

# TAKE FLIGHT COLLABOSPHERE

ENTERPRISE TRACK

## THE QUEST FOR LAZINESS

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JASON DIEHL | CBS



# Agenda



- How to identify areas of automation
- Explorations (big and small)
  - For the user
  - For the team
  - For the admin
- Q+A



**Class**  
First class

**Departure**  
Santa Monica

**Arrival**  
Cloud 9



A man with a mustache and a white headband is flexing his biceps. He is wearing a large, inflatable costume that makes his torso look like a hamburger bun with sesame seeds. The costume is brown with green lettuce and red tomato visible at the top. He is standing in a field of tall green grass under a clear blue sky. A semi-transparent grey box is overlaid on the center of the image, containing the text "TRIMMING THE FAT" in yellow capital letters.

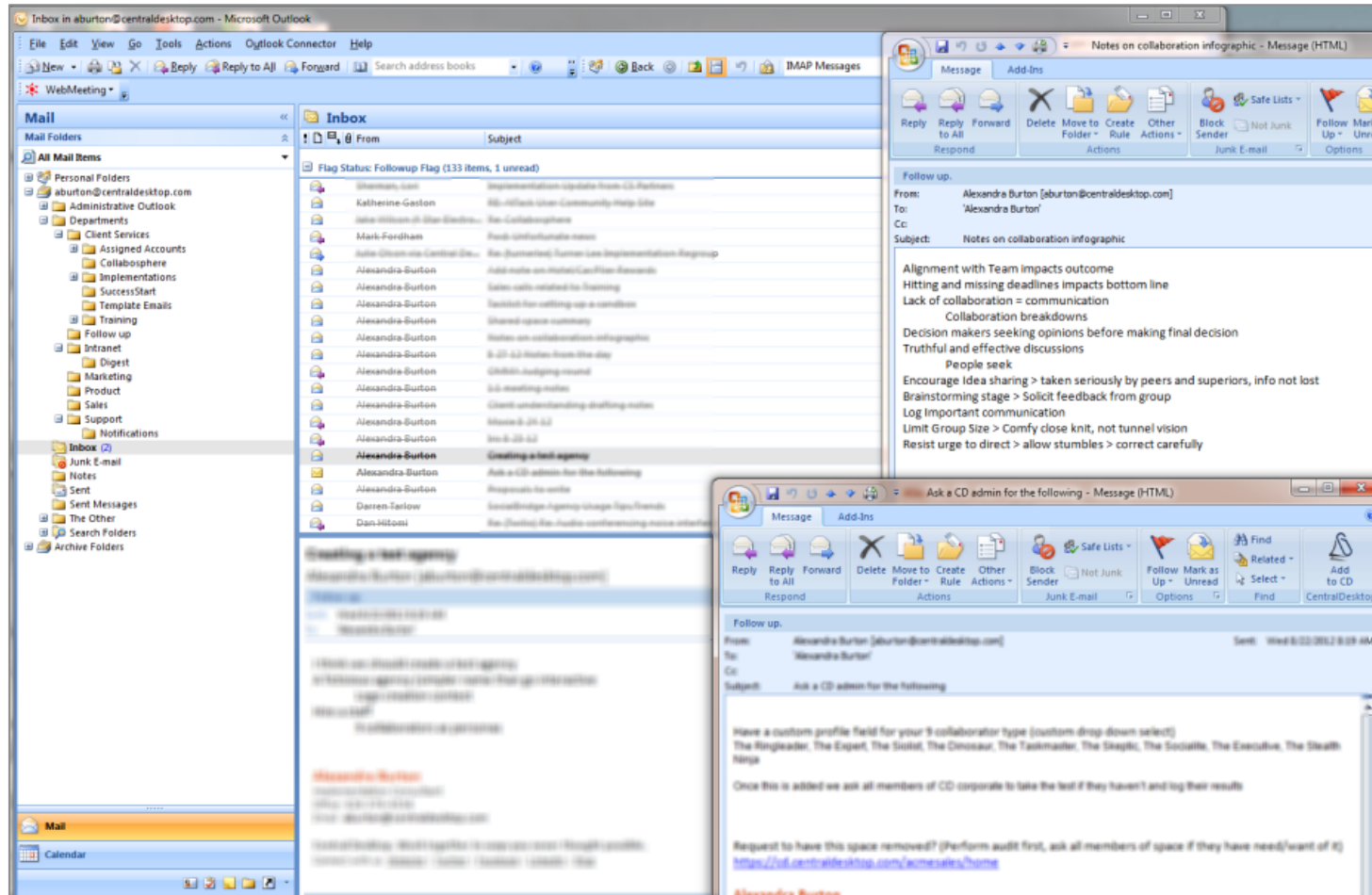
TRIMMING THE FAT

# Trimming the fat

- Places to look
  - Your email inbox/sent folder
  - Company setup
    - General tab for feature usage
    - Reports
    - Trending searches
  - Project Management tab



