



**Adobe Workfront**

ADOBE WORKFRONT GUIDE

# Fusion Cookbook

Real scenarios from Adobe Workfront customers and consultants





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Please note that the scenarios showcased in this Cookbook only represent a small portion of Adobe Workfront Fusion's capabilities. Please stay tuned for more Adobe-to-Adobe scenarios in a follow-up Adobe Workfront Fusion Cookbook!

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FUSION REPORT RECIPES

# Getting Started with Adobe Workfront Fusion Templates

**Prep:** 30 minutes

**Yield:** Select a template from the template library. Follow guided instructions to build a scenario from the template. Consider further fine-tuning to meet your needs

**Benefit:** Starting from an Adobe Workfront Fusion Template reduces development cycles and allows you to see what is possible without a heavy lift

**Serves:** Process Owners, Integration Architects/Developers, System Admin

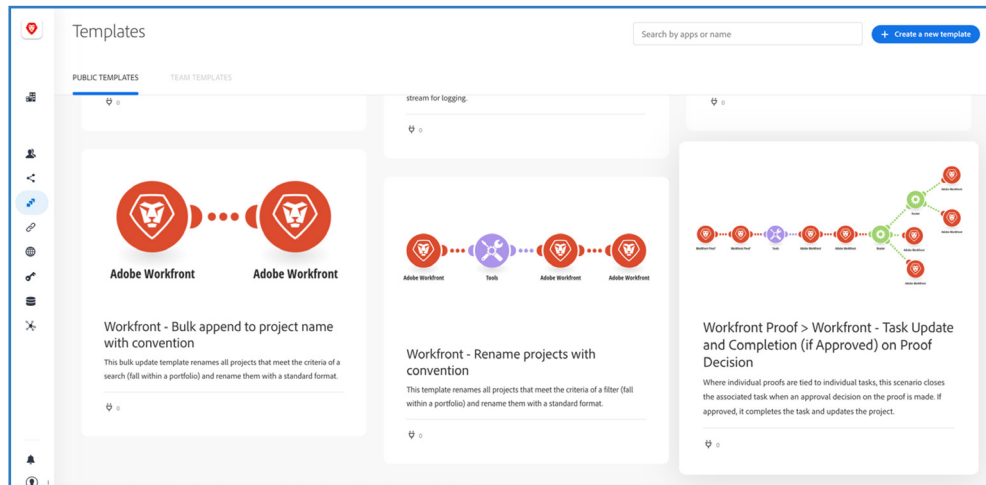
**By:** Ewan Hruska



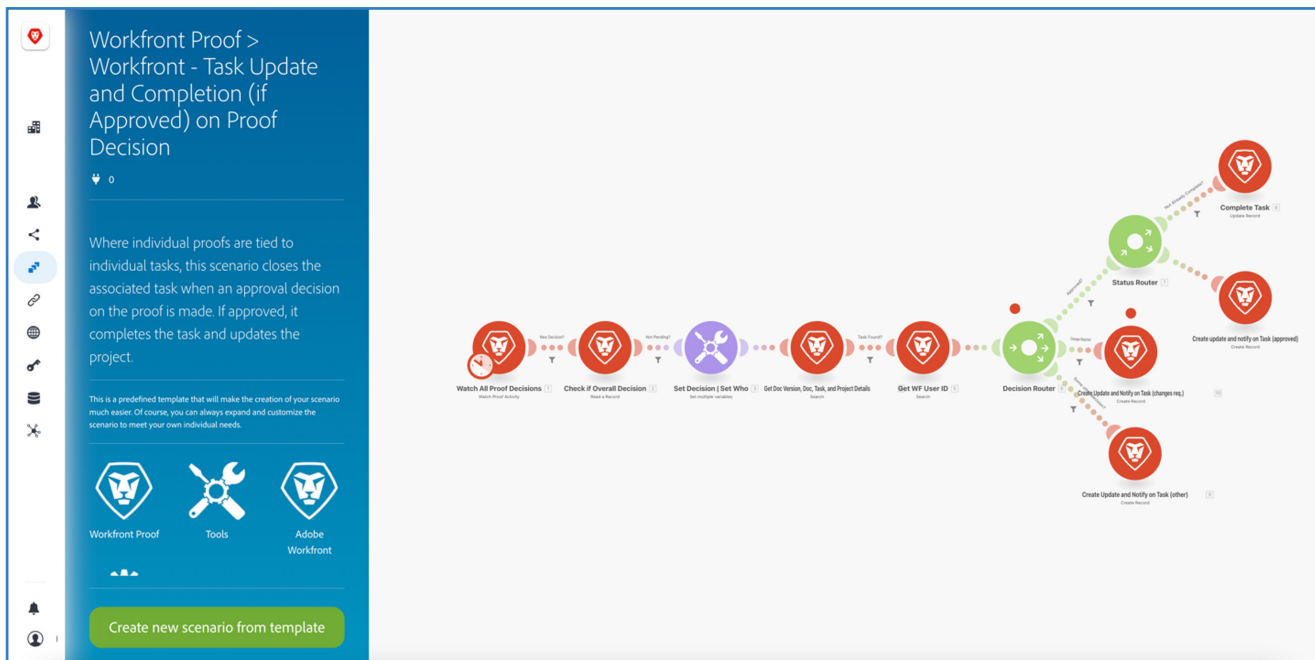
# Getting Started with Adobe Workfront Fusion Templates

## Detailed instructions

**Step 1:** After logging in, you can access Fusion Templates by selecting the **Templates** icon on the left sidebar menu (circled below).



**Step 2:** Once you find a template that meets your needs from the **Template** library, select it by clicking on **Create a new scenario from template** from the template overview window. Follow the unique prompts for each template in order to build it according to your needs.



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## FUSION REPORT RECIPES

# Convert Approved Issue to Project

**Prep:** 90 minutes

**Yield:** Convert Issues (Requests) to Projects based on specific criteria

**Benefit:** This template and the resulting scenario is based off an extremely common need to be able to convert approved issues to projects

**Serves:** Project Owners, Process Owners

**Modules:** Adobe Workfront



**By:** Ewan Hruska



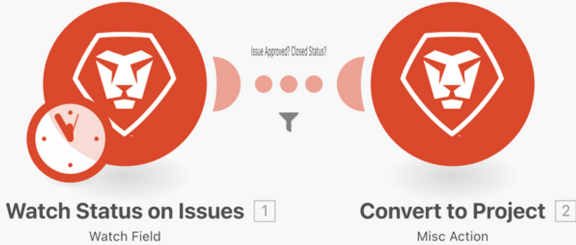
Workfront - Convert approved issue to project

Let Workfront Fusion convert your Issues to Projects for you with this helpful template. Be sure to modify it to meet your organizations standards.

This is a predefined template that will make the creation of your scenario much easier. Of course, you can always expand and customize the scenario to meet your own individual needs.

Create new scenario from template



```

graph LR
    A[Watch Status on Issues  
Watch Field] -- "Issue Approved? Closed Status?" --> B[Convert to Project  
Misc Action]
  
```

# Convert Approved Issue to Project

## Detailed instructions

**Step 1:** You need to have an [approval workflow setup](#) in your Workfront environment based on Closed status if you are running this as designed on Approved issues. Other statuses could be used for the approval workflow but a few small additional changes in the scenario would be needed.

**Step 2:** From inside Workfront go to the **Main Menu > Setup** select **Processes > Approvals** and go to the Tab. Create a Basic Approval Workflow that looks something like the following one. The key point for the template to work as is, are to **Start approval process when the status is set to: Closed**.

The screenshot shows the 'Edit approval process' configuration page. The 'Overview' tab is selected. The 'Approval process name' is 'Basic Issue Approval'. The 'Description' is 'Approval process for Closure to assigned to manager'. The 'Is Active' checkbox is checked. The 'This approval process can be used by' dropdown is set to 'All groups'. Under 'Path 1', the 'Start approval process when the status is set to' dropdown is set to 'Closed'. Under 'Stage 1', the 'Name' is 'Manager' and the 'Approvers' list contains 'Assigned To Manager'. The 'Choose what happens when the approval is rejected' dropdown is set to 'In Progress'. The 'Save' button is highlighted in blue.

**Step 3:** To kick off the approval process when an issue is closed, you need to attach the Approval Process we just created with the issue. This can be done in an individual issue's settings (Good) OR within the project for any issue created (Somewhat Scalable) OR in a project template (Enterprise Scalable).



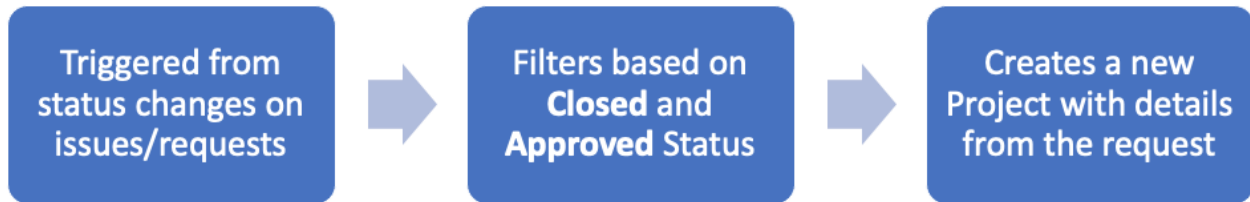
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# Convert Approved Issue to Project

## Detailed instructions

**Step 4:** The high-level workflow overview of the template is:



**Pro-Tip:** There are a ton of different things to map when converting issues to projects. Below you will find a subset of some of the settings you could change in your scenario:

- 1. Project Name:** This example changes the project name to include the word “PROJECT” prior to the existing name. This could be easily changed in the name area from the Convert To Project module options. Check out the Project Rename Templates for some ideas on Project Name structure.
- 2. Templates:** You may (probably) want the new project to use a specific project template...if so you can add the project template through the Template ID field. Pull the template id from the URI of the template in Workfront.
- 3. Conversion Options:** Remove preserveIssue if you do not want to maintain the original Issue. We recommend keeping it for tracking purposes in most situations.

Standard Options:

- a. preserveIssue
- b. preservePrimaryContact
- c. preserveCompletionDate



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FUSION RECIPES

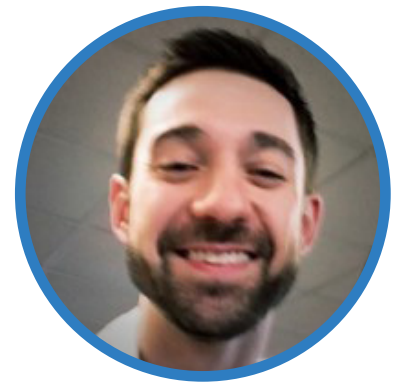
# Move New Documents from Original Issue to Resolving Project

Prep: 10 minutes

Yield: Avoid missing new documents added to the original issue

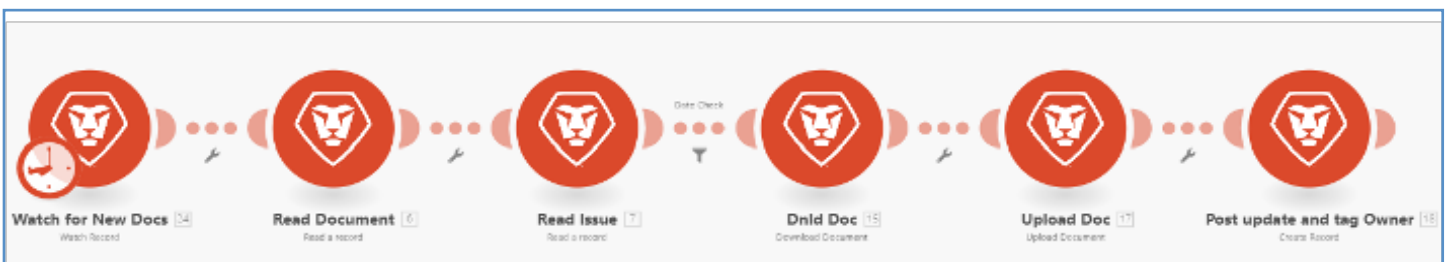
Serves: Project Owners and Requesters

By: Brandon Pritchard (Nationwide)



Watch Record **ACID**

Start a scenario when a record is created or updated



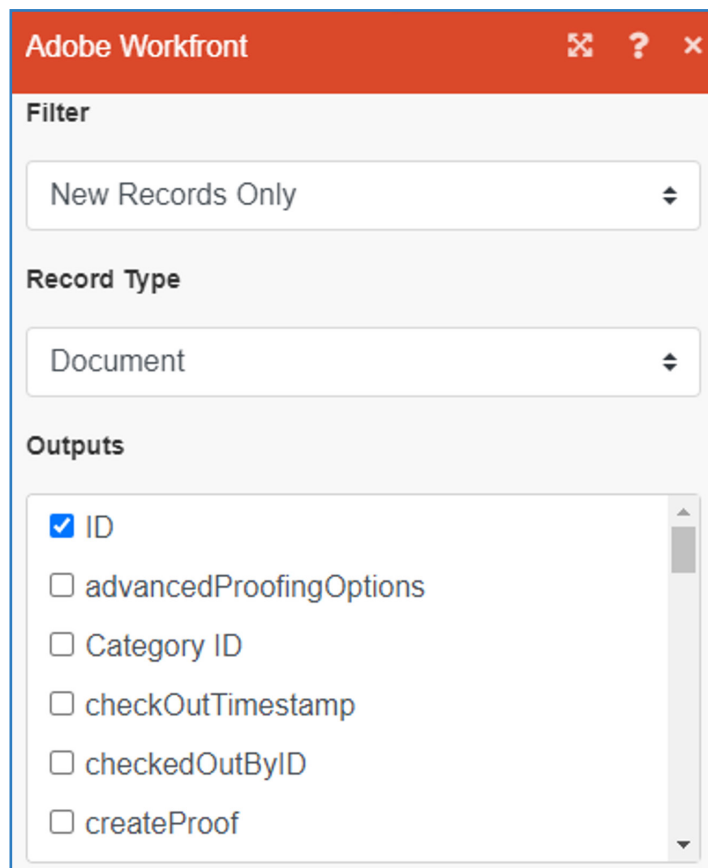


# Move New Documents from Original Issue to Resolving Project

## Detailed instructions

**Step 1:** Use the **Watch Record** Module to look for new Documents.

- Filter: New Records Only
- Record Type: Document
- Record Origin: New and Updated



The screenshot shows the Adobe Workfront Watch Record Module configuration window. The window has a red header with the text "Adobe Workfront" and three icons: a square with an 'X', a question mark, and a close 'X'. Below the header, there are three sections: "Filter", "Record Type", and "Outputs".

