The project manager's cookbook for Workfront.

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Table of contents

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We hear it all the time — people want to know which reports other customers love and use. So we reached out, and you answered!

Together we've created the Adobe Workfront project manager cookbook. Inside, you'll find 10 useful reports and dashboards to explore simple reports, complex reports, and cross-project views to help you manage work more effectively.

Take these recipes, try them out in your own Adobe Workfront reporting kitchen, and just like any good recipe, make them your own! Then, share what you learn with your fellow work management experts on the Adobe Workfront Community.

Report recipes

Team "In-The-Weeds" Weekly Task Report

Submitted by: Tim Wyckoff
Company: Shaw Industries Inc.
Prep: 20–30 minutes
Yield: A clean, list-based view of all tasks due for a team by week. Project managers and team members can see what's coming, what's overdue, and where to jump in — without needing a dashboard.
Serves: Project managers, team leads, individual contributors, and resource managers
Report type: Task

Detailed instructions

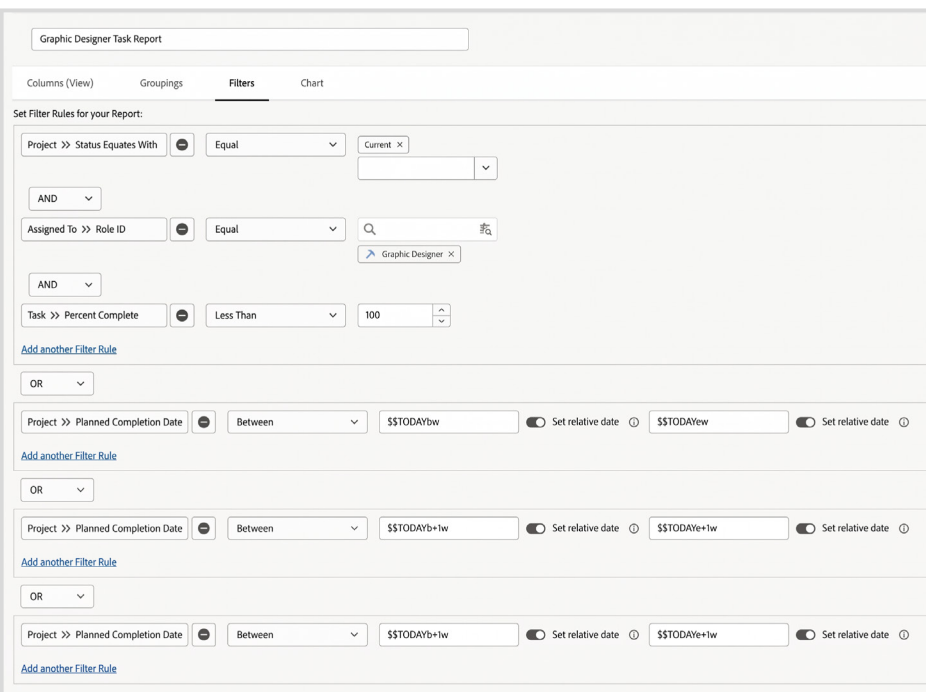
Step 1: Create a task report

Go to Reports → New Report → Task Report

Step 2: Set filters for scope, date range, and status

Use the following filter logic:

- **Scope:** Assignment Roles >> Role ID = Graphic Designer
  Substitute your target role, home team, or manager here.
- **Overdue:** Planned Completion Date is before this week AND Task Status is not complete/closed.
- **Upcoming:** OR Planned Completion Date is this week OR Planned Completion Date is next week.



Step 3: Group tasks by Planned Completion Date (week)

To make the report meeting-friendly:

- Go to the Grouping tab.
- Add a grouping by Planned Completion Date.
- Configure it to group by week, if your instance supports date bucketing.

Step 4: Adjust columns in list view

Use conditional formatting to highlight information in rows, such as tasks that have not been started.

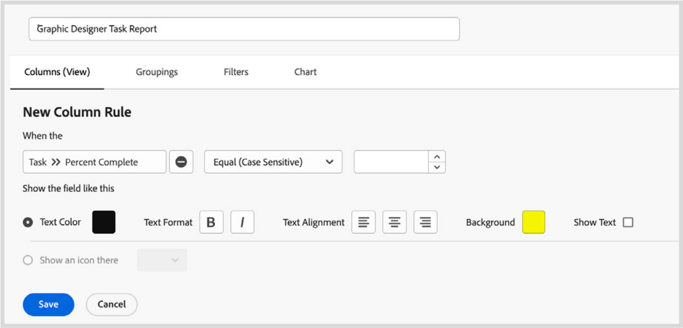
Columns
Task Name
Priority
Project Name
Planned Completion Date
Planned Hours
Assigned To (Primary Assignee)
Actual Hours
% Complete
Project Condition
Planned Project Completion Date

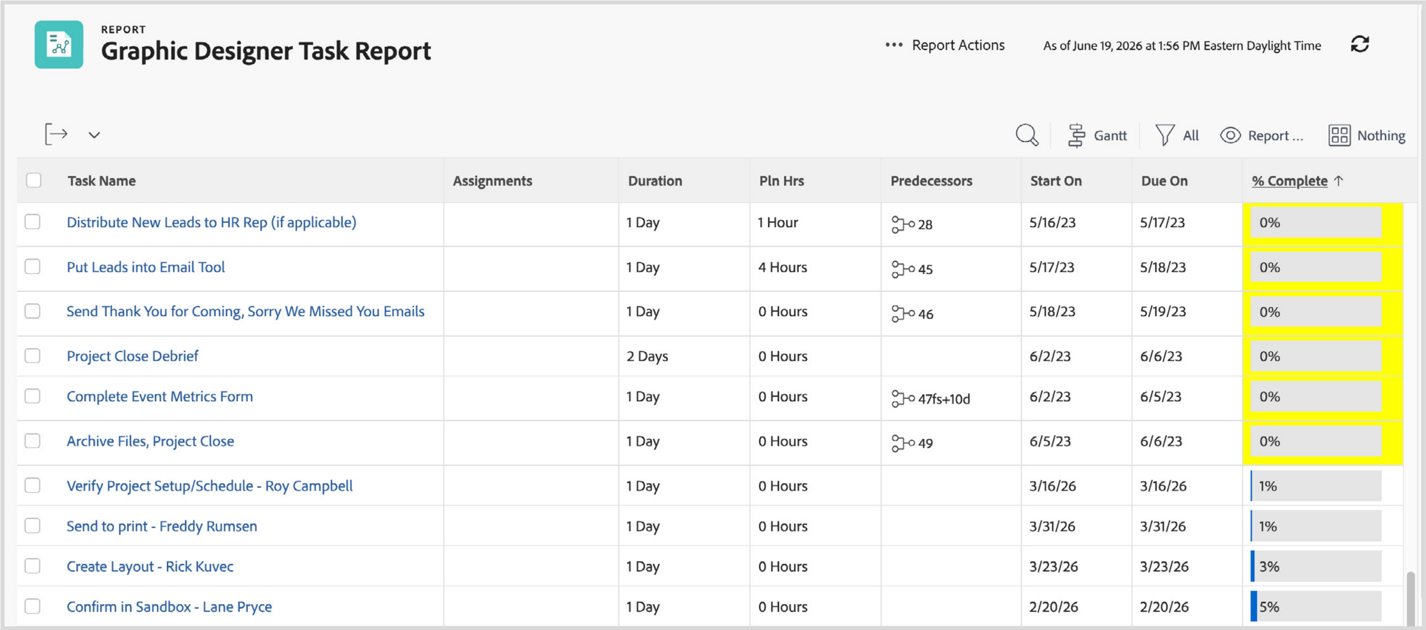
Important:

If your organization assigns more than one user to a work item, use Assignments instead of Assigned To.

Assigned To only shows the primary assignee, while Assignments ensures that all assigned users appear in the report. This guidance also applies anywhere else this field is referenced in other report instructions.

If your environment uses only one assignee per task, Assigned To may still work, but Assignments is the better default when shared ownership is possible. This is also consistent with how Blueprints are typically built.





REPORT
Graphic Designer Task Report

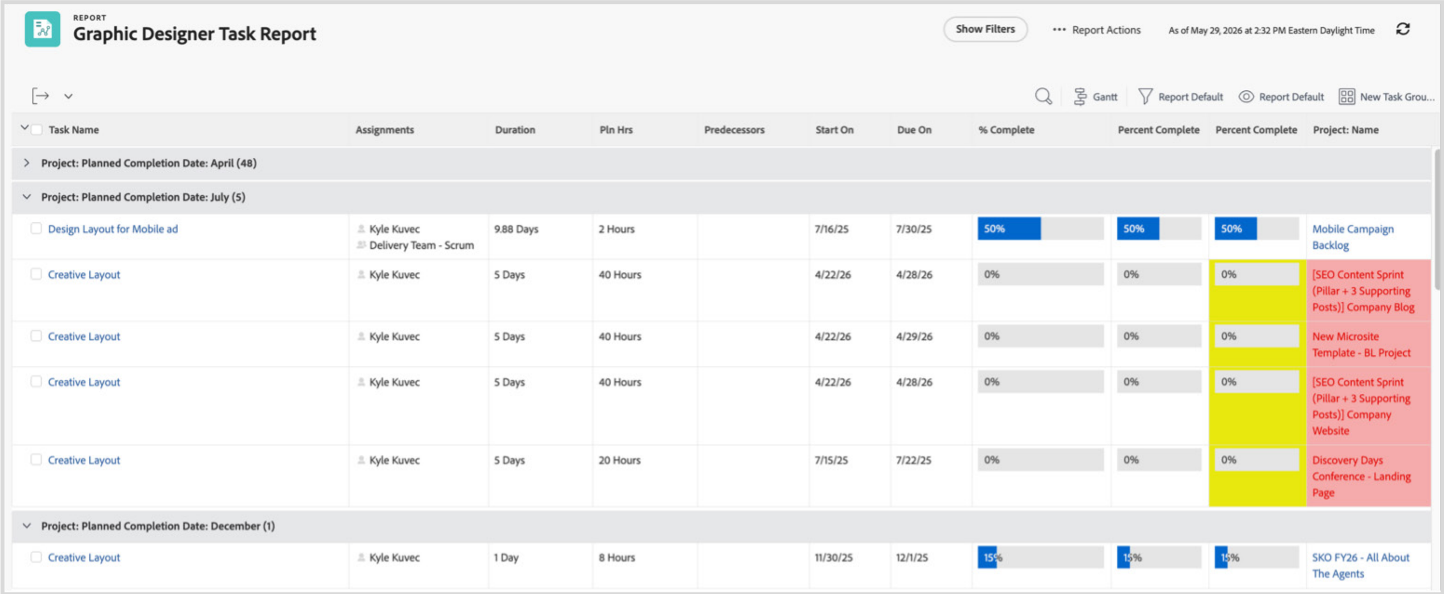
••• Report Actions   As of June 19, 2026 at 1:56 PM Eastern Daylight Time

Gantt   All   Report ...   Nothing

Task Name	Assignments	Duration	Pln Hrs	Predecessors	Start On	Due On	% Complete
Distribute New Leads to HR Rep (if applicable)		1 Day	1 Hour	28	5/16/23	5/17/23	0%
Put Leads into Email Tool		1 Day	4 Hours	45	5/17/23	5/18/23	0%
Send Thank You for Coming, Sorry We Missed You Emails		1 Day	0 Hours	46	5/18/23	5/19/23	0%
Project Close Debrief		2 Days	0 Hours		6/2/23	6/6/23	0%
Complete Event Metrics Form		1 Day	0 Hours	47fs+10d	6/2/23	6/5/23	0%
Archive Files, Project Close		1 Day	0 Hours	49	6/5/23	6/6/23	0%
Verify Project Setup/Schedule - Roy Campbell		1 Day	0 Hours		3/16/26	3/16/26	1%
Send to print - Freddy Rumsen		1 Day	0 Hours		3/31/26	3/31/26	1%
Create Layout - Rick Kuvec		1 Day	0 Hours		3/23/26	3/23/26	3%
Confirm in Sandbox - Lane Pryce		1 Day	0 Hours		2/20/26	2/20/26	5%

Final product

A meeting-ready weekly task table, grouped by due week, showing team workload at a glance. Use it to drive your weekly standup and surface at-risk items before they become blockers.



REPORT
Graphic Designer Task Report

Show Filters   ••• Report Actions   As of May 29, 2026 at 2:32 PM Eastern Daylight Time

Gantt   Report Default   Report Default   New Task Grou...

