

Topics Today

1. Team and Agile Boards

2. Organizing Project Deliverables

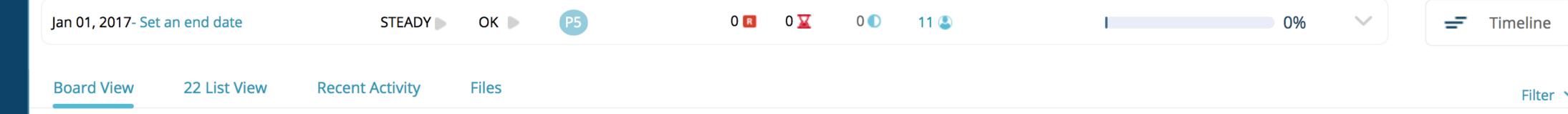
3. Batch Updates

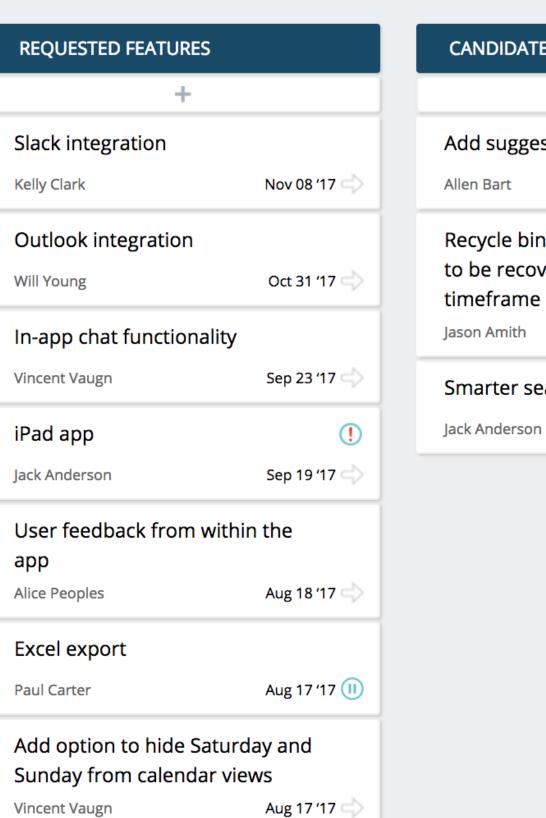


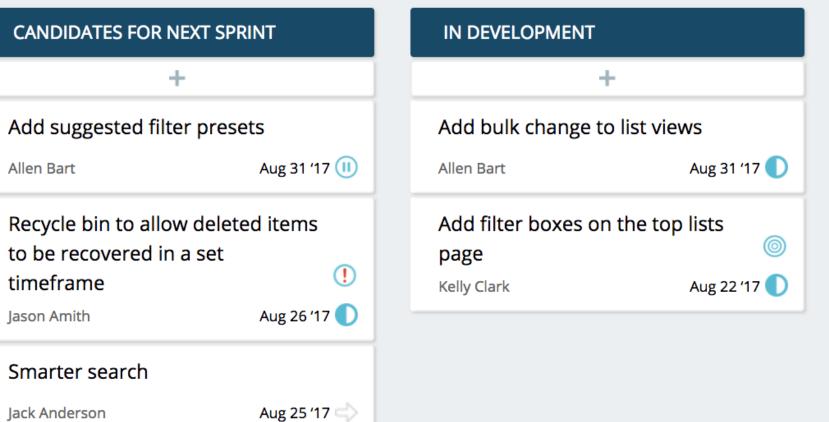
TEAM AND AGILE BOARDS

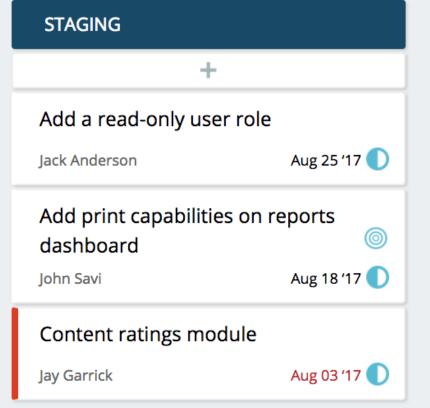
- Add any number of columns
- Columns with no implied status
- Specify what kind of board you want as you add workstreams
- Label action items by their workstream and the bucket on the board

Customer feature requests Application Development









In Production



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ORGANIZING PROJECT DELIVERABLES

- Import actions and their sub actions
- Better templating and reusable work lists

_	A	В	С	D	E	F	G	Н		J	K	L
1	Description	Priority	Status	Effort	Notes	Rating	Start Date	Due Date	Workstream	Loop	Owner	Туре
2	Finalize Budget	M	Pending	L	Type: Enhancment BSA: Bsizemore	G	6/22/17	7/30/17	Team Workstream		sjones@acme.com	
3	Project plan is approved (parent action item)	М	Next	Н	Type: Enhancment BSA: CM	G	6/28/17	8/15/17	Team Workstream		pmalone@acme.co	m
4	1. Draft is finalized (subaction to row 3)	L	Doing	τ		R	7/22/17		Team Workstream	tbarnes@acme.com	pmalone@acme.co	n Child
5	2. Presentation deck is complete (subaction to row 3)	M					6/22/17	7/30/17	Team Workstream		cdavison@acme.co	n Child
6	3. Schedule leadership meeting for approval (subaction to row 3)	M	Doing					8/6/17	Team Workstream		cdavison@acme.co	n Child
7	Kick off content is completed (parent action item)	Н	Done	Н			6/22/17	7/30/17	Team Workstream		sjones@acme.com	
8	Training material is complete (subaction to row 7)	M	Doing	Н		G	6/22/17	7/30/17	Team Workstream		rharris@acme.com	Child
9	2. Drip emails are activated (subaction to row 7)	М	Doing	Н		G			Team Workstream		cmanley@acme.com	rr Child



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UPDATE MANY OKRS FROM ONE SPREADSHEET

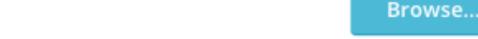
- Simple batch updates
- Easy way to provide transparency to data out of transaction systems
- Single file can
 update multiple
 results in multiple
 objectives in one
 pass
- Easy to map objectives and results as an end user
- Privileged role

Batch update key results from a spreadsheet

Update key results in one or more objectives from a spreadsheet in three steps; select your file, choose the columns that will be key result data and select which column maps to your objectives.

1. Select the source file (xls, xlsx, or csv file).

ProjectAccounting_July.xls



2. Identify which column maps to objectives

Select the column that maps to your objectives. The content of the column (each row) must appear in the name of the specific and unique objectives you want to batch update in Workboard.

3. Select columns to import as results or metric updates

The names of the columns must match the name of the key results in Workboard.

Columns	Key Result Match
CUST ID	
CUSTOMER	
PROJECT ID	
START DT	
END DT	
REVENUE	✓
EXPENSE	\checkmark
GROSS PROFIT	✓
GROSS MARGIN PCT	\checkmark
NET PROFIT	\checkmark
NET MARGIN PCT	\checkmark

Choose the time period and update the results.

There is not a batch undo option. Please check the column mapping carefully. Idenitfy the time period for which you want to post the updates and press "Update Now" to push the results to Workboard.

Time frame for updates:	ear	2017	~	Month	Jun	~		Update Now
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Thank you for the opportunity to support your success!

