durations, planned hours, and predecessors accordingly.

Other options are editing existing tasks, deleting and replacing tasks, or marking unneeded tasks as Complete or Cancelled. Just remember, if there's work already done that includes comments, assets, hours logged, etc., you probably want to preserve that information...so don't delete the tasks it's all attached to!



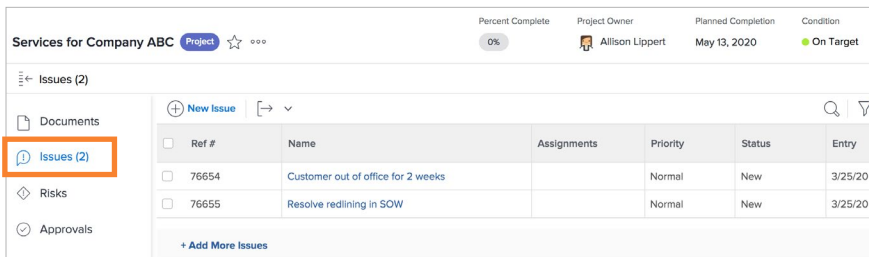
Manage unplanned work.

Problem: It's a new type of project, a new project template, etc. Whatever the case, some required but unplanned work is popping up. How can you handle it?

Solution 1

Track the unplanned work using Issues. You can create issues at the task or project level, but they're all visible from the project Issues tab.

You can assign Issues to project team members, and use the issue to track hours and make updates. Once the work is done to resolve the Issue, just change the status to Complete.



Ref #	Name	Assignments	Priority	Status	Entry
76654	Customer out of office for 2 weeks		Normal	New	3/25/20
76655	Resolve redlining in SOW		Normal	New	3/25/20

A few things to know about Issues:

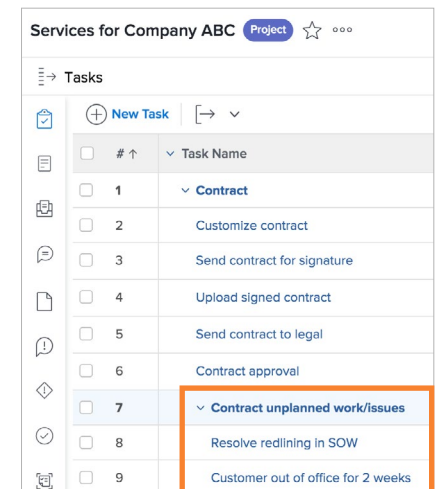
- Issues cannot be included in the project timeline. If you need to include the time needed to resolve the Issue in the project plan, you'll need to convert the Issue to a task.
- All issues must be resolved—the status marked as Complete—before the project status can be set to Complete. Workfront will warn you when there are open issues.
- Not every organization uses Issues for unplanned work. Check with your team to see how best to handle the things that pop up.

Solution 2

Add all of the unplanned work, with your best guesses for durations and planned hours, at the bottom of the project under a special parent task. (Use predecessors, of course, to get them worked in the right order in the timeline.)

If you prefer, you can put the tasks in the proper place in the task list. Just mark them somehow—naming convention, custom field, etc.—so you can easily distinguish them from what came with the template.

During the post-project retrospective meeting, take a look at the planned versus unplanned work. How did that affect the original plan? The planned completion date? Then decide if these unplanned items that cropped up should be included in the project template.



#	Task Name
1	Contract
2	Customize contract
3	Send contract for signature
4	Upload signed contract
5	Send contract to legal
6	Contract approval
7	Contract unplanned work/issues
8	Resolve redlining in SOW
9	Customer out of office for 2 weeks

Updates aren't working right.

Problem: As you're working with the project timeline, dates aren't changing the way you think they should. You can't figure out why.

Solution

Check the task constraints.

Task constraints control when a task should start or stop in a project. Most projects get set up with Workfront's default task constraints—As Soon As Possible (when a project is scheduled from start date) or As Late As Possible (when a project is scheduled from completion date).

When you click into the date fields and click a date in the pop-up calendar, you're changing the task constraint. For example, if you select a start date, then you're resetting the task constraint to Must Start On.

These constraints affect how the task behaves when you adjust predecessors or durations. Oftentimes, when date changes aren't cascading through a project like you expect them to, there's a task in there somewhere with a different constraint.

