Adobe Workfront

JULY 2021

Customer Reporting Cookbook

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Table of Contents

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

Together we've created the first ever Adobe Workfront Customer Cookbook. Inside you'll find 10 useful reports to explore. We have simple reports, complex reports, reports with text mode, reports without text mode, and even a dashboard combining 6 different reports!

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

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REPORT RECIPES

Open Tasks By Assignment

Submitted by: Kathy McLaughlin

Company: Mayo Clinic Alix School of Medicine

Prep: less than 10 minutes

Yield: Shows all new and open tasks for a specific user. Great to use when tasks need to be reassigned.

Serves: Project Owners

Report type: Task

REPORT
MCASOM Open Tasks By Assignment

Locates all active project tasks for a person.

Show Filters and Prompts | Report Actions | As of Jun 23, 2021 7:17 am Central Daylight Time

Details | Summary | Prompts

Export | Filter: Report Default | View: Report Default | Grouping: Report Default

Task Name	Assignments	Start On	Due On	Status	Progress Status	% Complete	Last Note: Note Text
Project: Name: MCASOM - AA - 2020-2021 - Neuroscience RST Checklist (1)							
Project: Name: MCASOM - AA - 2020-2021 Autopsy RST Checklist (1)							
Project: Name: MCASOM - ADMIN - KNN - 2020 -2021 Financials (5)							
Process Monthly Financials - June	Kathy McLaughlin	7/12/21	7/16/21	In Progress	On Time	0%	Reopening task. It should not have been closed.
Monthly Financials	Kathy McLaughlin	1/11/21	12/16/21	In Progress	On Time	91.67%	
Quarterly Reporting	Kathy McLaughlin	1/10/21	10/15/21	In Progress	On Time	75%	
Create Invoices - April - June	Kathy McLaughlin	7/12/21	7/16/21	New	On Time	0%	
Close Project	Kathy McLaughlin	12/16/21	12/16/21	New	On Time	0%	Schmidt I'll work on this task when it's ready

Open Tasks By Assignment

Detailed instructions

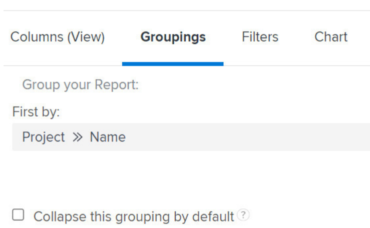
Step 1: From the reports area, choose a new Task Report. Add the following task fields as columns to the report:

- Name
- Assignments
- Start On (The field to choose is Planned Start Date, it auto renames to Start On.)
- Due On (The field to choose is Planned Completion Date, it auto renames to Due On.)
- Status
- Percent complete
- Last Note>> Note Text

TASK NAME	ASSIGNMENTS	START ON	DUE ON	STATUS	PROGRESS STATUS	% COMPLETE	LAST NOTE: NOTE TEXT
Train Inside Sales Team		7/5/21	7/7/21	In Progress	Late	75%	Sample Text

Step 2: Group the report by **Project: Name**

Charts: No charts needed for this report.



Step 3: Set filters to **Task: Status** not equal to Complete. Basically, remove tasks that have been completed.

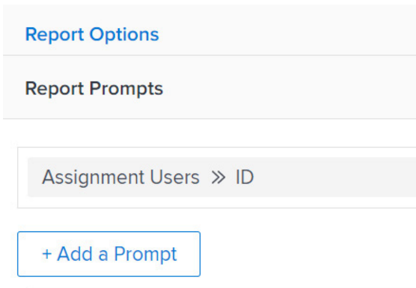
***Note from Workfront:** Because every customer might have unique custom statuses that equate with Complete, the best way to handle this is to use a filter which will account for any statuses or custom statuses that equate with Complete. Try using this filter: Task >> Is Complete >> Equal >> False

See next page for more directions and the final product.

Open Tasks By Assignment

Detailed instructions

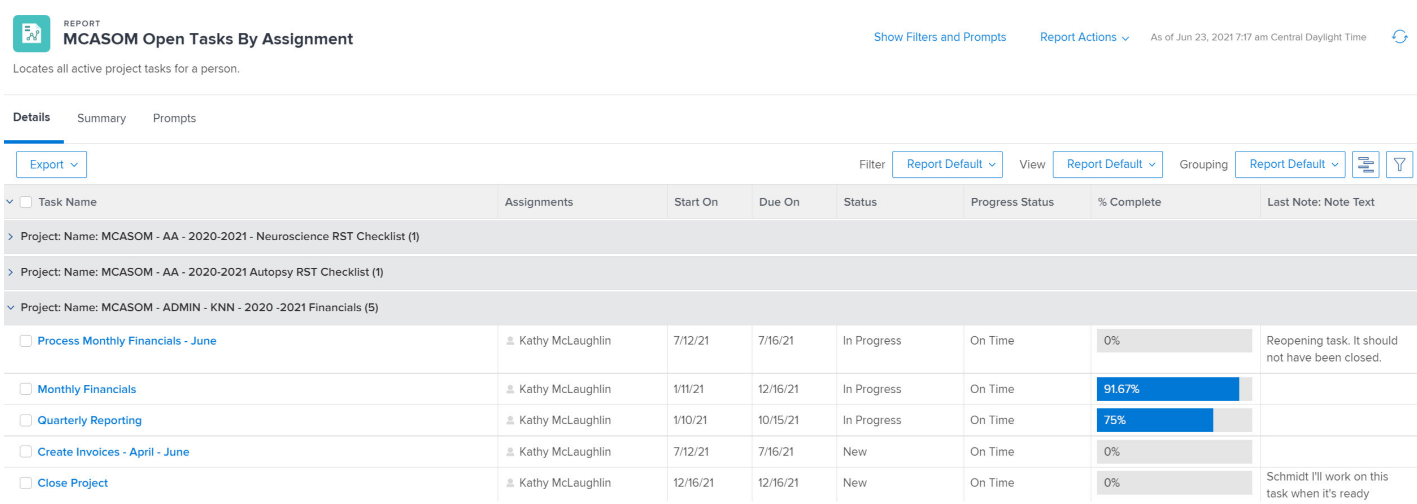
Step 4: From the Report Settings area, select Report Prompts. Choose **Assignment Users: ID** from the field library. This allows you to view results for a specific user on the Prompts tab when the report is run.



Step 5: Give your report a name and include a description. A description helps anyone the report has been shared with to understand its purpose.

Final product

Don't forget to share this report once you've finished it.



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REPORT RECIPES

Most Recent Update

Submitted by: Jonathan Hobbs

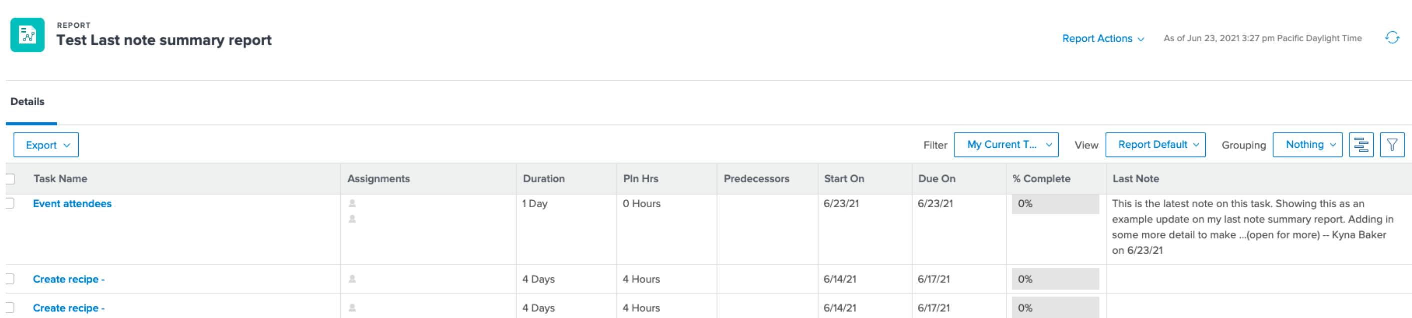
Company: Fannie Mae

Prep: 10 minutes

Yield: This report will give the viewer an abbreviated look (140 character limit) at the last update entered for an object. It also will include who made the entry and when the entry was submitted.

Serves: This is for people who want their "Last Note" column height and width to be consistent across all rows.

Report type: Project, Task or Issue



REPORT

Test Last note summary report

Report Actions

As of Jun 23, 2021 3:27 pm Pacific Daylight Time

Details

Export

Filter My Current T...

View Report Default

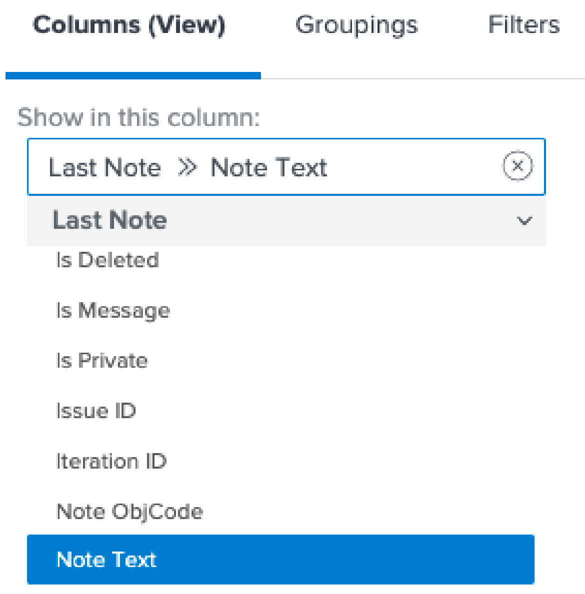
Grouping Nothing

Task Name	Assignments	Duration	Pln Hrs	Predecessors	Start On	Due On	% Complete	Last Note
Event attendees		1 Day	0 Hours		6/23/21	6/23/21	0%	This is the latest note on this task. Showing this as an example update on my last note summary report. Adding in some more detail to make ...(open for more) -- Kyna Baker on 6/23/21
Create recipe -		4 Days	4 Hours		6/14/21	6/17/21	0%	
Create recipe -		4 Days	4 Hours		6/14/21	6/17/21	0%	

Most recent update

Detailed instructions and final product

Step 1: Add the Last Note column to a report (Either a project, task, or issue report of your choice). The same text mode works in all these report types.



Groupings: No groupings needed

Charts: No charts needed

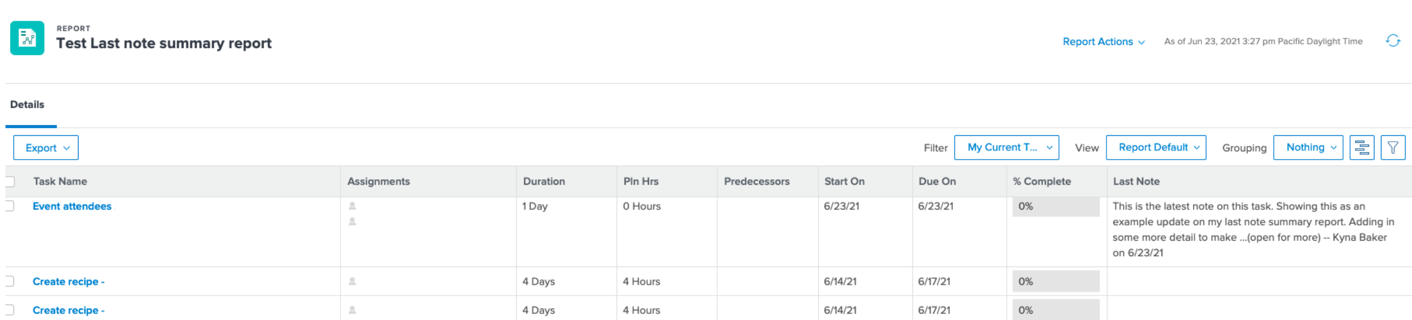
Filters: No filters needed

****Note from Workfront:** When copying and pasting text mode from this Cookbook PDF into your Workfront report, a new line character (which is a line break) is inserted at the end of the first two lines of the valueexpression. You will need to remove the new line characters to ensure that the text mode delivers accurate results.

