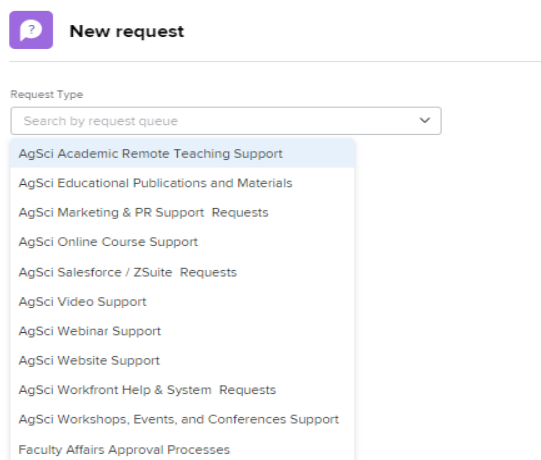


# Logging into Workfront

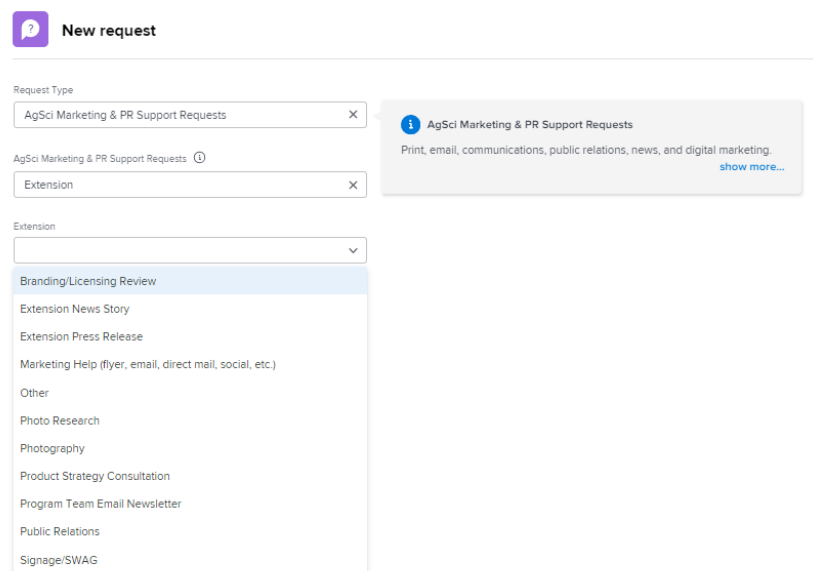
1. To access the login screen, visit <https://pennstate.my.workfront.com>
2. Once on this screen, you will see a login prompt with the Penn State logo. Here you can use your regular Penn State credentials and enter Workfront through Duo authentication.

# Submitting a Request in Workfront

1. Once logged in you will automatically be taken to the Requests page. On this screen you can submit new requests and view the status of any request previously submitted through Workfront.
2. To submit a new request, click on “New Request” and select a request type from the drop-down menu.



3. Depending on the request type, you may have to make some additional selections to reach the correct request form. Once there, you will see various fields that need to be completed before submitting your request.
  - a. Hovering over the selections in the drop-down menus will queue a brief description.
  - b. Fields in bold are required in order to submit your request.