Task Name	Assignments	Duration	Pln Hrs	Predecessors	Start On	Due On	% Complete	Percent Complete	Percent Complete	Project: Name
Project: Planned Completion Date: April (48)										
Project: Planned Completion Date: July (5)										
Design Layout for Mobile ad	Kyle Kuvec Delivery Team - Scrum	9.88 Days	2 Hours		7/16/25	7/30/25	50%	50%	50%	Mobile Campaign Backlog
Creative Layout	Kyle Kuvec	5 Days	40 Hours		4/22/26	4/28/26	0%	0%	0%	[SEO Content Sprint (Pillar + 3 Supporting Posts)] Company Blog
Creative Layout	Kyle Kuvec	5 Days	40 Hours		4/22/26	4/29/26	0%	0%	0%	New Microsite Template - BL Project
Creative Layout	Kyle Kuvec	5 Days	40 Hours		4/22/26	4/28/26	0%	0%	0%	[SEO Content Sprint (Pillar + 3 Supporting Posts)] Company Website
Creative Layout	Kyle Kuvec	5 Days	20 Hours		7/15/25	7/22/25	0%	0%	0%	Discovery Days Conference - Landing Page
Project: Planned Completion Date: December (1)										
Creative Layout	Kyle Kuvec	1 Day	8 Hours		11/30/25	12/1/25	15%	15%	15%	SKO FY26 - All About The Agents

Adobe

Report recipes

My Projects' Open Tasks (Project Manager "Pulse" View)

Submitted by: Paul Calvillo
Company: Omnicom
Prep: 20–30 minutes
Yield: A clean, project manager-centric view of all can-start tasks assigned to others within projects you own, so you always know what work is in motion without needing a dashboard.
Serves: Project managers, program managers, and portfolio managers
Report type: Task

Detailed instructions

Step 1: Create a task report

Go to Reports → New Report → Task Report

Step 2: Filter to tasks assigned to others that can start

Prerequisites: Tasks should use predecessor relationships. **Can Start** means a task is ready to begin because its predecessor conditions have been met. Build filters that answer, "For the projects I own, what tasks are assigned to other people and can be worked on right now?"

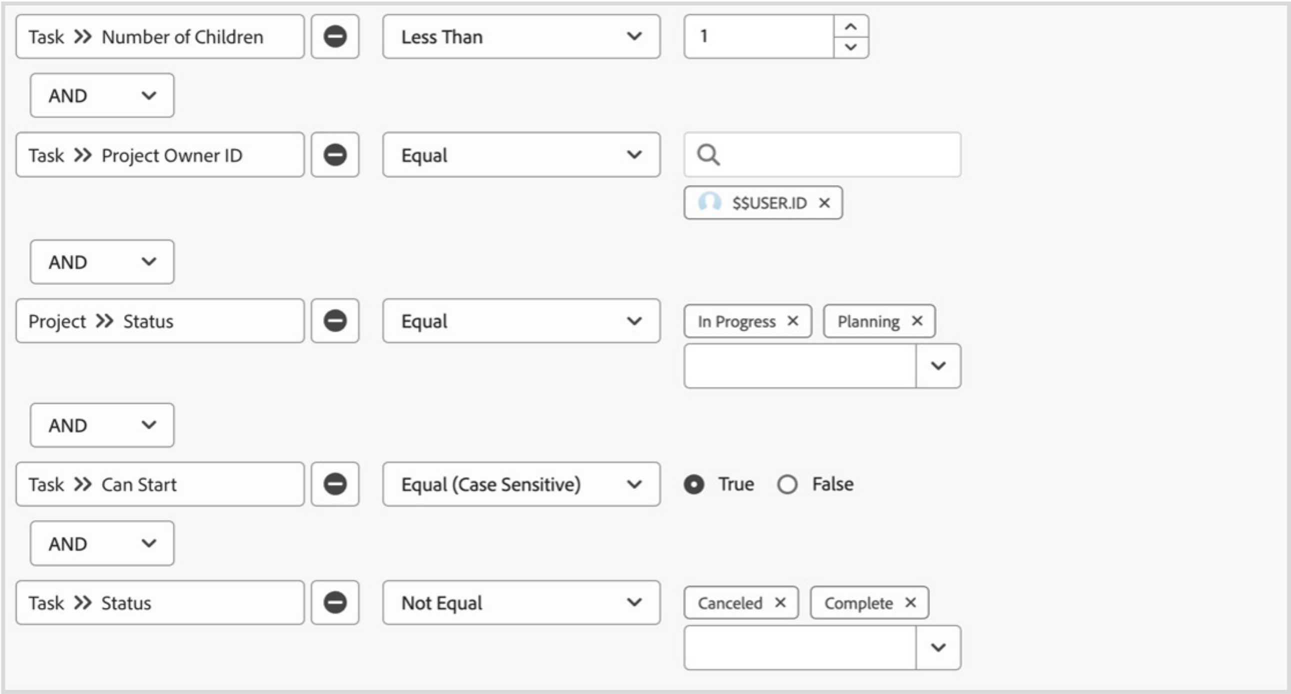
Use these filter ideas:

- **Limit to non-parent tasks:** Task > Number of Children < 1
- **Limit to your projects:** Project > Owner ID = $$USER.ID
  - Or use a portfolio, program, or group filter if that is how you scope "my projects."
- **Optional:** Exclude inactive projects with Project > Status not in Complete, Dead
- **Exclude tasks assigned to you:** Task > Primary Assignee ID!= $$USER.ID
- **Focus on work that is ready now:** Task > Can Start = True
- **Optional time awareness:** Planned Completion Date = This Week **OR** Planned Completion Date < This Week AND Task Status not in Complete, Closed

Step 3: Group in a project manager-friendly way

Choose a grouping that matches how you review work:

- Option A — By Project, then by week: "Within each project, what's everyone working on this week?"
- Option B — By week, then by project: "This week, across all my projects, what's everyone working on?"



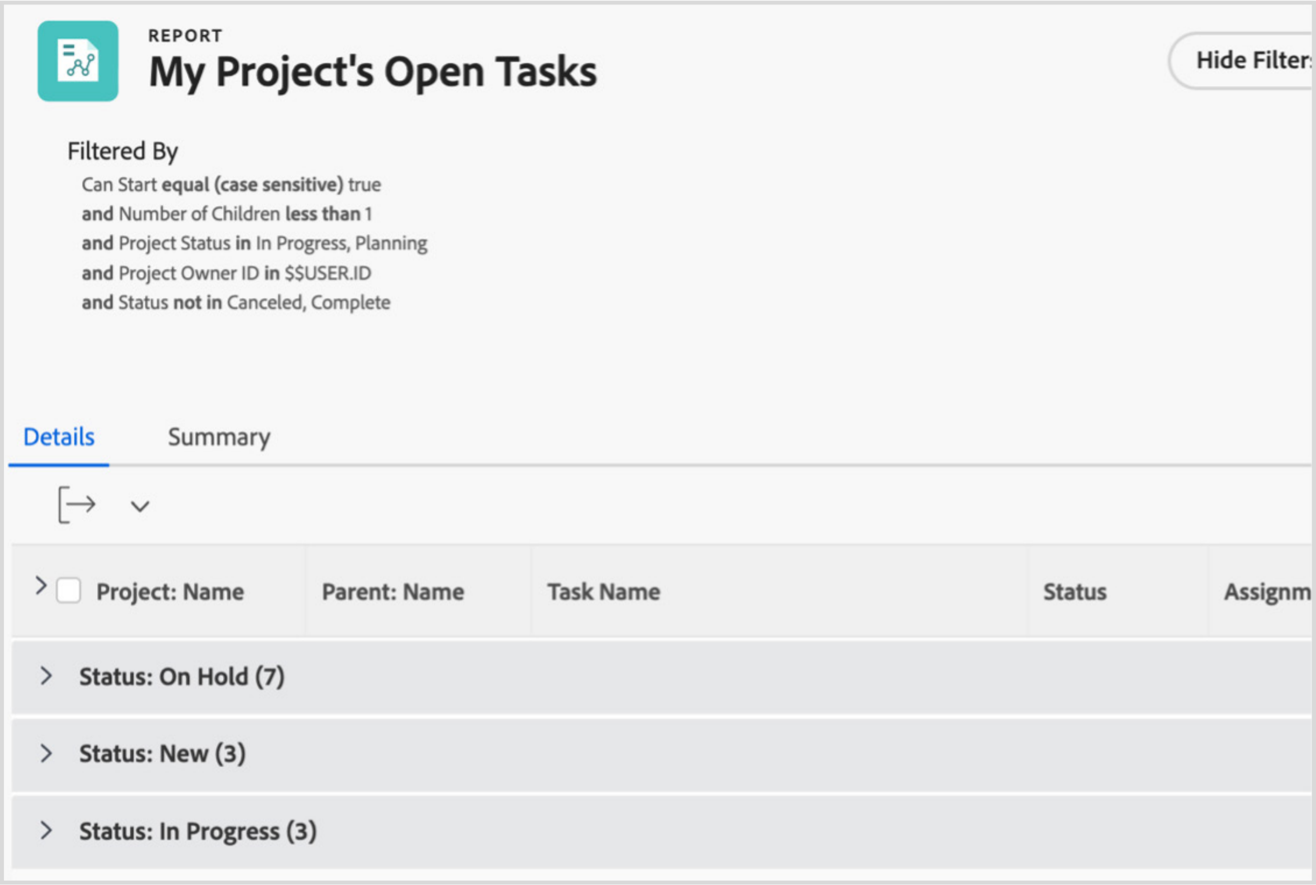
Step 4: Adjust columns in list view

Make sure you are using Assignments vs Assigned To ID.

Columns
Task Name
Project Name
Primary Assignee
Task Status
Planned Start Date
Planned Completion Date
Planned Hours
% Complete
Project Condition

Final product

Tasks grouped by project or due week, showing Primary Assignee, Status, Planned Start/Completion, and % Complete. All tasks shown have Can Start = True.



Report recipes

Current Task Information on a Project Report

Submitted by: Nichole Vargas
Company: Adobe Workfront
Prep: 5 minutes
Yield: Leveraging text mode collections, this project list or report quickly shows what child task(s) on projects I own can be started without having to click into the project timeline itself. The column shows not only the name of the task(s), but who it is assigned to and the planned start date.
Serves: Project managers, program managers, and portfolio managers
Report type: Project

Detailed instructions

Step 1: Create a new Project report (If leveraging the list view of the Projects area, skip this step)

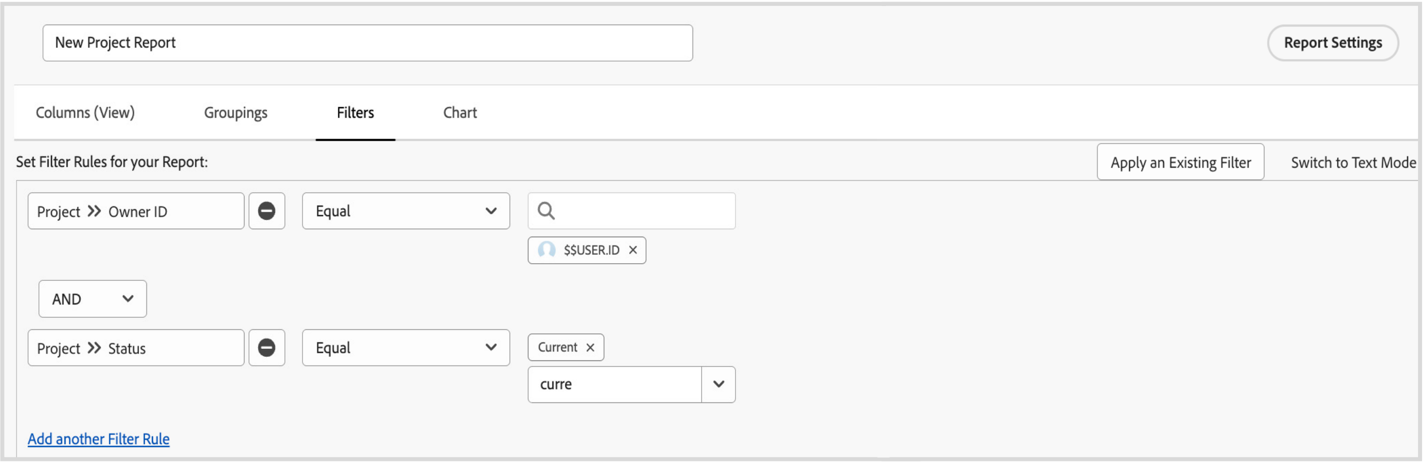
Go to Reports → New Report → Project Report. Add a clear title and description so users understand the report's purpose.