- Filter:** A dropdown menu with "New Records Only" selected.
- Record Type:** A dropdown menu with "Document" selected.
- Outputs:** A list of checkboxes with the following items:
  - ID
  - advancedProofingOptions
  - Category ID
  - checkOutTimestamp
  - checkedOutByID
  - createProof



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# Move New Documents from Original Issue to Resolving Project

## Detailed instructions

**Pro Tip:** You can use the “optional filter” field to add additional filters. The syntax is the same as a text mode filter. For multiple filters, use the “&” as an AND function.

In the filter example below, we are looking for documents that have an issue ID and a resolving project ID.

Optional Filter

```
opTaskID_Mod=notblank&opTask:resolveProjectID_Mod=notblank
```

💡 Additional filter criteria appended to the API query to only select specific records meeting the criteria

**Step 2:** Add a **Read a Record** Module to read the document data.

**Record Type** map:

Document

**Outputs** map:

- ID
- advancedProofingOptions
- Category ID
- checkOutTimestamp
- checkedOutByID
- createProof

**References** map:

```
currentVersion:entryDate, opTask
```



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# Move New Documents from Original Issue to Resolving Project

**Step 3:** Add a **Read a Record** Module to read the document data.

**Record Type** map:

Issue

**Outputs** map:

- ID
- Actual Completion Date
- Actual Cost
- Actual Start Date
- Actual Hours
- actualWorkRequiredExpression

**References** map:

```
resolveProject, resolveProject:owner:name, resolveProject:ownerID, resolveProject:entryDate
```

**Pro Tip:** Use the **References** section to jump data tables and pull referenced data.

**Step 4:** Use a filter to only allow through new documents added to the issue **after** it was converted into a project. Adding on additional minutes can help ensure the entry dates do not match.

Set up a filter

Label

Date Check

Condition

6. currentVersion: entryDate

Later than

addMinutes( 7. resolveProject: entryDate ; 2 )

Add AND rule Add OR rule



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# Move New Documents from Original Issue to Resolving Project

**Step 5:** Add a **Download Document Module** and an **Upload Document Module** to download the new document and upload it to the resolving project.

The screenshot shows the Adobe Workfront interface. At the top, there's a red header with the text "Adobe Workfront" and icons for search, help, and close. Below the header, there are two main sections: "Connection" and "Document ID". In the "Connection" section, there is a dropdown menu showing "Fusion ID Connection (Fusion2 API | ni)" and an "Add" button. Below this, there is a lightbulb icon and a link to "online Help". In the "Document ID" section, there is a text input field containing "6. ID".

The screenshot shows a configuration panel for a module. It has a "Related Record ID" field containing "7. resolveProjectID". Below it is a "Related Record Type" dropdown menu set to "Project". There is a "Folder ID" field which is empty. Below that, there is a lightbulb icon and the text "Root is default folder". At the bottom, there is a "Source file" section with two radio buttons: "Adobe Workfront - Download Document" (selected) and "Map".

**Step 6:** Add a **Create Record Module** to post an update to the resolving project and notify the project owner.

The screenshot shows a configuration panel for a "Create Record Module". It has a "Record Type" dropdown menu set to "Update". Below it is a "Select Fields to Map" section with four checkboxes: "Object Type", "Object ID", "Update Text", and "Notify", all of which are checked. Below this, there is an "Object Type" dropdown menu set to "Project". At the bottom, there is an "Object ID" field containing "7. resolveProjectID".

The screenshot shows a configuration panel for an "Update Text" module. It has a text area containing the text: "A new document was uploaded to the original issue. As a result, The document, 17. name, has been copied into this project." Below the text area is a "Notify" section with a "map:" toggle switch. Below that, there is a "Notify" section with a dropdown menu set to "ID: 7. resolveProject: ownerID" and "User Or Team: USER". There are also icons for edit and delete. At the bottom, there is a "+ Add item" button.



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# Proof Settings Automation with Custom Form Update

**Prep:** 15 minutes

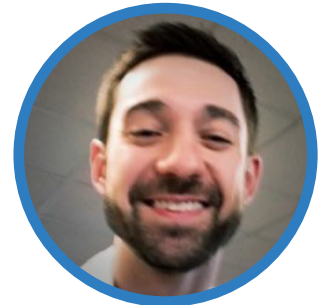
**Yield:** Create a Proof Custom Form in the Account Settings area of Workfront Proof

**Benefit:** Reduce the number of clicks, set standardized settings, and enable project association

**Serves:** Project Owners, Proof Owners

**Modules:** Adobe Workfront, Adobe Workfront Proof

**By:** Brandon Pritchard (Nationwide)

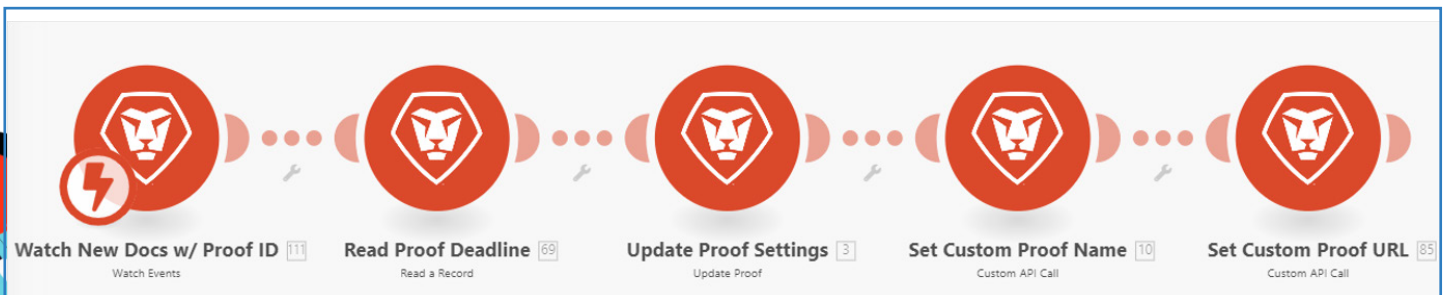


TRIGGERS

 Watch Events **INSTANT** **ACID**  
 Watch Events

 **Update Proof**  
 Update an existing proof using the proof ID

Proof				
Name	Help text	Mandatory	Type	Searchable
Project Proof Form				
Project Name		No	Text	Yes
Project URL		No	Text	No



# Proof Settings Automation with Custom Form Update

## Detailed instructions

**Step 1:** Use the **Watch Events** Module to look for Document Version s.s

- Record Type: Document Version
- State: New State
- Record Origin: New and Updated

The screenshot shows the configuration for the Watch Events Module. It includes a dropdown for 'Record Type' set to 'Document Version', a dropdown for 'State' set to 'New state', and a dropdown for 'Record Origin' set to 'New and Updated Records'. There is also a checkbox for 'Exclude updates made by this connection' which is checked, and a button for 'Add AND rule'.

**Step 2:** Add a **Read a Record** Module to read the Proof information

The screenshot shows the configuration for the Read a Record Module. It includes a dropdown for 'Connection' set to 'PROD - Proof connection (Production |', a dropdown for 'Record Type' set to 'Proof', and a text area for 'Outputs' containing the fields: 'custom\_link\_url, deadline, decision, file\_id, filename, owner, owner\_email, owner\_id, reference\_id, stages, version, versions'. There is also a 'map' toggle button for the 'Outputs' section.

**Pro Tip:** You can type the desired fields into the output section by toggling the “map” button on.



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# Proof Settings Automation with Custom Form Update

## Detailed instructions

**Step 3:** Add an **Update Proof Module** to default the proof settings to your specifications.

The screenshot displays two side-by-side 'Workfront Proof' configuration windows. The left window shows settings for 'Allow original file to be downloaded' (Yes selected), 'Deadline' (69. Deadline), 'Default email notifications for subscribers' (Disabled), 'Default Role' (empty), 'Disable Subscription Email' (Yes selected), and 'Enable Subscriptions' (Yes selected). The right window shows settings for 'Enable Subscriptions Validation' (No selected), 'Enable Team URL (Sharing Option)' (Yes selected), 'Lock proof when all required decision are made' (No selected), 'Message' (empty), 'Proof ID' (69. File ID), and 'Proof Name' (69. File Name). A third, smaller window on the right shows 'Require Login' (No selected) and 'Show Versions Link' (Yes selected).

**Step 4:** Add a **Custom API Call Module** to set the project Name on the custom form.

- Method: setProofCustomData
- Use the Body (XML) section to identify the File ID or Proof ID and set the custom value.

The screenshot shows the configuration for a Custom API Call Module. The 'Method' section contains the text 'setProofCustomData'. The 'Body (XML)' section contains the following XML code:

```
<FileID>3. File ID</FileID>
<Data>
  <item>
    <name>Project Proof Form</name>
    <fields>
      <item>
        <name>Project Name</name>
        <type>1</type>
        <value>111. project:name</value>
      </item>
      <multiple>false</multiple>
    </item>
  </fields>
</item>
</Data>
```



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# Proof Settings Automation with Custom Form Update

## Detailed instructions

**Step 5:** Add a **Custom API Call** Module to set the Project URL on the custom form.

- Method: setProofCustomData
- Use the Body (XML) section to identify the File ID or Proof ID and set the custom value.

**Pro Tip:** You can type in the data from previous modules without mapping them in the previous module.

Syntax: "{{module number.data field}}"

**Method**

**Body (XML)**

```
<FileID> 3. File ID </FileID>
  <Data>
    <item>
      <name>Project Proof Form</name>
      <fields>
        <item>
          <name>Project URL</name>
          <type>1</type>
          <value>https://nationwide.my.wo
rkfront.com/project/ 3. File ID /documents</va
lue>
          <multiple>>false</multiple>
        </item>
      </fields>
    </item>
  </Data>
```



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## FUSION REPORT RECIPES

# Task Changes - Staffing

**Prep:** 1-2 hours per item

**Yield:** Leverage Fusion to apply project attributes based on related objects. This scenario covers 3 different use cases you can apply to your environment.

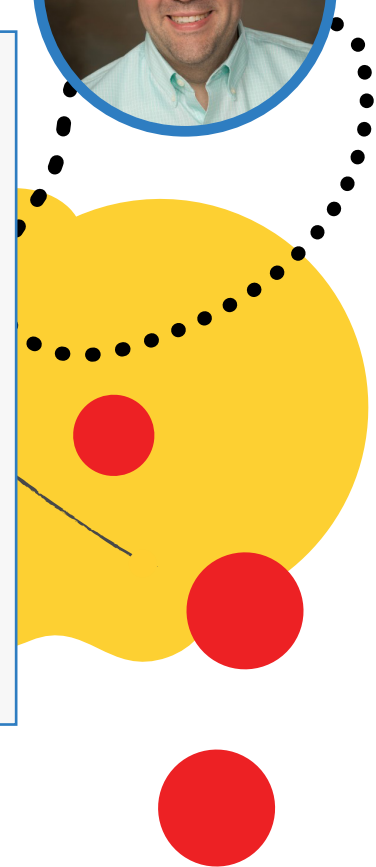
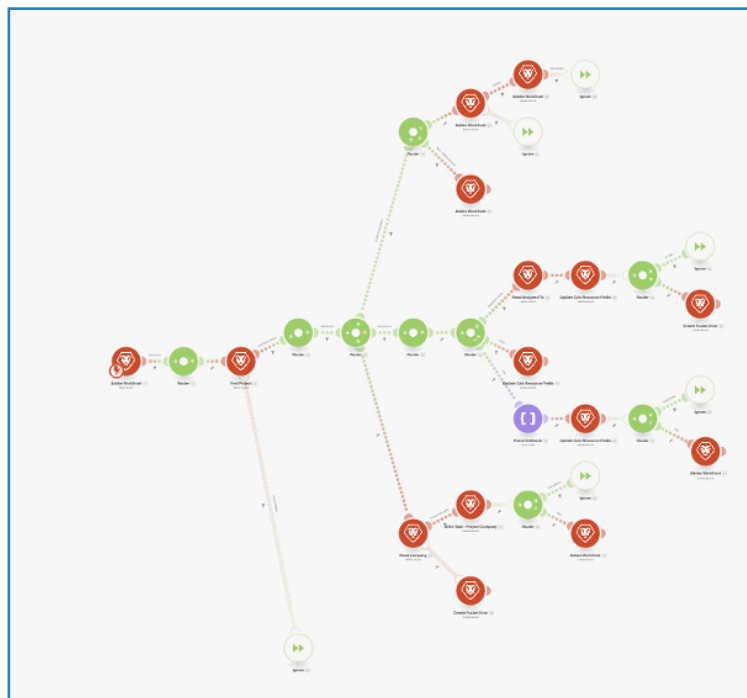
**Context:** We track staffing assignments and planned hours at the project level. We introduced "staffing tasks" that are at the top of each project plan. These tasks are the only tasks with planned hours, are tagged using custom fields, and pulled into custom reporting solutions we use to track capacity and utilization. This scenario automates maintenance, calculates data, and copies information to support Workfront's native task reports.