# How to check on the status of a request and/or update/change request information

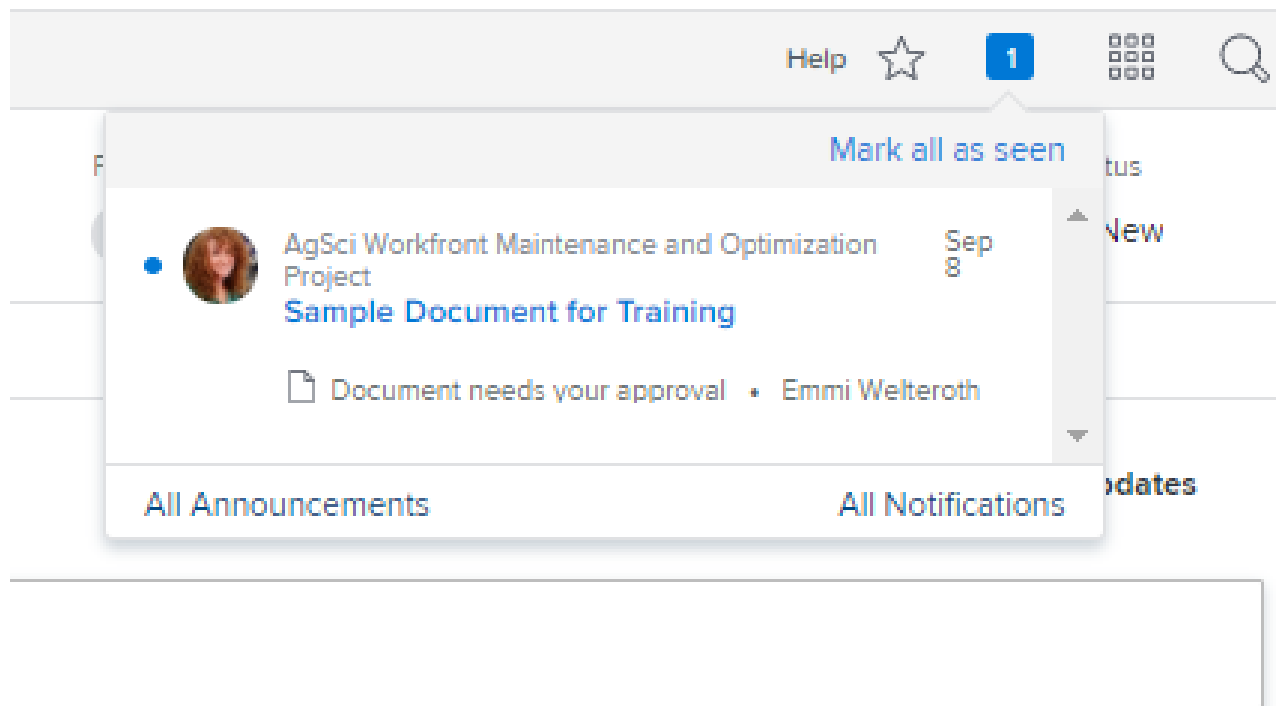
1. On the “My Requests Dashboard” tab you can view all open requests. On this screen you can quickly see the status, planned completion date, and who your request is assigned to.
2. For more details, click on the name of the request. This will take you to a new screen – the request landing page.
3. On the request landing page you can use the following tabs to review, update, or monitor your request:
  - a. Updates–this is your hub for collaborating with the assignee of your request. Here you can leave a comment or reply to an existing one. It’s key to @-tag the user you are directing your comment to, so they receive a notification.
  - b. Documents–this is where you can view any items you may have attached when submitting the request, attach additional items after submitting your request, or review documents shared with you.
  - c. Request Details–this is where you can see a quick overview of your request or review/revise the original custom form you filled out when submitting the request.

The screenshot shows the 'My Requests Dashboard' interface. On the left is a navigation menu with options: 'New', 'My Requests D...', 'Requests I've S...', 'Drafts (0)', 'All Requests', and 'Add custom section'. The main content area is titled 'AgSci Requestors Dashboard' and includes a description: 'Used by AgSci-MC Requestors to monitor the progress and updates on the marketing car - Status of My Requests - Health of Active Projects | Sponsor, by Campaign'. Below this is a 'Status of My Requests' section with an 'Export' button and a table. The table has columns for 'Entry Date' and 'Name'. A dropdown menu is open for 'Request Queue: AgSci Workfront Help & System Requests (1)', showing a row with '9/17/20' and 'Training Request'.

The screenshot shows the 'Training Request' landing page. At the top, there is a 'Pin current page' button. Below that, the title 'Training Request' is followed by a yellow 'Request' tag, a star icon, and a menu icon. The main content area is titled 'Updates' and features a navigation menu on the left with options: 'Updates', 'Documents', 'Request Details', and 'Add custom section'. On the right, there is a 'New Updates' button and a text input field with the placeholder text 'Start a new update'.