# Trimming the fat: Your email inbox/sent folder



# Trimming the fat: Company setup

- General tab for feature usage
- Reports
- Trending searches

**Current Status**

Storage used: 11.3 MB out of 244.14 GB

Internal Members used: 1 out of 50

Workspaces used: 11 out of 5000

External Members used: 0 out of 0

**Features**

Print Account Snapshot

**Low Usage**

- Discussions: Instead of sending mass emails, try creating discussion topics in your workspaces.
- Tagging: Your tags could be optimized. It appears you have almost as many tags as items.
- Outlook Plugin: Improve user adoption by letting your Outlook Users know that a plugin is available.
- Status Updates: Use status updates to take advantage of Twitter- or Facebook-like features in your organization.
- Archive Workspaces: Contents of Archived Workspaces are still available in search but are marked as "Read Only" for archival purposes.
- Databases

**Not Used**

- Online Spreadsheets: Collaborate in real time with multiple users with Online Spreadsheets instead of using Excel.
- Saved Web Pages: Save web pages you find online to share with your team.
- External Members: Invite customers, vendors and partners as External Members to your workspaces.
- Shared Folders: Use shared folders to share files and discussions across workspaces and reduce redundant file uploads.
- Custom Style Template: Customize the look and feel of your account to match your website or brand.
- Single Sign On: Leverage your Active Directory or LDAP service for user authentication.

Company Settings - Reports

Reports

Report To Run: Search History: by Keyword Popularity

Date Selection: Last Year

Run Report

Report: Search History: by Keyword Popularity - Last Year

Please Note: Data only goes back to Dec 2007.

Keyword(s) Searched	Total Times Search Executed
design	35
david	11
samirg	8
Design	6
karen	5
karen	3
d	3
asx sugar	3
starbucks	3
logo	2
david green	2
army	2
wildlife	1
Army	1
outbouding	1
starbucks design	1
asx	1
Starbucks	1
...	...



# Trimming the fat: Project management

The screenshot displays the Go Interactive project management software interface. The top navigation bar includes 'Workspaces', 'My Dashboard', 'Web Meetings', and 'Favorites'. The secondary navigation bar features 'Go Design', 'Home', 'Files & Discussions', 'Project Management', 'Calendar', 'People', 'Settings', and 'Properties'. The main content area shows 'Go Design Project' with buttons for 'New Milestone' and 'New Task List'. The left sidebar contains 'Task Lists' (Inbox, Milestones, Company Party, Web Design) and 'Inbox' (Create New Task, More options, Title, Look into building code, Test the new computers, Follow up with Client, Completed Tasks). The right sidebar displays the 'Project Status Report' with a table of milestones and tasks.

Milestone / Task	Owner	Start Date	Due Date	Status
<b>Complete Designs</b>		Apr 25, 2012	Apr 30, 2012	155 Days Overdue
<b>Design Drafts (0% Complete)</b>				
Brainstorm Design Ideas	Karen Wilson	Tue Apr 24th	Wed Apr 25th	160 Days Late
Review Mockups	David Green	Thu Apr 26th	Fri Apr 27th	158 Days Late
Review Final Drafts	-	Sun Apr 29th	Wed May 2nd	153 Days Late
<b>Company Party</b>		Oct 31, 2012	Oct 31, 2012	Pending
<b>Bookings (0% Complete)</b>				
Caterer	-	None	None	Pending
DJ	-	None	None	Pending
Photographer	-	None	None	Pending
Rentals	-	None	None	Pending
<b>Follow up (0% Complete)</b>				
Budget Analysis	-	None	None	Pending
Survey	-	None	None	Pending
<b>Research (0% Complete)</b>				
5 Places to Consider	-	None	None	Pending
List	-	None	None	Pending
<b>Site Visits (0% Complete)</b>				
Step 1	-	None	None	Pending
Step 2	-	None	None	Pending
Step 3	-	None	None	Pending



# Trimming the fat: Questions to ask

- Do I see patterns in the people I work with...in the actions I take...in the information I am getting?
- Are people always asking for clarification?
- Am I always looking for the same thing?
- Do I always send in the same format?
- Are my projects structured in the same way?