Step 2. Switch to text mode and add the following text mode:

displayname=Last Note
querysort=lastNote:entryDate
textmode=true
valueexpression=IF(LEN({lastNote}.{noteText})>140, CONCAT(SUBSTR({lastNote}.{noteText},0,139),"...(open for more) -- ", {lastNote}.{owner}.{name}," on ", {lastNote}.{entryDate}), IF(LEN({lastNote}.{noteText})>0, CONCAT({lastNote}.{noteText}," -- ", {lastNote}.{owner}.{name}," on ", {lastNote}.{entryDate})))
valueformat=HTML
width=250
usewidths=true

Final product



REPORT RECIPES

Team Members Tasks By Project
Ready to Start

Submitted by: Benetta Perry

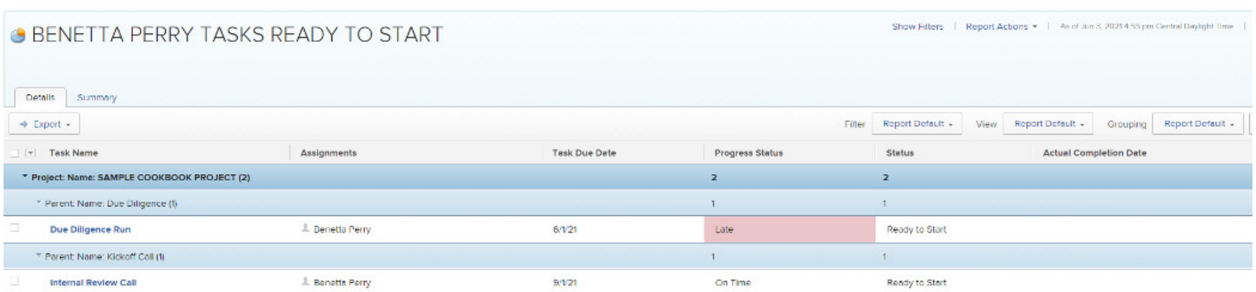
Company: Automatic Payroll Systems Inc (APS)

Prep: 30 minutes

Yield: Each day, new and experienced team members alike will know what tasks are ready for them to perform, the due dates of each task, and which project the task belongs to. In addition, project managers will be able to see which tasks are late.

Serves: Project team members

Report type: Task

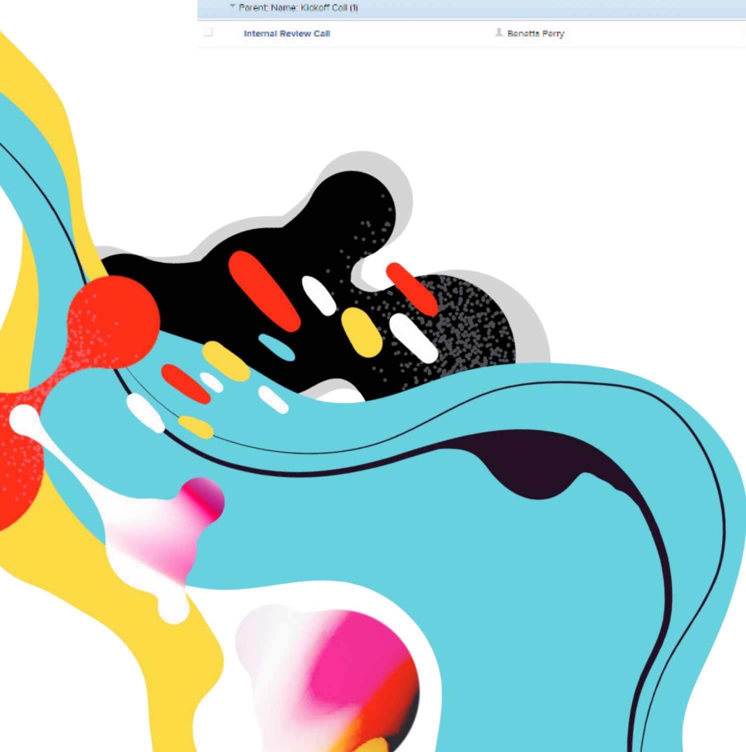

BENETTA PERRY TASKS READY TO START

Show Filters | Report Actions | As of Jun 3, 2021 4:55 pm Central Daylight Time

Details | Summary

Export | Filter: Report Default | View: Report Default | Grouping: Report Default

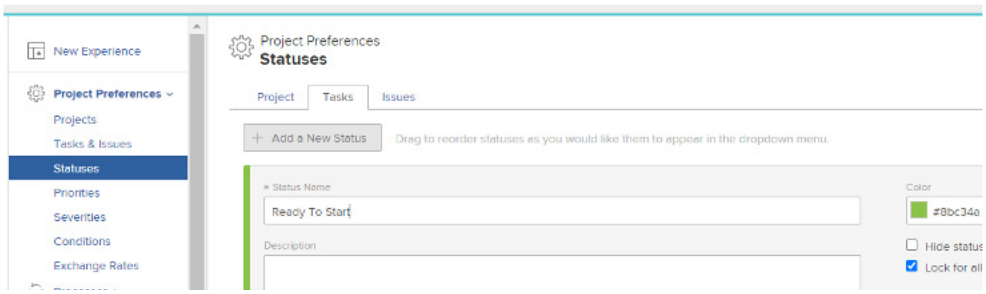
Task Name	Assignments	Task Due Date	Progress Status	Status	Actual Completion Date
Project: Name: SAMPLE COOKBOOK PROJECT (2)			2	2	
Parent Name: Due Diligence (1)			1	1	
Due Diligence Run	Benetta Perry	6/1/21	Late	Ready to Start	
Parent Name: Kickoff Call (1)			1	1	
Internal Review Call	Benetta Perry	9/1/21	On Time	Ready to Start	



Team Members Tasks By Project

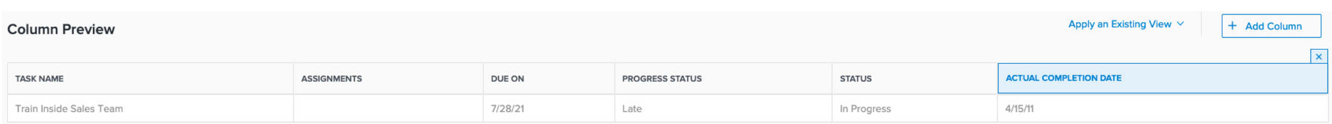
Detailed instructions

Step 1: Create a custom task status. From Setup, select Project Preferences, select Statuses, select the tab Tasks and click "add a new status". Here is where you would create your unique task status. In my example "Ready to Start". I have equated it as new. Click save.

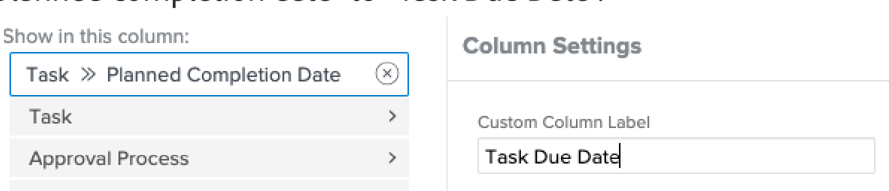


Step 2: Create task report

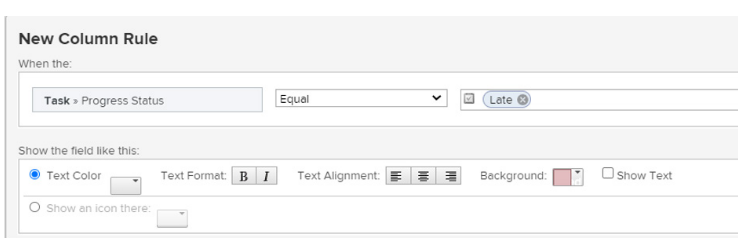
Columns: No text mode is required. Just make sure you have one column for Planned Completion Date and one column for Progress Status. You can customize the display name of one column and change the background color of one column.



Step 3: Using the Advanced Options: I renamed the display name of the out-of-the-box column "planned completion date" to "Task Due Date".



Step 4: Using the Advanced Options: I changed the background color of the column "Progress Status" if the status was "late".

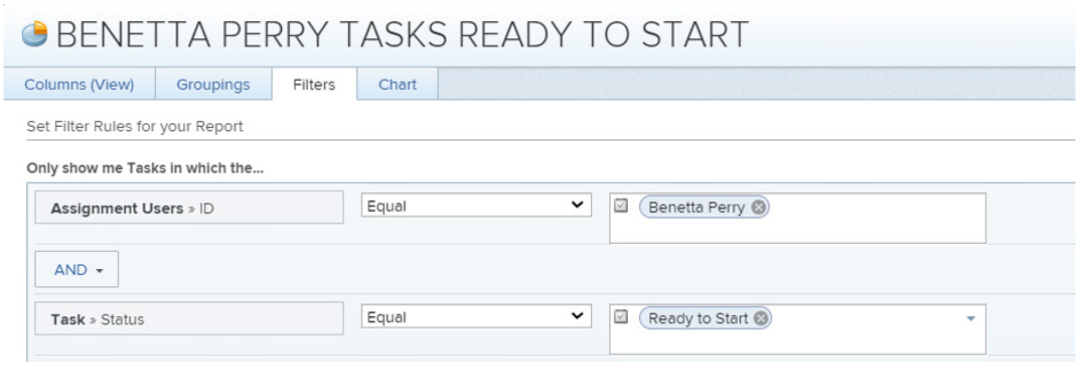


See next page for detailed instructions.

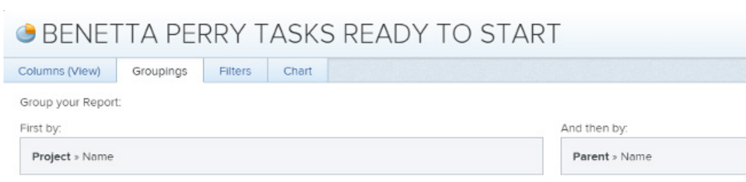
Team Members Tasks By Project

Step-by-step directions

Step 5: Filters: No text mode is required. Filter on the team member who this task report is for and filter using the newly created customized task status. In order to make this work for any user, filter on the wildcard $$USER.ID instead of a person's name.



Step 6: Groupings: Group by Project Name, then by Parent Name.



Step 7: Charts: No charts needed

See next page for final product.

Team Members Tasks By Project

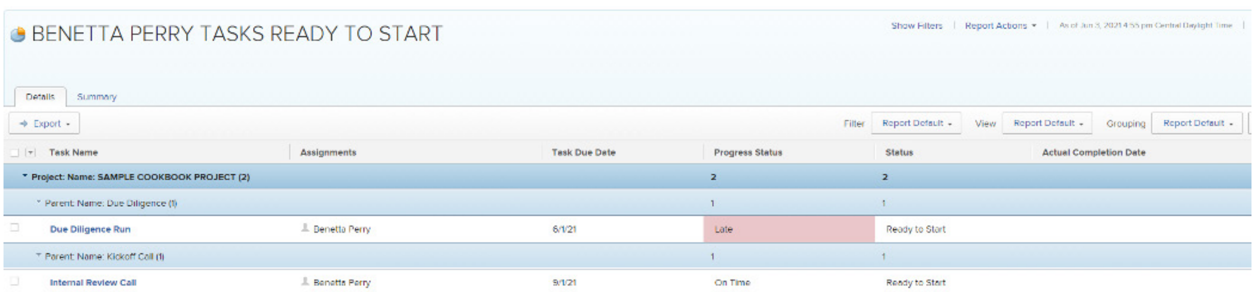
Final product

As you assign the team member “Benetta Perry” to additional tasks and change the status to Ready to Start, this report will show all tasks and be grouped by Project.

Every task assigned will have a due date which comes from the project. Changing the background color on a “late” task gives the team member and Project Manager a talking point in determining the reason for that task not being completed as expected.

Providing the task due dates also helps the team member with prioritization of their daily duties. It also tells them where they need to be focused that day and that week. Late tasks could indicate a performance issue, a workload balancing issue, a dependency not received issue, a flow of communication issue, or a project schedule issue.

Once the team member completes the work, they change the status to “complete” and it is removed from their report. Our teams love this report, as there is no confusion on who should be working on what and when. The “late” project status has helped us in improving our processes.