**Benefit:** Remove manual steps, summarize data across multiple projects, quarterly/ annual forecasting, cleaner data, more robust reporting, and more

**Serves:** Resource Managers, Report Builders

**Modules:** Adobe Workfront

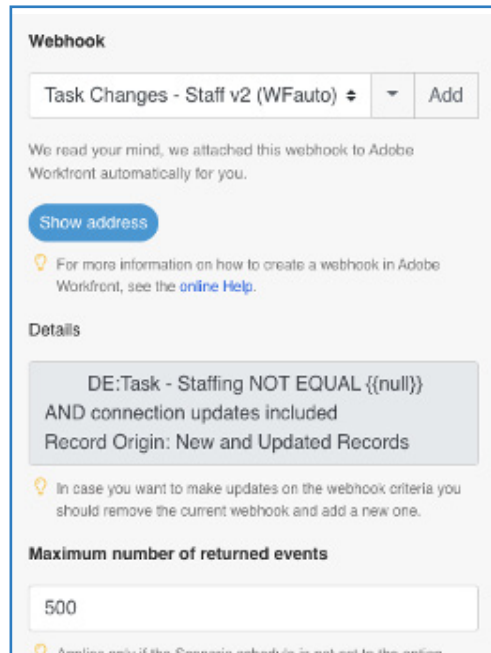
**By:** Jason Blunk



# Task Changes - Staffing

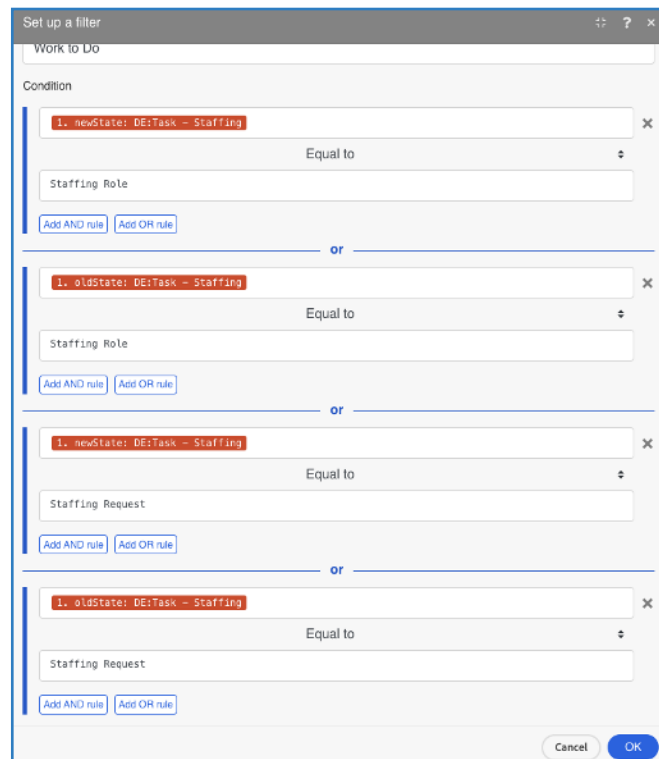
## Detailed instructions

**Step 1:** Create a webhook. In the details of your webhook, set parameters to filter down to only staffing tasks (as identified by a custom attribute on the task).



The screenshot shows a 'Webhook' configuration window. At the top, it says 'Webhook' and shows the name 'Task Changes - Staff v2 (WFauto)' with a dropdown arrow and an 'Add' button. Below this, a message reads: 'We read your mind, we attached this webhook to Adobe Workfront automatically for you.' There is a 'Show address' button. A lightbulb icon indicates a tip: 'For more information on how to create a webhook in Adobe Workfront, see the [online Help](#).' Under the 'Details' section, the filter criteria are displayed: 'DE:Task - Staffing NOT EQUAL {{null}} AND connection updates included Record Origin: New and Updated Records'. Another tip below states: 'In case you want to make updates on the webhook criteria you should remove the current webhook and add a new one.' At the bottom, there is a section for 'Maximum number of returned events' with a text input field containing the value '500'.

**Step 2:** Further narrow down your tasks using a filter. Set conditions according to your use case.



The screenshot shows a 'Set up a filter' dialog box. It has a title bar with 'Set up a filter', a search icon, a question mark, and a close icon. The main area is titled 'Work to Do' and contains a 'Condition' section. There are four filter rules stacked vertically, each separated by an 'or' connector. Each rule consists of a text input field containing '1. newState: DE:Task - Staffing', followed by a dropdown menu set to 'Equal to', and another text input field. The first two rules have 'Staffing Role' in the second input field, and the last two have 'Staffing Request'. Below each rule are 'Add AND rule' and 'Add OR rule' buttons. At the bottom right of the dialog are 'Cancel' and 'OK' buttons.



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# Task Changes - Staffing

## Detailed instructions

**Step 3:** Find related projects and get the project level data needed. You can also setup an Error Handler to ignore projects if they are deleted.

The 'Find Project' configuration window is shown. It includes a 'Connection' section with 'Workfront Automation PROD (Workfror)' and an 'Add' button. A 'Record Type' dropdown is set to 'Project'. The 'Outputs' section has several checkboxes: 'BC Completion State', 'ID' (checked), 'URL', 'Actual Benefit', 'Actual Completion Date', and 'Actual Duration Minutes'. The 'ID' field contains the expression '1. newState: projectID'. There are 'Cancel' and 'OK' buttons at the bottom.

The 'Set up a filter' dialog box is shown. The 'Label' field contains 'project deleted'. The 'Condition' section has a dropdown set to '2. Error: Message', followed by 'Contains (case insensitive)' and the value '[404] Project with primary key value(s)'. There are 'Add AND rule' and 'Add OR rule' buttons, and 'Cancel' and 'OK' buttons at the bottom.

**Step 4:** Remove **Dead** and **Complete** projects because the system is unable to update it by itself. Set up filters for **Customer Delivery** portfolio only.

The filter configuration window is shown. The 'Label' field contains 'Prj Not Dead or Complete'. The 'Condition' section has two rules: '2. status' Not equal to 'DED' and '2. status' Not equal to 'CPL', connected by an 'and' operator. There are 'Add AND rule' and 'Add OR rule' buttons at the bottom.

The filter configuration window is shown. The 'Label' field contains 'Customer Delivery Only'. The 'Condition' section has a dropdown set to '2. portfolioID' and 'Equal to' with the value '612ec218008249966b98c5337eab153'. There are 'Add AND rule' and 'Add OR rule' buttons at the bottom.



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# Automating Data Attributes - Calculate Planned Hours

Detailed instructions

**Step 1:** Filter for only managed tasks.

The screenshot shows a configuration dialog for a rule. Under the 'Label' section, there is a text input field containing 'Include in Calculation'. Below this is a checkbox labeled 'The fallback route. It will be used in the case where a bundle cannot continue on from the router via any other route. For more information, please see the online Help.' which is currently unchecked. Under the 'Condition' section, there is a rule editor showing a single rule: '1. newState: DE:Staffing - Planned Hours Calculation'. Below the rule editor, the comparison operator is set to 'Equal to'. There is a text input field below the operator containing 'Include in automation'. At the bottom of the dialog, there are two buttons: 'Add AND rule' and 'Add OR rule'.

**Step 2:** Filter for Staffing Removed and Update Work = 0.

- Work is "Planned Hours"

The image contains two screenshots of configuration dialogs. The left screenshot shows the 'Task - Staffing removed' configuration dialog. Under the 'Label' section, the text input field contains 'Task - Staffing removed'. Below this is a checkbox labeled 'The fallback route. It will be used in the case where a bundle cannot continue on from the router via any other route. For more information, please see the online Help.' which is unchecked. Under the 'Condition' section, there are two rules: '1. newState: DE:Task - Staffing' with the operator 'Does not exist', and '1. oldState: DE:Task - Staffing' with the operator 'Exists'. The two rules are connected by an 'and' operator. At the bottom of the dialog, there are buttons for 'Add AND rule', 'Add OR rule', 'Cancel', and 'OK'. The right screenshot shows the 'Connection' configuration dialog. It features a 'Connection' section with a dropdown menu set to 'Workfront Automation PROD (Workfror)' and an 'Add' button. Below this is a note: 'For more information on how to create a connection to Adobe Workfront, see the online Help.' The 'ID' section has a text input field containing '1. newState: ID'. The 'Record Type' section has a dropdown menu set to 'Task'. The 'Select Fields to Map' section has a list of checkboxes: 'URL', 'Actual Completion Date', 'Actual Cost', 'Actual Duration', 'Actual Duration Minutes', and 'Actual Expense Cost', all of which are currently unchecked. The 'Work' section has a text input field containing '0'.



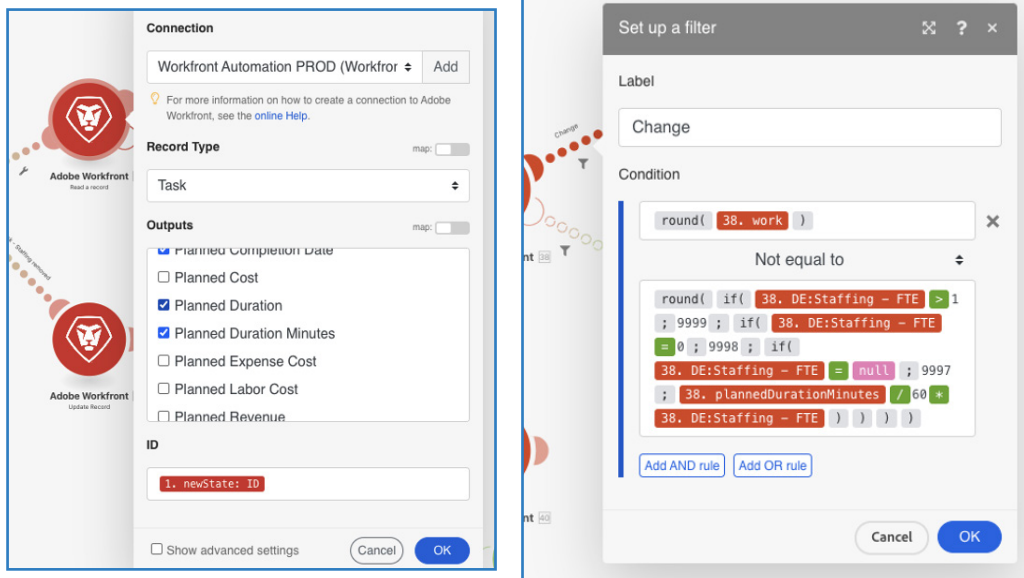
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# Automating Data Attributes - Calculate Planned Hours

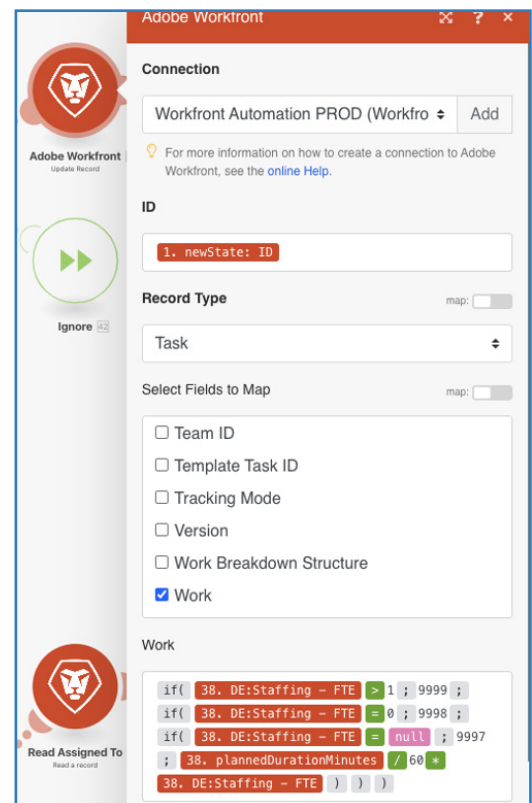
## Detailed instructions

**Step 3:** Read the task. Filter to verify that there is a change so that it doesn't update when there is no change.



**Step 4:** Identify approach for flagging erroneous data. In this example, larger number outputs are used.

- **9999:** more than 1 FTE planned for a single person
- **9998:** FTE planned = 0
- **9997:** FTE planned is blank (most common user entry error)



# Automating Data Attributes - Calculate Planned Hours

Detailed instructions

**Step 5:** Add an error handler to ignore errors where the task is deleted.

The screenshot shows a configuration dialog box for a task. It has a 'Label' field containing 'Task Deleted'. Below it is a 'Condition' section with a text input field containing '39. Error: Message'. A dropdown menu is set to 'Starts with', and another text input field contains '[404] null with primary key value(s)'. At the bottom of the condition section are two buttons: 'Add AND rule' and 'Add OR rule'. At the very bottom of the dialog are 'Cancel' and 'OK' buttons.

