8 Steps to create simple, effective reports in Adobe Workfront

Reports & Dashboards Success Guide | June 2025

Adobe

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Step 1

Understand the benefits of reporting

Accessibility — Surface critical data so information can be quickly accessed and viewed by a variety of user personas including project managers, assignees, team leads, executes, etc. Improved visibility leads to improved productivity and communication.

- Support strategic discussions and speed up the decision-making process.

Accountability — Hold people accountable for the work they're assigned to or have to approve.

- Elevate required actions by adding a report description with expectations for assignees and approvers, as well as requesters and leadership, to head off roadblocks and delays.

Actionable Data — Extract meaningful insights.

- Identify process gaps, inefficiencies, or bottlenecks for future improvements.

- Highlight project, team, and individual success through real-time accomplishment reports.

Step 2

Develop a data strategy

A lack of data poses challenges when it comes to reporting. To view and measure data, the information must be in Workfront.

- Set expectations and regularly communicate the why behind entering timely, accurate data in Workfront. With accurate real-time data, you can highlight successes and identify improvements.
- Communication is not a one and done activity. Consider monthly newsletters, regular updates to a dedicated Workfront-related wiki page, global Announcement Center messages, and more. Want to see how other Workfront customers are doing it? Check out the End User Communications Cookbook for customer-submitted examples.

Set up guardrails around who can create reports, what should be included in reports, and how reports should be accessed or distributed.

- Determine what metrics are important for your team, department, and organization – make sure that you are tying data back to your Workfront why. View the Value Realization Success Guide to help you execute on your data strategy.
- Ask questions and enable yourself on how teams are using the system.
- Think with the end goal in mind. Build or refine your processes based on metrics you want to share out and across the organization.
- Drill down into your access levels to control report creation. Does everyone need access, just one person, or a limited number of people?
- Consider having dedicated naming conventions to easily identify reports for different teams or departments.

Leverage custom forms to capture organization specific or unique information so the data can be used in reporting. If possible, standardize field names for re-use.

Have a formal process for report requests to easily organize and capture what is needed.

- Set up a request queue (or queue topic within an existing Workfront Help request queue) that is specifically designed for custom report requests. These requests can automatically route to you, another person, or the team responsible for executing the request.

Step 3

Enable yourself using free resources

Experience League should be your one-stop shop for learning all things Workfront, including reporting. Create a free account and browse the different areas you can take advantage of today.

Documentation

- Read through all documentation to learn the basic fundamentals of all things reporting. Start with reporting elements, as these are three elements (views, filters, and groupings) that make a report or list possible.
- Review the guides, Best Practices – Filters, Views, and Groupings and Best Practices – Custom Reports for a list of recommendations and guidelines.

Videos – Tutorials and Playlists

- Complete all tutorials (videos) within the Basic Reporting playlist. There are 16 tutorials in total, which should take around 45-minutes to complete.

Blueprints

- Rather than start from scratch, browse the Blueprints library to easily view and install ready-to-use dashboards, project templates, and organizational structures. With over 40 Blueprints available (see the full list here), the most popular Blueprint dashboards to-date are:
  - System Administrator Maintenance Dashboard
  - People Manager Dashboard
  - Offboarding | Departing User Dashboard

Events & Community

- Ask questions and crowd-source solutions with other Workfront Admins on the Community forum.
- Register and attend reporting-focused workshops and webinars to learn best practices, ask questions, and learn from your peers. A list of all free events can be found on the Events page on Experience League.
- Join a local Workfront User Group chapter! User Groups are customer-led groups intended to bring together Workfront users regionally in person and/or virtually to create open and inclusive communities to network, share ideas and best practices, collectively problem-solve, and provide ongoing education.

Customer Support

- Available 24/7, the Customer Support team can help troubleshoot reports that aren't working as expected or to answer questions you may have around technical how-to's.

Step 4

Familiarize yourself with key reporting elements

User-based wildcards

- User-based wildcards are one of the most beneficial features within reporting. These wildcards decrease the number of reports you need to create in the system, as one report can be shared with several users and the results dynamically change based on who is logged in and looking at the report.
- Wildcards can be applied within a filter to both reports and lists.
- The most common user-based wildcard is $$USER.ID. Additional variations of user-based wildcards can be found here.

