

Create dashboard activities

Activity 1: Create a dashboard

Create a dashboard with only one report in it—“Search Notes in This Project.” This is useful for quickly finding any update made on a project, even if there are thousands of updates to search through. This will search into update threads to quickly extract any updates that meet the criteria you specify in the prompts.

Create this report by making a copy of the “Search Notes” report you created in the “Create a note report” activity (or use another report if you didn’t do that activity).

- Remove the Project Name prompt from the copy and rename the report “Search Notes in This Project.”
- Name the Dashboard “Search Notes.”
- Go to any project landing page and create a custom section for a dashboard.
- Note that when you search for notes in your custom section it will only show notes contained within the project you’re currently in.

Answer 1

1. Run the report you created in the “Create a note report” activity.
2. Click **Report Actions** and select **Copy**. Workfront creates a new report named “Note Search (Copy).”
3. Go to **Report Actions** and select **Edit**. Click **Report Settings** and change the name to “Search Notes in This Project.”
4. Click Report Prompts and delete the Project > Name prompt from the list.

Search Notes in this Project

Columns (View) Groupings Filters Chart

Select or add

Report Options

Report Prompts

- Note >> Audit Text
- Note >> Note Text
- Owner >> Name
- Note >> Entry Date
- Note >> Audit Type

+ Add a Prompt

Show Prompts in Dashboards

Done

Column Preview

NOTE TEXT	AUDIT TEXT	ENTRY DATE	OWNER: NAME
Sample Text	Sample Text	4/15/11 3:16 AM	John Smith

Save + Close Apply Cancel

5. Check the **Show Prompts in Dashboard** box.
6. Click **Done**, then **Save + Close**. You now are looking at the Prompts screen of the report.

Next you’re going to use a shortcut to create a new dashboard and add this report to it.

7. Click **Report Actions** and select **Add to Dashboard > New Dashboard**.
8. Drag the report “Search Notes in This Project” to the **Layout** panel.

9. Notice that the name of the report becomes the name of the dashboard. Edit the name to just “Search Notes.”

New Dashboard

Dashboard Details

Name
Search Notes

Description

Available Reports & Calendars
Built-in, public, and viewable private reports and calendars

All Reports Calendars

Search Notes in this Project

Select Layout / Add Reports / Add Calendars

Search Notes in this Project

+ Add External Page

Save + Close Cancel

10. Click **Save + Close**.

Now add the dashboard to a project page.

Marketing
Digital Workflow - Project Project ★ ...

Percent Complete 78.57% Project Owner Chuck Middleton Planned Completion Nov 7, 2019 Condition In Trouble Status Current

← Tasks

Tasks + New Task [→] [v]

Project Details

Business Case

Updates

Documents

Issues (0)

Risks

Approvals

Baselines

Billing Rates

Billing Records

Expenses

Show More

Add custom section

#	Task Name	Assignments	Duration	Actual Duration	Start On	Actual Start On	Due On	Actual Due On
1	Initiate				3/19/14	7/11/19	3/25/14	7/11/19
2	Open Job				3/19/14	7/11/19	3/20/14	7/11/19
3	Assign Te				3/20/14	7/11/19	3/21/14	7/11/19
4	Make V1 sk				3/21/14	7/11/19	3/24/14	7/11/19
5	Kickoff/Bri				3/24/14	7/11/19	3/25/14	7/11/19
6	Concepting				3/25/14	7/11/19	3/28/14	7/11/19
7	Develop C				3/25/14	7/11/19	3/26/14	7/11/19
8	Develop animation samples	Dan Designer	1 Day	0 Days	3/26/14	7/11/19	3/27/14	7/11/19
9	Handoff Approved Assets to MRM/Isobar/Martin		1 Day	0 Days	3/27/14	7/11/19	3/28/14	7/11/19
10	Production		1461.84 Days	0 Days	3/28/14	7/11/19	11/5/19	

+ Add More Tasks

Showing 21 tasks

Add custom section

Custom section title

Add a Dashboard

Add new section Cancel

11. Go to any project. From the left panel menu, click the **Add custom section** icon.
12. In the **Add a Dashboard** field, type “Search Notes” and select the dashboard from the list.
13. In the **Custom section title** field, type in “Search Notes.”
14. Click **Add new section**.
15. From the left panel menu, find Search Notes. Click the dots to the left of the section name and drag it right below Updates.