FLYING SOLO



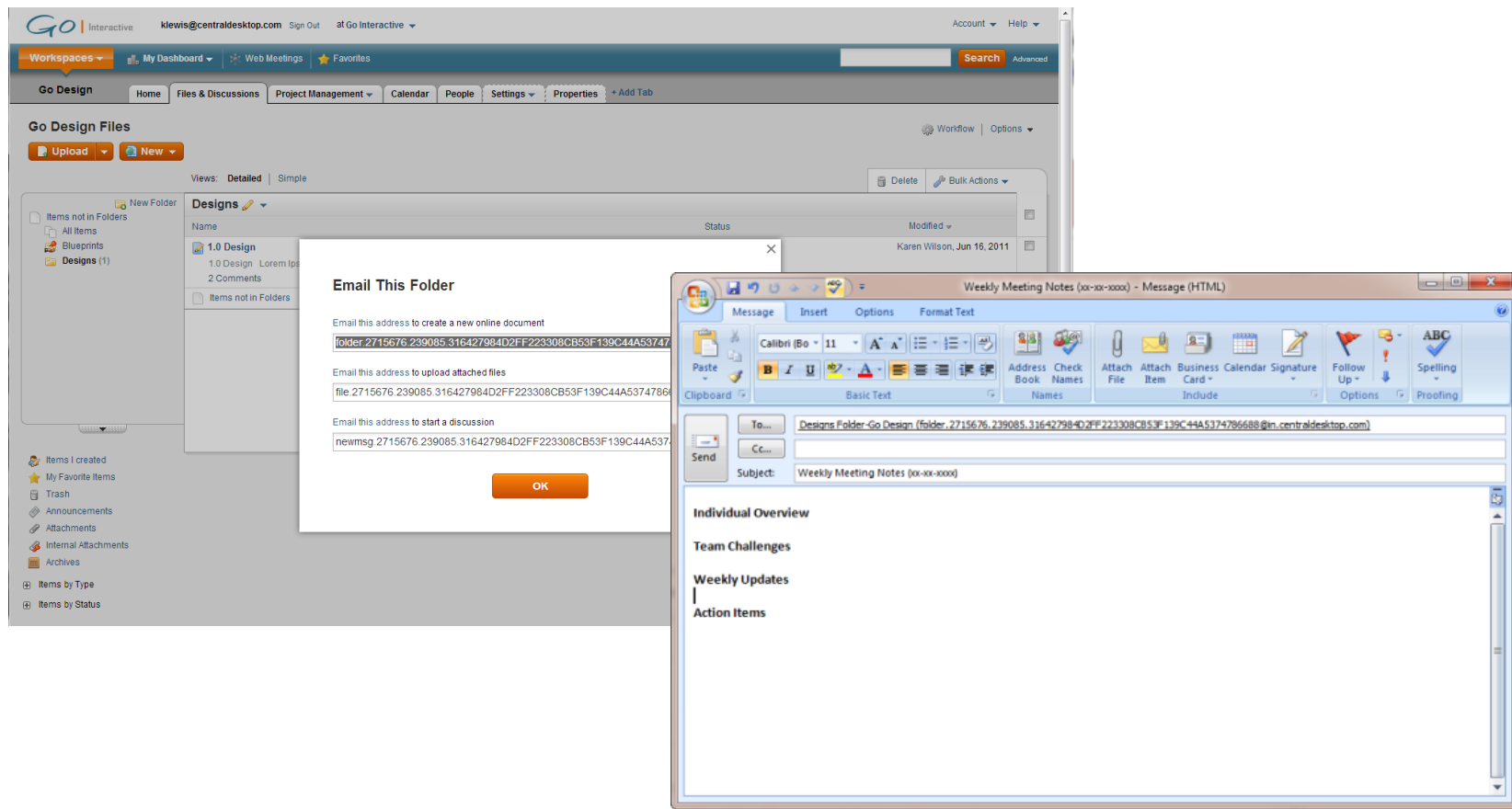
# Flying solo: For the user

- Flex your email muscles (email in content)
  - Email templates
  - Custom contacts for folders
- Make your own mark
  - Using favorites
  - Identifying where you land
- Report on the things that matter
  - Custom reports
  - Saved for future use