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REPORT RECIPES

My Work, Ready to Start

Submitted by: Sarah Nau

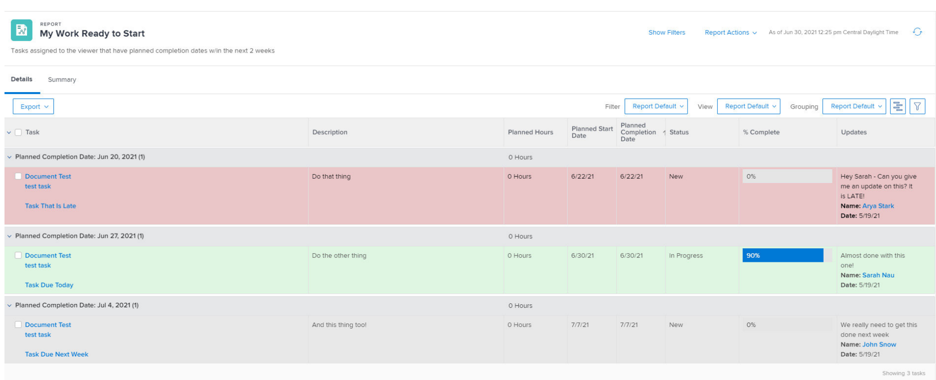
Company: Dominium

Prep: 10-15 minutes

Yield: Show your users what tasks they have coming up in the next two weeks or tasks that are overdue. This report also shows the project name, parent task name, and the last update with who it was made by and when.

Serves: Workers

Report type: Task



REPORT
My Work Ready to Start
Tasks assigned to the viewer that have planned completion dates w/in the next 2 weeks

Show Filters | Report Actions | As of Jun 30, 2021 12:25 pm Central Daylight Time

Details | Summary

Export | Filter: Report Default | View: Report Default | Grouping: Report Default

Task	Description	Planned Hours	Planned Start Date	Planned Completion Date	Status	% Complete	Updates
Planned Completion Date: Jun 20, 2021 (1)		0 Hours					
Document Test test task Task That Is Late	Do that thing	0 Hours	6/22/21	6/22/21	New	0%	Hey Sarah - Can you give me an update on this? It is LATE! **Name:** Arya Stark **Date:** 5/19/21
Planned Completion Date: Jun 27, 2021 (1)		0 Hours					
Document Test test task Task Due Today	Do the other thing	0 Hours	6/30/21	6/30/21	In Progress	90%	Almost done with this one! **Name:** Sarah Nau **Date:** 5/19/21
Planned Completion Date: Jul 4, 2021 (1)		0 Hours					
Document Test test task Task Due Next Week	And this thing too!	0 Hours	7/7/21	7/7/21	New	0%	We really need to get this done next week **Name:** John Snow **Date:** 5/19/21

Showing 3 tasks

My Work, Ready to Start

Detailed instructions

Step 1: Create a task report and add filters, columns, groups.

Columns: Some of the columns in this report are text mode and some standard Workfront fields. First Column combines the Project Name, Parent Name and Task Name through text mode. Select the left column and switch to text mode. Copy and paste the text mode from this page, replacing the text mode that was in this column previously.

Copy the text mode from here:

```
column.0.displayname=Task
column.0.linkedname=project
column.0.namekey=view.relatedcolumn
column.0.namekeyargkey.0=project
column.0.namekeyargkey.1=name
column.0.querysort=project:name
column.0.sharecol=true
column.0.textmode=true
column.0.valuefield=project:name
column.0.valueformat=HTML
column.1.sharecol=true
column.1.textmode=true
column.1.value=<br>
column.1.valueformat=HTML
column.1.width=1
column.2.displayname=
column.2.linkedname=parent
column.2.namekey=view.relatedcolumn
column.2.namekeyargkey.0=parent
column.2.namekeyargkey.1=name
column.2.querysort=parent:name
column.2.sharecol=true
column.2.textmode=true
column.2.valuefield=parent:name
column.2.valueformat=HTML
column.3.sharecol=true
column.3.textmode=true
column.3.value=<br><br><b>
column.3.valueformat=HTML
column.3.width=1
column.4.descriptionkey=name
column.4.isInlineEditable=false
column.4.link.linkproperty.0.name=ID
column.4.link.linkproperty.0.valuefield=ID
column.4.link.linkproperty.0.valueformat=int
column.4.link.lookup=link.view
column.4.link.valuefield=objCode
column.4.link.valueformat=val
column.4.linkedname=direct
column.4.listsort=string(name)
column.4.namekey=task.name.abbr
column.4.querysort=name
column.4.section=0
column.4.shortview=true
column.4.stretch=100
column.4.textmode=true
column.4.valuefield=name
column.4.valueformat=HTML
column.4.width=150
```

(This is just the continuation of the text mode started on the column on the left)

See next page for more instructions.

My Work, Ready to Start

Detailed instructions

Columns continued:

The next 6 columns are standard Workfront fields, add or replace the existing columns starting with the second column from the left:

- Description
- Planned Hours
- Planned Start Date
- Planned Completion Date (sort by this column in Ascending order to see the tasks that are due the earliest first)
- Status
- Percent Complete

Feel free to change these to the columns that helps your team the most!

Updates Column: Create a new column on the far right. The last column is a text mode column that combines the last update, who made it and the date it was made (make sure you have 6 columns between the first one and this one so that the column numbers line up correctly – you can remove some later).

Copy the text mode from here:

```
column.11.displayname=Updates
column.11.linkedname=lastNote
column.11.namekey=view.relatedcolumn
column.11.namekeyargkey.0=lastNote
column.11.namekeyargkey.1=noteText
column.11.querysort=lastNote:noteText
column.11.sharecol=true
column.11.textmode=true
column.11.valuefield=lastNote:noteText
column.11.valueformat=HTML
column.12.sharecol=true
column.12.textmode=true
column.12.value=<br><b>Name: </b>
column.12.valueformat=HTML
column.12.width=1
column.13.displayname=
column.13.linkedname=lastNote
column.13.namekey=view.relatedcolumn
column.13.namekeyargkey.0=lastNote
column.13.namekeyargkey.1=owner:name
```

This is just the continuation of the text mode started on the column on the left:

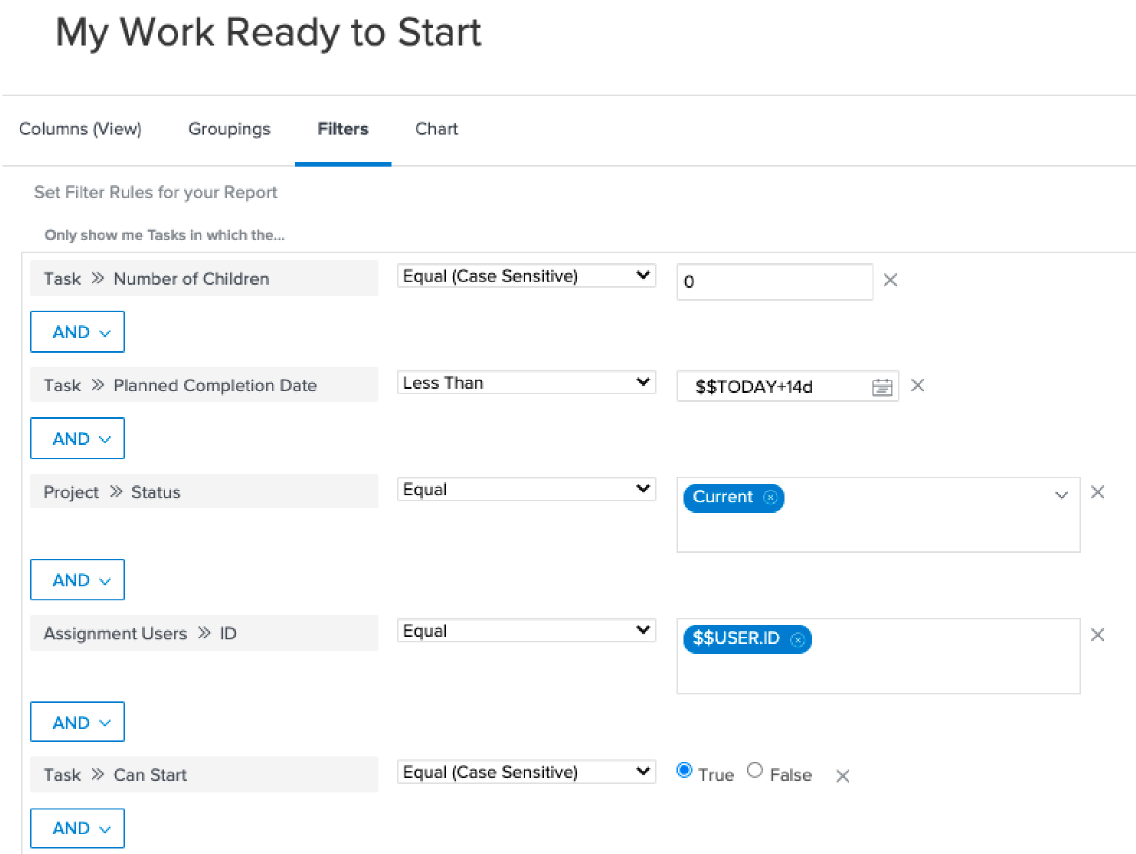
```
column.13.querysort=lastNote:owner:name
column.13.sharecol=true
column.13.textmode=true
column.13.valuefield=lastNote:owner:name
column.13.valueformat=HTML
column.14.sharecol=true
column.14.textmode=true
column.14.value=<br><b>Date: </b>
column.14.valueformat=HTML
column.14.width=1
column.15.displayname=
column.15.linkedname=lastNote
column.15.namekey=view.relatedcolumn
column.15.namekeyargkey.0=lastNote
column.15.namekeyargkey.1=entryDate
column.15.querysort=lastNote:entryDate
column.15.textmode=true
column.15.valuefield=lastNote:entryDate
column.15.valueformat=atDate
```

See next page for more instructions.

My Work, Ready to Start

Detailed instructions

Filters: No text mode is required, all are standard Workfront fields



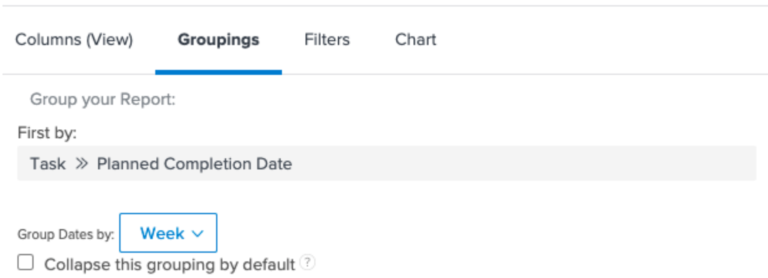
If you have custom statuses, I highly recommend using the 'Status Equates With' filter option instead of 'Status' to avoid having to select all possible 'Current' statuses.

See next page for more instructions.

My Work, Ready to Start

Detailed instructions

Groupings: (Optional) No text mode for grouping, all are standard Workfront fields



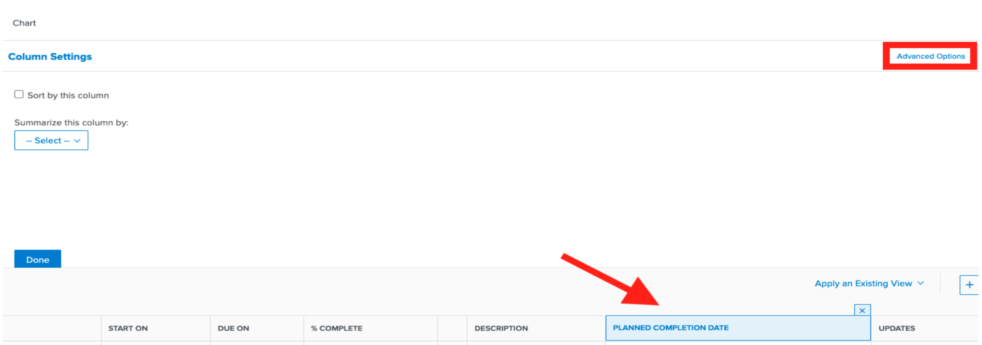
Make it easy for your users to clearly see what is due each week by grouping your report by the planned completion date.

Charts: I don't use any for this recipe.

Other Features:

Add some color to your report to show users what is overdue, due today, and what isn't due until next week.