Step 2: Filter to show active Projects I Own

Project Owner ID > Equals > $$USER.ID

AND

Project Status > Equals > Current (or any active status)



Optionally, add additional filters based on your specified criteria, but this is the bare minimum.

Step 3: Add your text mode collection column to show the current task(s) that can start

Go to the Columns (View) tab and select Add Column > Switch to Text Mode > Edit Text Mode > Delete any text that appears and then paste the following:

displayname=Current Task

listdelimiter=<div>

listmethod=nested(tasks).lists

type=iterate

valueexpression=IF({numberOfChildren}=0,IF({canStart}="True",IF(ISBLANK({actualCompletionDate}), CONCAT({name}," - ",{assignedTo}.{name}," - ",{plannedStartDate}))))

valueformat=HTML

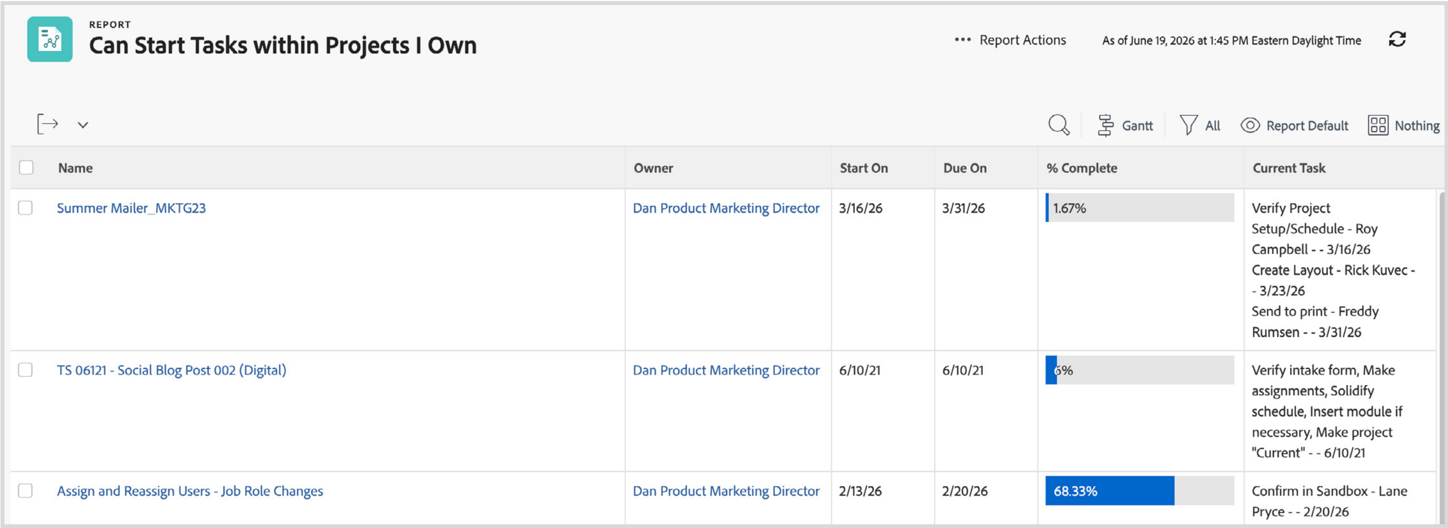
width=300

Important:

This text mode collection column pulls in the name of any child task(s) that can start, along with the assigned user and planned start date. Keep in mind that if you are not using predecessor relationships on your tasks, any child task without one will be pulled in.

Final product

A high-level view of what task(s) are ready to be worked on in your projects. You can also incorporate percent complete or any other task-level fields into this CONCAT expression. If you'd like to include additional information, it only requires a slight modification to the text mode value expression.



Name	Owner	Start On	Due On	% Complete	Current Task
Summer Mailer_MKTG23	Dan Product Marketing Director	3/16/26	3/31/26	1.67%	Verify Project Setup/Schedule - Roy Campbell - - 3/16/26 Create Layout - Rick Kuvec - - 3/23/26 Send to print - Freddy Rumsen - - 3/31/26
TS 06121 - Social Blog Post 002 (Digital)	Dan Product Marketing Director	6/10/21	6/10/21	6%	Verify intake form, Make assignments, Solidify schedule, Insert module if necessary, Make project "Current" - - 6/10/21
Assign and Reassign Users - Job Role Changes	Dan Product Marketing Director	2/13/26	2/20/26	68.33%	Confirm in Sandbox - Lane Pryce - - 2/20/26

Project Meeting Agenda and Minutes

Submitted by: Mark Evans
Company: LifeNet Health
Prep: 1 hour
Yield: A project meeting dashboard that helps teams run structured status meetings, capture discussion in real time, and generate a meeting-minutes report immediately after the session.
Serves: Project managers and project lead
Report type: Dashboard (2x Task, 1x Note Reports)

Detailed instructions

This recipe creates a simple meeting operating system inside Workfront. Build the three reports below and add them to a dashboard in this order: Tasks Due in the Next 7 Days, Tasks Due in Days 8–14, and Project Team Meeting Updates ("Meeting Minutes"). Once built, add the dashboard to the left panel of a project or surface it through a layout template.

Report 1: Tasks Due in the Next 7 Days

Refer to "Tasks Due Next Week" shown in Recipe 1, **Team "In-The-Weeds" Weekly Task Report.**

Report 2: Tasks Due in Days 8–14

Go to Reports → New Report → Task Report.

Add a clear title and description so users understand the report's purpose. Copy Report 1 and change only the date filter: Task >> Planned Completion Date is between $$TODAY+8d and $$TODAY+14d. Update the report title so the time horizon is clear.

Report 3: Project Team Meeting Updates ("Meeting Minutes")

Create a new Note Report with these columns: Task >> Name, Task >> Assigned To >> Name (label as "Task Owner"), Note >> Note Text (see text mode below), Task >> Planned Completion Date, Task >> Projected Completion Date, Task >> Progress Status, Task >> % Complete.

Text mode for the Note column (includes author):

```
displayname=Note
linkedname=direct
namekey=noteText
querysort=noteText
valueexpression=CONCAT({noteText}," -- ", {owner}.{name})
valuefield=noteText
valueformat=HTML
```

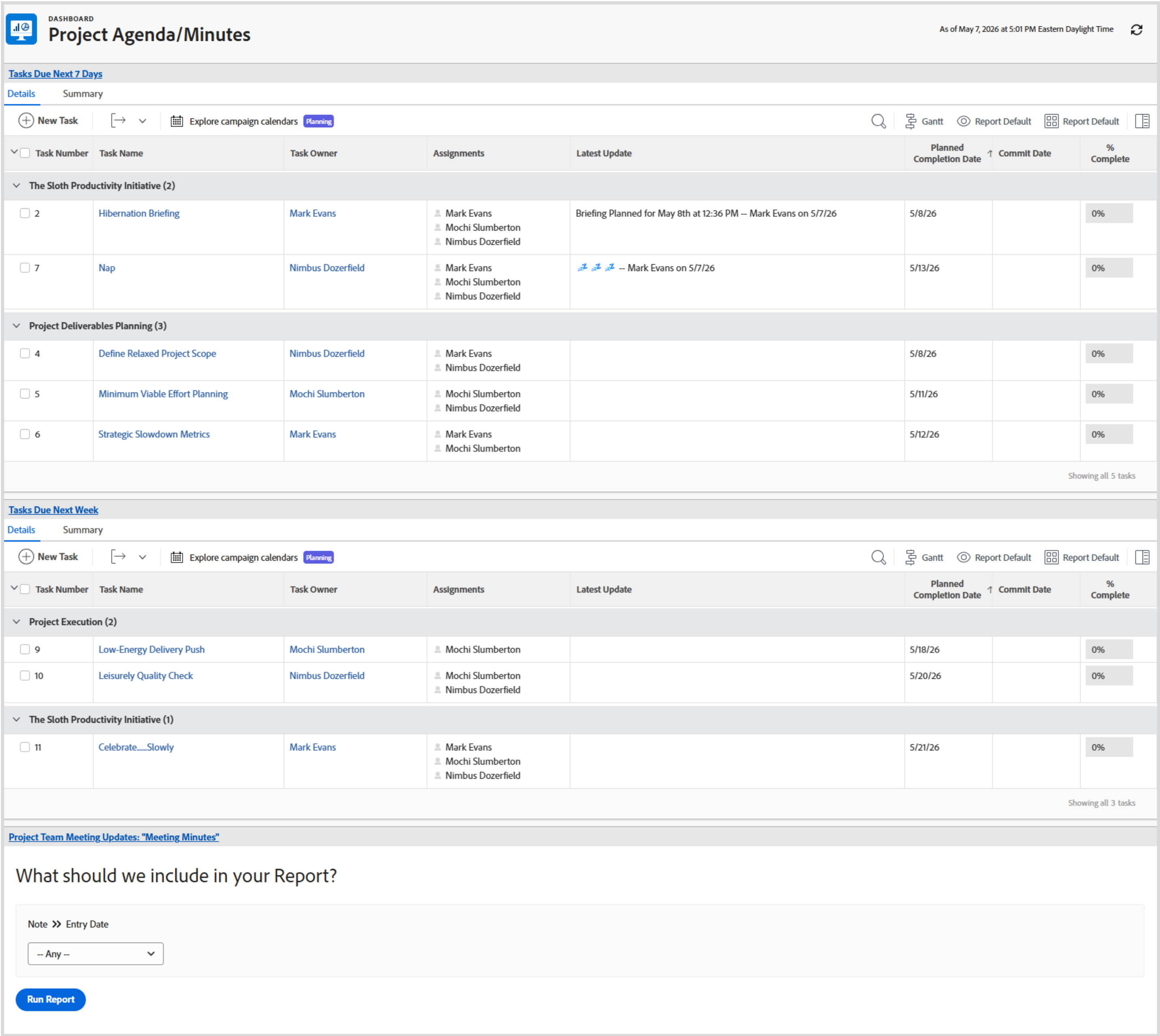
Text mode grouping:

```
group.0.valuefield=task:backlogParent
group.0.valueformat=string
group.1.valuefield=task:name
group.1.valueformat=string
textmode=true
```

In Report Prompts, add a prompt for Note >> Entry Date. Make sure Show prompts in Dashboards is checked.

Final product

Display the dashboard during a project meeting and work through due-soon tasks first. Capture decisions and follow-ups directly in the task update stream. At the end of the meeting, run the Meeting Minutes report for the session's time frame and export if needed — an immediate written record with no separate document required.


DASHBOARD

Project Agenda/Minutes

As of May 7, 2026 at 5:01 PM Eastern Daylight Time

Tasks Due Next 7 Days

Details Summary

New Task | Explore campaign calendars Planning | Gantt | Report Default | Report Default

Task Number	Task Name	Task Owner	Assignments	Latest Update	Planned Completion Date	Commit Date	% Complete
The Sloth Productivity Initiative (2)							
2	Hibernation Briefing	Mark Evans	Mark Evans Mochi Slumberton Nimbus Dozerfield	Briefing Planned for May 8th at 12:36 PM -- Mark Evans on 5/7/26	5/8/26		0%
7	Nap	Nimbus Dozerfield	Mark Evans Mochi Slumberton Nimbus Dozerfield	-- Mark Evans on 5/7/26	5/13/26		0%
Project Deliverables Planning (3)							
4	Define Relaxed Project Scope	Nimbus Dozerfield	Mark Evans Nimbus Dozerfield		5/8/26		0%
5	Minimum Viable Effort Planning	Mochi Slumberton	Mochi Slumberton Nimbus Dozerfield		5/11/26		0%
6	Strategic Slowdown Metrics	Mark Evans	Mark Evans Mochi Slumberton		5/12/26		0%

Showing all 5 tasks

Tasks Due Next Week

Details Summary

New Task | Explore campaign calendars Planning | Gantt | Report Default | Report Default

Task Number	Task Name	Task Owner	Assignments	Latest Update	Planned Completion Date	Commit Date	% Complete
Project Execution (2)							
9	Low-Energy Delivery Push	Mochi Slumberton	Mochi Slumberton		5/18/26		0%
10	Leisurely Quality Check	Nimbus Dozerfield	Mochi Slumberton Nimbus Dozerfield		5/20/26		0%
The Sloth Productivity Initiative (1)							
11	Celebrate.....Slowly	Mark Evans	Mark Evans Mochi Slumberton Nimbus Dozerfield		5/21/26		0%

Showing all 3 tasks

Project Team Meeting Updates: "Meeting Minutes"

What should we include in your Report?

