Adobe Workfront

Foundations of Operational Reporting - Kick-Start Reports

The Dashboard shown during the webinar and the Reports within are generic and meant to spark your own ideas. Since the webinar, I've refined the Reports slightly to make them even more generic, outlined changes that I made, and added adjustment suggestions below.

Worker Dashboard Reports
- Renamed in the Kick-Start
  - *[name your Dashboard here]*
- Purpose
  - Add this Report object Report to a Dashboard to collect the descriptions for the Reports within
- What you need to adjust
  - The filter is empty, so you'll need to add this to the filter: **Report >> ID equal [add each of your Reports included in the Dashboard]**
  - The expectation within the Report's description

My Upcoming Tasks - Worker
- Renamed in the Kick-Start
  - *My Upcoming Tasks - 2 Weeks*
- Purpose
  - This Report shows incomplete Tasks which should start in the next two weeks for the user viewing the Report. Tasks that can start have green within the Actual date fields.
- What you need to adjust
  - The expectation within the Report's description
  - Additional applicable columns, especially for custom fields

Notes I'm Tagged In
- Purpose
  - The My Updates area is more interactive functionality that collects all of your mentions (and approvals!), but for those that prefer a Report on a Dashboard, this Report shows Updates where the user viewing the Report was tagged on Projects, Tasks, Issues (and associated Documents) that are not in specific statuses. Note that this Report will bring in all Updates made on all objects, but only a column for Project is provided.
- What you need to adjust
  - The expectation within the Report's description

o   The filter is in text mode and looks for Projects, Issues, Tasks that are not in particular statuses that have tags for the user viewing the Report. For example, the first 2 lines of text mode looks for Issues that are NOT IN statuses that equate with Closed (CLS) or On Hold (ONH). You'll need to know what your status keys are (via Setup > Project Preferences > Statuses) in order to make changes to the text mode. Change the highlighted status keys below as appropriate and paste the full text mode into the filter.

OR:1:opTask:statusEquatesWith=CLS ONH
OR:1:opTask:statusEquatesWith_Mod=notin
OR:1:tags:userID=$$USER.ID
OR:1:tags:userID_Mod=cicontains
OR:2:Project:statusEquatesWith=CPL DED ONH REJ
OR:2:Project:statusEquatesWith_Mod=notin
OR:2:tags:userID=$$USER.ID
OR:2:tags:userID_Mod=cicontains
tags:userID=$$USER.ID
tags:userID_Mod=cicontains
Task:statusEquatesWith=CPL
Task:statusEquatesWith_Mod=notin

Incomplete Tasks in the Past

- Purpose
    - o   This Report shows incomplete Tasks with Planned Completion dates in the past for the user viewing the Report. The conditional formatting is red in the Actual dates for Tasks that can start.
- What you need to adjust
    - o   The expectation within the Report's description

My Task Calendar

While this isn't a Report that can be imported using a Kick-Start, here are instructions to build a simple Task Calendar for the user viewing it. Note that you can add any Calendar you've already created to a Dashboard, but this is what was shown in the webinar.

1. Use the instructions from the **Set up group of items** section this article on Workfront One: Use Planned Dates in a calendar Report

2. Now that you have a Calendar, click **Add to Calendar** and add items using the screenshot below:

3. Click **Save**.

How to Kick-Start the Reports into your instance

1. Download the .zip attached to the post: **Reports.zip.**
2. Navigate to **Setup > System > Import Data (Kick-Starts)**.
3. Click **Choose File**.
4. In the popup, find **Reports.zip** that you just downloaded onto your machine.
5. Click **Open**.

7. Back in the Workfront Setup area, you'll see the .zip filename next to the **Choose File** button. Click the blue **Upload** button.
8. You'll receive a message stating that 4 Reports were successfully imported.
9. The Reports will be available in the Report area with the following names:
    a. *[name your Dashboard here]*
    b. *Notes I'm Tagged In*
    c. *My Upcoming Tasks – Next 2 Weeks*
    d. *Incomplete Tasks in the Past*