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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
Submit a new request

A. Go to the “New Request” tab.

B. Select “Research & Evaluation” from the drop-down menu.
Fill out the form completely.
Fields shown in “BOLD” are **REQUIRED FIELDS**

**Subject** – Name of Request.

**Description** – Provide specific details regarding what your research question is and how this information will be used.

**Do you need data pulled from SIS?** – You can request additional data from Student Information Systems to be pulled by a SAIS data analyst and then analyzed by Research & Evaluation. 
**Note:** This process may extend the timeline of your project.

**Are you supplying your own data for analysis?** Indicate whether you have existing data for Research & Evaluation to analyze. You can attach the data using the Documents tool or submit through iShare.

**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

**Date Needed** – Please specify a deadline for your project to be completed. If your project does not have a deadline, please leave this blank.
Note: If you select Survey/Assessment as your Research Request Type, you will be prompted with the following additional questions about your survey:

Are you offering incentives? Please select whether survey participants will be rewarded with a prize, compensation, or be entered into a raffle for participating in your survey. Please provide as much detail as possible about any incentives offered.

Who will participate in the survey?
Please identify the sample size and demographics of your survey participants (e.g., all currently enrolled UCR undergraduates).

Is this a new survey?
Please indicate whether you need Research & Evaluation to design a survey for you or if you are requesting an existing survey to be administered.

Does this survey require IRB approval?
If your survey contains sensitive information, it may require approval from UCR’s institutional review board. If your survey is a program evaluation, it likely will not need approval. Please review the UCR research policy at research.ucr.edu to learn more about UCR’s IRB.

Survey Launch Date and Survey Close Date:
Please indicate if you have specific dates of when you would like your survey to be open. If you do not have specific dates, please include a general time frame in your project description (e.g., fall quarter).

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

Once your request has been submitted, we’ll schedule a meeting with you to discuss it. If you have questions before submitting your Research & Evaluation request, contact SAISResearch@ucr.edu.
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
**Communicating About 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).
Overview of Navigation Bar

A. 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.

B. Workfront Help – If you have a question about Workfront, call Susana Roddy at 2-5694. For specific questions about submitting a R&E request, call Sara Langben at 2-5968. You are also welcome to explore any topics using the search box.

C. 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.

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