Go to the Planned Completion Date column and click on Advanced Options in the upper right:



See next page for more details.

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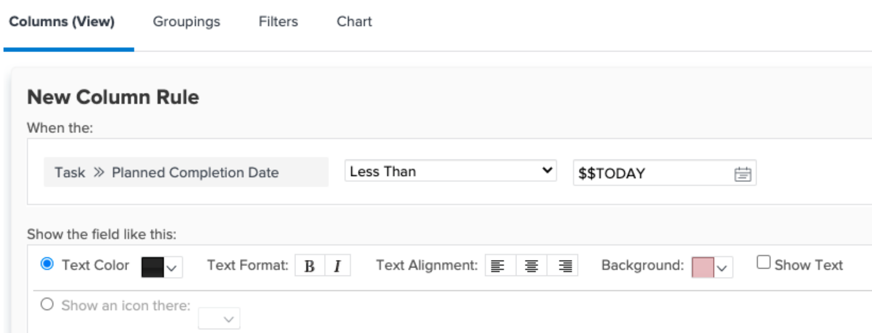
My Work, Ready to Start

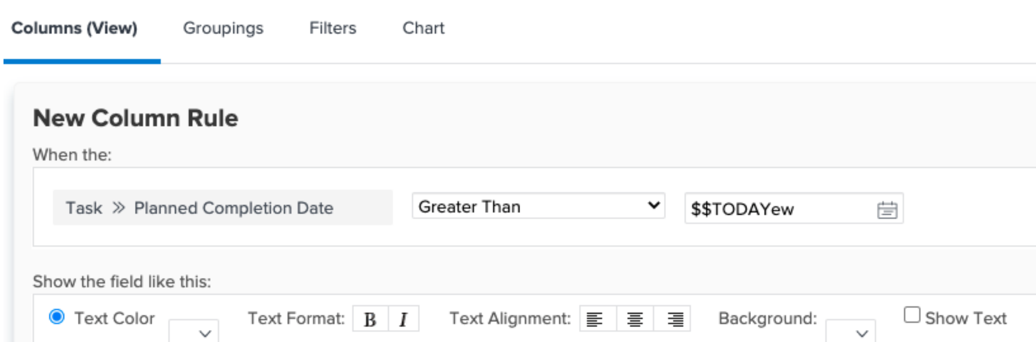
Detailed instructions

Step 2: Add conditional formatting with the following rules – don't forget to check the box for 'Apply to the entire row'!

Late tasks:

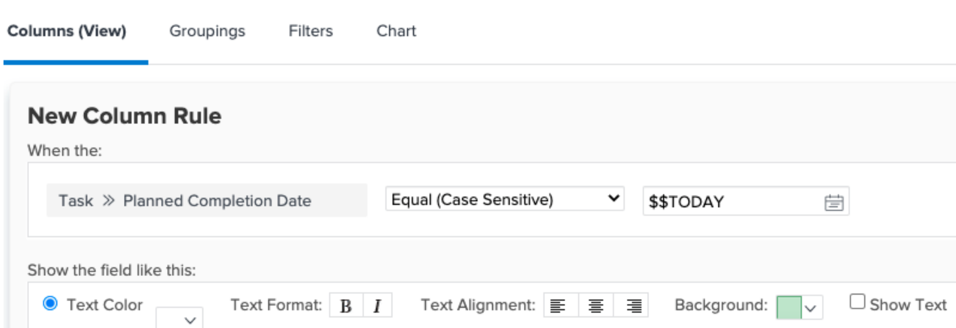


Tasks not due this week:



Select the background color you want to indicate each status.

Tasks that are due today:



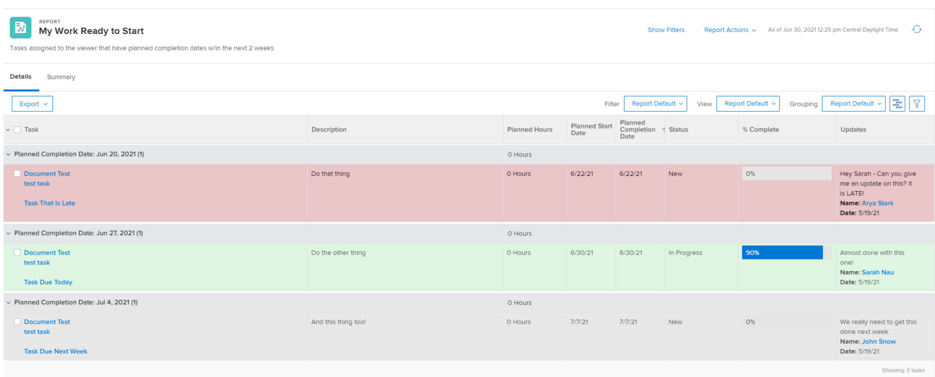
See next page for final product.

My Work, Ready to Start

Final product

Step 3: Add to any dashboard or send a link out to users to pin to their environment. Remember that the signed in user viewing this report must be assigned tasks due in the next two weeks in order to see any results. In "Report Settings", select the default tab to show as the "Details" tab to see the final product as indicated below.

NOTE: If you are adding this report to a dashboard, I would also recommend changing in your report settings, under “When the report loads on a dashboard, show:” increase the number of items to 200 to help your Project Owners and Audit Teams and make sure they see everything.



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REPORT RECIPES

My Tagged Update Threads by Project

(In the Last Week)

Submitted by: Monique Evans

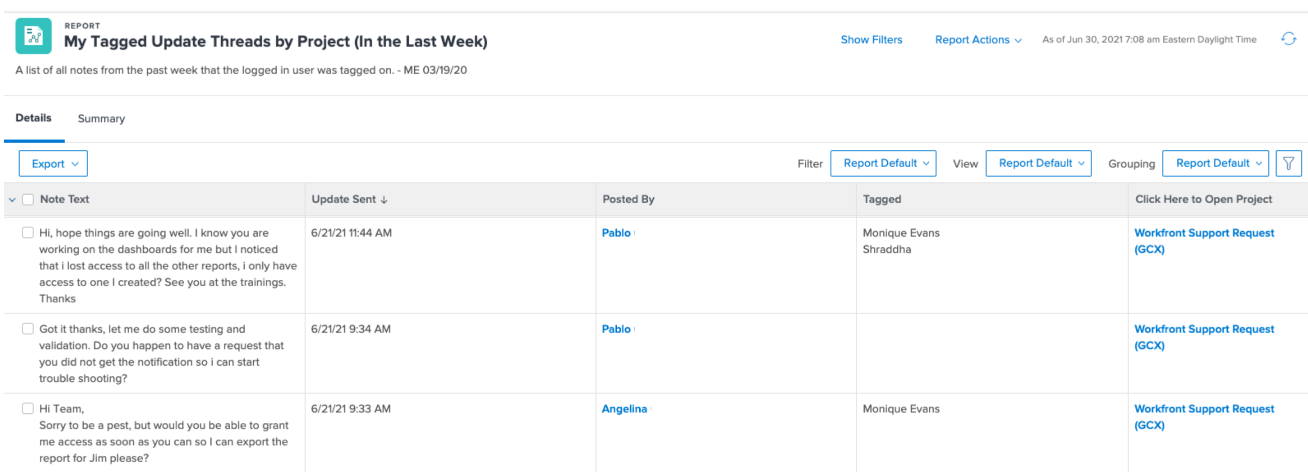
Company: Stanley Black & Decker

Prep: 7 minutes

Yield: Everyone can easily see a list of all tagged updates, like an email inbox. Comes in handy when returning from vacation.

Serves: Anybody that gets tagged on messages

Report type: Note



REPORT
My Tagged Update Threads by Project (In the Last Week)

Show Filters | Report Actions | As of Jun 30, 2021 7:08 am Eastern Daylight Time

A list of all notes from the past week that the logged in user was tagged on. - ME 03/19/20

Details | Summary

Export | Filter: Report Default | View: Report Default | Grouping: Report Default

Note Text	Update Sent ↓	Posted By	Tagged	Click Here to Open Project
Hi, hope things are going well. I know you are working on the dashboards for me but I noticed that i lost access to all the other reports, i only have access to one I created? See you at the trainings. Thanks	6/21/21 11:44 AM	Pablo	Monique Evans Shraddha	Workfront Support Request (GCX)
Got it thanks, let me do some testing and validation. Do you happen to have a request that you did not get the notification so i can start trouble shooting?	6/21/21 9:34 AM	Pablo		Workfront Support Request (GCX)
Hi Team, Sorry to be a pest, but would you be able to grant me access as soon as you can so I can export the report for Jim please?	6/21/21 9:33 AM	Angelina	Monique Evans	Workfront Support Request (GCX)

My Tagged Update Threads by Project

Detailed instructions

Step 1: Create a Note object type report and add the columns and filters as below.

Columns: All are renamed out of the box except column 4 which requires text mode.

- Column 1 – Note >> Note Text
- Column 2 – Note >> Entry Date
  - Sort by the column First and sort it descending (Z-A)
  - Advanced Options
  - Rename to Update Sent
  - Field Format: 10/17/60 4:00 AM
- Column 3 – Owner >> Name
  - Advanced Options
  - Rename to Posted By
- Column 4 - Click "+ Add Column" and "Switch to Text Mode"; paste in the following.

  displayname= Tagged
  listdelimiter=<div>
  listmethod=nested(tags).lists
  textmode=true
  type=iterate
  valuefield=user:name
  valueformat=HTML

displayname= Tagged
listdelimiter=<div>
listmethod=nested(tags).lists
textmode=true
type=iterate
valuefield=user:name
valueformat=HTML

- Column 5 – Project >> Name
  - Advanced Options
  - Rename to Click Here to Open Project

NOTE TEXT	UPDATE SENT	POSTED BY	TAGGED	CLICK HERE TO OPEN PROJECT
Sample Text	4/15/11 8:00 AM	John Smith		CRM Integration - Tampa Office

Filters: Click "Switch to Text Mode"; Paste in the following

EXISTS:a:$$EXISTSMOD=EXISTS
EXISTS:a:$$OBJCODE=NTAG
EXISTS:a:note:threadID=FIELD:threadID
EXISTS:a:userID=$$USER.ID
entryDate=$$TODAYb-1w
entryDate_Mod=between
entryDate_Range=$$TODAYe
**If you wish to change the date range the bold text is where you would do it

Groupings: Group by Project Name.

Charts: No charts needed.

See next page for final product.

My Tagged Update Threads by Project

Final product.

Step 2: Share with everyone and relish in the applause.

REPORT

My Tagged Update Threads by Project (In the Last Week)

Show Filters | Report Actions | As of Jun 30, 2021 7:08 am Eastern Daylight Time

A list of all notes from the past week that the logged in user was tagged on. - ME 03/19/20

Details | Summary

Export | Filter: Report Default | View: Report Default | Grouping: Report Default

Note Text	Update Sent ↓	Posted By	Tagged	Click Here to Open Project
Hi, hope things are going well. I know you are working on the dashboards for me but I noticed that i lost access to all the other reports, i only have access to one I created? See you at the trainings. Thanks	6/21/21 11:44 AM	Pablo	Monique Evans Shraddha	Workfront Support Request (GCX)
Got it thanks, let me do some testing and validation. Do you happen to have a request that you did not get the notification so i can start trouble shooting?	6/21/21 9:34 AM	Pablo		Workfront Support Request (GCX)
Hi Team, Sorry to be a pest, but would you be able to grant me access as soon as you can so I can export the report for Jim please?	6/21/21 9:33 AM	Angelina	Monique Evans	Workfront Support Request (GCX)

Adobe Workfront

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REPORT RECIPES

Workfront FAQs

Submitted by: Richard Leek

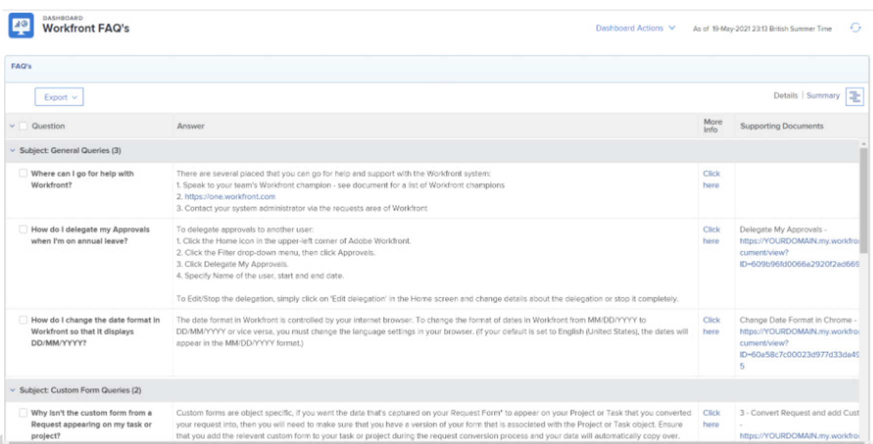
Company: Vantage Clever

Prep: 1 hour (but should be continually developed and improved over time)

Yield: This report is great for users / organizations that are relatively new to using Adobe Workfront! It enables you to display frequently asked questions about the system that are specific to your configuration and your organization. You can pin this report to your user's UI via layout templates so that they can easily access answers to the most frequently asked questions about Adobe Workfront in your organization!