Example filters with a user-based wildcard include:

- My Issues = Assignment Users ID equals $$USER.ID
- My Projects = Project Owner ID equals $$USER.ID
- Hours Logged by My Home Team = Hour Owner ID equals $$USER.homeTeamID

TIP: If you're creating a task or issue report for users to see their assigned work, filter for Assignment Users ID instead of Assigned To ID. Assigned To looks at the Primary Assignee whereas Assignment Users looks at all assignees.

Date-based wildcards

- Date-based wildcards generalize dynamic time frames on a report. Rather than selecting specific dates, apply a date- based wildcard filter to show data from variable time frames like next week, this month, or last year. But remember, they are dynamic to the time-zone of the viewer!
- There are two date-based wildcards — $$TODAY (current date) and $$NOW (current date and time).
- Watch the short video, Create filters with date-based wildcards, to see how they work.
- You can combine date-based wildcards with attributes using qualifiers and operators to indicate various points in time. A chart describing each of these can be found here.

Example filters with a date-based wildcard include:

- Projects Due Last Week = Project Planned Completion Date between $$TODAYb-1w and $$TODAYe-1w
- Tasks Completed Yesterday = Task Actual Completion Date equals $$TODAY-1d
- Hours Entered This Month = Hour Entry Date between $$TODAYbm and $$TODAYem

TIP: If applying a date-based wildcard to a report filter, common time frames (Last Month, This Quarter, This Week, Next Year, etc.) are pre-populated in the dropdown menu. Look there first before trying to build one from scratch.

Step 4

Familiarize yourself with key reporting elements

Conditional formatting or column rules

- Conditional formatting is used to make key information stand out in a report or list view. Formatting options include custom labels, icons, background colors, text colors, text formatting, and text alignment.
- Apply formatting to columns in your View using column rules, found through Advanced Options. When the rule, or condition, has been met, special formatting is applied to the column or entire row.

Examples of conditional formatting:

- If Project Progress Status equals At Risk or Late, apply a red flag icon
- If Task Planned Start Date is less than $$TODAY, apply a yellow background
- If Timesheet Total Hours is greater than 40, highlight the entire row blue

Charts

- Graphs and charts give users a clean, visual picture to better understand the data.
- Choose from a variety of chart options — column chart, bar chart, pie chart, line graph, a bubble chart, or gauge chart. Watch the quick, 6-minute video on how to Create Reports with Charts.
    - Additional visualizations are available in Canvas Dashboards or by exporting your data into a business intelligence tool of your choice through Data Connect (included in the Ultimate plan, offered as an add-on ($$) for those on a Prime or Select plan). Learn more about the future of reporting in Adobe Workfront in Step 8.
- When a chart is added to a report, it becomes the default tab when the report opens. You can always change that by going into the Report Settings (found via Report Actions > Edit).
    - There are a handful of Report Settings that can be configured for each report. Review the full list here.
- To add a chart, your report must contain a grouping. However, not all fields are groupable. Limitations include dynamic fields like Planned Hours or those with more than one value, such as:
    - Groups or Teams
    - Assignment Users
    - Multi-select custom fields
- Chart variations have different options (show in 3D, display in percent vs number, group by an additional field, combine the chart with an additional field), so you can make them as simple or complex, as needed.

Step 4

Familiarize yourself with key reporting elements

Run a report with the access rights of another user

- Running a report with the access rights of another user allows users to see the exact same results in a report as another user, regardless of their access level or permission on the objects inside the report. Unless a result has been directly shared with the user, he/she will only be able to see the results – not open or modify them.
- Running reports with the access rights of another user is report specific and must be set on each report. To access or edit this field, navigate to the Report Settings found via Report Actions > Edit > Report Settings.

Commonly used to share:

- Team workload to all members of the team.
- All hours that have been logged, regardless of whether the hours were entered by direct reports.
- Financials with decision-makers who don't have access to this information based on their permissions in Workfront.
- If a deactivated user's name has been entered in this field, the report will throw an error that says "Let's try that again. You are running this report with the access rights of a user who has been deactivated. Update your Report Settings to include an active user." Keep that in mind when someone transitions to a new role or leaves the company. Create a report to see all of the reports that are run with the access rights of the deactivated user to ensure they get updated.