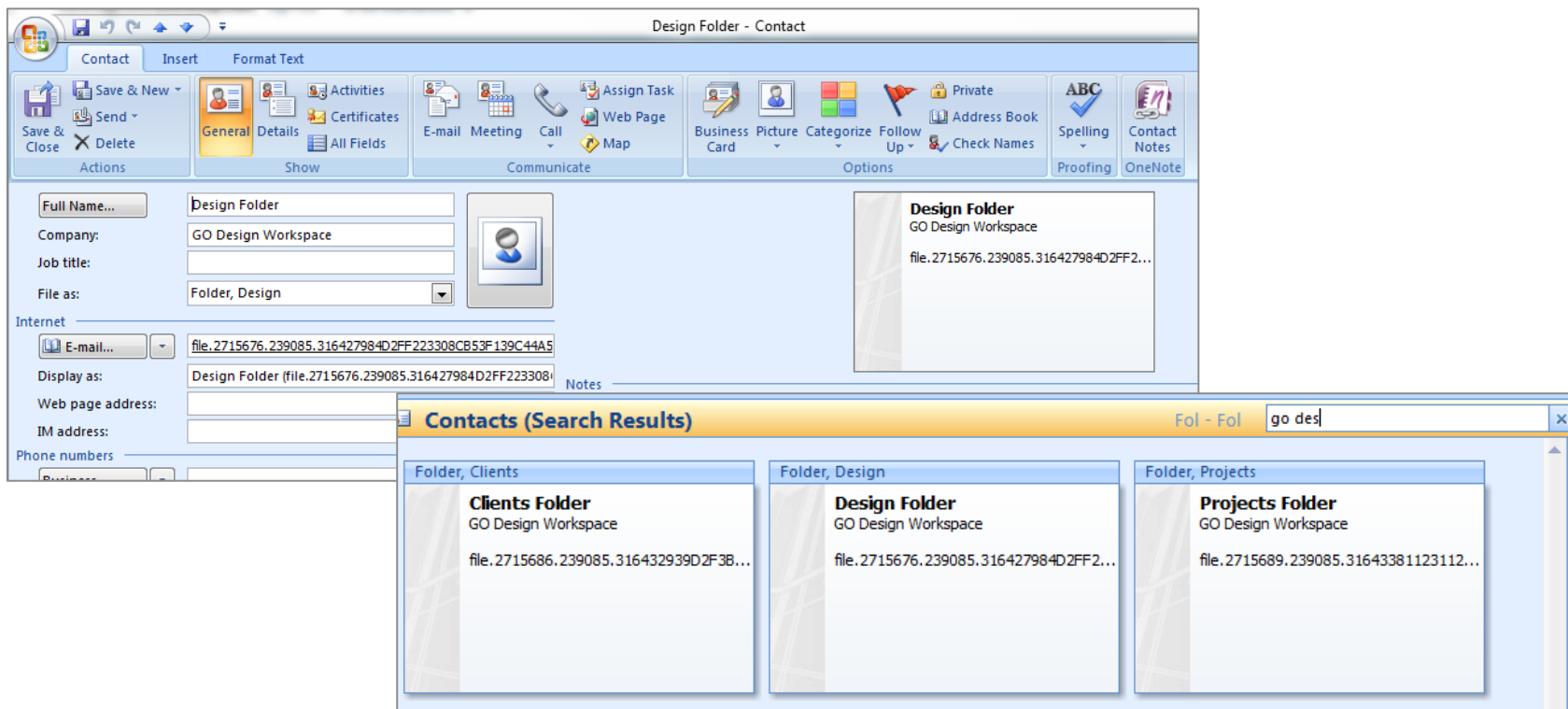
# Flying solo: Flex your email muscles

## Email templates for email-in



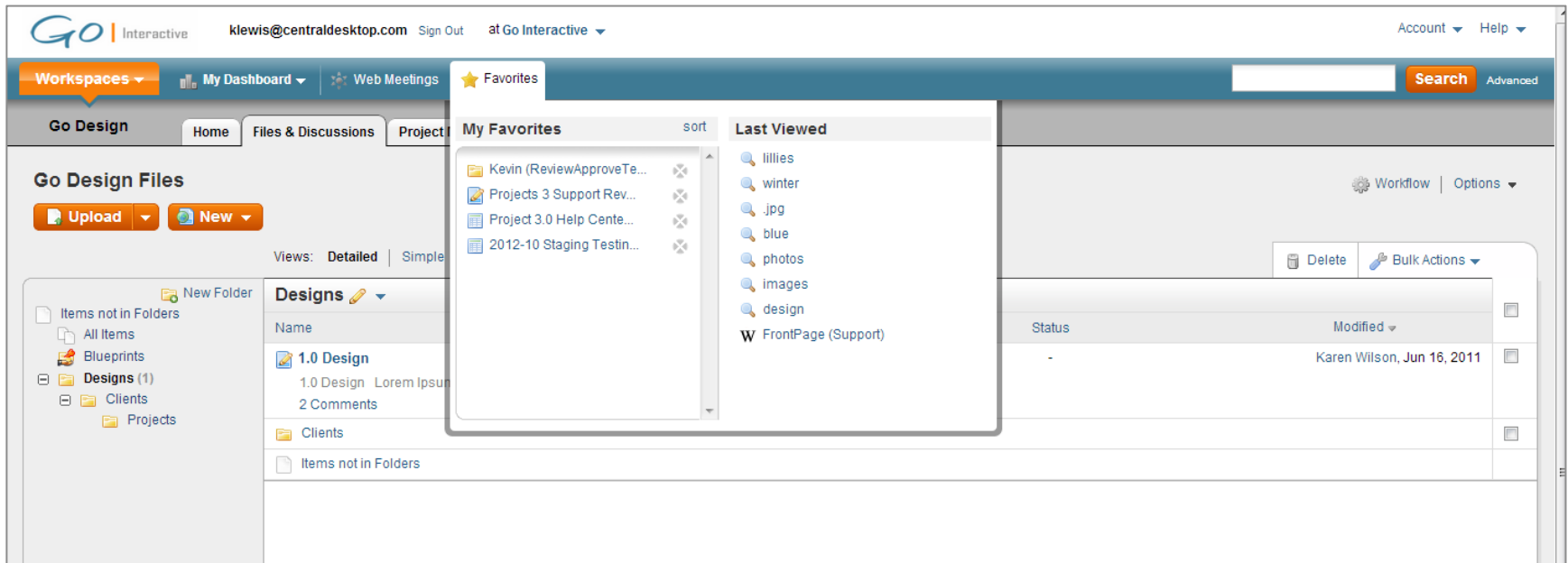
# Flying solo: Flex your email muscles

## Custom contacts for folders



# Flying solo: Make your own mark

- Using favorites
- Identifying where you land



# Flying solo: Report on things that matter

- Custom reports
- Saved for future use

The screenshot displays the Go Interactive Project Reports interface. The main window shows a list of reports with columns for Type, Description, Start Date, Due Date, Assigned, Status, and Workspace. A yellow banner at the top indicates that the report has not been saved yet. A modal window titled "Manage Reports - Rename or Delete Project Reports" is open, showing a table with columns for Report Name and Actions. The table lists "Calendar Report", "My Incomplete Tasks", and "New Report", each with a "Run Report | Rename" action. The footer of the interface contains copyright information for Central Desktop Inc. and links to various resources.