Final product



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# Automating Data Attributes - Manage Resource Calculated Reporting Fields

## Detailed instructions

**Step 1:** Filter for relevant tasks - in this scenario, we are filtering for softbooks or assignment changes.

Label: Softbook or Assignment Change

The fallback route. It will be used in the case where a bundle cannot continue on from the router via any other route. For more information, please see the [online Help](#).

Condition

- 1. newState: DE:Resource Softbook Not equal to 1. oldState: DE:Resource Softbook
- 1. newState: assignedToID Not equal to 1. oldState: assignedToID
- 1. newState: DE:Retrigger Not equal to 1. oldState: DE:Retrigger

**Step 2:** Filters for Assigned To exist

**Step 3:** Read Assigned To record

- ID
- Name

Label: Assigned To exists

The fallback route. It will be used in the case where a bundle cannot continue on from the router via any other route. For more information, please see the [online Help](#).

Condition

- 1. newState: assignedToID Exists

Connection: Workfront Automation PROD (Workfor) Add

Record Type: User

Outputs:  ID,  Access Level ID,  actualDeactivationDate,  Address,  Address2,  apiKeyCreateDate

ID: 1. newState: assignedToID



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# Automating Data Attributes - Manage Resource Calculated Reporting Fields

## Detailed instructions

**Step 4:** Update project fields for Resource Calculated:

- Fields are used to support reporting and queries
- Provides a single field to pull from regardless if the user is assigned or softbooked
- Used in Capacity Charts

The screenshot shows the Adobe Workfront interface for configuring a calculated reporting field. The window title is 'Adobe Workfront'. The main configuration area is titled 'Update Calc Resource F' and includes the following sections:

- Workfront Automation PROD (Workfro** with an 'Add' button.
- A help message: 'For more information on how to create a connection to Adobe Workfront, see the [online Help](#).'
- ID** field: '1. newState: ID'
- Record Type** dropdown: 'Task' (with a 'map' toggle switch).
- Select Fields to Map** section (with a 'map' toggle switch):
  - Audit Types
  - Order
  - Cap or Fixed Amount
  - Billing Record ID
  - Can Start
  - Category ID
- DE:Resource Calculated - ID** field: '46. ID'
- DE:Resource Calculated - Name** field: '46. name'
- DE:Resource Calculated - Type** dropdown: 'Assignment' (with a 'map' toggle switch).



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# Automating Data Attributes - Manage Resource Calculated Reporting Fields

## Detailed instructions

**Step 5:** Set up an Error Handler with the following conditions:

- If the task is deleted: ignore
- If the task remains - create an issue in a Workfront project for tracking Fusion errors.

*Author's Note: We use this Fusion Errors project like a helpdesk queue for non-urgent errors that need to be reviewed but should not stop a scenario.*



Issue ↕

Select Fields to Map map:

- Actual Completion Date
- Actual Cost
- Actual Start Date
- Actual Hours
- Approval Path Completion Date
- Approval Processes ID

Description

Task Changes - Staffing: Customer tag ERROR

Type: **45. Error: Type**

Message: **45. Error: Message**

Detail: **45. Error: Detail**

Log Link: <https://app.workfrontfusion.com/1308/scenarios/29629/logs/executionId>

Task: <https://oliveai.my.workfront.com/task/1.newState:ID/updates>

Name

Task Changes - Staffing: Customer tag ERROR

**now**

Project ID map:

6151f1f20017a08bbe96c4dc2b718d0d

Start typing project name



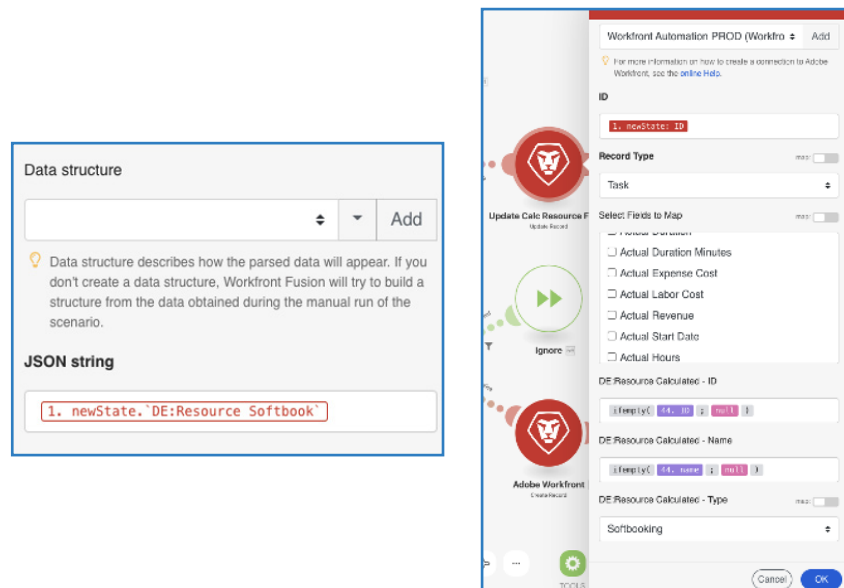
# Automating Data Attributes - Manage Resource Calculated Reporting Fields

## Detailed instructions

**Step 6:** Set up a Softbook resource by:

- Parsing the field using JSON Parse
- Updating the Calculated Resource fields
- Setting up an Error handler

**Note:** Error Handler setup follows the same procedure as outlined in Step 5.



## Final product



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# Automating Data Attributes - Company Name on Staffing Task

## Detailed instructions

**Step 1:** Read Company Name or companyID as the output. If error on Company - create an Error ticket.

**Connection**

Workfront Automation PROD (Workfror) Add

For more information on how to create a connection to Adobe Workfront, see the [online Help](#).

**Record Type** map:

Company

**Outputs** map:

- Last Updated By ID
- Name
- DE:Account - Pi Type
- DE:Account - Program Type
- DE:Account - Program Type\_archive
- DE:Account Record Type - SF

**ID**

2. companyID

**Step 2:** Filter for company name change

Set up a filter

Label

Company name update

Condition

1. newState: DE:Task - Project Company

Not equal to

52. name

Add AND rule Add OR rule



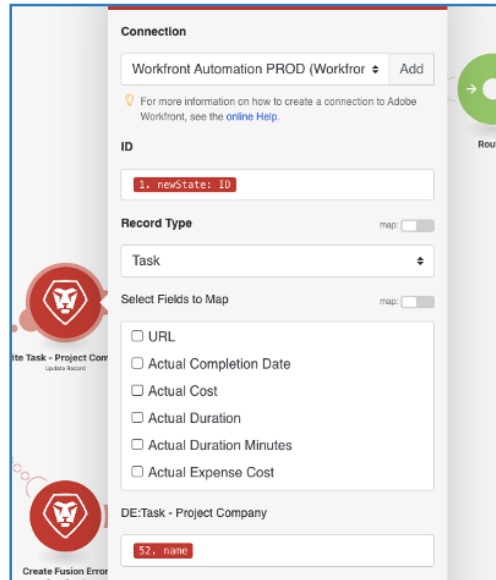
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# Automating Data Attributes - Company Name on Staffing Task

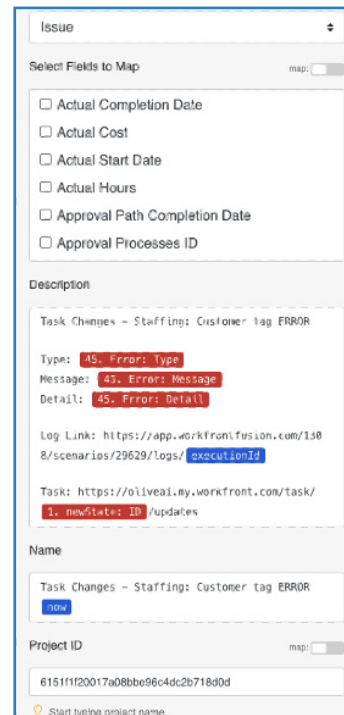
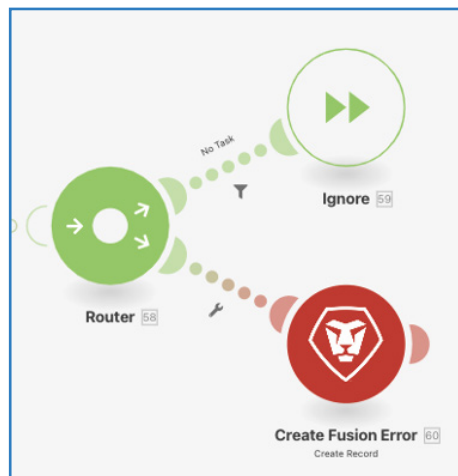
## Detailed instructions

**Step 3:** Write company name in the custom field (used for reporting on task reports since it's too many jumps for WF reports).



**Step 4:** Set up an Error Handler.

- If the task is deleted - ignore
- If the task remains - create a Fusion Error Record

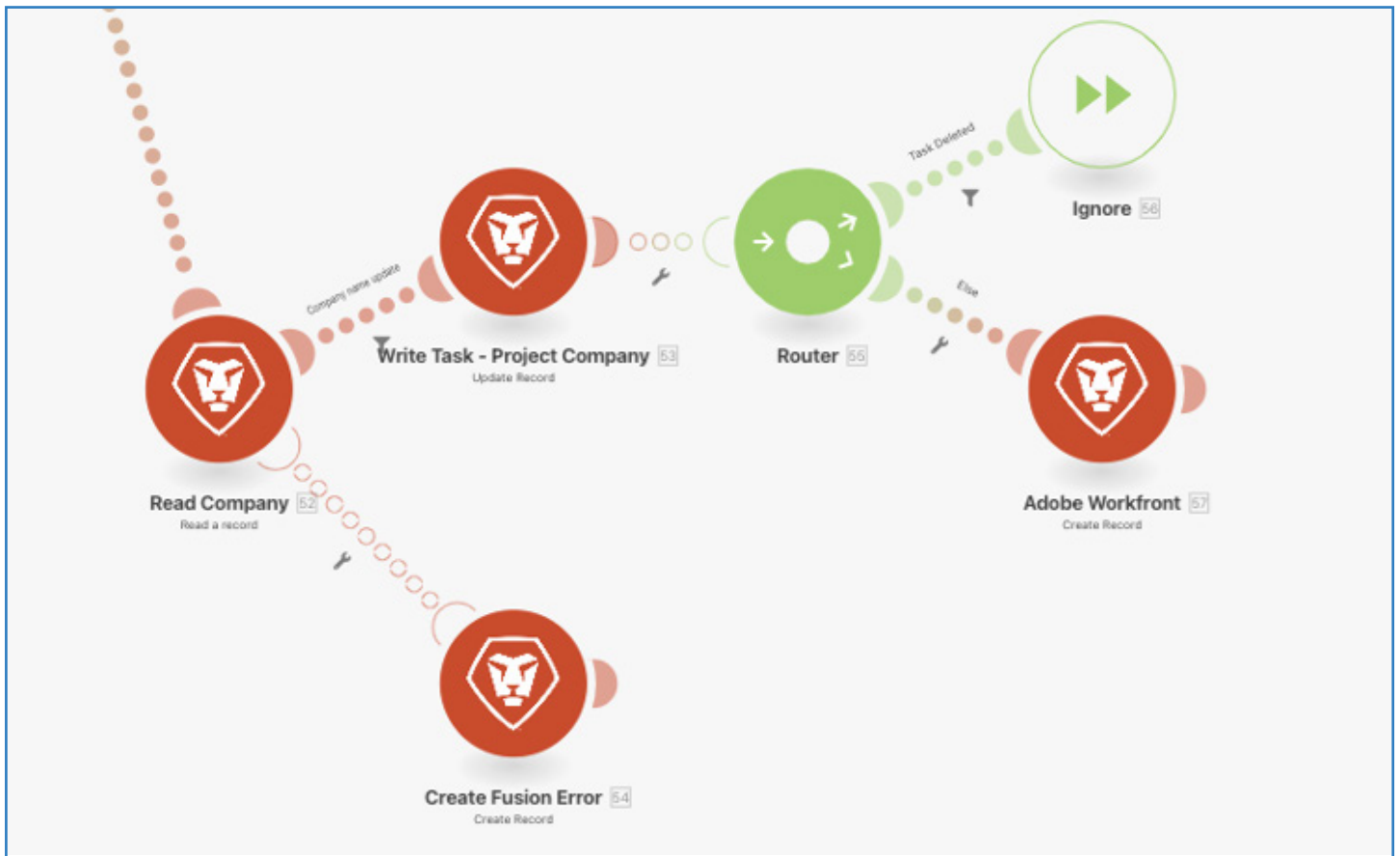


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# Automating Data Attributes - Company Name on Staffing Task