Serves: Your general Adobe Workfront user population

Report type: Project



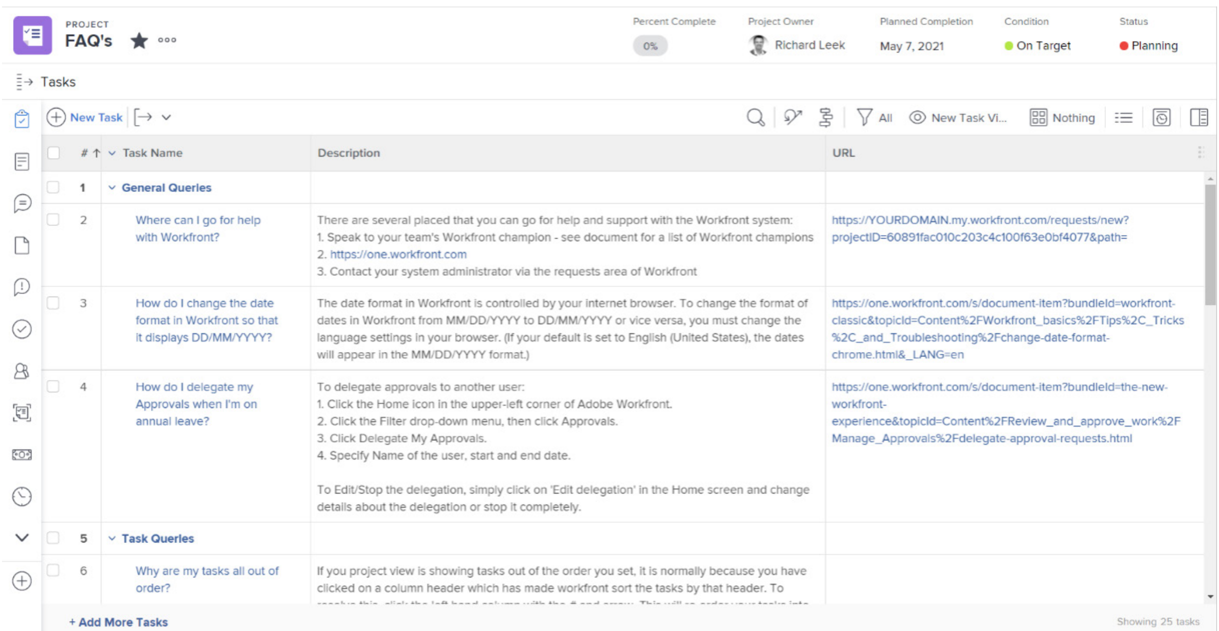
Workfront FAQs

Detailed instructions

Step 1: First create a project in Workfront and populate it with tasks. Populate task names with the questions about Workfront. Populate the task descriptions with answers to these questions

Step 2: Add Parent tasks to your project and name these by question category. (i.e. General Queries, UI Queries, Task Queries, Reporting Queries). Organize your tasks into parent child relationships.

Step 3: Paste the URL to the relevant help article on Workfront One into the URL field of each task.



Step 4: Add any supporting documents to the tasks, such as screen shots or screen recordings.

Step 5: Build a task object report. Instructions start on the next page.

Step 6: Add your report to a dashboard and pin it to your user's UI within a layout template.

Columns: Text mode is required.

QUESTION	ANSWER	MORE INFO	SUPPORTING DOCUMENTS
	Sample Text		

See next page for more detailed instructions

Workfront FAQs

Detailed instructions

Question Column Text Mode:
This column returns the task name, but I like to apply the following text mode to ensure that the name is not clickable in my report and also to format it into bold text.

```
displayname=Question
isInlineEditable=false
styledef.case.0.comparison.icon=false
styledef.case.0.comparison.leftmethod=name
styledef.case.0.comparison.lefttext=name
styledef.case.0.comparison.operator=notblank
styledef.case.0.comparison.operatortype=string
styledef.case.0.comparison.righttext=
styledef.case.0.comparison.trueproperty.0.name=fontstyle
styledef.case.0.comparison.trueproperty.0.value=bold
styledef.case.0.comparison.truetext=
textmode=true
usewidths=true
valueexpression={name}
valueformat=HTML
width=150
```

Answer Column: Use the Task Description field but apply a Custom Column Label in Advanced Options to rename it to 'Answer'.

More Info Column Text Mode:
The following text mode will take the URL entered on your tasks and embed it into a clickable 'click here' within your report.

```
displayname=More Info
link.url=URL
linkedname=html(URL)
textmode=true
usewidths=true
valueexpression=IF(ISBLANK({URL}),"","Click here")
valueformat=HTML
width=50
```

See next page for more detailed instructions

Workfront FAQs

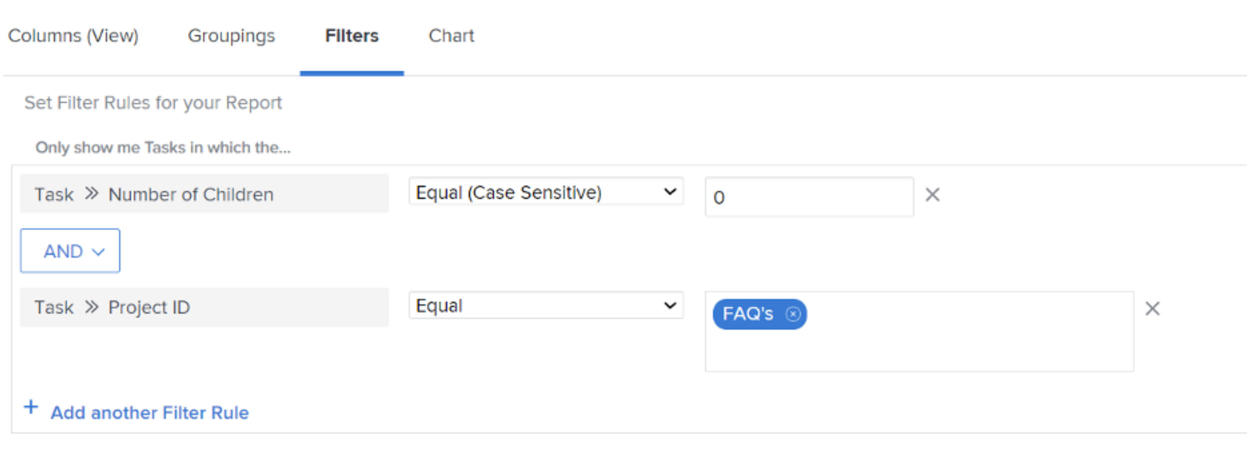
Detailed instructions

Supporting Documents Column Text Mode:
The following text mode will display the document names and a clickable link to your documents for any files uploaded to your tasks. PLEASE NOTE: You will need to replace 'YOURDOMAIN' with the domain of your Adobe Workfront instance.

displayname=Supporting Documents
listdelimiter=
listmethod=nested(documents).lists
textmode=true
type=iterate
usewidths=true
valueexpression=CONCAT({name}," - https://YOURDOMAIN.my.workfront.com/document/
view?ID=",{ID})
valueformat=HTML
width=100

****Note from Workfront:** When copying and pasting text mode from this Cookbook PDF into your Workfront report, a new line character (which is a line break) is inserted at the end of the first line of the valueexpression. You will need to remove the new line character to ensure that the text mode delivers accurate results.

Filters: Here are the filters to use:



See next page for more detailed instructions

Workfront FAQs

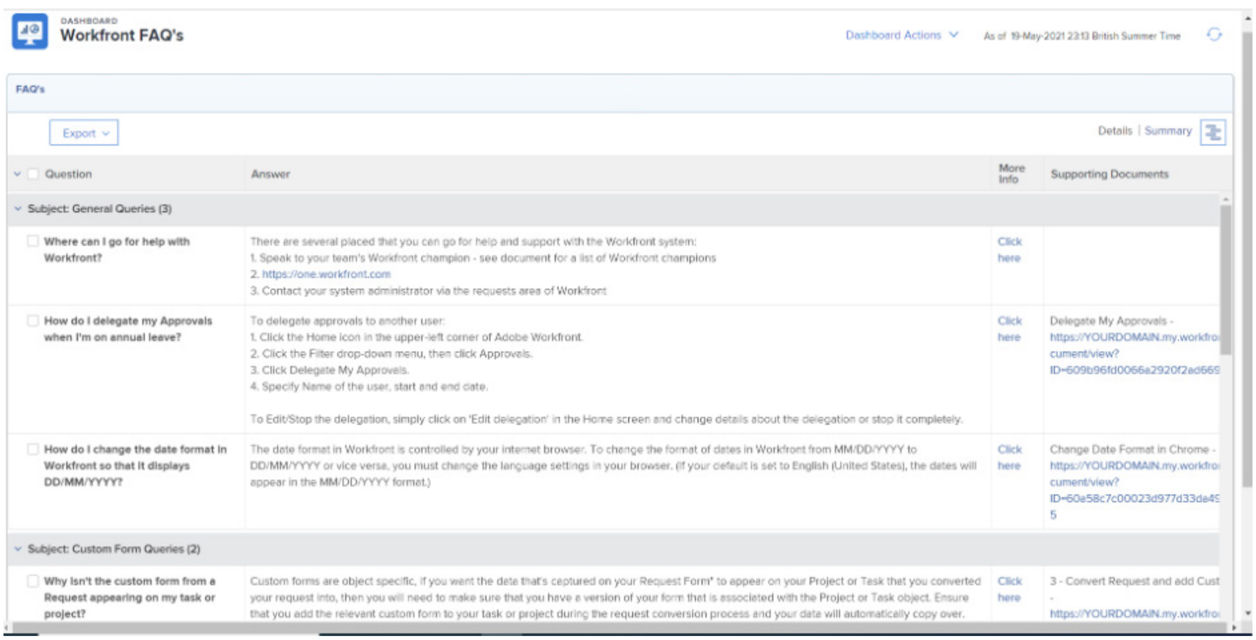
Detailed instructions and final product

Groupings: You can just group by parent task name, however I like to rename this to 'Subject' using the below text mode code:

```
group.0.displayname=Subject
group.0.linkedname=parent
group.0.namekey=view.relatedcolumn
group.0.namekeyargkey.0=parent
group.0.namekeyargkey.1=name
group.0.valuefield=parent:name
group.0.valueformat=string
textmode=true
```

Charts: No Charts needed

The final report should look like this:



As your users start to use Workfront, no doubt there will be regular questions that come up. Be sure to identify any common questions that arise and add them to your Project so that they pull into your report. This will ensure that your userbase can get answers to their most common questions quickly and easily and will aid in user adoption of Adobe Workfront.

Adobe Workfront

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REPORT RECIPES

My People's Work —Universal Dashboard

Submitted by: Skye Hansen

Company: T-Mobile

Prep: 15 minutes (Just copy and paste the textmode below into 6 different reports)

Yield: This is meant to yield 6 reports in one dashboard that anyone can use to see themselves, a manager can use to see their direct reports, and that their manager can use to see all teams under them (and so on). i.e. a universal dashboard.

Serves: People, People managers, People managers' Managers, People managers' Managers' Managers, and so on.