Note >> Entry Date

-- Any --

Run Report

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Report recipes

Project Updates Search

Submitted by: Mark Evans
Company: LifeNet Health
Prep: 10 minutes
Yield: A prompted report that lets users quickly search for project updates by project, task, note content, owner, or date.
Serves: All project users, especially project managers and project leads
Report type: Note

Detailed instructions

This report gives users a fast way to locate updates without opening tasks one by one. It's especially useful when a Project Manager needs to answer questions like: What was the latest update on this task? Who posted a specific note? When did this project discussion happen? Where was the decision first mentioned?

Step 1: Create the Note Report

Go to Reports → New Report → Note Report.

Add a clear title and description so users understand the report's purpose. Create a new Note Report with these columns: Link to Task, Note >> Note Text, Owner >> Note Entered By, Note >> Entry Date.

Text mode for the Link to Task column:

```
displayname=Link to Task
linkedname=task
namekey=view.relatedcolumn
namekeyargkey.0=task
namekeyargkey.1=name
querysort=task:name
styledef.case.0.comparison.icon=false
styledef.case.0.comparison.leftmethod=taskID
styledef.case.0.comparison.lefttext=task:name
styledef.case.0.comparison.operator=in
styledef.case.0.comparison.operatortype=string
styledef.case.0.comparison.righttext=
styledef.case.0.comparison.truetext=
valuefield=task:name
valueformat=HTML
```


Step 2: Configure report settings

Add a clear title and description so users understand the report's purpose. Set the report to load in the Details tab and to show enough records to be useful when filtered on a dashboard.

Step 3: Add prompts

Add prompts for the following fields and ensure Show prompts in Dashboards is checked:

- Project >> Name
- Task >> Name
- Note >> Note Text
- Note >> Owner ID
- Note >> Entry Date

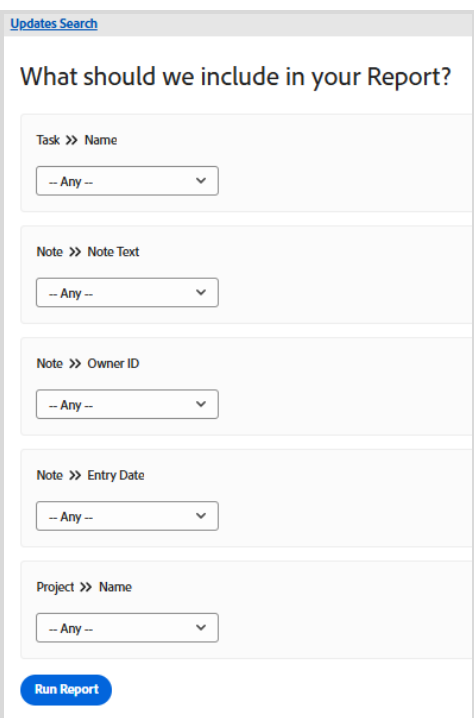
“Link to Task” is a custom display label applied in Text Mode; the underlying field is the task name/link field.

LINK TO TASK	NOTE TEXT	NOTE ENTERED BY	ENTRY DATE
Train Inside Sales Team	Sample Text	John Smith	Apr 15, 2011

Optional: Add this report to a single-report dashboard and place it in the left panel of every project. When used within a project context, it becomes a lightweight way to search that project's update history.

Final product

A searchable update log for your projects. Helps project managers answer questions faster, track historical decisions, and avoid clicking through multiple tasks to find the right note.



Project Owner Notes

Submitted by: Skye Hansen
Company: Merkle
Prep: 15–20 minutes
Yield: Shows overall health of active projects by project owner. A running narrative of where each project stands and what's needed — ready for status conversations, leadership check-ins, or handoffs when you're out.
Serves: Project managers and anyone covering for them
Report type: Project

Detailed instructions

This report gives a project owner the ability to store a short, current narrative that can be pulled up any time: for a 1:1, a leadership check-in, or a weekly review. Because the narrative is already in the system, planned or sudden absences don't leave your coverage guessing.

Assumptions: A Project Owner Notes custom form with three paragraph fields—Running Notes (where the project stands), Project Manager Availability and Coverage (plain language for when you're out and who's covering), and Action Needed (risks, blockers, decisions). Ask your admin to attach the form to active projects in bulk or through templates. In a pinch, the project description field works as a proof of concept.

Step 1: Create the project report

Go to Reports → New Report → Project Report.

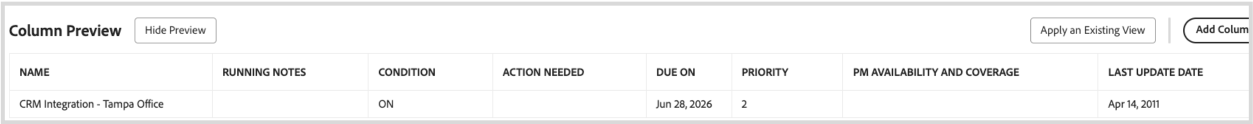
Add a clear title and description so users understand the report's purpose.

Step 2: Add columns

Add the following columns. The three custom fields are inline editable — update them straight from the report.

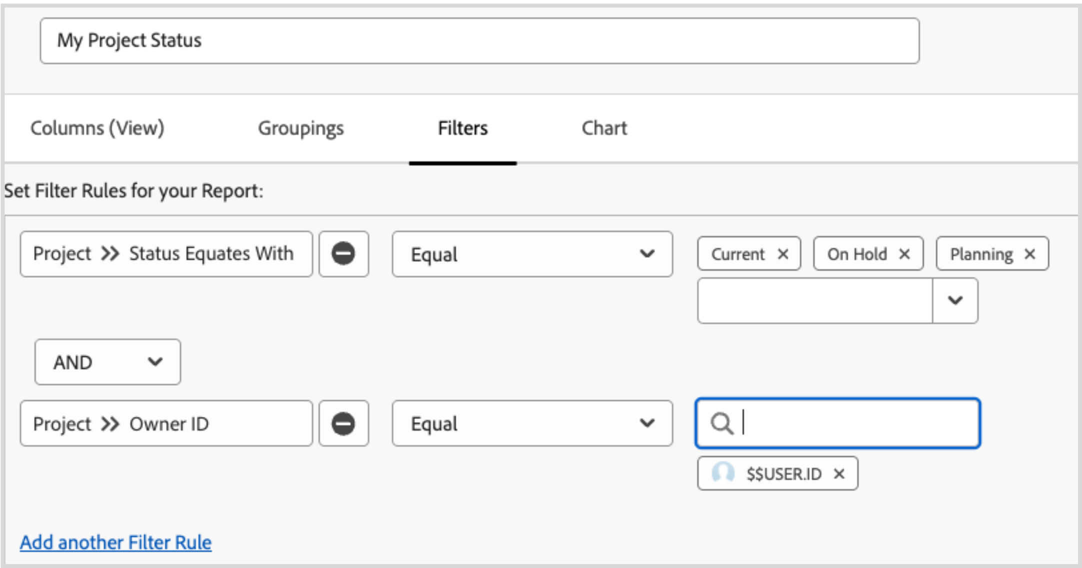
Columns
Project Name
Running Notes (custom field)
Project Condition
Action Needed (custom field)
Project Planned Completion Date
Project Priority
Project Manager Availability and Coverage (custom field)
Project Last Update Date

Sort by Planned Completion Date. The three custom fields are inline editable — update them straight from the report.



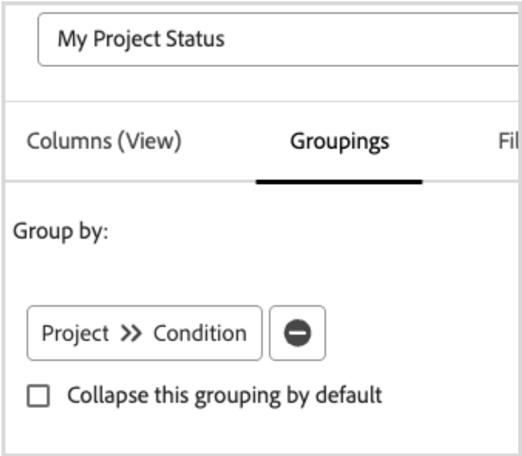
Step 3: Filter to your projects

- Project >> Status Equates To: Current, Planning, On Hold (or your preferred active statuses)
- Project >> Owner ID = $$USER.ID



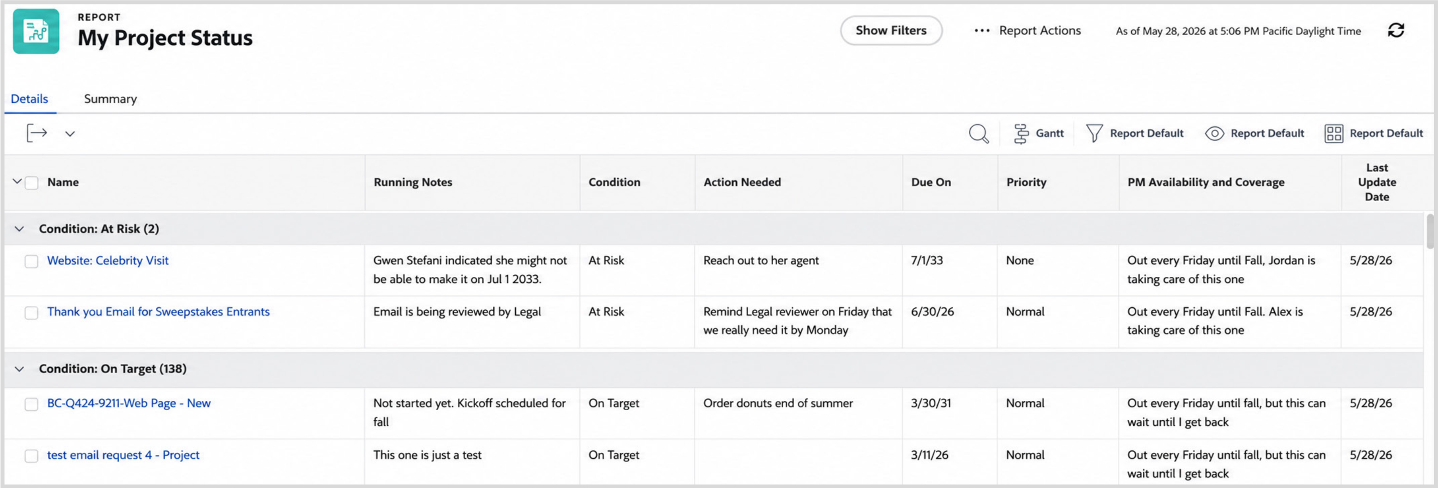
Step 4 (Optional): Group by Condition

Group by condition so that the person viewing the report sees what needs attention first.



Final product

A list of your projects, each carrying its own short status: where it stands, who's watching it, and what it needs. Tip: pin it to your global navigation bar so updating the notes becomes part of your normal rhythm.



Name	Running Notes	Condition	Action Needed	Due On	Priority	PM Availability and Coverage	Last Update Date
Condition: At Risk (2)							
Website: Celebrity Visit	Gwen Stefani indicated she might not be able to make it on Jul 1 2033.	At Risk	Reach out to her agent	7/1/33	None	Out every Friday until Fall, Jordan is taking care of this one	5/28/26
Thank you Email for Sweepstakes Entrants	Email is being reviewed by Legal	At Risk	Remind Legal reviewer on Friday that we really need it by Monday	6/30/26	Normal	Out every Friday until Fall. Alex is taking care of this one	5/28/26
Condition: On Target (138)							
BC-Q424-9211-Web Page - New	Not started yet. Kickoff scheduled for fall	On Target	Order donuts end of summer	3/30/31	Normal	Out every Friday until fall, but this can wait until I get back	5/28/26
test email request 4 - Project	This one is just a test	On Target		3/11/26	Normal	Out every Friday until fall, but this can wait until I get back	5/28/26

Report recipes

Cross-Project Visibility with Cross-Project Predecessors

Submitted by: Tim Wyckoff
Company: Shaw Industries
Prep: 20–30 minutes
Yield: A report that pulls in related projects, based on cross-project predecessors, into a single view to let Project Managers and stakeholders see how work in one project impacts another - and quickly answers "Where are we?" without chasing status updates.
Serves: Project managers, task owners, cross-functional teams, and executive
Report type: Project / Task

Prerequisite: This recipe consists of a Main project where you can see tasks linked to milestone tasks in multiple Related projects. Because these are linked via cross-project predecessors, the Main project will show the current status of all the milestone tasks in the Related projects.