Type	Description	Start Date	Due Date	Assigned	Status	Workspace
Workshop	Partners Workshop (In Preparation - 09/12/2011 to 09/14/2011)	Sep 12, 2011 @ 12:01am - Sep 14, 2011 @ 11:59pm		Kevin Lewis		Pasadena Paris
EC	Breakfast meeting	Sep 15, 2011 @ 1:00am - 2:00am		Kevin Lewis		Pasadena Paris
2.1.1	WCB : One Health workshop in cameroon	Sep 22, 2011 @ 2:00am - Sep 23, 2011 @ 3:00am		Kevin Lewis		Pasadena Paris
Uganda	Moh IDSR/HR Review	Sep 27, 2011 @ 3:00am - 4:00am		Kevin Lewis		Pasadena Paris
Uganda	EPT Partners Meeting	Sep 28, 2011 @ 3:00am - 6:00am		Kevin Lewis		Pasadena Paris
	Testing for Observer	Sep 29, 2011 @ 8:00am - 9:00am		Kevin Lewis		Pasadena Paris
SEA	Global Health Institute Short Course, 'Emerging Zoonotic Diseases: Integrative Researc...	Sep 25, 2011 @ 9:00pm - Oct 7, 2011 @ 6:00am		Kevin Lewis		Pasadena Paris
SEA	2nd OH Network Working Group Meeting, Kuala Lumpur, Malaysia	Oct 9, 2011 @ 9:00pm - Oct 11, 2011 @ 2:00am		Kevin Lewis		Pasadena Paris
SEA	Thailand National One Health Meeting, Siam City Hotel, Bangkok, Thailand	Oct 30, 2011 @ 9:00pm - Nov 2, 2011 @ 6:00am		Kevin Lewis		Pasadena Paris
SEA	The 6th TEPHINET Bi-Regional Scientific Conference, Nusa Dua Convention Center, Bali, Indon...	Nov 6, 2011 @ 8:00pm - Nov 11, 2011 @ 5:00am		Kevin Lewis		Pasadena Paris
WC	OHCEA Country coordinating committee (CCUS), first meeting at Kinshasa.	Nov 19, 2011 @ 8:00am - 4:00pm		Kevin Lewis		Pasadena Paris
PREVENT/RESPOND	Co-training for Journalists on "Outbreak Reporting"	Nov 22, 2011 @ 1:00am - 4:00am		Kevin Lewis		Pasadena Paris
SEA	Vietnam National One Health Meeting, Nha Trang, Vietnam	Nov 20, 2011 @				
SEA	3rd One Health Network Working Group Meeting, Nha Trang, Vietnam	Nov 22, 2011 @				
	Implementation: Identify Service Provider	Oct 31, 2011	Nov 25, 2011			
	Nairobi CCC meeting	Dec 5, 2011 @				

Report Name	Actions
Calendar Report	Run Report   Rename
My Incomplete Tasks	Run Report   Rename
New Report	Run Report   Rename





THE FLIGHT CREW  
CAN NOW PREPARE  
FOR TAKE OFF

# The flight crew can now prepare for takeoff: Least common denominator

## Workspace templates

The screenshot displays the Go Interactive workspace management interface. The main area is titled "Manage Workspaces" and includes tabs for "General", "Workspace Groups", and "Templates". Under "Private Workspace Templates", there is a "Create New Workspace Template" button and a list of "Remaining Templates" including Client Connect, Help Desk, Project Wiki, Review and Approve, Corporate Database, and Community Forum. A "Workspace Creation Wizard" overlay is shown, allowing users to select a "Private Workspace Type" (Recruiting, Project Template, Corporate or Department Blog, Feedback Loop, Project Workspace, or "A La Carte" Workspace). The "Project Template" is highlighted. Below the wizard, there are input fields for "Workspace Name" (with "Project X" entered) and "Description" (with "Top Secret, super cool project you wish you could work on." entered), and a "Web address (URL)" field (with "https://gointeractivedemo.centraldesktop.com/projectx" entered).





# The flight crew can now prepare for takeoff: Use Workflow to:

- Send an email notification
- Create a task
- Perform an action



# The flight crew can now prepare for takeoff: Workflow automation

- Creating templates that work for you
- Database process notifications
- “File room” maintenance
- File and document approval

**Notification**

Insert Variable  
Select a Database Field

**Task Title**  
New Project Request:###\$TITLE### has been ###\$ACTIONED### -[###\$WORKSPACE\_NAME###]

**Task Description**  
This notification has been sent to you because the request for: ###\$TITLE### has been ###\$ACTIONED###  
Title: ###\$TITLE###  
Category: ###\$CATEGORY\_Q6523QM0317264152P###  
If Other, list: ###\$IF\_OTHER\_LIST\_BP8SL7MB317264153G###  
Comments/ More Info: ###\$COMMENTS\_MORE\_INFO\_MJ88L27J317264154C###  
Elements: ###\$ELEMENTS\_CA4ZWRCH317264156P###  
  
Please triage this request and assign the appropriate team to begin work.  
(Go) Notes: ###\$GO\_NOTES\_K8PH8QDP317264157X###  
Creative Director: ###\$CREATIVE\_DIRECTOR\_RBPXX577317264160N###  
Team: ###\$TEAM\_L51EKT1N317264161S###  
  