TIP: If a report has a user-based wildcard filter applied and the field for "Run this report with the access rights of" has been filled in, the wildcard filter is overwritten, and the report results are based on the name entered in this field.

Automatic report deliveries

- Schedule reports to be automatically delivered on a defined schedule or sent on a one-time, manual basis. Watch the short, 5-minute video, Send and Share Reports, to learn more.
- Reports can be sent to individuals, groups, teams, or roles, but not an entire company, in a variety of formats.
- Read through the list of report delivery limitations for more information on timestamps, branding, formatting, and links.

Commonly used for:

- Quarterly exception reports that require your review (act as a reminder!)
- A monthly digest of what has been accomplished
- A weekly report to users or managers highlighting late or upcoming tasks

Step 4

Familiarize yourself with key reporting elements

Aggregation (Summarize this column by)

- Summarize this column by allows you to choose how you want the data to display in your column
- For an aggregator to be used on a field, a grouping must be applied to your report. To access this dropdown menu, click on the field you wish to summarize in the Columns (View) area.
- Not all fields can be summarized. If available, you will have the option to summarize a column by Count, Maximum, Minimum, Average, and Sum.
- You can also add or influence how the values of each column are summarized using text mode.

Dashboards

- While not technically a reporting element, the purpose of a dashboard is to provide quick access to information that comes from multiple reports. You can gather information in reports and then place multiple reports on a dashboard to group related data and make it easier to access the information.
- You can populate a dashboard with up to 25 of the following items in Workfront:
  - Reports
  - Calendars
  - External Pages
- A dashboard can be pinned to the global navigation bar for easy access or added to the Favorites menu.
- You have the option of adding a dashboard as your default landing page. If you prefer to land on a dashboard when you login to Workfront vs Home (or any other area), you can customize that using layout templates.

IMPORTANT: Not all reporting features are covered in this guide, so for additional information on topics like prompts, shared columns, calendar reporting, and matrices, review the product documentation on Experience League.

Step 5

Expand your reporting abilities with basic text mode

Text mode enables you to create more complex views, filters, groupings, and prompts by allowing you to use fields that are not available in the standard builder. This proprietary language is unique to Workfront, so if you are just getting started, this language will be new to you. It is recommended you start in the standard builder first and use text mode only when necessary.

Bookmark the basics:

- The API Explorer is a great resource for text mode, and one that you will want to bookmark, as it provides you with a list of all objects and fields that are available for Workfront.
- From a syntax perspective, text mode is written in camel case meaning the first word always starts with a lowercase letter, the following words always start with an uppercase letter, and there are no spaces between the words.
- Not sure what text mode can be used for? Review the article, Overview of common uses for Text Mode, to see examples and step-by-step instructions.

Watch (and re-watch) training videos on Experience League to help you grasp the concept:

- Understand basic text mode for filters
- Understand basic text mode for views
- Understand basic text mode for groupings

Try a few practice exercises on your own:

- Change ID to name
- Merge data from multiple columns in one shared column
- Filter your report based on work that is Pending Approval
- Remove an object hyperlink in your list or report

For a library of example text mode views, filters, and groupings, check out the article, Custom view, filter, and grouping samples: article index

It takes time and a lot of practice to learn text mode, so consider taking the live, instructor led ($$) training within Adobe Digital Learning Services, to gain a deeper understanding of the text mode language.

Step 6

Build reports based on your audience

Before you start building a report, you need to first determine who the target audience is. Who will be engaging with the data — executives, project managers, people managers, users, approvers, etc.?

The information should resonate with the audience's role, so consider the following ideas:

- Executives and decision-makers want to know that their investment in Workfront is having the impact that they were sold on. To help you showcase the value of Workfront to your leadership, download the Blueprint, Value Realization | Core Value Dashboard.
- Project managers want to see a high-level overview of all projects, including metrics tied to performance, progress, and possible risks that may require further attention.
- People Managers want to see what their team is working on and upcoming team time off. No need to start from scratch, the People Manager Dashboard in the Blueprints library has you covered with a handful of pre-built reports. Keep in mind that you need to have a manager assigned in a user's profile for this dashboard to populate.
- Users want to see their work — late work, upcoming work, requests they've submitted, and recently completed work.
- Individuals involved with compliance may want to review work items that have legal obligations or those needed for compliance audits.
- Approvers want to see work items, documents, or proofs awaiting their decision so that they aren't holding up the approval process.

