

Welcome!

WoBo New Features & Enhancements

August 24



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](#)

Jan 01, 2017- [Set an end date](#)

STEADY ▶

OK ▶

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Timeline

Board View

22 List View

Recent Activity

Files

Filter

REQUESTED FEATURES

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Slack integration	Kelly Clark	Nov 08 '17	↔
Outlook integration	Will Young	Oct 31 '17	↔
In-app chat functionality	Vincent Vaugn	Sep 23 '17	↔
iPad app	Jack Anderson	Sep 19 '17	↔
User feedback from within the app	Alice Peoples	Aug 18 '17	↔
Excel export	Paul Carter	Aug 17 '17	⏸
Add option to hide Saturday and Sunday from calendar views	Vincent Vaugn	Aug 17 '17	↔

CANDIDATES FOR NEXT SPRINT

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Add suggested filter presets	Allen Bart	Aug 31 '17	⏸
Recycle bin to allow deleted items to be recovered in a set timeframe	Jason Amith	Aug 26 '17	⚠
Smarter search	Jack Anderson	Aug 25 '17	↔

IN DEVELOPMENT

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Add bulk change to list views	Allen Bart	Aug 31 '17	🕒
Add filter boxes on the top lists page	Kelly Clark	Aug 22 '17	🕒

STAGING

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Add a read-only user role	Jack Anderson	Aug 25 '17	🕒
Add print capabilities on reports dashboard	John Savi	Aug 18 '17	🕒
Content ratings module	Jay Garrick	Aug 03 '17	🕒

In Production



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ORGANIZING PROJECT DELIVERABLES

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

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



Browse...

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.

PROJECT ID



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	<input type="checkbox"/>
CUSTOMER	<input type="checkbox"/>
PROJECT ID	<input type="checkbox"/>
START DT	<input type="checkbox"/>
END DT	<input type="checkbox"/>
REVENUE	<input checked="" type="checkbox"/>
EXPENSE	<input checked="" type="checkbox"/>
GROSS PROFIT	<input checked="" type="checkbox"/>
GROSS MARGIN PCT	<input checked="" type="checkbox"/>
NET PROFIT	<input checked="" type="checkbox"/>
NET MARGIN PCT	<input checked="" type="checkbox"/>

4. Choose the time period and update the results.

There is not a batch undo option. Please check the column mapping carefully. Identify 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:

Year

2017



Month

Jun



Update Now



**ASK MORE
QUESTIONS**



**Thank you for the opportunity to
support your success!**