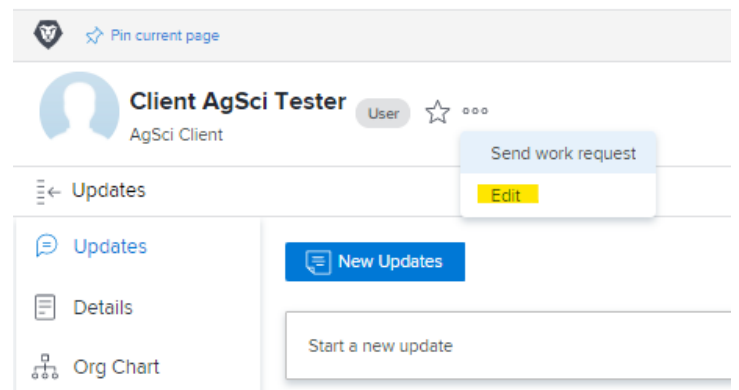
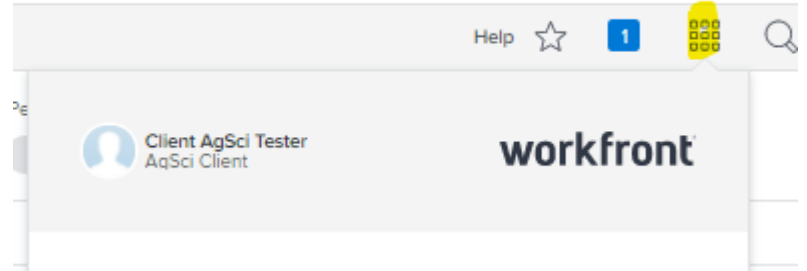
# Workfront Notifications

1. When something needs your attention in Workfront you will receive notifications in two different places: via email and in the gray global navigation bar in Workfront.
2. If accessing your notifications via Workfront, simply click on the item and you will be redirected to the page needing your attention. Notifications will appear in the top right corner of your screen.
3. If accessing your notifications via email, you can click on the link provided, which will open a web browser and take you to the page needing your attention. Notification emails will come from a standard PSU email address, but it is important to note that in order to view and reply to a comment, you will need to click on the link and take action within Workfront. **If you reply to the email, the recipient will not receive your response.**



# Profile Settings

1. You can access your profile by clicking the main menu icon on the far right of the global navigation bar and selecting your name.
2. From here you can edit your information by clicking the three dot icon next to your name and selecting "Edit". This will take you to the "My Info" page where you can make any changes to your profile, including your email notifications.

A screenshot of the 'My Info' profile settings page. The page is divided into several sections: 'Personal Info', 'Job Info', 'Contact Info', 'Profile Photo', and 'Preferences'. The 'Personal Info' section includes fields for 'First Name', 'Last Name', 'Email Address (this will be the username)', and 'Federation ID'. The 'Job Info' section includes a 'Title' field. The 'Contact Info' section includes fields for 'Phone Number', 'Ext.', 'Mobile Number', 'Address', 'City', 'State', 'Postal Code', and 'Country'. The 'Profile Photo' section includes a photo upload area with an 'Upload Photo' button and a note: 'You can upload a JPG, GIF or PNG file (file size limit is 4 MB)'. The 'Preferences' section includes dropdown menus for 'When I log in, show:' (set to 'Requests (Default page)'), 'In the Global Nav bar, show:' (set to 'My Updates, Requests'), 'Time Zone' (set to 'Eastern Standard Time (US & Canada)'), and 'Locale' (set to 'English (United States)'). There is also a checkbox for 'Show percent complete on update status' which is checked. At the bottom of the page, there are 'Save Changes' and 'Cancel' buttons.

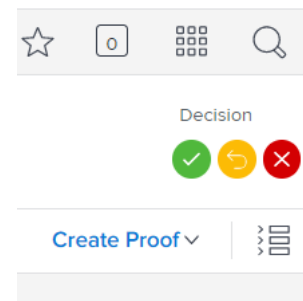
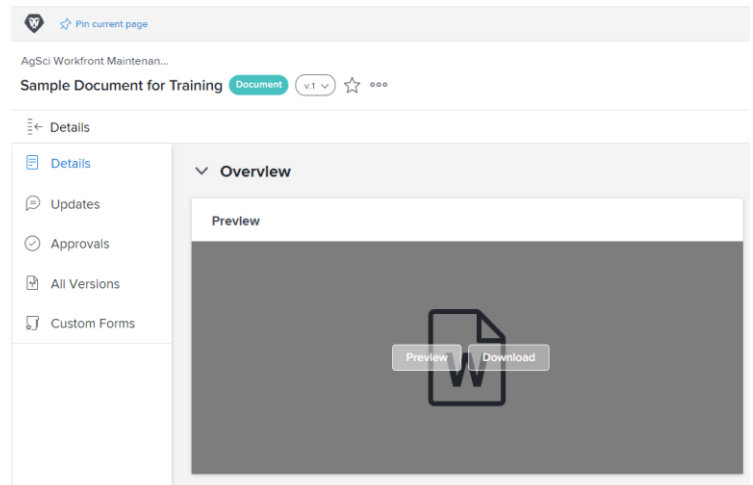
# Reviewing and Approving Documents

1. If you have a document that needs reviewed and approved in Workfront, you will receive a notification via email containing a link to the document needing your attention.