- Want a dashboard to help you manage offboarding users? Install the Departing User Dashboard in the Blueprints library for 13 reports to help you find, reassign, or otherwise manage the objects and assignments associated with a user departing your purview of Workfront.
- Present the information in a clear yet attractive way. Workfront offers a variety of visuals like lists, charts, graphs, and matrices to quickly see relevant or critical data, keeping the audience engaged. Often, executives prefer charts and graphs, whereas users typically toggle between the Details and Summary tabs of a list or report to see their work.
- Add multiple reports, calendars, and external pages to a dashboard for quick and easy access to related data (Note there is a 25-object limit).
  - Watch this short 5-minute video to learn how to create a dashboard.

TIP: Dashboards are a great way to help with adoption challenges! They can be pinned to the navigation bar or set as the default landing page via layout templates, added to a user's Favorites menu, or added as a custom section for projects, tasks, issues, approval processes, notes, and documents.

Step 7

Ask for help! Don't try and tackle reporting alone

Whether you want to learn from the experts, share ideas with other Workfront users, or ask for best practices, a variety of experiences and teams of people are here to help:

- Seek recommendations or best practices from your peers by posing questions on the Experience League Community.
  - Check out customer-submitted reports with their step-by-step instructions in the Reporting Cookbook.

- Talk to a Technical Support Engineer over the phone or by submitting a case through Experience League. Customer Support is available 24/7 for all Workfront customers.
  - While the Customer Support team won't build custom reports for you, they can troubleshoot specific questions about why your report isn't displaying the expected results.

- Have a reporting feature enhancement you'd like to see added to the Workfront product roadmap? Submit your idea to the Ideas space on the Community and make sure to review (and up-like!) other suggestions that you think can help businesses become more data- driven.

- FREE Events! Register for webinars and interactive workshops through the Events page on Experience League to learn, collaborate, and crowd source ideas with other Workfront users.

- Join a local Workfront User Group chapter! User Groups are customer-led groups intended to bring together Workfront users regionally in person and/or virtually to create open and inclusive communities to network, share ideas and best practices, collectively problem-solve, and provide ongoing education.

- There are custom, instructor-led learning options available in Adobe Digital Learning Services ($$) if you prefer hands-on training. Reach out to your Account Manager for more information.
  - Recommended course: Create Reports with Adobe Workfront I. This 2-day, instructor-led course focuses on the creation of reports and reporting elements in Adobe Workfront using the standard report builder.

- Attend the annual Adobe Summit and sign up for Workfront reporting focused sessions or labs.

- For help with custom reports, utilize the expertise of Professional Services. Work with your Account Manager to purchase ($$) remote consulting hours. If you aren't sure who your Account Manager is, reach out to Customer Support and they can provide you with a name and email address.

Step 8

The future of reporting in Adobe Workfront

Canvas Dashboards

While still in a closed beta testing phase (as of June 2025) and subject to frequent changes, Canvas Dashboards is the future of reporting in Adobe Workfront.

- Report on core Workfront objects (ex: projects, tasks, issues, etc.) alongside data from peripheral services (Boards, Review & Approval, Workfront Planning, etc.)
- Reduce dependency on text mode
- Introduce new visualizations – ex: KPI widget

Workfront Data Connect

Workfront Data Connect is a secure and scalable way for customers to connect business intelligence tools and other data processing/cloud-data-hosting services to a curated Adobe Workfront data set hosted by Adobe to drive business decisions.

- Allows enterprise customers to interrogate their data using data visualization tools directly from a Workfront data lake, or to export Workfront data to a customer-owned data warehouses.
- Subscribers will be able to connect their business intelligence tool of choice (Tableau, Power BI, Domo, Looker, etc.) to Data Connect to create data visualizations with the following types of data:
  - Low latency, current state data
  - Change event records for point-in-time comparisons
  - Daily historic snapshots for trend analysis
- Included in the Ultimate package but offered as an add-on ($) for customers with a Prime or Select package

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