Report type: Assignment, Project (all pulled into a Dashboard)

Please note:

- All users involved must have a manager or be a manager.
- All users doing work must be assigned tasks or requests or own projects.
- You must have a "Manager Names" calculated field on each user on their user custom form. (see next page for how to build calculation)
- View access to work in reports

Our suggestion is to create some kind of leader or manager role for each group. If this role is shared to the portfolio or program level, anyone assigned to the role will be able to see all the projects (and hence tasks and requests) that are stored there.

My People's Work Universal Dashboard

Detailed instructions

Step 1: If you don't already have one, you must bulk attach a custom form to all your users, and add the calculated field below to that form. In this example, we have called ours "SYS Manager Hierarchy". Remember, if you don't have a managers calculated field, you'll need to create the empty field first, save the form, and then go back and populate the calculation.

The calculation is therefore: CONCAT(IF(ISBLANK(Manager.Manager.Manager.Manager.SYS Manager Hierarchy),"",CONCAT(Manager.Manager.Manager.Manager.SYS Manager Hierarchy," - ")),IF(ISBLANK(Manager.Manager.Manager ID),"",CONCAT(Manager.Manager.Manager.Name," - ")),IF(ISBLANK(Manager.Manager ID),"",CONCAT(Manager.Manager.Name," - ")),IF(ISBLANK(Manager ID),Name,CONCAT(Manager.Name," - ",Name)))

****Note from Workfront:** When copying and pasting text mode from this Cookbook PDF into your Workfront report, a line break is inserted at the end of the lines to wrap the text. You will need to remove the new line character to ensure that the text mode delivers accurate results.

Step 2: Create 4 assignment reports and 2 project reports and copy/paste the following textmode as a filter (you can switch back to standard mode when you're done—this just makes it easy to create the report). Change all reports to show charts. We suggest grouping the "Open" charts by Assigned To Name or Project Owner name and the "All" charts to group by some sort of date field by month (either Entry Date or Planned Completion Date). We also used Bar charts for the "Open"—these can get lengthy because of the number of users involved. We used Column charts for the "All" since there are only 12 columns possible in each of these reports.

Assignment 1: (Open Requests)

```
opTask:percentComplete=100
opTask:percentComplete_Mod=lt
opTaskID_Mod=notblank
project:statusEquatesWith=CUR	PLN
project:statusEquatesWith_Mod=in
DE:assignedTo:SYS Manager Hierarchy=$$USER.name
DE:assignedTo:SYS Manager Hierarchy_Mod=cicontains
status=DN
status_Mod=notin
OR:1:assignedToID=$$USER.ID
OR:1:assignedToID_Mod=in
OR:1:opTask:percentComplete=100
OR:1:opTask:percentComplete_Mod=lt
OR:1:opTaskID_Mod=notblank
OR:1:project:statusEquatesWith=CUR	PLN
OR:1:project:statusEquatesWith_Mod=in
OR:1:status=DN
OR:1:status_Mod=notin
```

See next page for more details.

My People's Work Universal Dashboard

Detailed instructions

Assignment 2: (Open Tasks)

project:statusEquatesWith=CUR PLN
project:statusEquatesWith_Mod=in
task:percentComplete=100
task:percentComplete_Mod=lt
DE:assignedTo:SYS Manager Hierarchy=$$USER.name
DE:assignedTo:SYS Manager Hierarchy_Mod=cicontains
taskID_Mod=notblank
status=DN
status_Mod=notin
OR:1:assignedToID=$$USER.ID
OR:1:assignedToID_Mod=in
OR:1:project:statusEquatesWith=CUR PLN
OR:1:project:statusEquatesWith_Mod=in
OR:1:task:percentComplete=100
OR:1:task:percentComplete_Mod=lt
OR:1:taskID_Mod=notblank
OR:1:status=DN
OR:1:status_Mod=notin

Assignment 3: (All Requests past year)

opTaskID_Mod=notblank
opTask:plannedCompletionDate=$$TODAY-1y
opTask:plannedCompletionDate_Mod=between
opTask:plannedCompletionDate_Range=$$TODAY
DE:assignedTo:SYS Manager Hierarchy=$$USER.name
DE:assignedTo:SYS Manager Hierarchy_Mod=cicontains
OR:1:assignedToID=$$USER.ID
OR:1:assignedToID_Mod=in
OR:1:opTaskID_Mod=notblank
OR:1:opTask:plannedCompletionDate=$$TODAY-1y
OR:1:opTask:plannedCompletionDate_Mod=between
OR:1:opTask:plannedCompletionDate_Range=$$TODAY

See next page for more details.

My People's Work Universal Dashboard

Detailed instructions

Assignment 4: (All Tasks past year)

task:plannedCompletionDate=$$TODAY-1y
task:plannedCompletionDate_Mod=between
task:plannedCompletionDate_Range=$$TODAY
DE:assignedTo:SYS Manager Hierarchy=$$USER.name
DE:assignedTo:SYS Manager Hierarchy_Mod=cicontains
taskID_Mod=notblank
OR:1:assignedToID=$$USER.ID
OR:1:assignedToID_Mod=in
OR:1:task:plannedCompletionDate=$$TODAY-1y
OR:1:task:plannedCompletionDate_Mod=between
OR:1:task:plannedCompletionDate_Range=$$TODAY
OR:1:taskID_Mod=notblank

Project 1: (Open Projects)

DE:owner:SYS Manager Hierarchy=$$USER.name
DE:owner:SYS Manager Hierarchy_Mod=cicontains
statusEquatesWith=CUR PLN ONH
statusEquatesWith_Mod=in
OR:1:statusEquatesWith=CUR PLN ONH
OR:1:statusEquatesWith_Mod=in
OR:1:ownerID=$$USER.ID
OR:1:ownerID_Mod=in

Project 2: (All Projects past year)

entryDate=$$TODAY-1y
entryDate_Mod=between
entryDate_Range=$$TODAY
DE:owner:SYS Manager Hierarchy=$$USER.name
DE:owner:SYS Manager Hierarchy_Mod=cicontains
OR:1:entryDate=$$TODAY-1y
OR:1:entryDate_Mod=between
OR:1:entryDate_Range=$$TODAY
OR:1:ownerID=$$USER.ID
OR:1:ownerID_Mod=in

See next page for more details and the final product.

My People's Work Universal Dashboard

Detailed instructions and final product.

Step 3: Add all 6 charts to a dashboard. It should look something like this.

Columns: none needed as this is more of a charts situation
Filters: see Step 2 above
Groupings: see Step 2 above, but if serving this up to Director or VP level, we recommend you consider grouping the Open reports by Home Team name instead of individual contributors as this may be a bit too granular.
Charts: see Step 2 above

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REPORT RECIPES

Project and Task Approval Workflow Details

Submitted by: Teale McCleaf

Company: Rego Consulting at Google

Prep: 20-30 minutes

Yield: End-to-End approval workflow details about a Project submitted for approval via a Request Queue and Tasks within that same project that must be completed in order for the Project request to be approved by committee.

Serves: Leadership Team

Report type: Project

Project Details	Status	Project Approval Flow Details	Pre-Budget Review Tasks Status	Review Completion Dates
Name: [redacted] **Owner:** [redacted] **Originator:** [redacted]	Requested - Pending Approval	**Approval Start Date:**6/29/21 **Approver by Stage:** Ambassador Review - DSC Review - **Approval Completion Date:**	**Milestones Documented:** 100% **Resource Budget & Business Case:** 100% **Scorecard Data Input:** 100%	**Budget Review Start:** 6/29/21 **Budget Review Complete:** 6/29/21 **80% Review Start:** 6/29/21 **80% Review Complete:** 6/29/21

Project and Task Approval Workflow Details

Detailed instructions

Step 1: Create a project report.
Columns: Add the following fields to the report

- Project Name
- Project Owner
- Converted Issue Originator >> Name
- Project >> Status (this will not become part of the stacked columns)

NOTE We're going to stack columns so notice that we're inserting blank columns in front of the fields that will be stacked.

***Note from Workfront:** "Converted Risk or Issue Originator" is based on a customized name this customer is using. The standard default name is "Converted Issue Originator".

Column Preview

COLUMN	NAME	COLUMN	OWNER	COLUMN	CONVERTED RISK OR ISSUE ORIGINATOR: NAME
	CRM Integration - Tampa Office		John Smith		John Smith

Step 2: Add Labels to each field
Click the blank column and input the following textmode code:

```
value=<strong>Label:   </strong>
valueformat=HTML
width=1
sharecol=true
displayname=Project Details
```

Replace the word **"Label"** with the name of the column to the right, i.e. **Name** as shown in the image, and Save. Click the blank column and input the same textmode code with one addition.

```
value=<hr><strong>Label:  </strong>
valueformat=HTML
width=1
sharecol=true
displayname=This line can be removed
```

See next page for more instructions.

Project and Task Approval Workflow Details

Detailed instructions

Repeat Step 2 for the Originator field and the final textmode code will look like this:

```
column.0.displayname=Project Details
column.0.sharecol=true
column.0.textmode=true
column.0.value=<strong><p style="color:DodgerBlue;">Name:  <br></p></strong>
column.0.valueformat=HTML
column.0.width=200
column.1.descriptionkey=name
column.1.link.linkproperty.0.name=ID
column.1.link.linkproperty.0.valuefield=ID
column.1.link.linkproperty.0.valueformat=int
column.1.link.lookup=link.view
column.1.link.valuefield=objCode
column.1.link.valueformat=val
column.1.linkedname=direct
column.1.listsort=string(name)
column.1.namekey=name.abbr
column.1.querysort=name
column.1.section=0
column.1.sharecol=true
column.1.shortview=true
column.1.textmode=true
column.1.valuefield=name
column.1.valueformat=HTML
column.1.width=200
column.2.sharecol=true
column.2.textmode=true
column.2.value=<hr><strong>Owner: <br></strong>
column.2.valueformat=HTML
column.2.width=200
column.3.displayname=Owner
column.3.linkedname=portfolio
column.3.namekey=view.relatedcolumn
column.3.namekeyargkey.0=portfolio
column.3.namekeyargkey.1=owner:name
column.3.querysort=portfolio:owner:name
column.3.sharecol=true
column.3.textmode=true
column.3.usewidths=true
```

See next page for more instructions.

Project and Task Approval Workflow Details

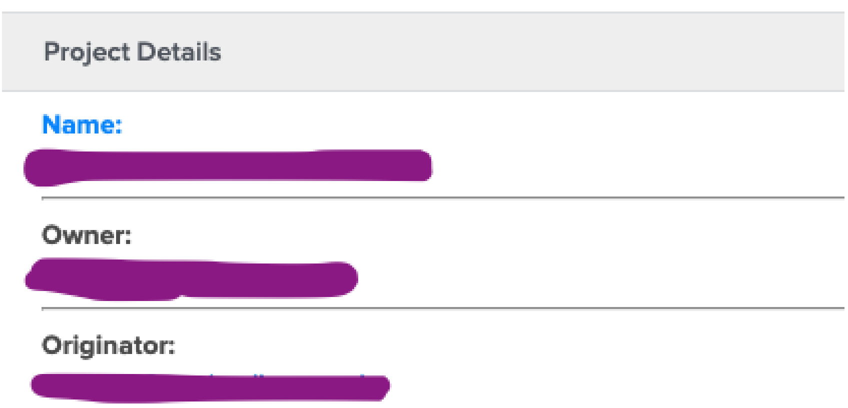
Detailed instructions

Text mode continued from previous page:

```
column.3.valuefield=portfolio:owner:name
column.3.valueformat=HTML
column.3.width=200
column.4.sharecol=true
column.4.textmode=true
column.4.value=<hr><strong>Originator:  <br></strong>
column.4.valueformat=HTML
column.4.width=200
column.5.displayname=Originator Name
column.5.textmode=true
column.5.usewidths=true
column.5.valuefield=convertedOpTaskOriginator:name
column.5.valueformat=HTML
column.5.width=200
```

Optional Variations:

<p style="color:DodgerBlue;">Name:
</p> - Add this to make the label blue (or add any other desired color)
<hr> - adds a line in the break between fields in the column
Looks like this:



In my case, the Status field remains outside of the Project Details stacked column, however, if desired, follow the previous steps to add it to the bottom of that column.

See next page for more instructions.