How can you troubleshoot this?

- Include the Task Constraint column in a View so you can see when a constraint is affecting the timeline. This is especially helpful for project managers who are new to working with timelines. You can reset the constraint right there in the column.
- Reset multiple task constraints to ASAP or ALAP with a bulk edit. You may need to reset all tasks in the project or just the tasks that are affected by the timeline change.
- Workfront recommends that timeline changes be done using durations, dependency type, lag, and predecessors. With a combination of these features, you can set tasks to begin concurrently, rather than consecutively. Or you can add gaps between tasks.

Start On	Due On	% Complete	Task Constraint
3/27/20	4/15/20	0%	As Soon As Possible
3/27/20	4/2/20	0.00	Must Start On
			As Soon As Possible
			As Soon As Possible
			As Soon As Possible
			As Soon As Possible
			As Soon As Possible
			As Soon As Possible

Pro tip

Sometimes you can't tell what's going on unless you can see all of the information that affects the timeline. Select or create a task View that contains:

- Task name
- Duration
- Planned hours
- Predecessors
- Planned Start Date
- Planned
- Completion Date
- Task constraint
- Status

Team member is unavailable.

Problem: The person assigned to the task is out sick, on vacation, or otherwise unavailable.



Solution 1

If the amount of time planned for the task can be extended, change the Duration so the project team member has more time to get the work done.

This change could cascade through the rest of the project, so keep an eye on the timeline when you make a change. You might be able to get some of the time back by shortening Durations on later tasks.

Solution 2

The work still needs to get done, so assign a second team member to the task. They can log their hours and mark the task as complete when they're done.

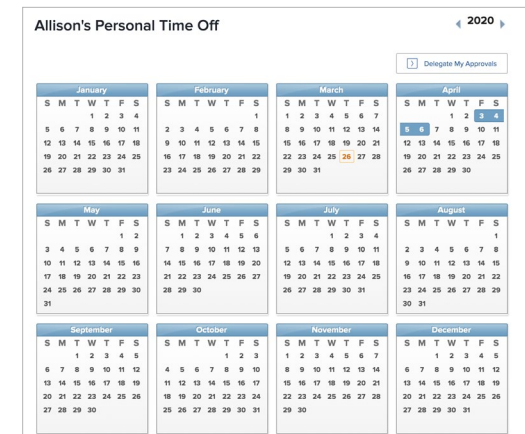
Assignments
<div>  Macey Eskelsen  Allison Lippert </div>

The team member initially assigned can still see the task and comment on it, but they aren't on the hook for a late task when they get back in the office.

Solution 3

Have your team members mark their personal time off using Workfront's time-off calendar. This is available on each Workfront users' profile page by selecting Time-Off in the left panel menu. Learn more [online](#) about the [time-off calendar](#).

When you're assigning tasks in the project, an icon alerts you to the fact that the user has time off on the calendar. It should be for the entire duration of the task, or just part of the duration. Workfront is letting you know that person might not be available during the time allocated.



Assignments

Allison Lippert

Services Manager

Here are a few recommendations

Allison Lippert
Project Man...

Pro tip

A global system setting called User Time Off determines if the assignee's time off changes the task duration.

Stick to the plan.

Problem: You don't have any wiggle room on the project. Everything has to be done by the planned dates.



Solution 1

Some projects have rigid due dates. The work has to be done by a certain date, such as preparing materials for a trade show.

If it looks like you won't meet that date, consider reducing the scope of the work or adding more resources to catch up.

Communication and good management is the key to making sure everyone is aware the deadlines are set in stone.

Solution 2

Track when and how the project timeline changed by snapping a baseline before you change the task list. Workfront lets you compare baselines, so you can compare the original plan with the new plan, to help you identify exactly where changes were made.

Name	Entry	Planned Start	Projected Start	Actual Duration	% Complete	Default Baseline
Baseline 1	3/25/20	3/25/20	3/25/20	0 Days	0%	
Baseline 2	3/25/20	3/25/20	3/25/20	0 Days	0%	

Use this information to analyze the changes that occurred along the way, and then make any necessary changes to the project template.

Learn about [creating baselines](#) on one.workfront.com.

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