Final product



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Adobe Workfront



FUSION REPORT RECIPES

# Automating Workfront Request Approval Workflows

**Prep:** 1-3 hours

**Benefit:** Dynamically build complex request approval workflows based on custom field inputs

**Serves:** Traffic Managers, Business Requesters

**Modules:** 1 Request Custom Form with desired custom fields and calculated fields

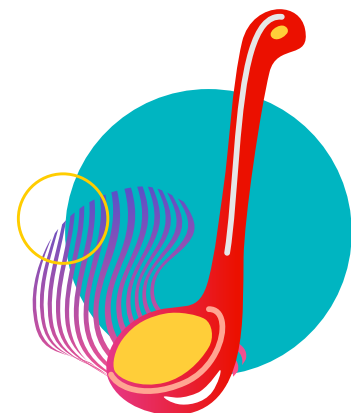
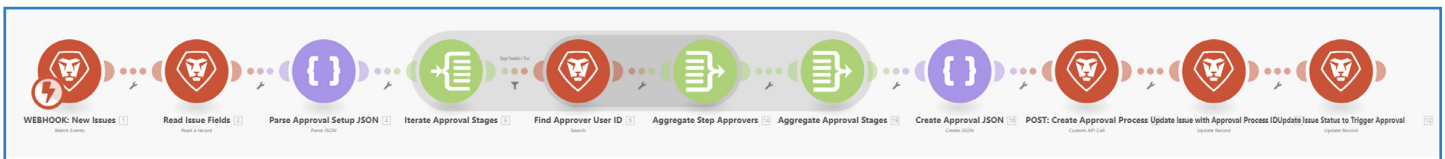
**By:** Veronica Bright



## API Modules: Adobe Workfront

TRIGGERS

Watch Events **INSTANT** **ACID**  
Watch Events



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# Automating Workfront Request Approval Workflows

## Detailed instructions

### Prep Work:

1. **Map the Approval Process(es):** Map out your business rules for the approval processes. Consider the rules as “IF / THEN” statements. For example, if a request is submitted by the “Retail” Line of Business and will cost more than \$10,000, the Marketing Director and Marketing VP for the group need to approve it.

2. **Building the Calculated Fields:** Create a custom calculated field for each possible approval stage

Use IF() statements in the field calculation to return a TRUE or FALSE value indicating if the request meets criteria to qualify for each approval stage.

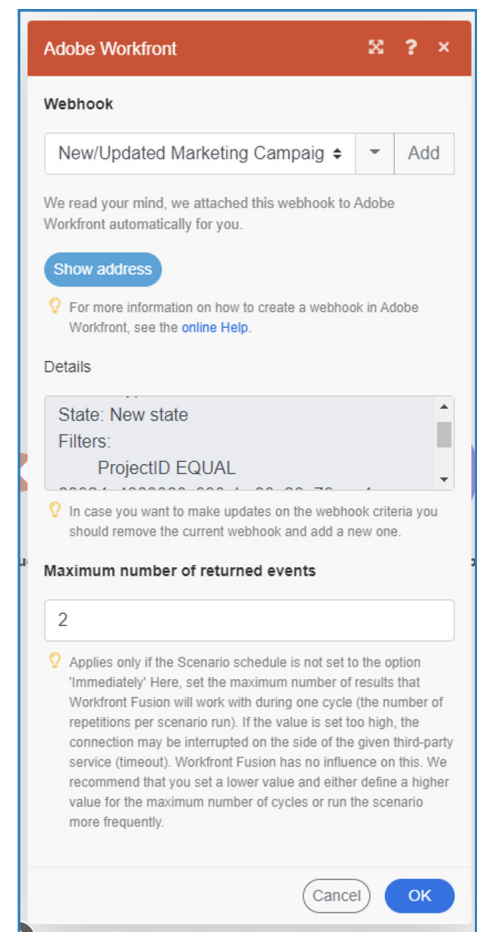
3. **Setup User Profiles:** Dynamically find the right user for each stage by assigning the user a job role and group (EX: Role = Marketing Director, Group = Retail Line of Business). When a request requires Retail Marketing Director approval, this user will be assigned the approval step. User profiles must have the correct job role and home group so they can be “Found” by the automation.

**Step 1:** Use the Watch Events Module to listen for new issues added to Workfront. If the requests will only come in from a specific request queue, include the queue project ID in the filter to limit the number of events the webhook needs to process.

- Record Type: Issue
- State: New State
- Record Origin: New Records

Exclude Updates made by Connection User.

**Pro Tip:** Use a ‘read record’ module to extract any related fields instead of mapping them from the trigger module. If you need to change the trigger module in the future, you won’t have to remap all the output fields.



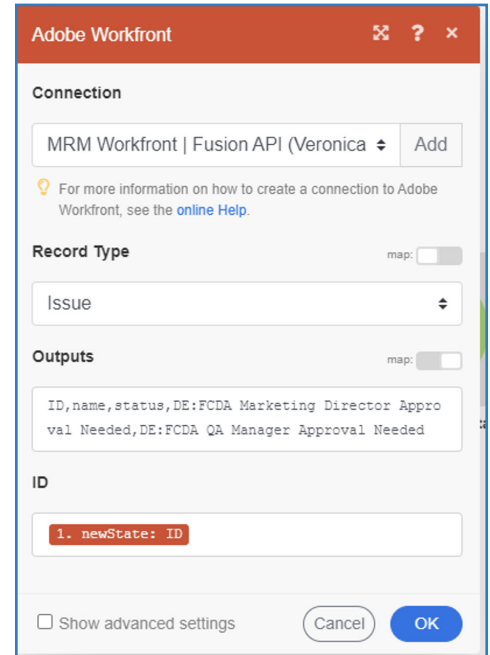
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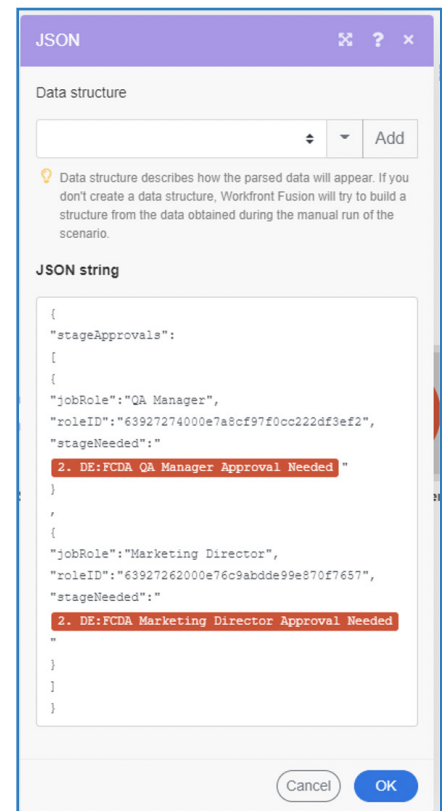
# Automating Workfront Request Approval Workflows

## Detailed instructions

**Step 2:** Add a **Read a Record** Module to read the Issue data, and extract the calculated fields indicating which stages are needed in the approval process from the custom form.



**Step 3:** Use a "Parse JSON" module to set the framework for the approval process(es). Here is where you will set the order of the approval stages (e.g. Marketing Manager reviews before Marketing VP) and use the calculated fields for each stage to indicate if the stage is required or not.



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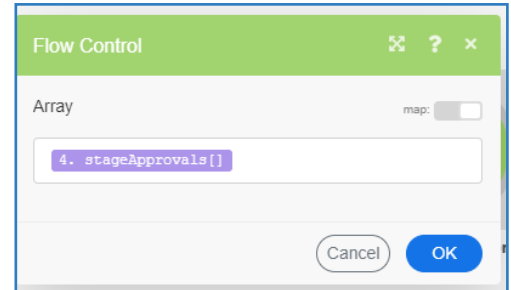
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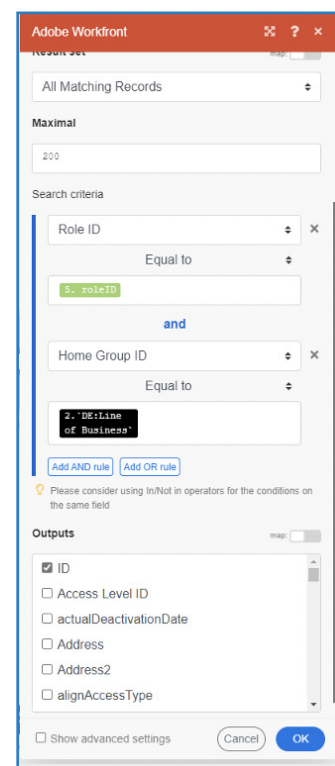
# Automating Workfront Request Approval Workflows

## Detailed instructions

**Step 4:** Add an iterator module to iterate through the array of approval stages you identified from **Step 3**.



**Step 5:** Use a Workfront search module to search for the correct user to assign to the approval stage. The parameters will be based on your business process, but using the stage “role” and Line of Business “group” IDs is a great way to make sure the right person is assigned.



**Pro Tip:** In the custom field configuration within Workfront’s UI, you can set the “value” of a drop-down field list values to a different back-end value that is passed into Fusion. For example, in our Line of Business custom field, we set the back-end value for the LOB list to match Group IDs that represent each Line of Business.

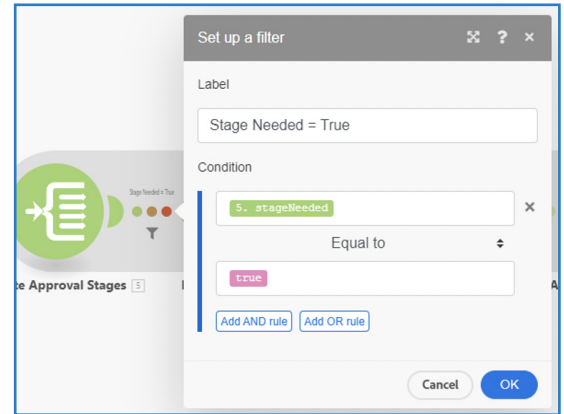
Choices	
<input checked="" type="checkbox"/> Show Values	<input type="checkbox"/> Sort Choices A-Z
Retail	61c0c4be000da68261bc14e426057103
Credit Card	61c0c4be000da68261bc14e42605710334
For Business	61c0c4be000da68261bc14e426057103w3432



# Automating Workfront Request Approval Workflows

## Detailed instructions

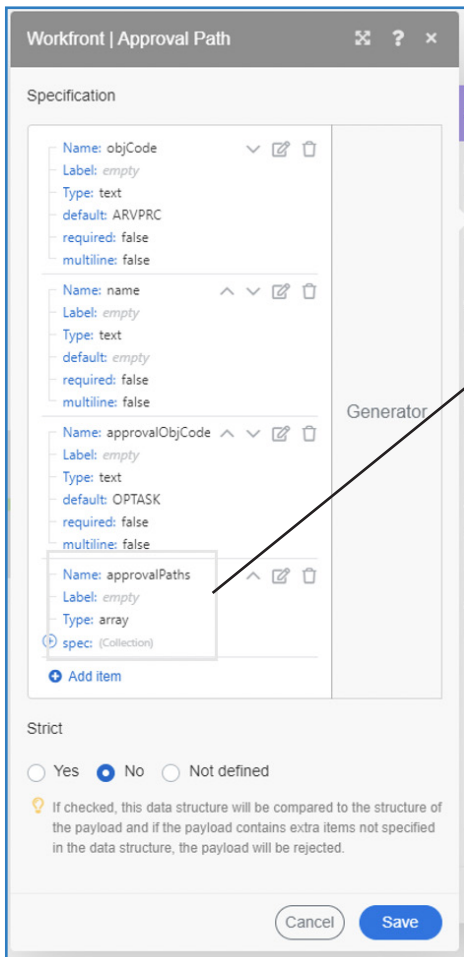
**Step 6:** Add a filter between the iterator module and the Search module in Step 5 to only filter stages where the parameter "stage required" = TRUE.