Detailed instructions

Step 1: Create connection tasks in each related project

In each related project, identify the milestone tasks that signal completion to another team.

Step 2: Link connection tasks to the main project

In your main project, create tasks that depend on those milestone tasks from the other projects.

For example:

- Launch Final QA depends on Landing Page Ready for QA from the Web project

To create the link:

1. Open the task in the main project.
2. Go to **Predecessors.**
3. Search for and select the connection task from the related project.
4. Choose the dependency type, usually **Finish-Start.**

This setup creates the cross-project dependency that will later drive your reporting and visibility.

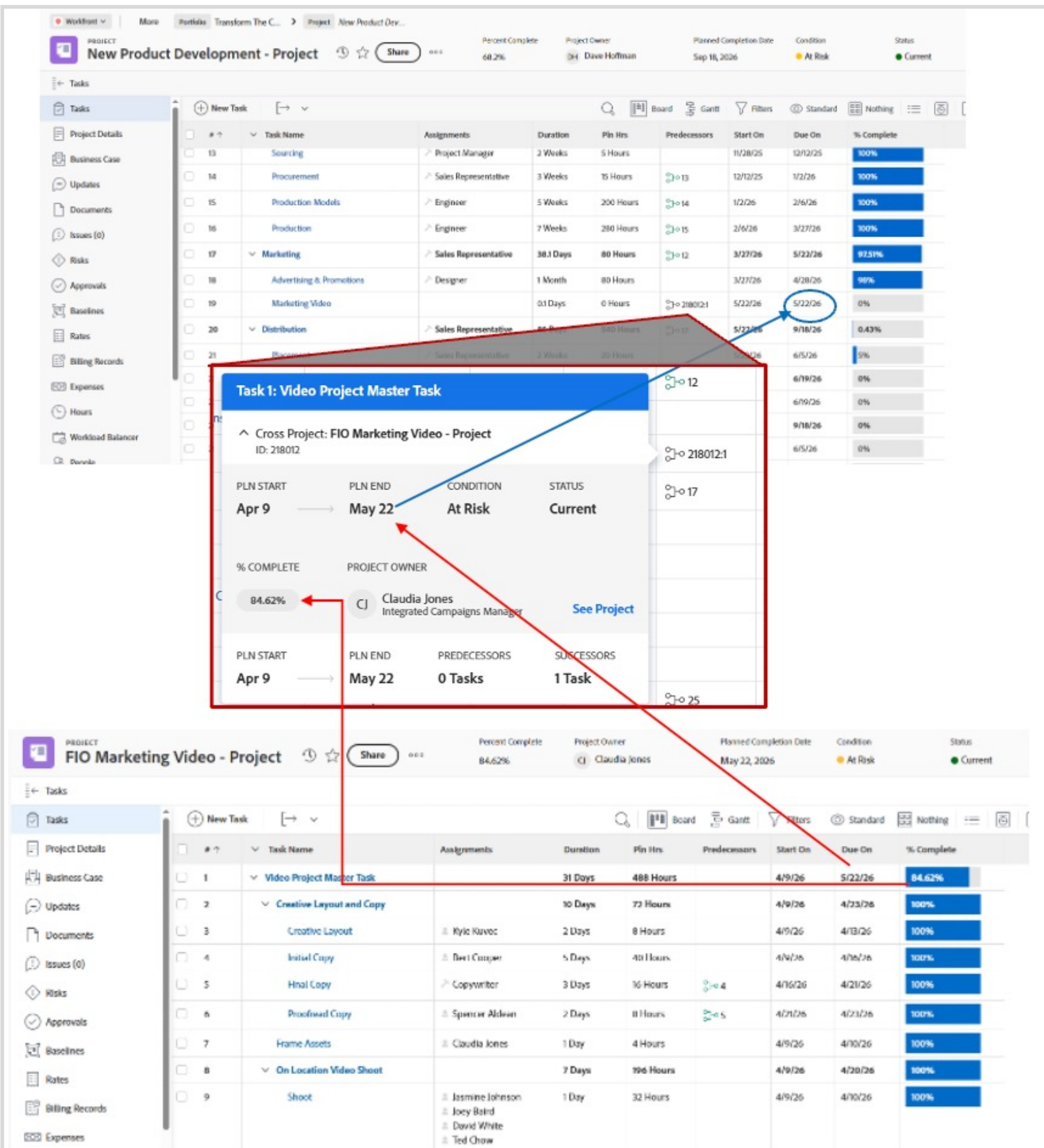
Step 3: Test that the dependency is working

Hover over the predecessor icon on a task in the main project.

You should see:

- the related project name
- the predecessor task name
- the current status of that task
- whether dates have shifted

If the related task moves, the dependent task in the main project should adjust automatically, depending on your Workfront settings.



Step 4: Keep it current

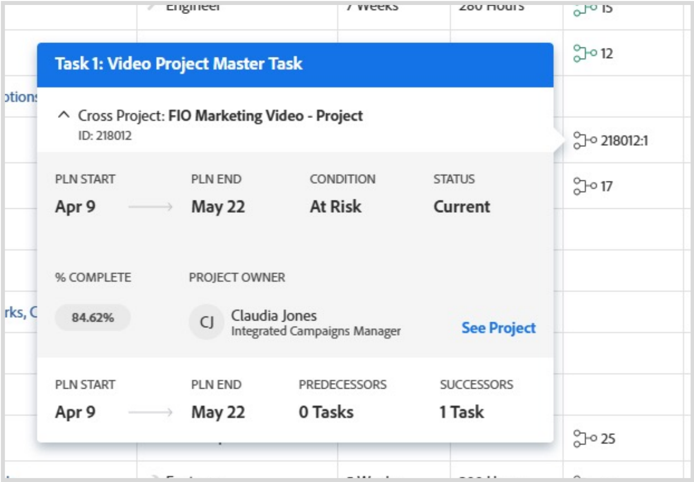
For this recipe to work well, both sides of the dependency need to stay updated.

Teams managing the related projects should:

- update task status regularly
- keep % Complete current
- maintain accurate dates
- use comments to note blockers or risks

The project manager for the main project should:

- monitor milestone tasks from related projects
- review dependency impacts
- adjust dependencies if the workflow changes



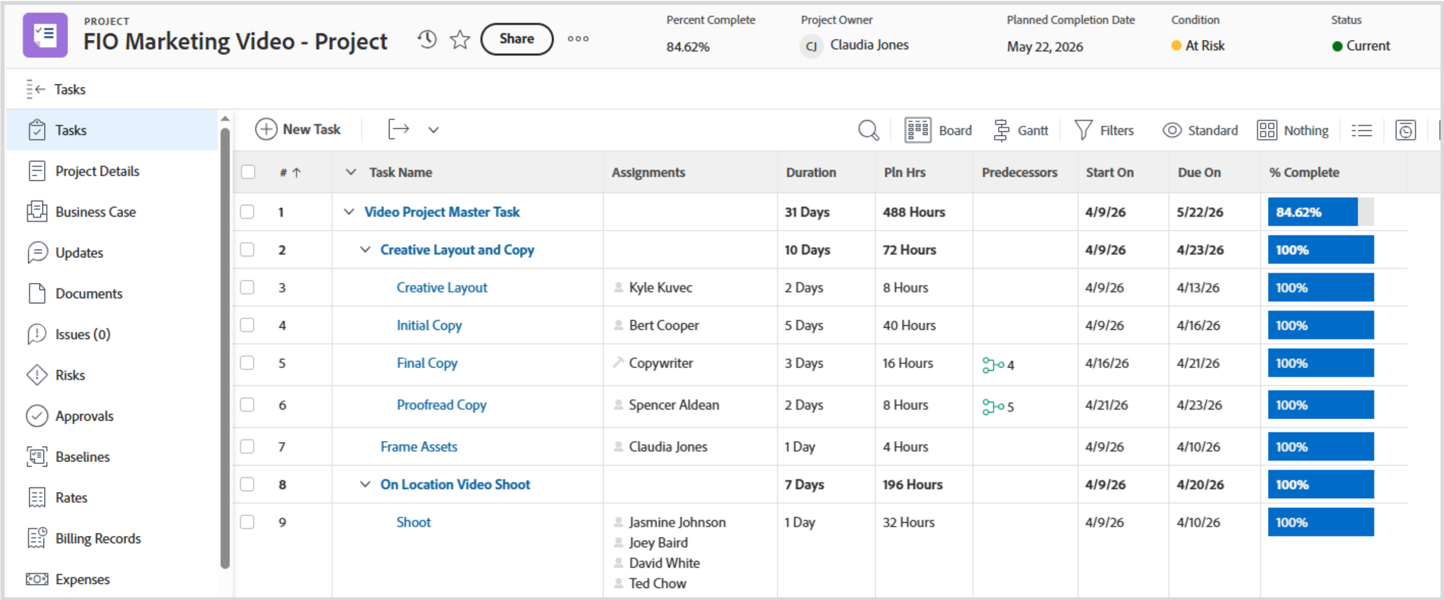
Step 5: Build a visibility report

Build a task report that shows tasks in the main project alongside their cross-project predecessor tasks, then add it to a dashboard for leadership and stakeholders. Add a clear title and description so users understand the report's purpose.

Columns
Project Name
Task Name
Predecessor Task Name
Status
Due Date

Final product

A living dependency map across projects.



Project Hygiene Dashboard

Submitted by: Lyndsy Denk
Company: IDEXX
Prep: 60–90 minutes
Yield: A project-level hygiene dashboard that helps Admins and Project Managers quickly find incomplete setup, stale records, and projects that should be closed or corrected.
Serves: System admins, project management office leads, and project managers
Report type: Dashboard

Detailed instructions

Use this dashboard to monitor the overall quality of project records in your instance. The goal is not to police every edge case but to surface the projects most likely to need cleanup. To scope reports to a specific business unit or leader:

- For functional groups: add Owner >> Home Group ID or Owner >> Home Team ID
- For individual users: add Project >> Owner ID = $$USER.ID

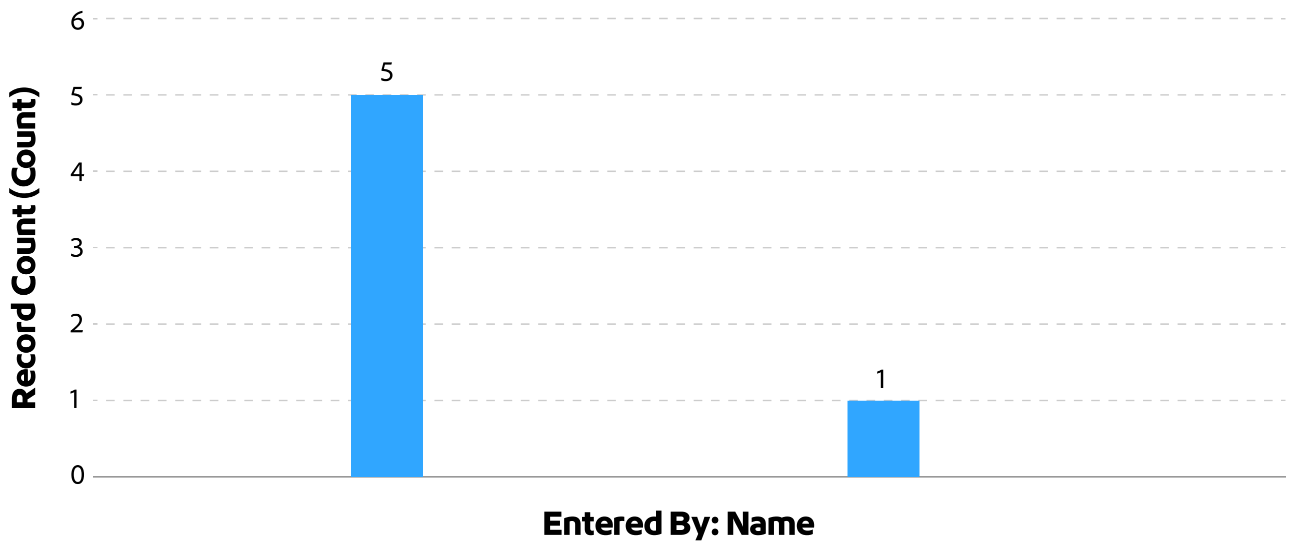
Report 1: Projects with No Owner

Go to Reports → New Report → Project Report.