Project and Task Approval Workflow Details

Detailed instructions continued

Step 3: Add Project Approval Flow Details
Add new columns for:

- Project >> Approval Path Start Date
- Project >> Approver Statuses - This is a collection
- Project >> Approval Path Completion Date

Add a blank column in front of each of the new columns and repeat the steps above to add a Label to each.
Your columns will should look like this:

PROJECT APPROVAL FLOW DETAILS	APPROVAL PATH START DATE		APPROVER		APPROVAL PATH COMPLETION DATE
Approval Start Date:	4/15/11	Approver by Stage:		Approval Completion Date:	4/15/11

Now we need to add the Approver Statuses. In this case, we want to show the approval step(s) and the individual(s) responsible for the approval that is pending. To do this, we reference the collection approverStatuses with a valueexpression like this:

```
column.10.listdelimiter=<br>
column.10.textmode=true
column.10.listmethod=nested(approverStatuses).lists
column.10.valueformat=HTML
column.10.valueexpression=CONCAT({approvalStep}," - ", {approvedBy}.{name}, " ")
column.10.sharecol=true
column.10.usewidths=true
column.10.displayname=Approver
column.10.type=iterate
column.10.width=200
```

Starting with the Approval Start Date column, Click to Edit and add the following at the bottom of the textmode code:

```
sharecol=true
```

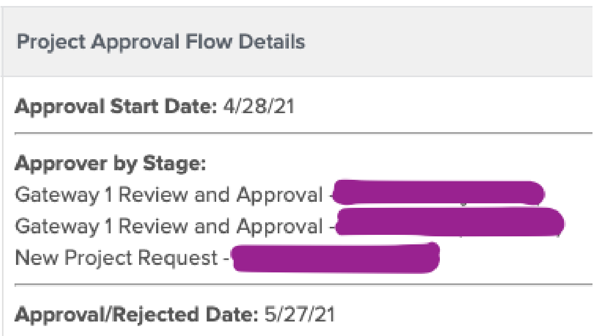
Save

See next page for more instructions.

Project and Task Approval Workflow Details

Detailed instructions continued

Remain on the Project Approval Flow Details column - Click to Edit and input:
column.X.sharecol=true (X being whatever number is the last on the list, i.e., column.8.sharecol=true)
Repeat until all columns are stacked and it will look like this:
(Names have been etched out)



Final textmode code looks like this:

```
column.7.usewidths=true
column.7.displayname=Project Approval Flow Details
column.7.width=200
column.7.textmode=true
column.7.sharecol=true
column.7.value=<strong>Approval Start Date:</strong>
column.7.valueformat=HTML
column.8.querysort=approvalStartDate
column.8.namekey=approvalStartDate
column.8.sharecol=true
column.8.valueformat=atDate
column.8.valuefield=approvalStartDate
column.8.textmode=true
column.8.linkedname=direct
column.9.sharecol=true
column.9.textmode=true
column.9.width=200
column.9.valueformat=HTML
column.9.value=<hr><strong>Approver by Stage:<br></strong>
column.10.valueformat=HTML
column.10.valueexpression=CONCAT({approvalStep}," - ", {approvedBy}.{name}, " ")
column.10.sharecol=true
```

See next page for more instructions.

Project and Task Approval Workflow Details

Detailed instructions continued

```
column.10.usewidths=true
column.10.displayname=Approver
column.10.type=iterate
column.10.width=200
column.10.listdelimiter=<br>
column.10.textmode=true
column.10.listmethod=nested(approverStatuses).lists
column.11.width=200
column.11.valueformat=HTML
column.11.sharecol=true
column.11.textmode=true
column.11.value=<hr><strong>Approval Completion Date:</strong>
column.12.querysort=approvalCompletionDate
column.12.textmode=true
column.12.width=200
column.12.valuefield=approvalCompletionDate
column.12.usewidths=true
column.12.namekey=approvalCompletionDate
column.12.displayname=
column.12.linkedname=direct
column.12.valueformat=atDate
```

Optional - Add Percent Complete for Specific tasks in the schedule

Precursor - the names of the tasks must remain constant for this to work so this can be ideal for teams/groups that use templates.

Use the following textmode code:

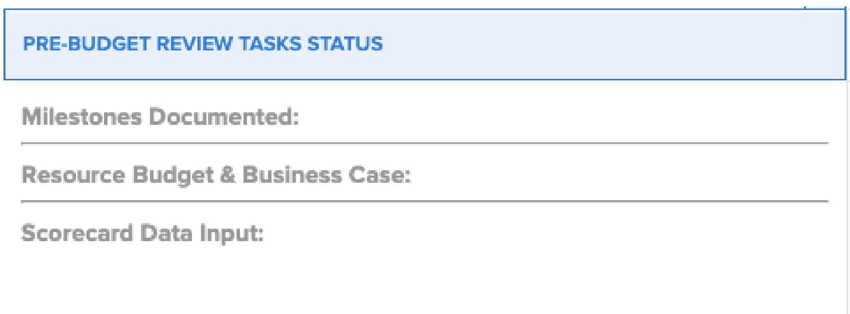
```
valueformat=HTML
textmode=true
type=iterate
listdelimiter=</>
displayname=Column Name
listmethod=nested(tasks).lists
valueexpression=IF(CONTAINS("INSERT TASK NAME",{name}),CONCAT({percentComplete},"%")
```

See next page for more instructions.

Project and Task Approval Workflow Details

Detailed instructions continued

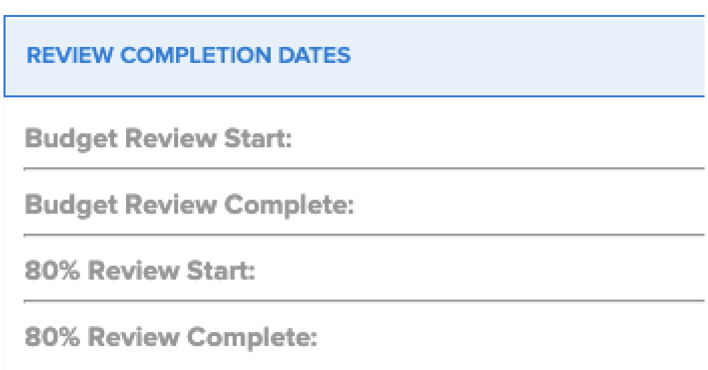
To add additional columns, repeat this and update the task name to include different columns. Mine looks like this:



Optional - Add Approval Path Start and End dates for specific tasks in schedule. Using the same textmode for collections, here's an example:

valueformat=HTML
textmode=true
type=iterate
listdelimiter=</>
displayname=Review Dates
listmethod=nested(tasks).lists
valueexpression=IF(CONTAINS("INSERT TASK NAME",{name}), {approvalStartDate})

Repeat this and change the valueexpression to include the approvalCompletionDate, add Labels and stack the columns as shown above to complete. Mine looks like this:



See next page for more instructions.

Project and Task Approval Workflow Details

Detailed instructions and final product.

Filters:
Since the report is to review projects pending approval, add a filter for Project Status = IDA or REQ, then switch to textmode and add ":A" to the end of REQ as shown below. This will get the system to show "Requested - Pending Approval" projects.
Mine looks like this:

portfolioID=5efa5df000c20330c7e7441a5b6e090d 5f1f1196001b1e01836d2f7b5bce5c5e
portfolioID_Mod=in
status=IDA **REQ:A**
status_Mod=in

Groupings: No groupings needed
Charts: No charts needed

Final Product

Project Details	Status	Project Approval Flow Details	Pre-Budget Review Tasks Status	Review Completion Dates
Name: [redacted] **Owner:** [redacted] **Originator:** [redacted]	Requested - Pending Approval	**Approval Start Date:**6/29/21 **Approver by Stage:** Ambassador Review - DSC Review - **Approval Completion Date:**	**Milestones Documented:** 100% **Resource Budget & Business Case:** 100% **Scorecard Data Input:** 100%	**Budget Review Start:** 6/29/21 **Budget Review Complete:** 6/29/21 **80% Review Start:** 6/29/21 **80% Review Complete:** 6/29/21

Adobe Workfront

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REPORT RECIPES

Contracts Pending Approval

Submitted by: Alison Wells

Company: Community Medical Centers

Prep: 30-120 minutes depending on components already existing in your system.

Yield: We created a custom form field to track contracts in the Workfront approval process with elapsed time, with capital (vs expense) contracts highlighted. Can be used to track anything you are approving, not just contracts because this is based on a custom form field.

Serves: Leadership in our environment. It would depend on what you are tracking.

Report type: Task

Contracts Pending ITS Approval (capital bolded)

Export

Name	Sponsor	Desc	Start On	Due On	Approval Start	Current Stage	Approval D
	Dan		6/3/21	6/29/21	5/27/21	**CIO**	31
	Eric		6/30/21	7/28/21	6/24/21	**CTO**	3
	Mark		7/7/21	8/3/21	6/28/21	**CIO**	-1

Contracts Pending Approval

Step-by-step directions

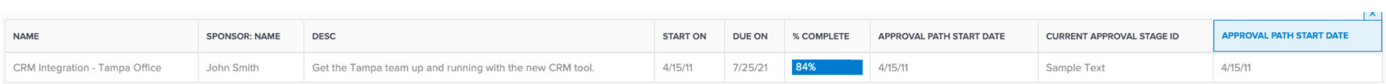
Step 1: Create Approval Processes if you do not already have them in place.

Step 2: Create Templates for your Capital and Expense Contracts, giving each the appropriate steps. We will be using the Template name to determine whether the contract is Capital or Expense. Alternatively, you could use a Custom Form and Field(s), or other methods, to accomplish the same thing. You'll need at least on one project or custom form in the approval process for testing.

Step 3: Create a new Project Report and name as desired. Click Apply.

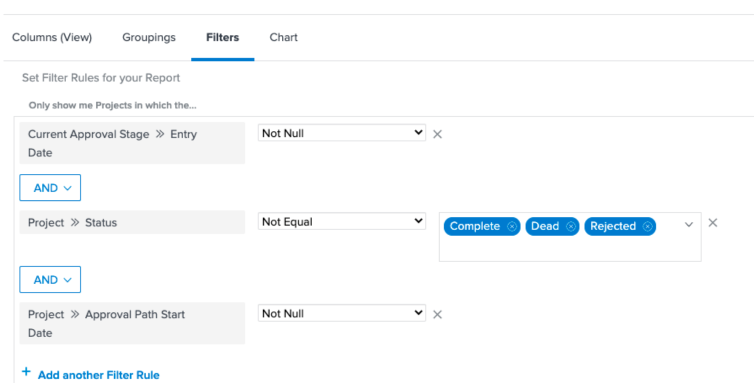
Step 4: On the Columns (View) tab, add the following columns and click Apply.

- Project Name
- Sponsor Name
- Project Description
- Project Planned Start Date
- Project Planned Completion Date
- Project Percent Complete
- Project Approval Path Start Date
- Current Approval Stage Name
- Project Approval Path Start Date (yes, add a second instance)



Step 5: On the Filters tab, set the following filters and click Apply

- Current Approval Stage >> Entry Date = Not Null
- Project Approval Path Start Date >> = Not Null
- Project Status>> = Not Equal Complete, Dead or Rejected
- Project CMC Contract – Initiator is Not Blank: This is a required Custom Form field for us and is used to identify a Contract project. Replace this filter item with how YOU will identify desired Projects in your environment.



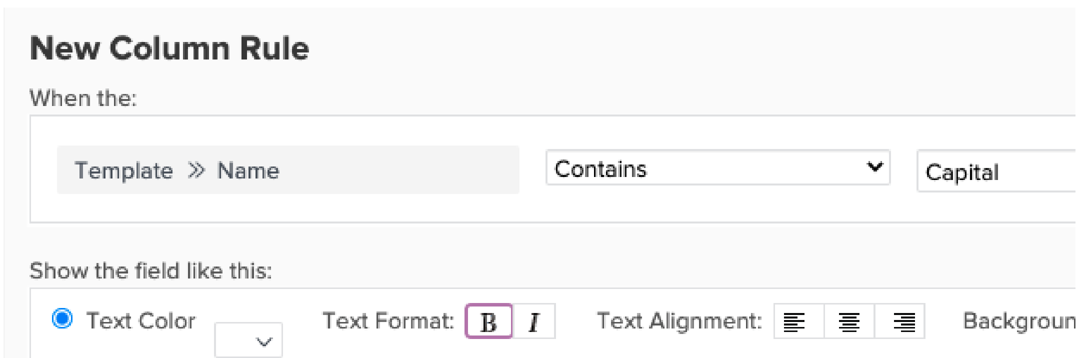
See next page for detailed instructions.