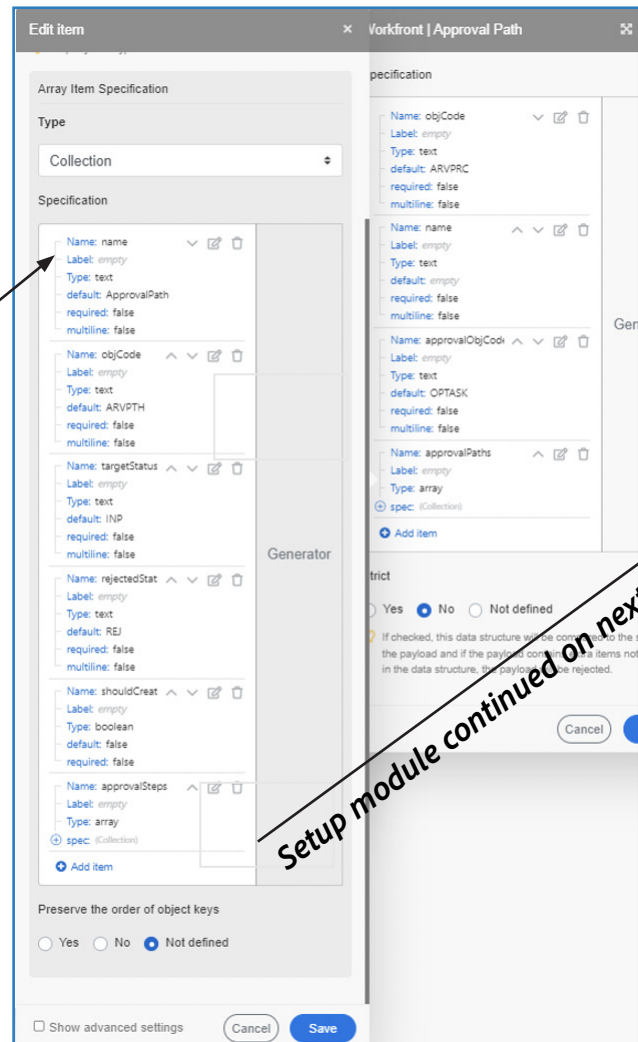
**Step 7:** Add a "Create JSON" Module with the Approval Process JSON data structure. This is a complex JSON structure with multiple complex arrays and sub-arrays.

The structure should look like this:

### 1. Top-Level Approval Inputs



### approvalPaths Array: Collection Inputs



Setup module continued on next page...



# Automating Workfront Request Approval Workflows

Detailed instructions

**Step 7 (continued):** The structure should look like this:

**approvalSteps Array: Collection Inputs**

**Edit item**

Type: Array

Property data type.

Array Item Specification

Type: Collection

Specification

- Name: objCode  
Label: empty  
Type: text  
default: empty  
required: false  
multiline: false
- Name: name  
Label: empty  
Type: text  
default: empty  
required: false  
multiline: false
- Name: approvalTyp  
Label: empty  
Type: text  
default: empty  
required: false  
multiline: false
- Name: sequenceNu  
Label: empty  
Type: text  
default: empty  
required: false  
multiline: false
- Name: stepApprovers  
Label: empty  
Type: array  
spec: (Collection)

Generator

**stepApprovers Array: Collection Inputs**

**Edit item**

Name: stepApprovers

Name of the property.

Type: Array

Property data type.

Array Item Specification

Type: Collection

Specification

- Name: userID  
Label: empty  
Type: text  
default: empty  
required: false  
multiline: false

Generator

Preserve the order of object keys

Yes  No  Not defined

Show advanced settings Cancel Save



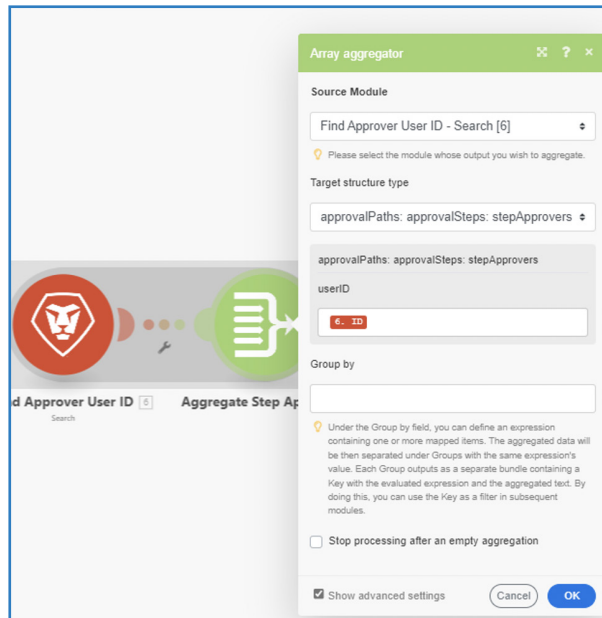
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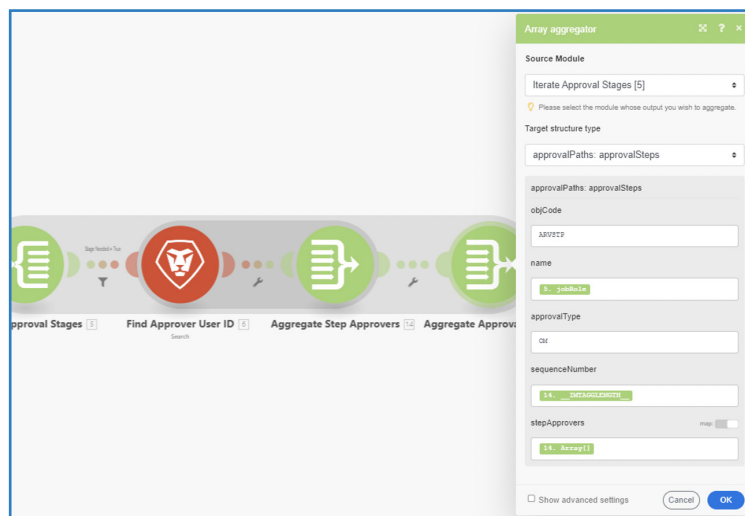
# Automating Workfront Request Approval Workflows

## Detailed instructions

**Step 8:** Add an Aggregate to Array Module BEFORE the “Create JSON” Module that you built in the previous step. Set the target structure type to approvalPaths:approvalSteps:stepApprovers from the ‘Create JSON” Module. Map the user ID from the “Search” Module into the userID field. Set the Aggregator ‘Source Module’ to the “Search” Workfront Module.



**Step 9:** Add another Array Aggregator Module BEFORE the “Create JSON” Module and AFTER the “Array Aggregator” from Step 9. Set the target structure type to approvalPaths:approvalSteps from the “Create JSON” Module. Map the output array from the stepApprover Array Aggregator into the stepApprovers field. Set the Aggregator ‘Source Module’ to the “Iterator” module.



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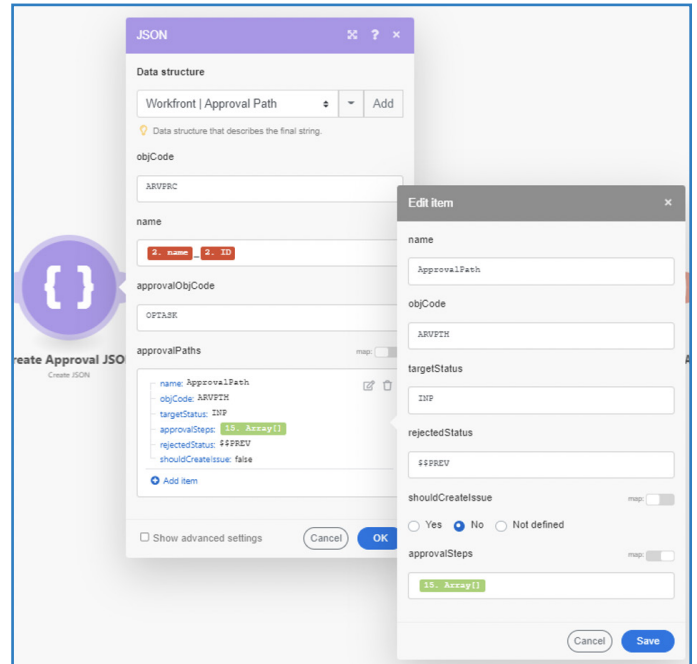
# Automating Workfront Request Approval Workflows

## Detailed instructions

**Step 10:** Update the inputs to the “Create JSON” module that you built in the previous step with the following:

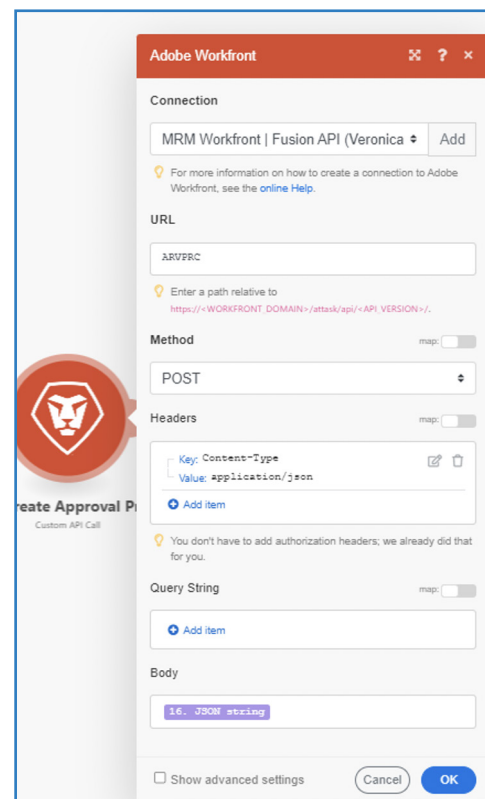
**Pro Tip:** Each approval will need a unique name, so use the “name” and “ID” from the request to set a unique name for this approval process.

Use the “map” toggle in the JSON inputs to map an array from a previous module into the array parameter.



**Step 11:** Use a Workfront “Custom API” Module to POST the ‘Create Approval JSON’ output to Workfront and create the new approval process.

**Pro Tip:** In order to map outputs from one module to another, you may need to “Run” the output module first before the output fields show up in the mapping panel. This can be tricky to get sample data to “Run” a module, so you can use the following format to map the ID from the custom API call into the Update Record modules. Replace the '11' with the number of your API Call module: `{{11.body.data.ID}}`



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# Automating Workfront Request Approval Workflows

## Detailed instructions

**Step 12:** Use an “Update Record” Workfront Module to Update the Request with the new Approval Process ID. Then use another “Update Record” Workfront Module to update the Request status to INP to trigger the approval process.

Adobe Workfront

Connection

MRM Workfront | Fusion API (Veronica) Add

For more information on how to create a connection to Adobe Workfront, see the [online Help](#).

ID

2. ID

Record Type map:

Issue

Select Fields to Map map:

- Actual Completion Date
- Actual Cost
- Actual Start Date
- Actual Hours
- Approval Path Completion Date
- Approval Processes ID

Approval Processes ID

11. body.data.ID

Cancel OK

Adobe Workfront

Connection

MRM Workfront | Fusion API (Veronica) Add

For more information on how to create a connection to Adobe Workfront, see the [online Help](#).

ID

2. ID

Record Type map:

Issue

Select Fields to Map map:

- Actual Completion Date
- Actual Cost
- Actual Start Date
- Actual Hours
- Approval Path Completion Date
- Approval Processes ID

Status map:

In Progress

Cancel OK

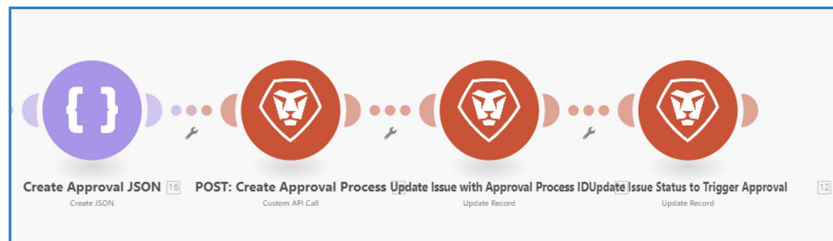
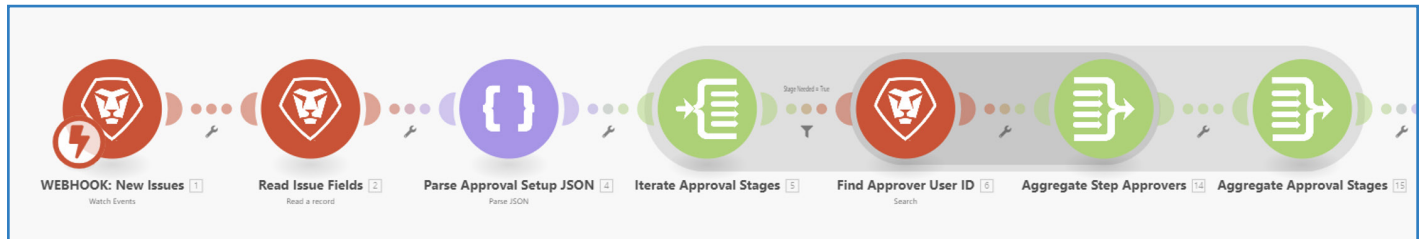


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# Automating Workfront Request Approval Workflows

Final product



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## FUSION REPORT RECIPES

# Integrate Workfront to JIRA

**Prep:** 15 minutes

**Yield:** Workfront projects represent initiatives that may need support from development teams who manage their work in Jira. The Workfront project needs to be linked to multiple Jira tickets on different backlogs, and the Jira status sync'd back to Workfront for tracking. Users can make multiple selections at the project level that automatically create the various Jira tickets needed and sync the Jira status and comments back to Workfront.