Add a clear title and description so users understand the report's purpose. Create a Project Report to identify projects without an assigned owner. Review immediately so accountability and routing are clear.

Columns
Project >> Name
Project >> Owner
Portfolio >> Name
Program >> Name
Group >> Name
Any field that helps determine who should assume ownership

Grouping: Entered By >> Name | Filter: Project >> Owner ID is blank
Optional chart: Column | Y axis: Record Count | X axis: Entered By >> Name



Report 2: Untitled Projects

Go to Reports → New Report → Project Report.

Add a clear title and description so users understand the report's purpose. Create a Project Report to surface placeholder or abandoned records named "Untitled Project" or named like template copies. Before deleting anything, check for assignments, updates, and recent activity.

Columns
Project >> Name
Owner >> Name
Portfolio >> Name
Program >> Name
Project >> Description

Report 2: Untitled Projects

Text mode column showing all tasks within the project:

displayname=Tasks

listdelimiter=<p>

listmethod=nested(tasks).lists

type=iterate

valuefield=name

valueformat=HTML

Adobe

Grouping: Project >> Status

Filters: Project >> Name contains "untitled" OR Project >> Name contains "template" AND Project >> Status not equal to Cancelled or Complete

Name	Owner: Name	Campaign: Name	Entry Date	Planned Completion Date	Tasks	Desc	Due On	% Complete
Status: Not Started (1)								
PAID MEDIA TEMPLATE FOR COPYING TASKS	[illegible]	[illegible]	5/21/26	9/17/26	Strategy Review Revise copy (Strategy review 1) Build with digital media agency (minimum 3 weeks) Creative review of agency work Strategy review 2 (if needed) Creative development Build/animate assets Proofing + Legal Review Copyediting Final Review [# of Assets] Review 2 with Strategist Project Setup & Kickoff LOB Review	[illegible] Deliverables include: - Paid social ads - Today's Veterinary Practice social ads (may be able to leverage above,	9/17/26	0%

Report 3: Projects with No Company

Go to Reports → New Report → Project Report.

Add a clear title and description so users understand the report's purpose. Create a Project Report to find projects missing a company association. In many organizations this field supports access, security, client alignment, and cleaner reporting.

Columns
Project >> Name
Template >> Name
Owner >> Name
Company >> Name

Grouping: Owner >> Name | Filter: Project >> Company ID is blank

Chart: Column

- Y axis: Record count
- X axis: Template >> Name

Report 4: Projects with No Portfolio

Go to Reports → New Report → Project Report.

Add a clear title and description so users understand the report's purpose. Assign all projects to a portfolio that fits best with the project's subject matter. Bonus points for also assigning a Campaign. This supports access, security, and reporting.

Columns
Project >> Name
Any contextual field to help determine the correct portfolio
Owner >> Name
Project >> Status

Grouping: Owner >> Name | Filter: Project >> Portfolio ID is blank

Name	Entry Date	Due On ↓	Desc	Status
Owner: Name: [illegible] (2)				
Owner: Name: [illegible] (2)				
[illegible] Owner: [illegible]	5/13/26	5/20/26	Use this template when you need to update an existing asset.	Complete 100%
Update [illegible] Detailer Owner: [illegible]	5/14/26	5/20/26	Product dimensions, etc [illegible] are incorrect in the sales detailer. Please update to reflect the attached info.	Complete 100%

Report 5: Projects with No Program

Go to Reports → New Report → Project Report.

Add a clear title and description so users understand the report's purpose. Create a Project Report to find projects that belong in a program but haven't been assigned one.

Columns
Project >> Name
Any contextual field to help determine the correct program
Owner >> Name
Project >> Status

Grouping: Owner >> Name | Filter: Project >> Program ID is blank

Report 6: Projects 100% Complete but Not Closed

Go to Reports → New Report → Project Report.

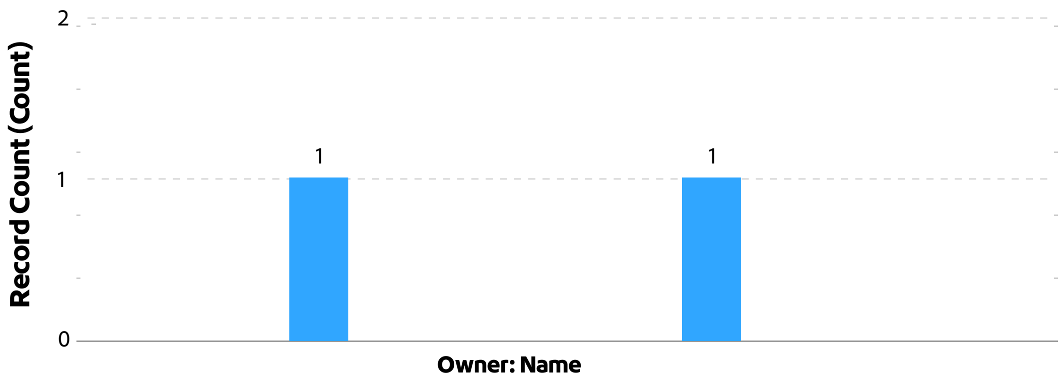
Add a clear title and description so users understand the report's purpose. Create a Project Report to identify projects that appear finished but are still open. Closing these improves dashboard accuracy and reduces noise for end users.

Columns
Project >> Name
Owner >> Name
Last Note >> Note Text
Project >> Last Update Date
Project >> Status
Project >> Planned Completion Date

Grouping: Project >> Status, Owner >> Name

Filters: Project >> Percent Complete = 100 | Project >> Status not equal to Cancelled, Complete (or any status equated to closed or complete)

Optional chart: Column | Y axis: Record Count | X axis (group columns): Owner >> Name and Status



Report 7: Projects at 0% Complete and Not Updated in 6+ Weeks

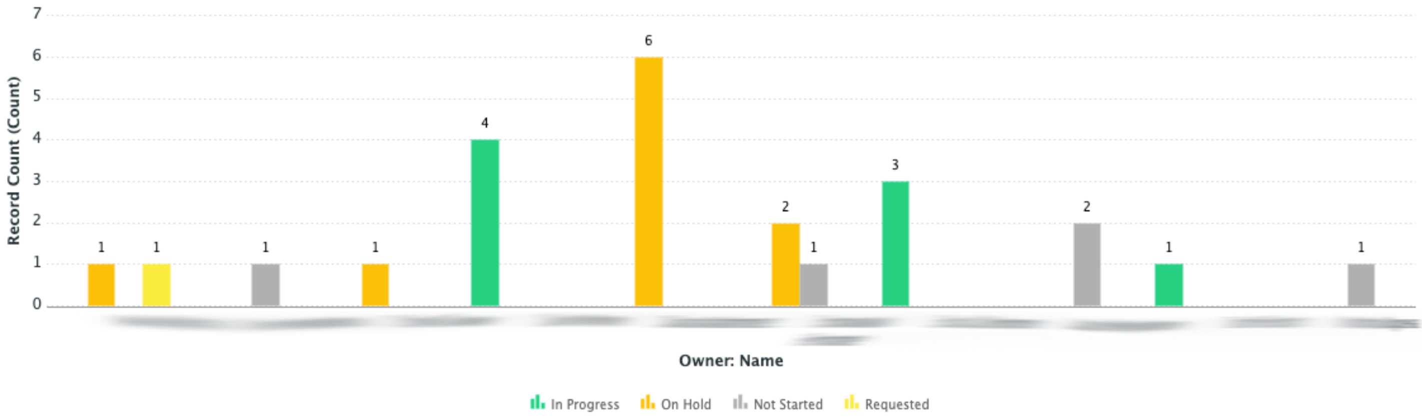
Go to Reports → New Report → Project Report.

Create a Project Report to identify projects that appear stalled, abandoned, or never truly started.

Columns
Project >> Name
Owner >> Name
Project >> Description
Project >> Planned Completion Date
Project >> Entry Date
Project >> Planned Start Date
Project >> Last Update Date

Grouping: Owner >> Name, Project >> Status

Filters: Project >> Planned Start Date ≤ $$TODAY | Project >> Last Update Date < $$TODAY-6w | Project >> Status not equal to Cancelled (or any status equated to cancelled)



Report 8: Projects Started but Still in Requested or Planning Status

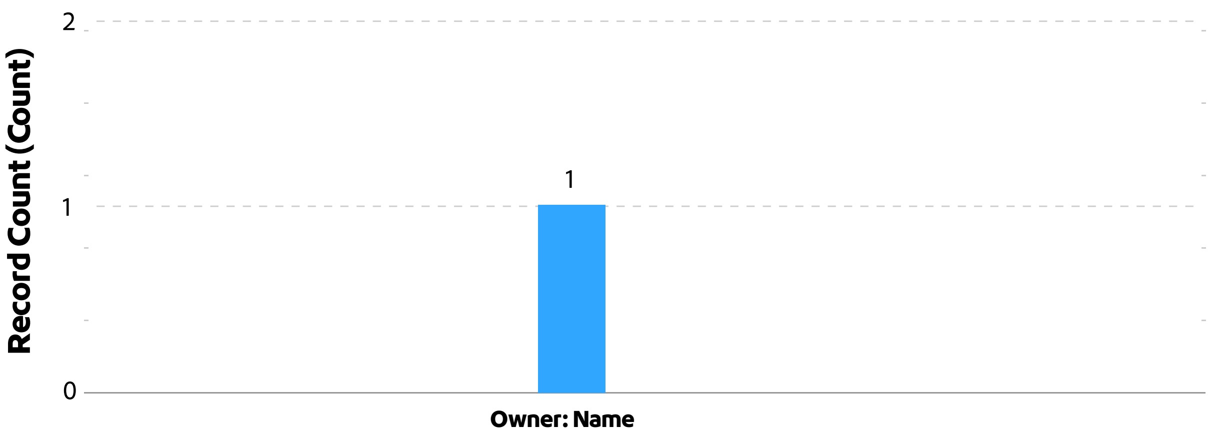
Go to Reports → New Report → Project Report.

Add a clear title and description so users understand the report's purpose. Create a Project Report to find projects where work has clearly begun but the status hasn't been updated to reflect it.

Columns
Project >> Name
Project >> Status
Owner >> Name
Project >> Planned Start Date
Project >> Planned Completion Date
Last Note >> Note Text

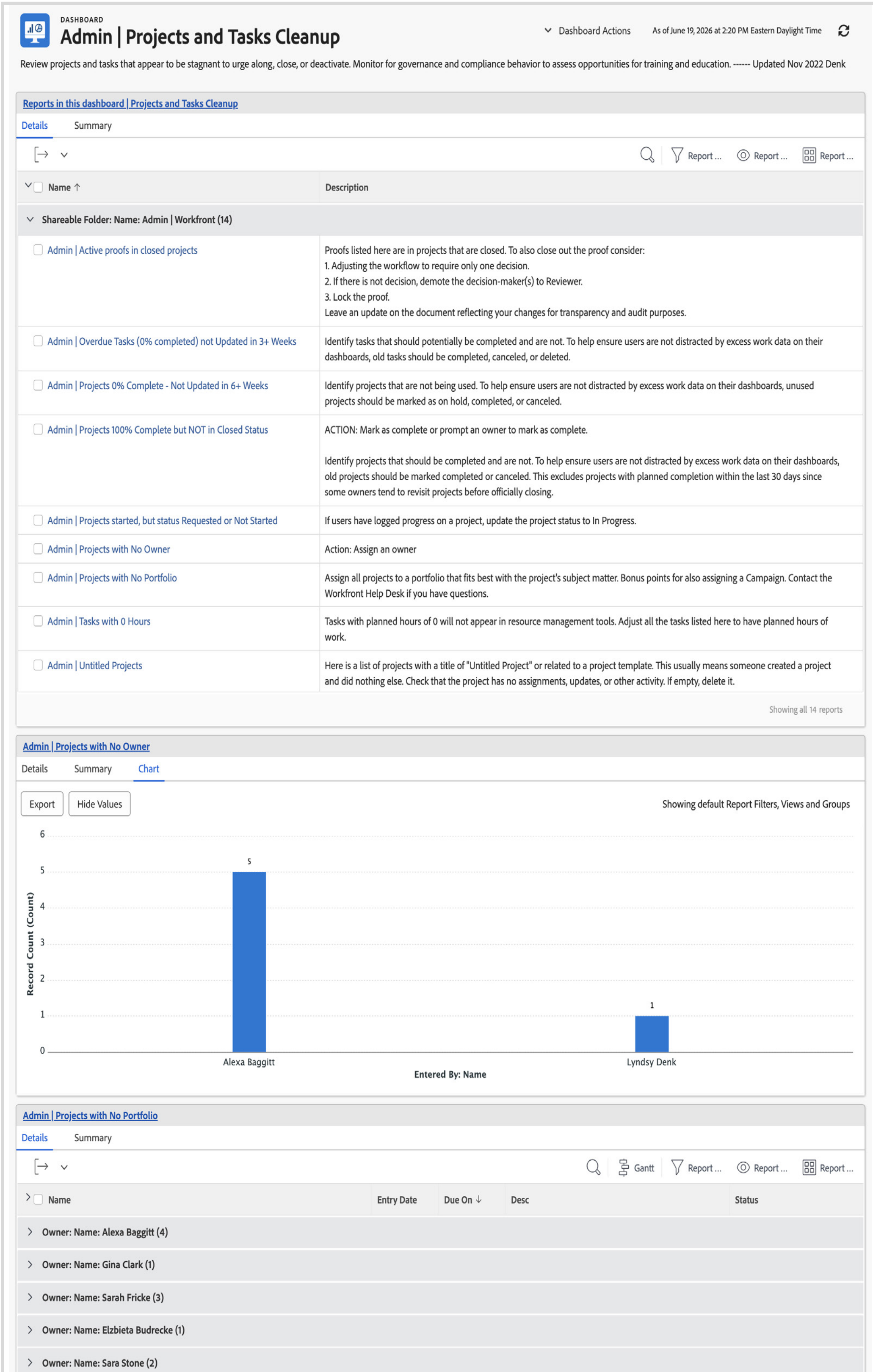
Grouping: Owner >> Name | Filters: Project >> Percent Complete > 0 AND Project >> Status = Planning or Requested