Contracts Pending Approval

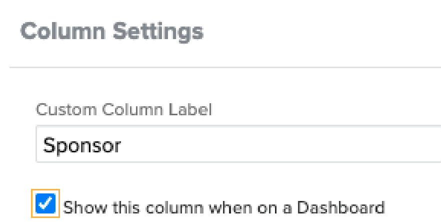
Step-by-step directions

Step 6: On the Columns (View) tab, we are now going to customize the columns we previously added, from left to right, starting with Project Name.

- Click on the Name column, then choose Advanced Options and add a Column Rule: When the Template Name Contains “Capital”, Text Format is Bold. Click Save. We use Capital and Expense Templates, which are named accordingly, and therefore use this to determine what type of contract we have. You should use what works best in your environment.



- Click on the Sponsor: Name column, then choose Advanced Options. Add a custom column label of “Sponsor” and click Save.



- Repeat to apply custom labels to these other columns:
  - Planned Start Date to “Start On"
  - Planned Completion Date to “Due On”
  - Approval Path Start Date to “Approval Start”
  - Current Approval Stage: Name to “Current Stage"

- Now, click on the second instance of Approval Path Start Date, then Switch to Text Mode. We are going to change this column to a custom calculation to give us the amount of time the approval has been waiting. The initial text mode you will see is this, make the changes as noted:

See next page for detailed instructions.

Contracts Pending Approval

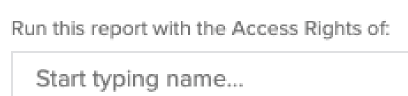
Step-by-step directions

Starting Text Mode	Changes to Make
valuefield=approvalStartDate	valueexpression=ROUND(DATEDIFF($$TODAY,{approvalStartDate},0))
querysort=approvalStartDate	
valueformat=atDate	valueformat=HTML
displayname=	displayname=Approval Duration
linkedname=direct	
namekey=approvalStartDate	
	shortview=true

Your ending text mode should look like this (and it's okay if the lines are rearranged, it happens sometimes.)

valueexpression=ROUND(DATEDIFF($$TODAY,{approvalStartDate},0))
valueformat=HTML
linkedname=direct
displayname=Approval Duration
namekey=approvalStartDate
textmode=true
querysort=approvalStartDate
shortview=true

Step 7: If your Templates are not giving rights to all Contract projects to your leadership team or placing them in a Portfolio that everyone has access to is not an option, you may want to set this report to run as yourself (Admin) to ensure everyone can see all the Contracts. To do this, click on Report Options and enter your name in the Run this report with the Access Rights of box:



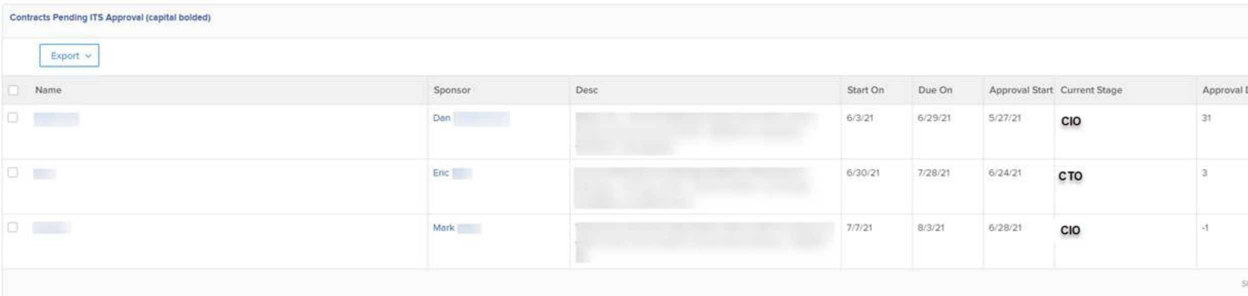
Step 8: Click Save + Close because you are DONE!

Columns: See Step 4 above.
Filters: See Step 5 above.
Groupings: No groupings needed.
Charts: No charts needed.

See next page for final product.

Contracts Pending Approval

Final product



Contracts Pending ITS Approval (capital bolded)

Export

Name	Sponsor	Desc	Start On	Due On	Approval Start	Current Stage	Approval D
	Dan		6/3/21	6/29/21	5/27/21	**CIO**	31
	Eric		6/30/21	7/28/21	6/24/21	**CTO**	3
	Mark		7/7/21	8/3/21	6/28/21	**CIO**	-1

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REPORT RECIPES

Creative Production Cycle Time

Submitted by: Amy Zakrzewski and Heather Kulbacki

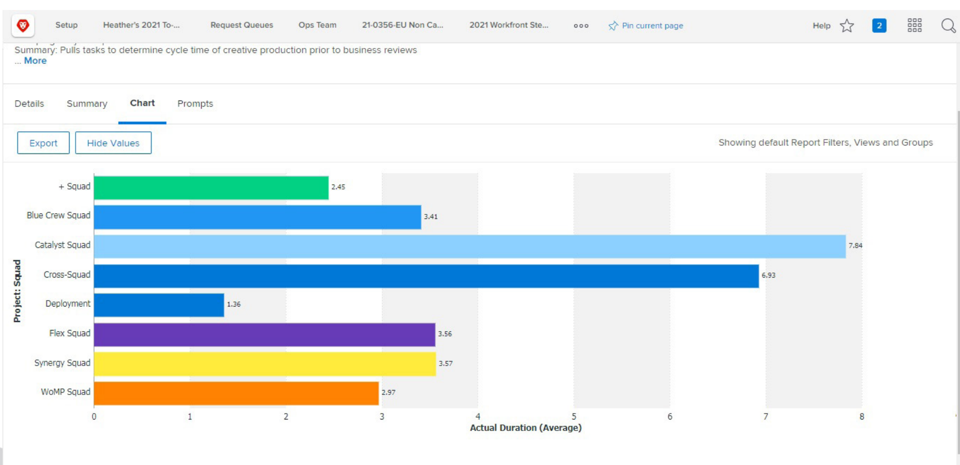
Company: Thermo Fisher Scientific

Prep: 15 minutes

Yield: This report will show, by team, how long a particular task takes to complete for the prompted actual completion date.

Serves: Leadership Team

Report type: Task



Creative Production Cycle Time

Detailed instructions

Step 1: Create a Task object type report. You'll need a task that you want to track across projects that is consistently named across all those projects. You'll aslo need either: 1) Users to consistently change the task status to In Progress when they begin working on a task or 2) In the Setup area for each team you want to track, set the "Work on it" button to correspond to an "in progress" status.

Columns: Here are the out-of-the-box names for the columns to use in this report.:
Task > Name

- Project > Name
- Task > Planned Start Date
- Task > Planned Completion Date
- Task > Actual Start Date
- Task > Actual Completion Date
- Task > Actual Hours, Summarized by Average
- Task > Actual Duration, Summarized by Average
- Custom Column for Project > Squad (we call Teams, Squads and this is a custom field on one of our project forms)

Filters: No text mode is required! Here are the filters to use:

- Task > Number of Children = 0, if it's a single task you are tracking the cycle time of
- Project > Company ID = appropriate company if you have multiple companies in your instance
- Task > Name Contains "Task you are looking to track the cycle time of"
- Any filters to filter out projects that you don't want pulled into this report, such as status = Canceled, or if you don't want projects that contain a certain answer to a custom field

Groupings: We group by Task Status then Squad (a custom field on a project form).

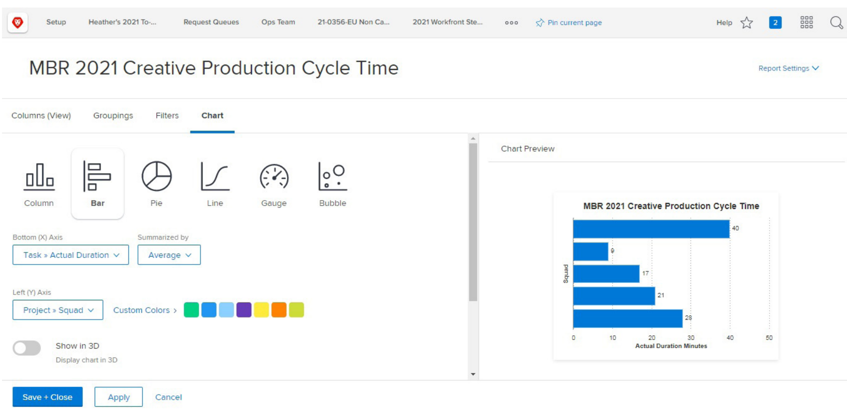
Prompts: Actual completion date.

See next page for final product.

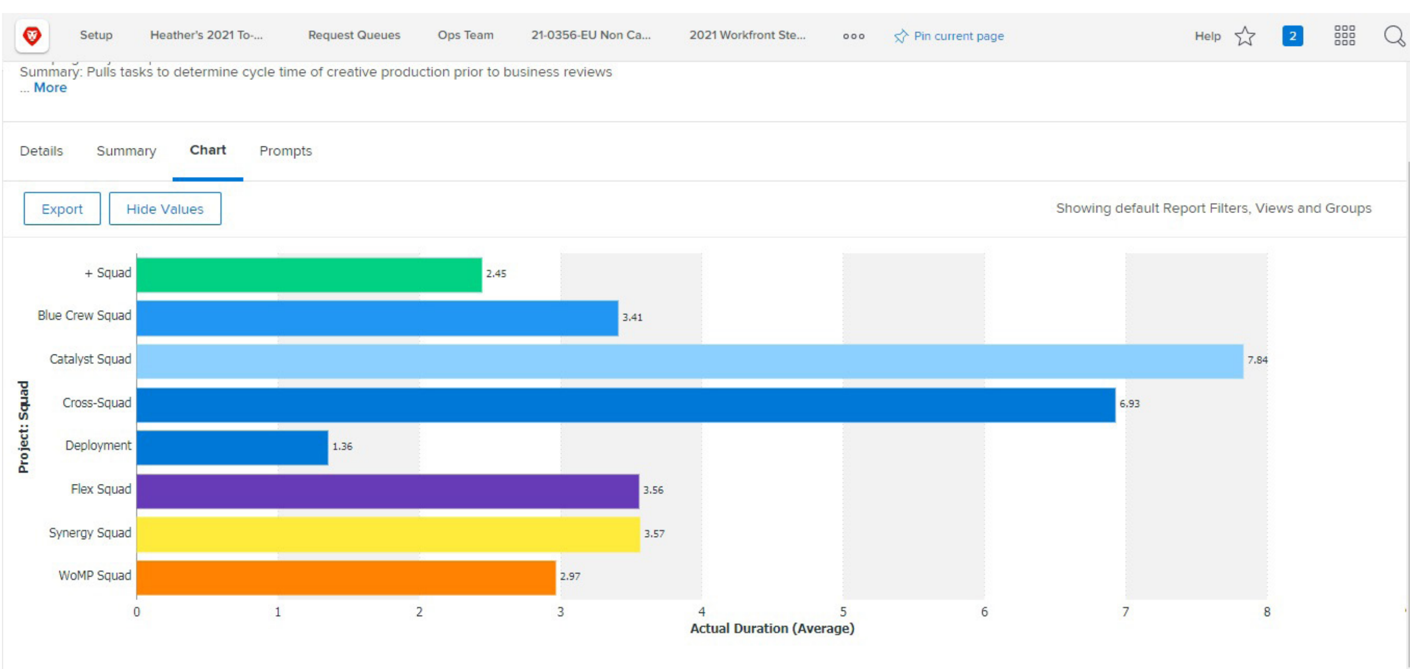
Creative Production Cycle Time

Detailed instructions and final product.

Charts:
Bar Chart
Bottom (X) Axis = Task > Actual Duration
Summarized by = Average
Left (Y) Axis = Project > Squad



Final Product



Now it's your turn.
Happy cooking!

Need more resources or want to join more conversations about reporting?
Check out the Adobe Workfront Community.
one.workfront.com/s/community

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