**Benefit:** Save time creating Jira tickets for dev teams to support projects in Workfront; Sync Jira data into Workfront for central tracking

**Serves:** Project Managers, Business Stakeholders, Execution/ Development Teams

**Modules:** Adobe Workfront, JIRA Cloud

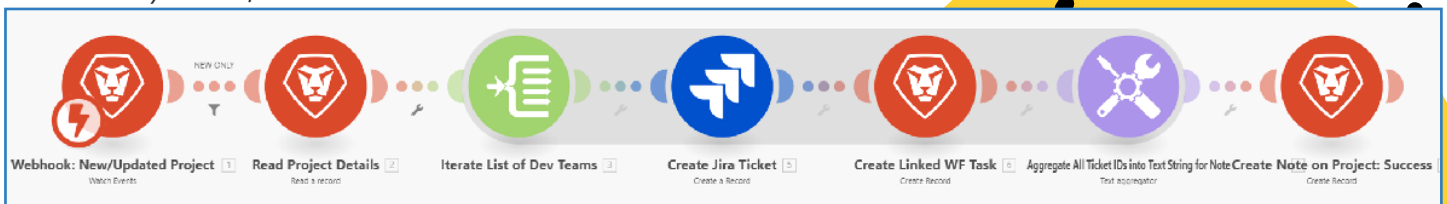


TRIGGERS

Watch Events **INSTANT** **ACID**

Watch Events

Scenario #1 - Sync Workfront to JIRA



Scenario #2 - Sync JIRA to Workfront



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# Integrate Workfront to JIRA

## Scenario #1 - Sync Workfront to JIRA

### Detailed instructions

**Step 1:** Use the Watch Events Module to listen for new/updated Projects in Workfront

- Record Type: Project
- State: New State
- Record Origin: New and Updated Records

**Pro Tip:** To create multiple routes that ONLY proceed when a specific field has been updated, compare the newState value to the oldState value from the trigger module in a filter and only proceed if the values do not match.

**Step 2:** Add a Read a Record Module to read the project data, and extract the necessary fields from the Project custom form.

The screenshot shows the 'Add a hook' configuration window. The 'Webhook name' field is set to 'New/Updated Project'. The 'Connection' is 'MRM Workfront | Fusion API (Veronica)'. The 'Record Type' is 'Project'. The 'State' is 'New state'. The 'Events filters' section has two empty input fields and a dropdown menu set to 'Equals'. The 'Record Origin' is 'New and Updated Records'. There are 'Cancel' and 'Save' buttons at the bottom right.

The screenshot shows the 'Adobe Workfront' configuration window. The 'Connection' is 'MRM Workfront | Fusion API (Veronica)'. The 'Record Type' is 'Project'. The 'Outputs' section has a list of checkboxes: 'BC Completion State', 'ID' (checked), 'URL', 'Actual Benefit', 'Actual Completion Date', and 'Actual Duration Minutes'. The 'ID' field contains '1. newState: ID'. There are 'Cancel' and 'OK' buttons at the bottom right.



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# Integrate Workfront to JIRA

## Scenario #1 - Sync Workfront to JIRA

### Detailed instructions

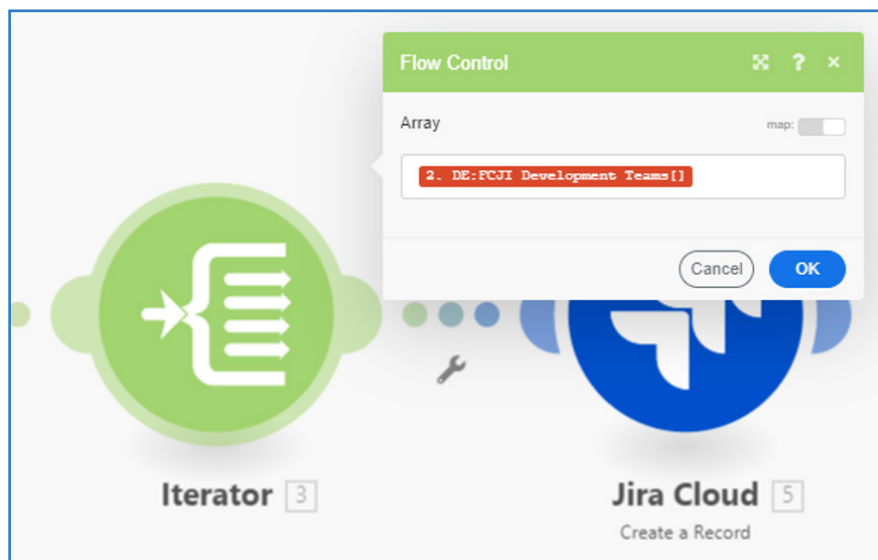
**Step 3:** Add a filter between the trigger module and the Read Record module so only NEW projects will continue through the scenario.

The screenshot shows a 'Set up a filter' dialog box. It has a title bar with a close button and a help icon. The 'Label' field contains the text 'NEW ONLY'. Below that, the 'Condition' section is active, showing a dropdown menu with '1. eventType' selected, followed by 'Equal to' and a text input field containing 'CREATE'. At the bottom of the condition section are two buttons: 'Add AND rule' and 'Add OR rule'. At the very bottom of the dialog are 'Cancel' and 'OK' buttons.

**Pro Tip:** Jira Cloud requires a user's "account ID" as a required value in the 'Reporter' field when creating an issue.

You could set a default reporter by entering the ID of the service user, or create a mapping table using a data store.

**Step 4:** Use an iterator on the multi-select custom field(s) to process the list of tickets that are needed. In this case, only the 'Development Teams' custom field will drive the tickets that are created.



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# Integrate Workfront to JIRA

## Scenario #1 - Sync Workfront to JIRA

### Detailed instructions

**Step 5:** Use the “Create Record” Jira module to create the Jira issue. To create a ticket on each team’s Jira project, use a switch() function to switch the project ID based on the development team that will work on the ticket.

**Pro Tip:** Always include the custom form ID, AKA the “Category ID” when updating custom fields on Workfront objects

**Step 6:** Use a “Create Record” Module to create a linked task on the originating Workfront Project where the Jira status and comments can be tracked. The Jira Key can be captured in a custom field or in the Workfront system field ‘External Reference ID’

The screenshot shows the 'Jira Cloud' configuration window. It includes a 'Connection' dropdown set to 'Accenture | Jira Cloud Sandbox', a 'Record Type' dropdown set to 'Issue', and a 'Project' dropdown with a complex switch function: `switch(3: Value ; QA ; 10000:DE ; Front of Site ; 10000:DE ; Back of Site ; 10000:DE ; App Development ; 10000:DE ; eCommerce ; 10000:DE )`. The 'Issue Type' dropdown is set to 'Task'. There is also an 'Assignee' field at the bottom.

The screenshot shows the 'Adobe Workfront' configuration window. It includes a 'Record Type' dropdown set to 'Task', a 'Select Fields to Map' section with 'Description' checked, a 'Category ID' field, a 'Description' field containing a Jira URL: `https://accentureadobebusinessgroup.atlassian.net/browse/5.key`, an 'External Reference ID' field with '5.key', a 'Name' field with '3: Value', a 'Project ID' field with '2: ID', and a 'DE Jira Key' field with '5.key'. There are 'Cancel' and 'OK' buttons at the bottom.



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# Integrate Workfront to JIRA

## Scenario #1 - Sync Workfront to JIRA

### Detailed instructions

**Step 7:** Use a text aggregator to aggregate all the Jira ticket keys into a text string, and aggregate the iterator bundles into a single bundle for the final step. Use a “New Row” as the Row Separator for Readability.

**Pro Tip:** To make this scenario more robust, add a router to the beginning of the scenario and have Fusion complete different steps when a NEW project is being “Created” or an EXISTING project is being “Updated”

**Step 8:** Use the “Create Record” Module to create a Note on the project informing the project owner that the Jira tickets are complete.

The screenshot shows the 'Tools' dialog box in Fusion. The 'Source Module' is set to 'Iterator [3]'. The 'Row separator' is set to 'New row'. The 'Group by' field is empty. A text field contains the expression '3. Value | Jira Key | 5. key'. The 'Show advanced settings' checkbox is checked. Buttons for 'Cancel' and 'OK' are at the bottom right.

The screenshot shows the 'Adobe Workfront' dialog box. The 'Connection' is 'MRM Workfront | Fusion API (Veronica)'. The 'Record Type' is 'Note'. The 'Select Fields to Map' section has several checkboxes, with 'attachWorkID' and 'attachWorkObjCode' selected. The 'Note ObjCode' field contains 'PROJ'. The 'Note Text' field contains 'Your Jira Tickets are Ready!'. The 'ObjID' field contains '2. ID'. The 'Project ID' field contains '2. ID'. Buttons for 'Cancel' and 'OK' are at the bottom right.



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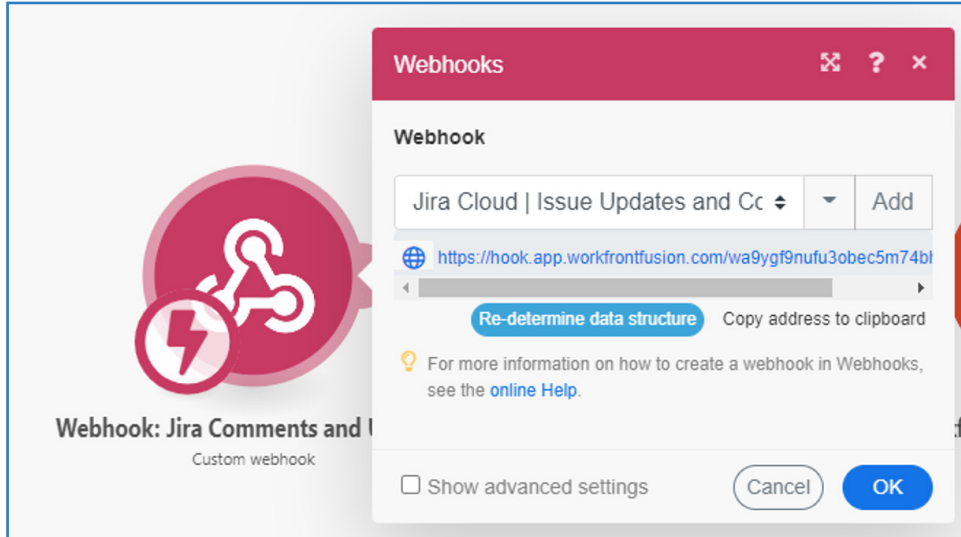
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# Integrate Workfront to JIRA

Scenario #2 - Sync JIRA to Workfront

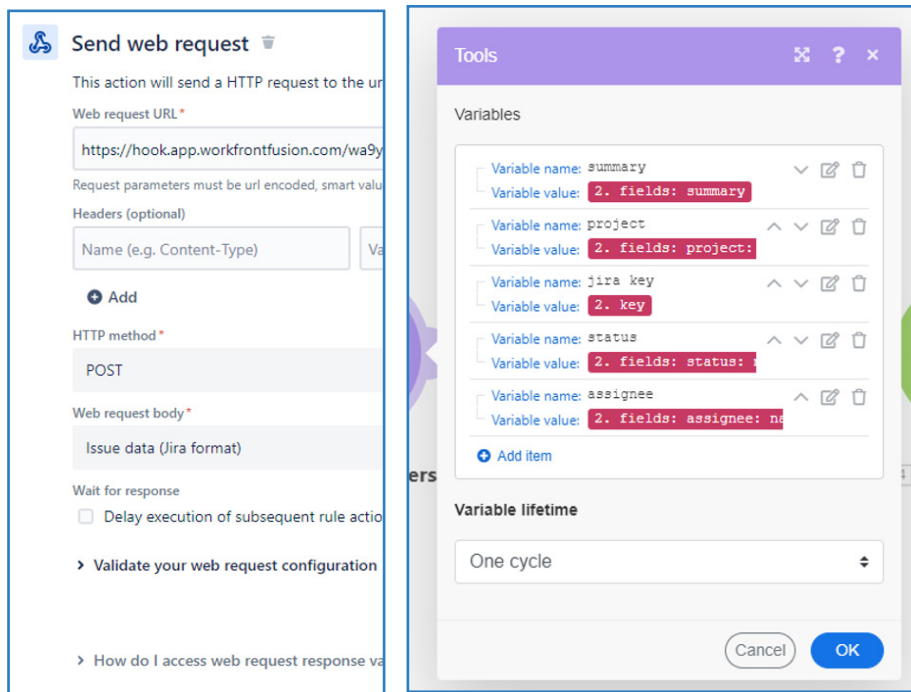
## Detailed instructions

**Step 1:** Use a webhook module to capture the data feed from JIRA.



**Pro Tip:** You can use the same webhook URL to configure the Jira data feed from multiple Jira projects AND for multiple Jira trigger events (New Comments, Updated Issues, Assigned Issues, etc.) to reduce the number of redundant scenarios.

**Step 2:** Use a set variable module to set the JIRA Issue parameters from the Webhook. When configuring the automation settings in Jira, select "Issue Data" in the Web Request Body.