To view this record click here:  
###\$URL###  
  
WF Rule: New project Request-Please Follow up



# Hearing from Jason Diehl, CBS: Workflow automation

- Identifying the need
- Designing the Solution
- Winning back valuable time



# Hearing from Jason Diehl, CBS: Workflow automation

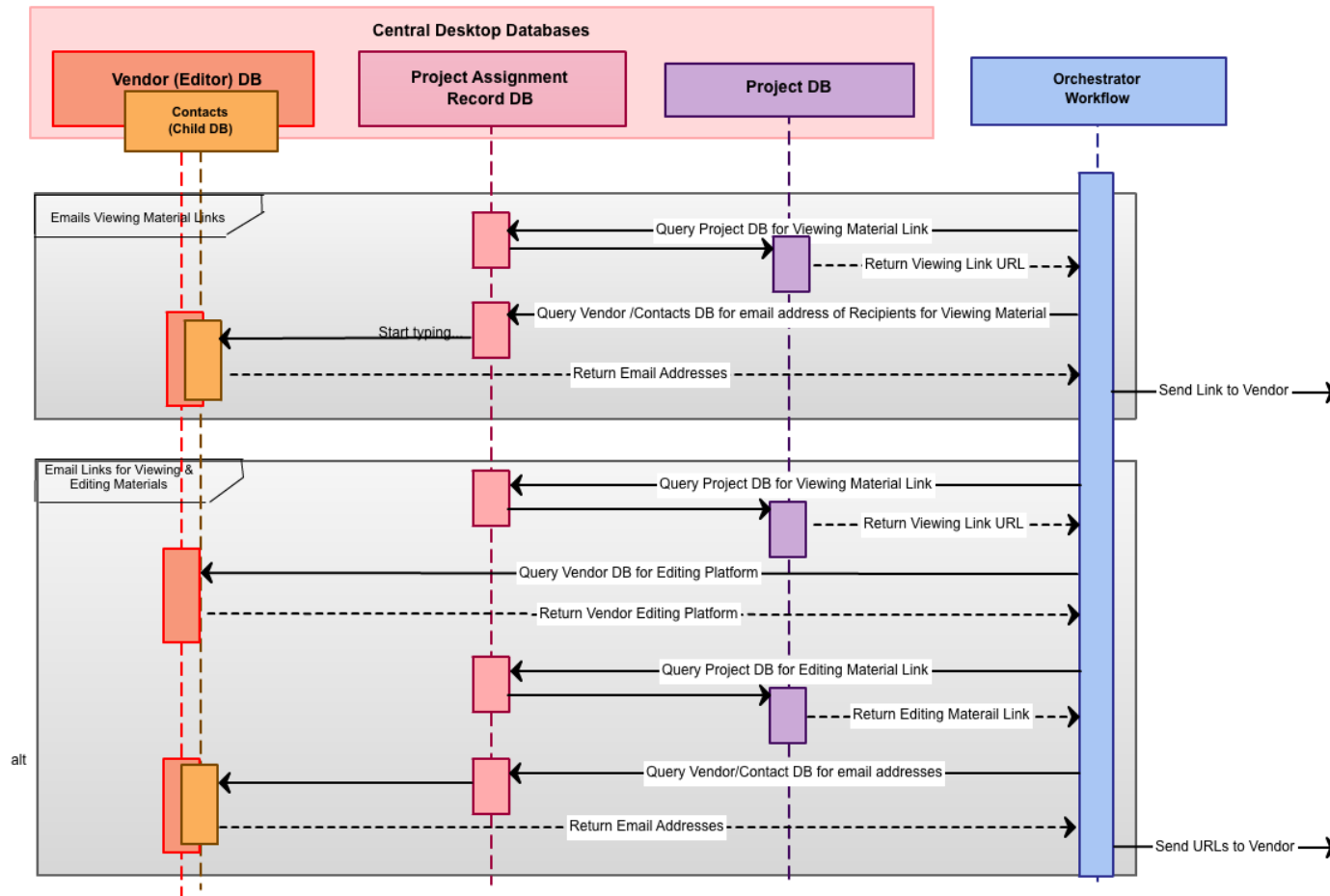
The screenshot displays the ONLYCBS web application interface. At the top, the user is logged in as jason.diehl@cbs.com. The navigation bar includes 'Workspaces', 'My Dashboard', 'Web Meetings', and 'Favorites'. Below this, a secondary navigation bar shows 'CBS Upfront 2012' with various menu items like 'Home', 'Wiki', 'Files & Discussions', 'Calendar', 'Database', 'PAR Tracking', 'AL VIEWS', 'UF Hi-Res Requests', 'C# List UF2012', 'VENDORS', 'PILOTS / PROJ', 'Meals', 'More', and '+ Add Tab'. A search bar is also present.

The main content area is titled 'CBS Upfront 2012 Home'. On the left, there is a 'New Project Assignment Record (PAR)' form. It includes a note: 'NOTE - The creation of a new record will automate the sending of emails containing download links for the viewing and editing materials. Once the record has been created there will be no way to stop the emails from being sent.' Below the note, it states 'All four fields must have a value chosen from the pull-down menus.' The form has four dropdown menus: 'Project Name' (Choose a project...), 'Vendor/WP' (Choose a Vendor/WP...), 'Vndr Activity Level' (Choose their level of activity...), and 'Creative Mgmt.' (Choose the Creative Director...). A 'Submit PAR' button is at the bottom right of the form.