2. If you are asked to approve a **document**, you can view the document online in Microsoft OneDrive by selecting **Preview** once inside Workfront

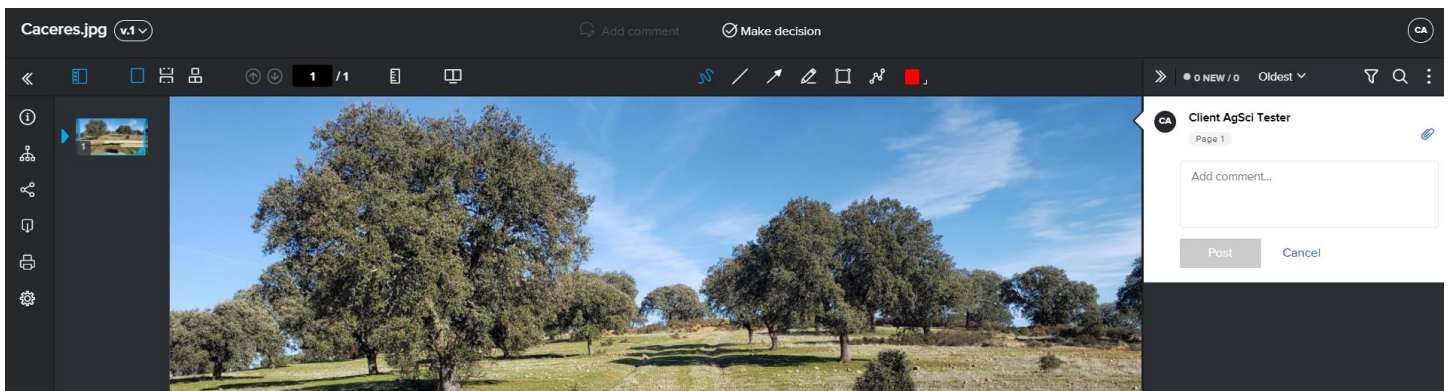
1. Once you've reviewed the document and left any comments, you'll need to submit a formal decision. You can do this by selecting one of the following options in Workfront:

1. Approved (Green Check)
2. Approved with Changes (Yellow Arrow)
  1. The document does not need reviewed again once changes are made.
3. Rejected (Red X)
  1. The document does need reviewed again once changes are made.



# Reviewing and Approving Proofs Less than 12 Pages

1. If you have a proof that needs reviewed and approved in Workfront, you will receive a notification via email containing a link to the proof needing your attention.
2. If you are asked to approve a **proof**, you will be taken to the Proofing Viewer where you can use markup tools, leave comments, and either approve or reject the proof.



3. To leave a comment select **Add Comment** along the top.
4. Once you've reviewed and left any feedback, you will need to submit a formal decision. To do so, select **Make a Decision** at the top.
  1. A popup will appear where one of the three options should be selected:
    1. Approved
    2. Approved with Changes – the proof does not need to be reviewed again once changes are made
    3. Changes Required – the proof does need to be reviewed again once changes are made

# Reviewing and Approving Proofs Exceeding 12 Pages

1. If you have a proof exceeding 12 pages that needs reviewed and approved in Workfront, you will receive a notification via email containing a link to the document.
2. If you are asked to approve a document exceeding 12 pages, you will need to download the PDF from Workfront and mark your changes in Adobe Acrobat.
3. Once you've reviewed the document, please save a new version and email it back to the designer.
4. After your document has been emailed back to the designer, you'll need to submit a formal decision. You can do this by selecting one of the following options **in Workfront**:
  - a. Approved (Green Check)
  - b. Approved with Changes (Yellow Arrow)
    - The document does not need reviewed again once changes are made.
  - c. Rejected (Red X)
    - The document does need reviewed again once changes are made.
5. Once you've completed these steps, the Creative Services team will move forward with next steps.