Optional chart: Column | Y axis: Record Count | X axis: Owner >> Name



Final product

A practical command center for project data quality. Helps teams close completed records, correct missing metadata, and improve portfolio structure without manually digging through the system.



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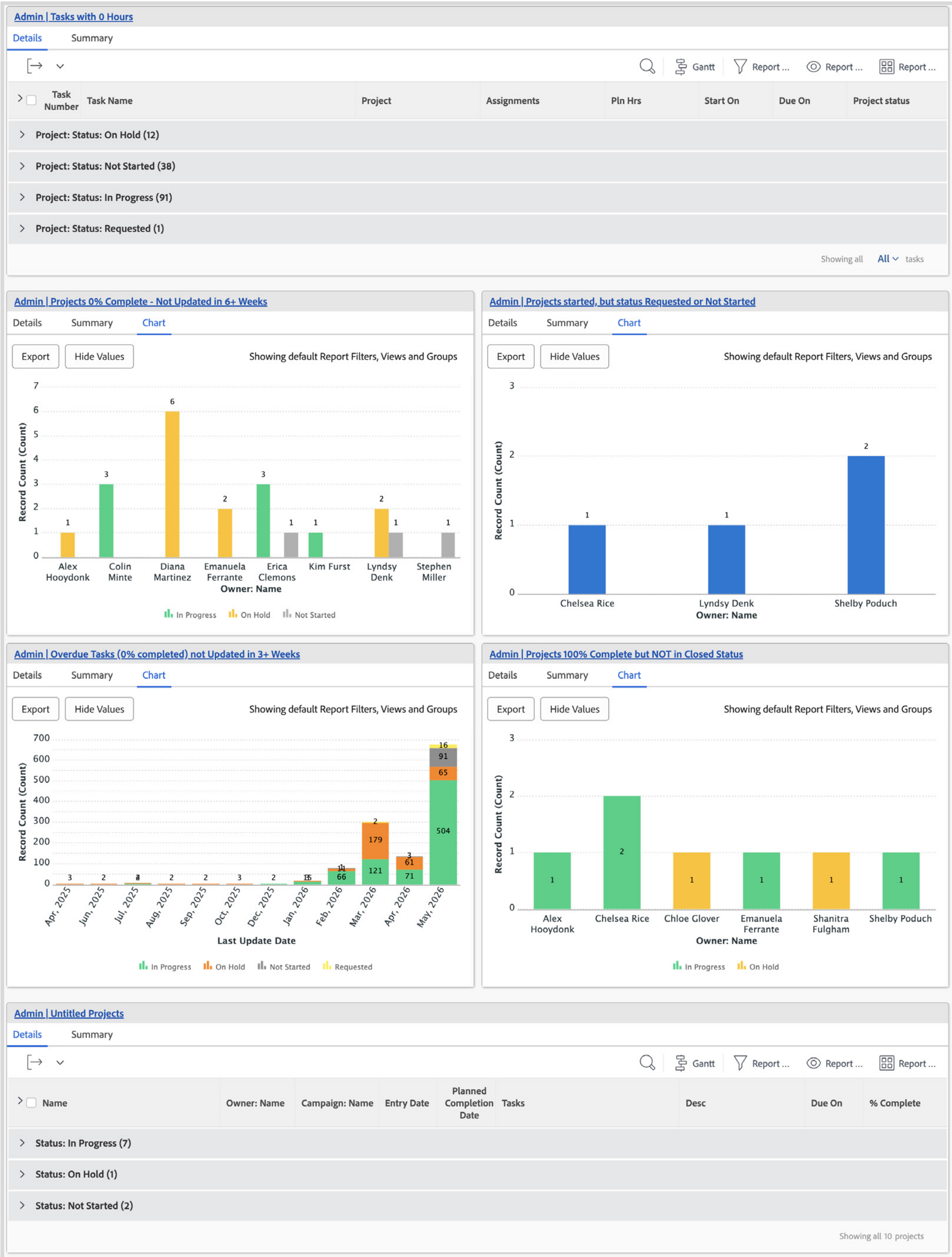

Admin | Tasks with 0 Hours
Details
Summary
Gantt
Report ...
Report ...
Report ...
Task Number
Task Name
Project
Assignments
Pln Hrs
Start On
Due On
Project status
Project: Status: On Hold (12)
Project: Status: Not Started (38)
Project: Status: In Progress (91)
Project: Status: Requested (1)
Showing all All tasks
Admin | Projects 0% Complete - Not Updated in 6+ Weeks
Details
Summary
Chart
Export
Hide Values
Showing default Report Filters, Views and Groups
Record Count (Count)
Alex Hoovdonk
Colin Minte
Diana Martinez
Emanuela Ferrante
Erica Clemons
Kim Furst
Lyndsy Denk
Stephen Miller
Owner: Name
In Progress
On Hold
Not Started
Admin | Projects started, but status Requested or Not Started
Details
Summary
Chart
Export
Hide Values
Showing default Report Filters, Views and Groups
Record Count (Count)
Chelsea Rice
Lyndsy Denk
Shelby Poduch
Owner: Name
Admin | Overdue Tasks (0% completed) not Updated in 3+ Weeks
Details
Summary
Chart
Export
Hide Values
Showing default Report Filters, Views and Groups
Record Count (Count)
Apr, 2025
Jun, 2025
Jul, 2025
Aug, 2025
Sep, 2025
Oct, 2025
Dec, 2025
Jan, 2026
Feb, 2026
Mar, 2026
Apr, 2026
May, 2026
Last Update Date
In Progress
On Hold
Not Started
Requested
Admin | Projects 100% Complete but NOT in Closed Status
Details
Summary
Chart
Export
Hide Values
Showing default Report Filters, Views and Groups
Record Count (Count)
Alex Hoovdonk
Chelsea Rice
Chloe Glover
Emanuela Ferrante
Shanitra Fulgham
Shelby Poduch
Owner: Name
In Progress
On Hold
Admin | Untitled Projects
Details
Summary
Gantt
Report ...
Report ...
Report ...
Name
Owner: Name
Campaign: Name
Entry Date
Planned Completion Date
Tasks
Desc
Due On
% Complete
Status: In Progress (7)
Status: On Hold (1)
Status: Not Started (2)
Showing all 10 projects

Adobe

Report recipes

Task Hygiene Dashboard

Submitted by: Lyndsy Denk
Company: IDEXX
Prep: 30–45 minutes
Yield: A task-level hygiene dashboard that surfaces hidden capacity issues and stale task records that need attention.
Serves: System admins, project management office leads, and project managers
Report type: Dashboard

Detailed instructions

This dashboard focuses on task records that commonly distort workload visibility or create unnecessary noise in project execution. It works well as a companion to the Project Hygiene Dashboard.

To scope the reports:

- For functional groups: add Project Owner >> Home Group ID or Project Owner >> Home Team ID
- For individual users: add Task >> Project Owner ID = $$USER.ID

Report 1: Tasks with 0 Planned Hours

Go to Reports → New Report → Task Report.

Add a clear title and description so users understand the report's purpose. Create a Task Report to identify tasks that are assigned but have no planned hours. These tasks disappear from workload and resource-management views, making capacity data misleading.

Columns
Task >> Task Number
Task >> Name
Project >> Name
Task >> Assignments
Task >> Planned Hours

Grouping: Project >> Status, Project Owner >> Name

Filters: Task >> Work = 0 | Project >> Status not equal to Complete or Cancelled | Task >> Status not equal to Complete

Task Number	Task Name	Project	Assignments	Pln Hrs	Start On	Due On	Project status
Project: Status: Not Started (42)							
Project: Status: On Hold (11)							
Project: Status: In Progress (79)							
Project Owner: Name: [redacted] (1)							
9	Creative review	[redacted] Detailer_Update	[redacted]	0 Hours	5/29/26	5/29/26	In Progress

Report 2: Overdue Tasks Not Updated in 3+ Weeks

Go to Reports → New Report → Task Report.

Add a clear title and description so users understand the report's purpose. Create a Task Report to identify late and apparently stale work. These tasks are prime candidates for follow-up — they may be blocked, forgotten, or inaccurately represented.

Columns
Task >> Name
Project >> Name
Project >> Status
Task >> Assignments
Task >> Predecessors
Task >> Planned Start Date
Task >> Planned Completion Date
Task >> Percent Complete
Task >> Last Update Date

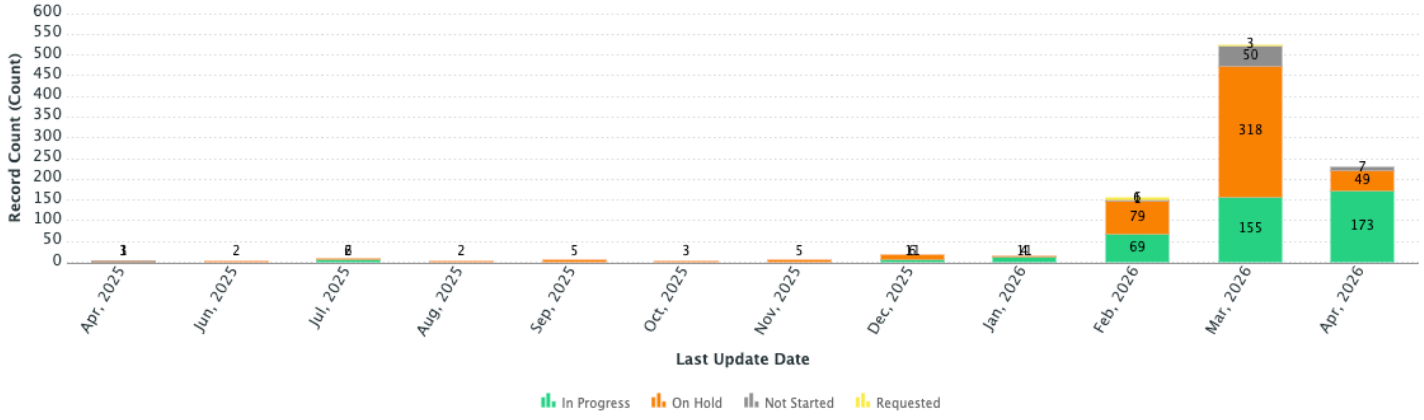
Grouping: Task >> Last Update Date (by Month), Project >> Status, Project Owner >> Name

Filters: Project >> Status not equal to Cancelled, Complete, or Queue | Task >> Status not equal to Complete | Task >> Number of Children = 0 | Task >> Last Update Date < $$TODAY-3w | Task >> Planned Completion Date < $$TODAY | Project >> Personal = False

Optional chart: Column | Y axis: Record Count | X axis: Last Update Date and Project >> Status

Final product

Two reports that help project managers and admins spot task records affecting workload accuracy or masking execution problems. Especially useful in weekly governance reviews or PMO office hours



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Resourcing at a Glance (Instant Insights Dashboard)

Submitted by: Carol Majewski, Director of Program Management
Company: RAPP
Prep: 20–30 minutes
Yield: A single dashboard that surfaces real-time allocation data from multiple Workload Balancer filters, so people managers can see allocations across teams without constantly changing filters or navigating Resourcing.
Serves: People managers, project managers, resource managers, and team leads
Report type: Dashboard

Prerequisites: This dashboard surfaces data from **Workload Balancer**, so accuracy depends on how well the customer has set up the Workfront areas that feed resource management. If key inputs such as schedules, job roles, planned hours, resource preferences, and project setup are incomplete, the dashboard may still display data, but that data may not be reliable. If the customer needs help preparing their instance, consider the Resource Management Preparation blueprint bundle, which includes checklist-style assets intended to improve resource management data quality.