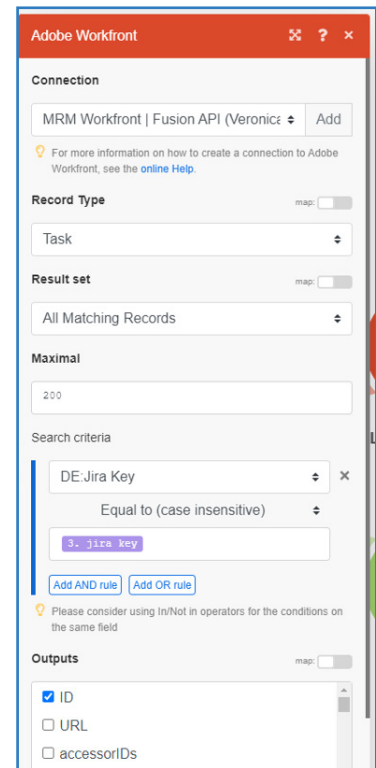


# Integrate Workfront to JIRA

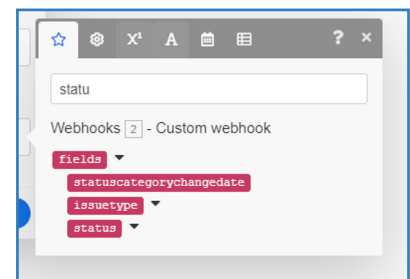
## Scenario #2 - Sync JIRA to Workfront

### Detailed instructions

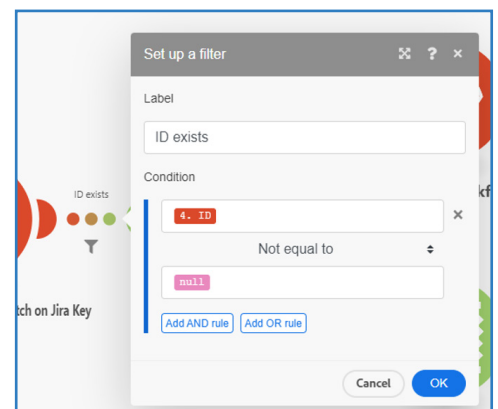
**Step 3:** Use a Workfront Search module to search for Workfront tasks where the DE:Jira Issue Key (or whichever field you set the Issue Key to populate from Scenario #1) = Issue Key from JIRA.



**Pro Tip:** Use the search bar in the mapping panel to quickly find and map fields from previous modules.



**Step 4:** Add a router, then before the router add a filter to only proceed if a matching task record is found from the Search module.



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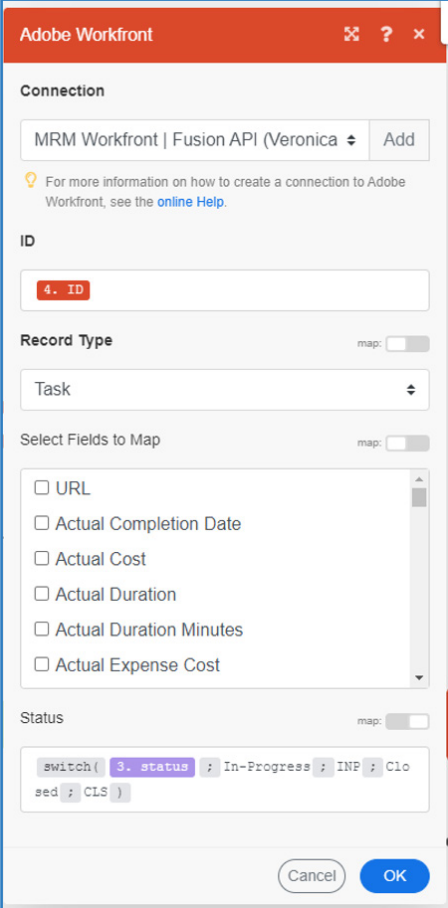
# Integrate Workfront to JIRA

## Scenario #2 - Sync JIRA to Workfront

### Detailed instructions

**Step 5:** Add an “Update Record” Workfront module to the first route of the router. Map the fields from the Jira ticket that should be updated in Workfront.

**Pro Tip:** Use a “Switch” function to swap the Jira status for the Workfront task status code in the field mapping

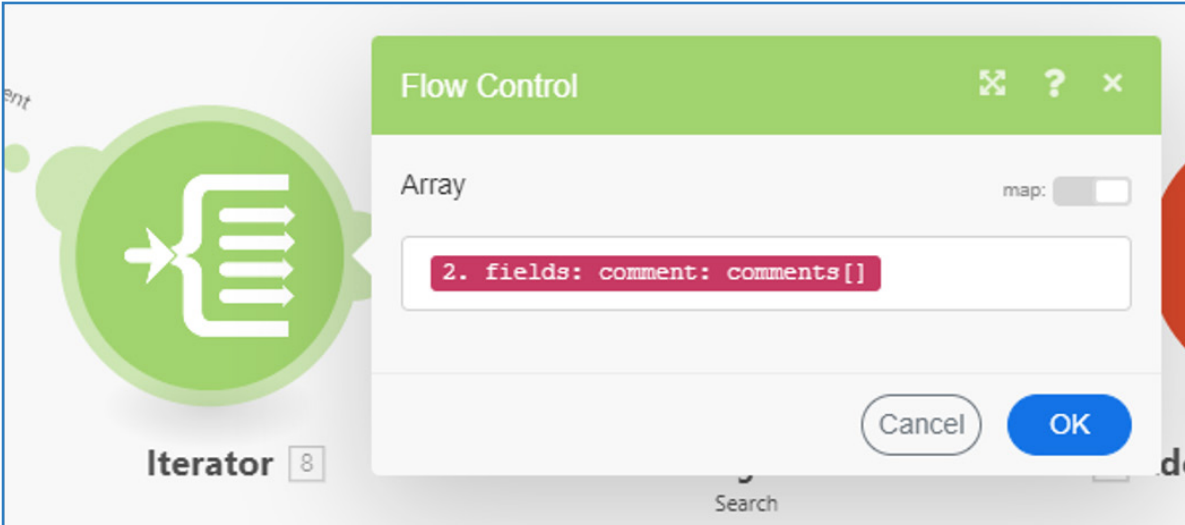


The screenshot shows the configuration window for an "Update Record" module in Adobe Workfront. The window has a red header with the text "Adobe Workfront" and icons for help and close. The configuration is as follows:

- Connection:** A dropdown menu shows "MRM Workfront | Fusion API (Veronica)" with an "Add" button next to it. Below this is a link: "For more information on how to create a connection to Adobe Workfront, see the [online Help](#)."
- ID:** A text input field contains "4. ID".
- Record Type:** A dropdown menu shows "Task".
- Select Fields to Map:** A list of checkboxes with the following labels: URL, Actual Completion Date, Actual Cost, Actual Duration, Actual Duration Minutes, and Actual Expense Cost. All are currently unchecked.
- Status:** A text input field contains a switch function: `switch( 3. status ; In-Progress ; INP ; Closed ; CLS )`.

At the bottom right, there are "Cancel" and "OK" buttons.

**Step 6:** Add an Iterator Module to the second route of the router, and map the “Comments []” array from the webhook into the iterator.



The screenshot shows the configuration window for an "Iterator" module in Adobe Workfront. The window has a green header with the text "Flow Control" and icons for help and close. The configuration is as follows:

- Array:** A text input field contains the JSON path: `2. fields: comment: comments[]`.

At the bottom right, there are "Cancel" and "OK" buttons.



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# Integrate Workfront to JIRA

## Scenario #2 - Sync JIRA to Workfront

### Detailed instructions

**Step 7:** Add a “Search” Workfront module after the iterator to search for Notes where the ‘External Reference ID’ equals the Jira Comment ID.

**Pro Tip:** When using Workfront search modules (and most other application’s search modules), make sure to select at least one output field or you will receive an error

**Step 8:** Add a “Create Record” Module to create a new Note with the Jira Comment inputs. Make sure to set the ‘External Reference ID’ value on the Workfront Note with the Comment ID from Jira so it doesn’t get duplicated.

The screenshot shows the configuration for a Search module in Adobe Workfront. The connection is set to 'MRM Workfront | Fusion API (Veronic: ...)'. The Record Type is 'Note' and the Result set is 'All Matching Records'. The Maximal value is set to 200. The search criteria is 'External Reference ID' equal to '8. id'. There are buttons for 'Add AND rule' and 'Add OR rule'. The Outputs section has 'ID' selected.

The screenshot shows the configuration for a Create Record module in Adobe Workfront. The Record Type is 'Note'. The Select Fields to Map section has several options, but none are checked. The External Reference ID is set to '8. id'. The Note ObjCode is 'TASK'. The Note Text is '[IMPORTED FROM JIRA]: 3. commenter name SAID' followed by '3. comment text'. The ObjID is '4. ID'. The Task ID is '4. ID'. There are 'Cancel' and 'OK' buttons at the bottom.



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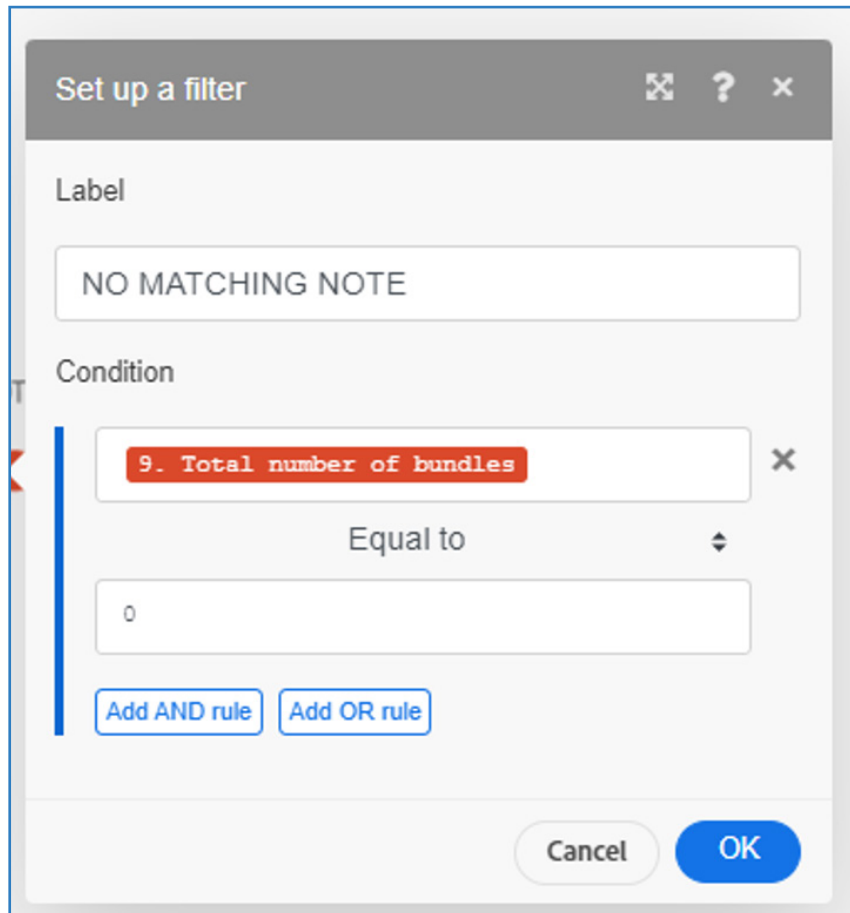


# Integrate Workfront to JIRA

Scenario #2 - Sync JIRA to Workfront

## Detailed instructions

**Step 9:** Add a filter between the Note "Search" and the Note "Create Record" module so a note is only created when there is not already an existing note.



The screenshot shows a "Set up a filter" dialog box. The "Label" field contains "NO MATCHING NOTE". The "Condition" section is configured with the field "9. Total number of bundles", the operator "Equal to", and the value "0". There are buttons for "Add AND rule" and "Add OR rule" below the condition. At the bottom of the dialog are "Cancel" and "OK" buttons.

**Pro Tip:** When setting conditions in filters, make sure you are using the correct data type operator (array, text, date, etc.) to avoid the filter inadvertently blocking records from passing through



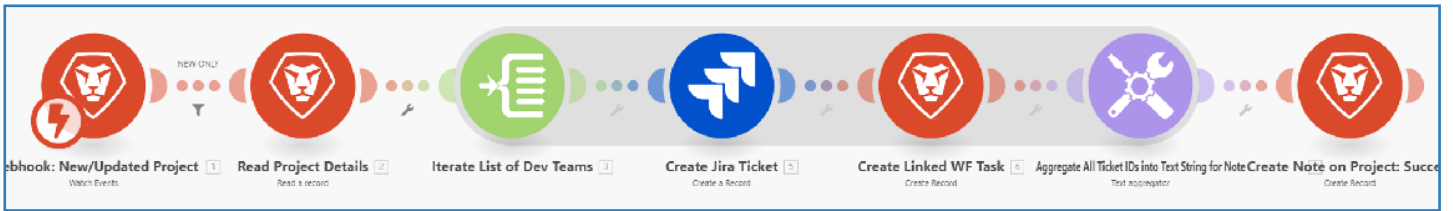
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# Integrate Workfront to JIRA

## Final product

Scenario #1 - Sync Workfront to JIRA



Scenario #2 - Sync JIRA to Workfront



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# That's a wrap for the Fusion Cookbook!

We hope you enjoyed these recipes and look forward to seeing you try them in your own kitchens.



## Questions or Feedback?

*Let us know in the comment section below, and be sure to tag the recipe author or Community Manager!*



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