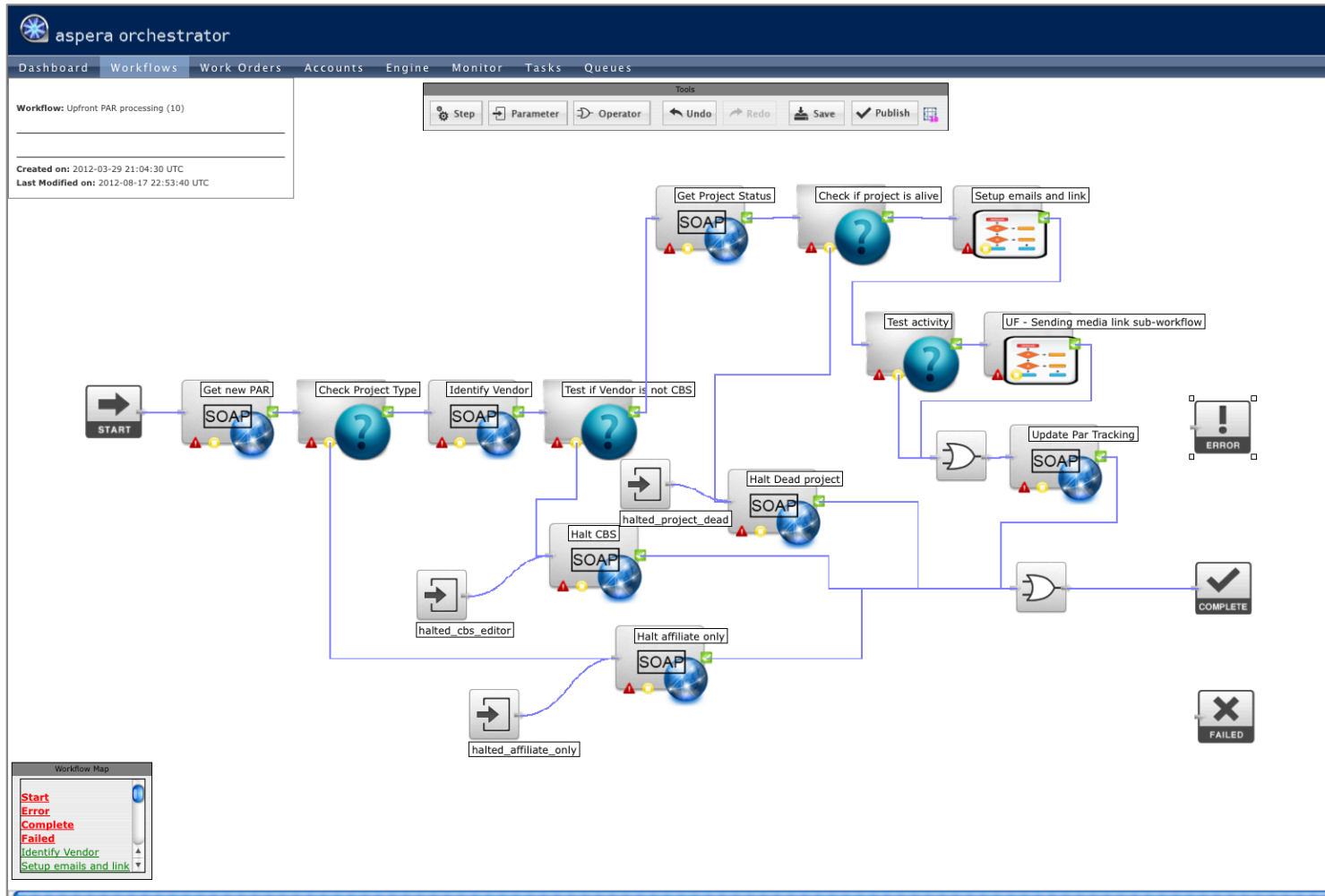
On the right side, there are two folders: 'Miscellaneous Projects' and 'Pilot Presentations'. Each folder contains a list of project names with a 'Go to Folder' link. The 'Miscellaneous Projects' folder includes: Comedy\_Sizzle, Drama\_Sizzle, Eyecon\_Open, Eyelab BTS, Image\_2012\_Hall, Image\_2012\_Net, Opener, and Back to Parent Folder. The 'Pilot Presentations' folder includes: Applebaum, Baby\_Big\_Shot, Before\_We\_Made\_It, David\_Gell\_is\_Back, Elementary, Entry\_Level, Friend\_Me, Golden\_Boy, Oh\_No\_Its\_You, Partners, Super\_Fun\_Night, The\_Job, Trooper, Untitled\_Martin\_Lawrence\_Proj, Untitled\_Vegas\_Proj, Widow\_Detective, and Back to Parent Folder.



# Hearing from Jason Diehl, CBS: Workflow automation



# Hearing from Jason Diehl, CBS: Workflow automation





**THIS IS YOUR CAPTAIN  
SPEAKING**

# This is your captain speaking...

- Lather, rinse, repeat
  - Task list templates
- Know your audience
  - Custom fields
  - Workspace properties
  - Time tracking
- Less is always more
  - Member groups













# This is your captain speaking... Lather, rinse, repeat

## Task list templates

The screenshot shows the Go Interactive web application interface. At the top, the user is logged in as klewis@centraldesktop.com. The navigation bar includes 'Workspaces', 'My Dashboard', 'Web Meetings', and 'Favorites'. A search bar is also present. The main content area is titled 'Company Settings' and has several tabs: 'General', 'Internal Members', 'Groups', 'Custom Fields', 'Task Templates', 'Look & Feel', 'Reports', 'Advanced', 'Billing', and 'Proof'. The 'Task Templates' tab is selected, showing a table of task list templates. An 'Add Task List Template' button is located above the table.