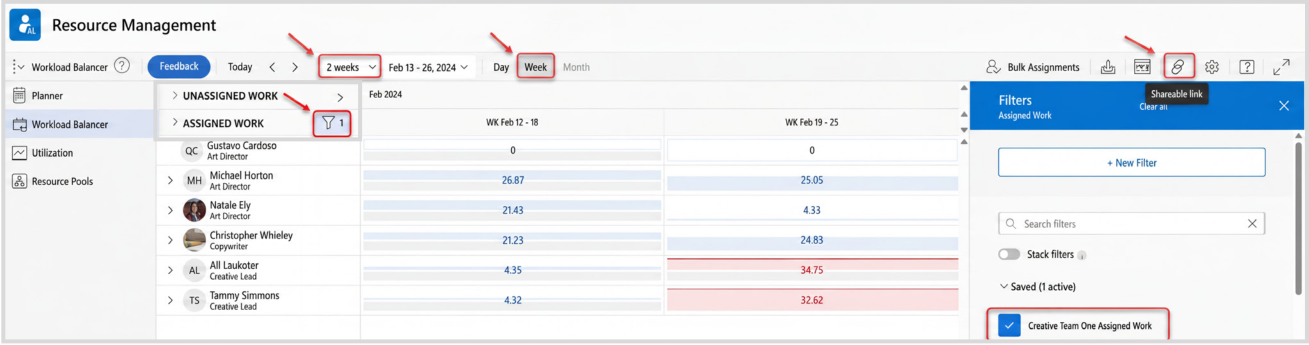
Detailed instructions

Assumptions: Users already rely on Workload Balancer and the filters used for this dashboard are already shared with the teams that need them. Dashboards have a 25-item limit.

Step 1: Create display and copy link

Go to the Resourcing area and open the Workload Balancer. Switch to the Assigned Work tab. Select the filter you want (e.g., Creative Team, Dev Squad A), the number of weeks to display, and the view: day, week, or month.

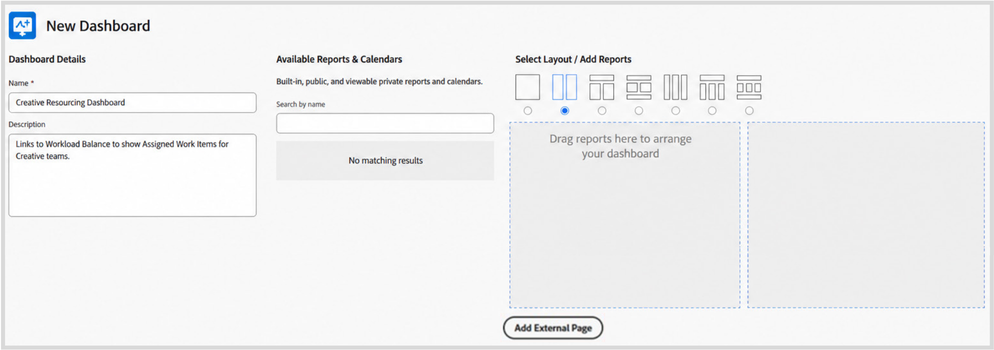
Click the Sharable link icon and copy the link to your clipboard.



Step 2: Create a resourcing dashboard

Open the Main Menu and click Dashboards → New Dashboard. Name it (e.g., Resourcing – Instant Insights).

Add a clear title and description so users understand the dashboard's purpose. Choose a two-column layout if you plan to show multiple teams side-by-side. Think of this dashboard as your resourcing homepage.



Step 3: Add an External Page for each resourcing view

In the dashboard builder, click Add External Page.

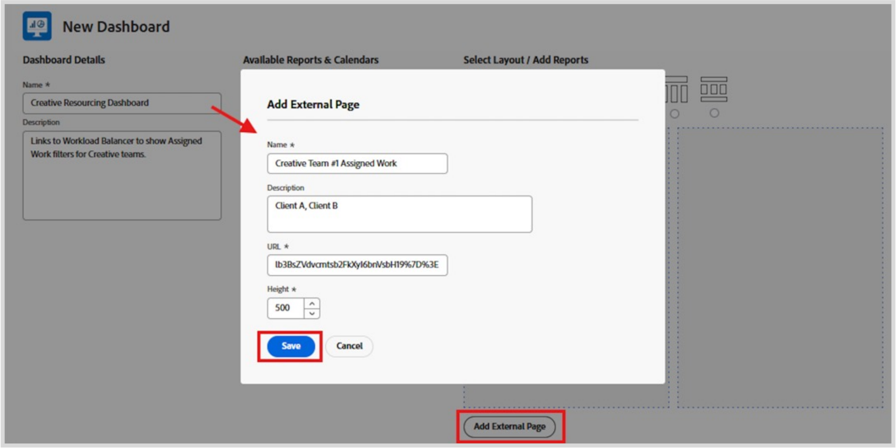
Click the Sharable link icon and copy the link to your clipboard.

Note: If the dashboard embeds Workfront content as an External Page, a System Admin may need to enable embedding of Workfront in an iFrame first. This is not required for every external page, and some URLs may still be blocked by security or authentication behavior.

Complete the following fields:

- Name: e.g., Creative Team – Assigned Work or Product Team A – 4 Week View
- Description: Context for the view
- URL: Paste the Workload Balancer sharable link from Step 1
- Height: Start at 500 (increase if your filter returns many users)

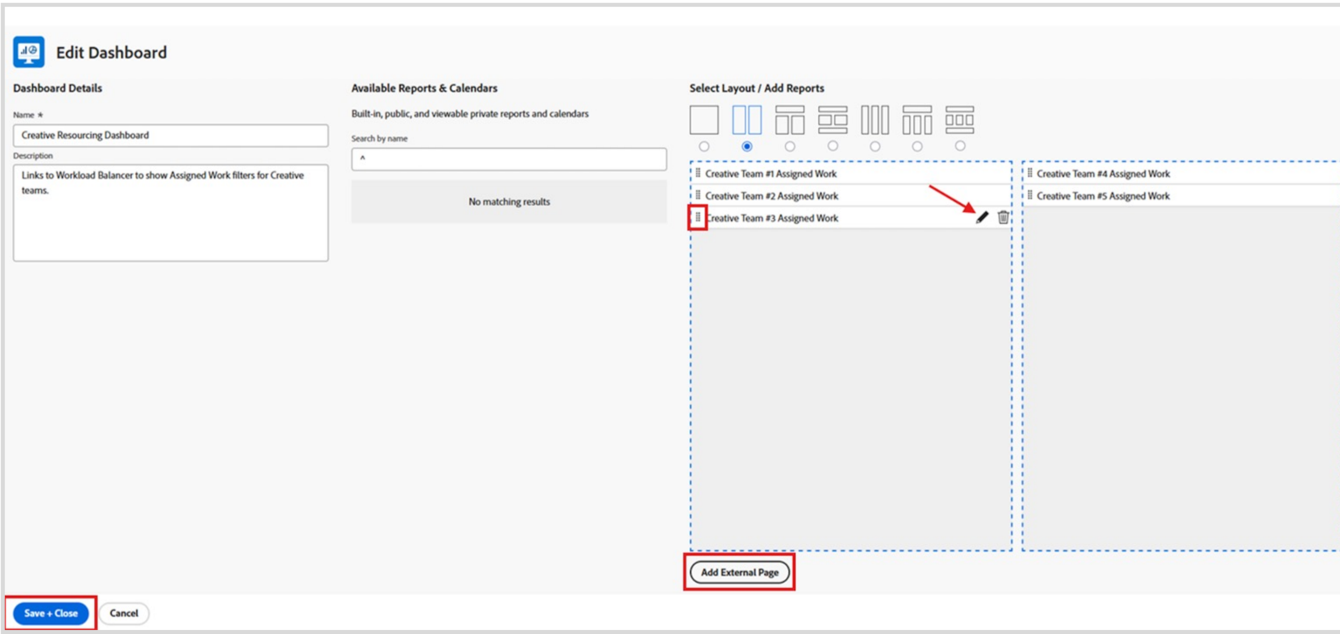
From the embedded view, users can change the timeline, toggle Show allocations, and expand a user to see projects and tasks.



Step 4: Repeat, arrange, and share

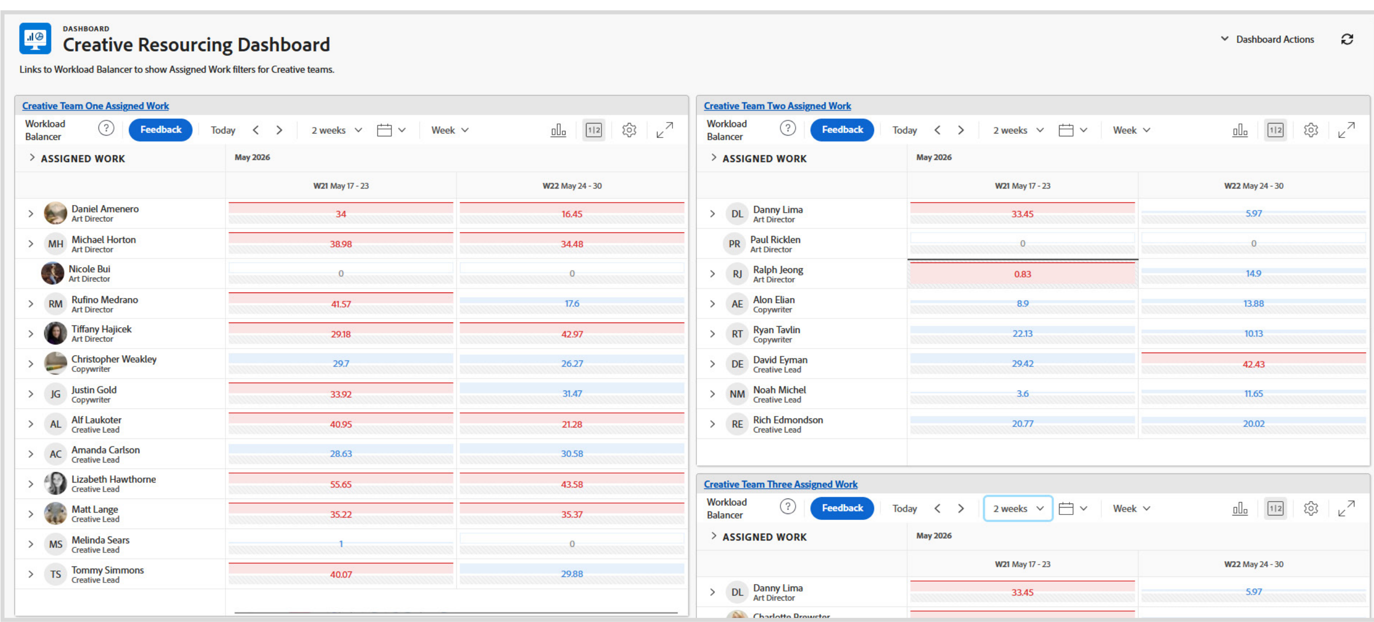
Add an External Page tile for each additional team or time window. Drag and drop to arrange by department, region, or priority. Use the pencil icon to refine names and descriptions. Click Save + Close to finalize, then share via Dashboard Actions → Share with People Managers, Project Managers, and Resource Managers.

For users without direct Resourcing access, this dashboard acts as a shortcut to see Assigned Work and, if they have rights, jump into the Workload Balancer for edits.



Final product

A single dashboard with embedded, interactive Workload Balancer views for each team. Managers open one page to see allocation across the entire organization.



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Now it's your turn.
Happy cooking!

Need more resources or want to join more conversations about project management? Check out the Adobe Workfront Community.

https://experienceleaguecommunities.adobe.com/adobe-workfront-22

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