List Name	Description	Actions
Booking a Location	Steps to take for booking a location for an event.	 
Closing a project		 
Kicking off a Project	These are the standard steps for initiating a project.	 
New User Training Day 1	Use this template for new user training day 1	 



# This is your captain speaking...

## Lather, rinse, repeat

### Task list templates

- Book Review Process
- Design Stages
- Onboarding Process
- Reporting Steps



# This is your captain speaking...

## Know your audience

- Custom fields
- Time tracking
- Workspace properties

Company Settings - Custom Fields

General Internal Members Groups Custom Fields Task Templates Look & Feel Reports Advanced Billing Proof

User Profile Workspace Properties Time Tracking Properties

[Display Layout](#) | [Edit Layout](#) | [Creation Wizard Layout](#) | [Edit Workspace Property Fields](#) | [Add Workspace Property Fields](#)

Add new section

Primary Resource

Primary Beneficiary

Space Status

Space Priority

Space Risk

+ Drop fields here

\* Fields required to be in layout

### Go Interactive

Project Owner

Start and End Dates

Comments

+ Drop fields here

### Client Information

Main Contact

Project Status Industry

Competitors

Current Advertising

+ Drop fields here

Apply to Edit Layout

**Save Changes** Cancel



# This is your captain speaking...

## Less is always more

### Member groups

The screenshot displays the 'Group Administration' page for a 'Product Group'. The interface includes a top navigation bar with 'Workspaces', 'My Dashboard', 'Web Meetings', and 'Favorites'. Below this, there are tabs for 'General', 'Internal Members', 'Groups', 'Custom Fields', 'Task Templates', 'Look & Feel', 'Reports', 'Advanced', 'Billing', and 'Proof'. The 'Groups' tab is active, showing a 'Back to All Groups' link and a 'Create Group' button. The main content area is divided into sections: 'Name' (Product Group), 'Visibility' (Membership Visible on User Profile), and 'Members'. The 'Members' section features two lists of users. The left list contains 16 users, with 't9ui85kaded299374463' selected. The right list contains 5 users, with 'Karen Wilson', 'Mark Fordham', and 'Alexandra Burton' selected. Between the lists are four buttons: 'Add >', 'Add All >>', 'Remove <', and 'Remove All <<'.

Source List	Target List
nqwfo6mbnd5284899987	Karen Wilson
a5cawok5gjm284902501	Mark Fordham
xyt31o55lje270903980	Alexandra Burton
jackiemoon	4cm9xamw011297703124
t9ui85kaded299374463	Jessica Wilson
syichel4v3t292688846	
David Green	
Habib Daof	
Jared Allen	
John Doe	
John Winthrop	
Josephine Hoffer	
Kevin Lewis	
Kevin Lewis	
May Yang	
Michael Scott	
Millie Zhou	
Penny Braden	
Rachel Gellar	
Sally Mae	

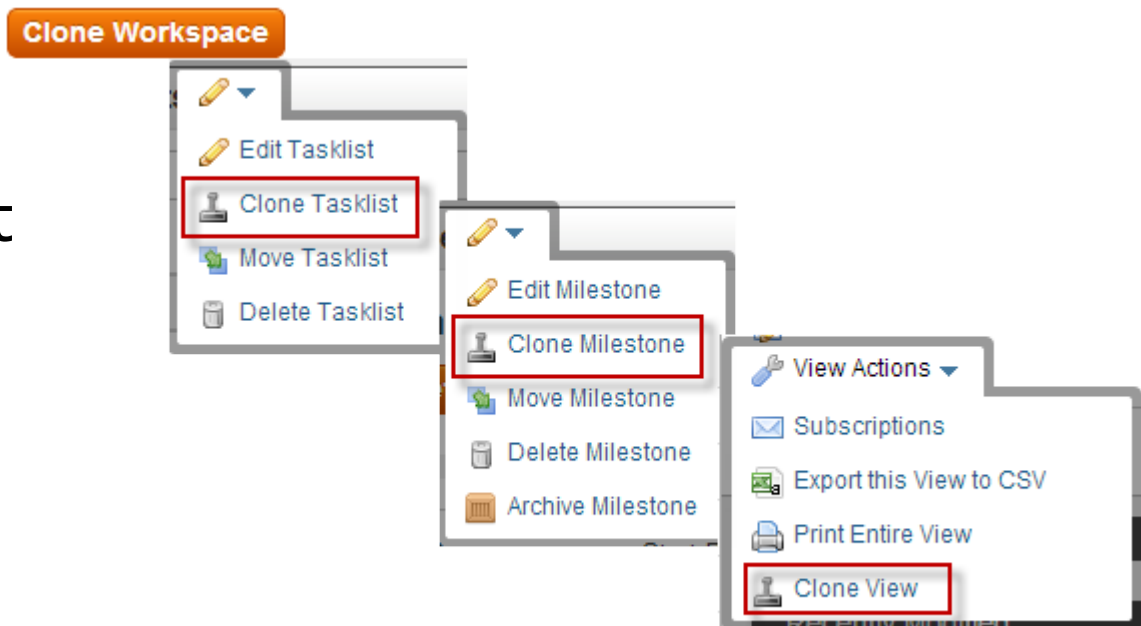


IT'S THE LITTLE  
THINGS...



# It's the little things...

- Cloning
- Drag and drop
- Email in content





THANK YOU FOR  
FLYING WITH US.

GET READY FOR  
YOUR NEXT  
ADVENTURE



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