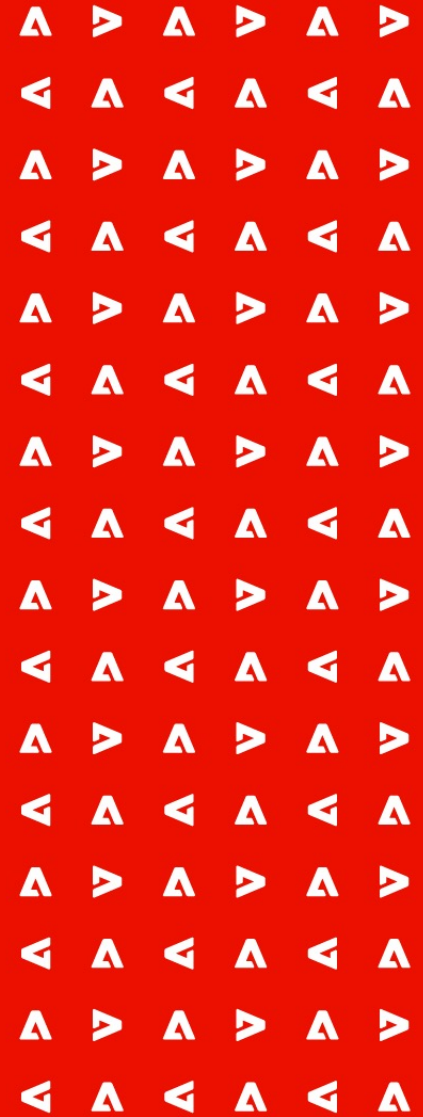




# Adobe Workfront Virtual User Group

Leveraging Custom Forms  
Tuesday, August 31, 2021



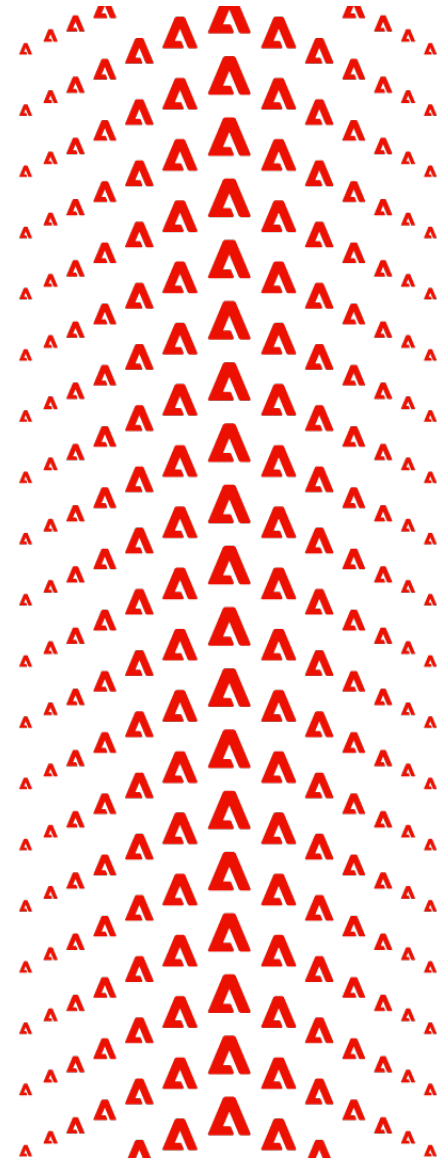
## Today's host



Kristin Farwell

Sr. Manager, Customer Marketing

Adobe Workfront



This session is being recorded  
and will be made available to  
customers after the event.

## Say hello!

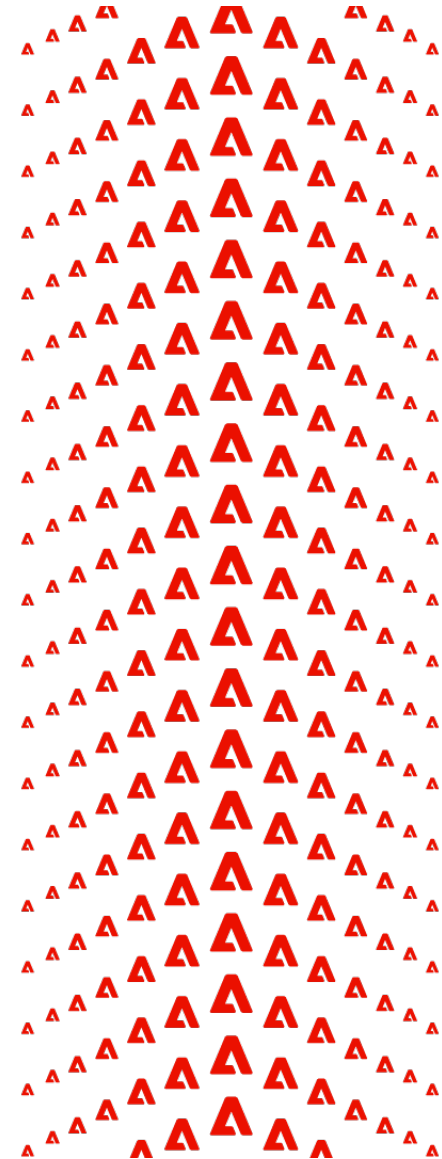
Type into chat:

- Your company, role and location
- What do you hope to take away from today?
- What would you be if you grew up to be what you wanted to when you were a kid?



# Agenda (Pacific)

Time	Topic
8:00 a.m.	Welcome and agenda
8:10 a.m.	<b>Leveraging Custom Forms</b> <i>Betsy West, Learning Program Manager, Adobe Workfront</i>
8:40 a.m.	Group discussion
8:55 a.m.	Wrap-up and next steps
9:00 a.m.	Meetup ends



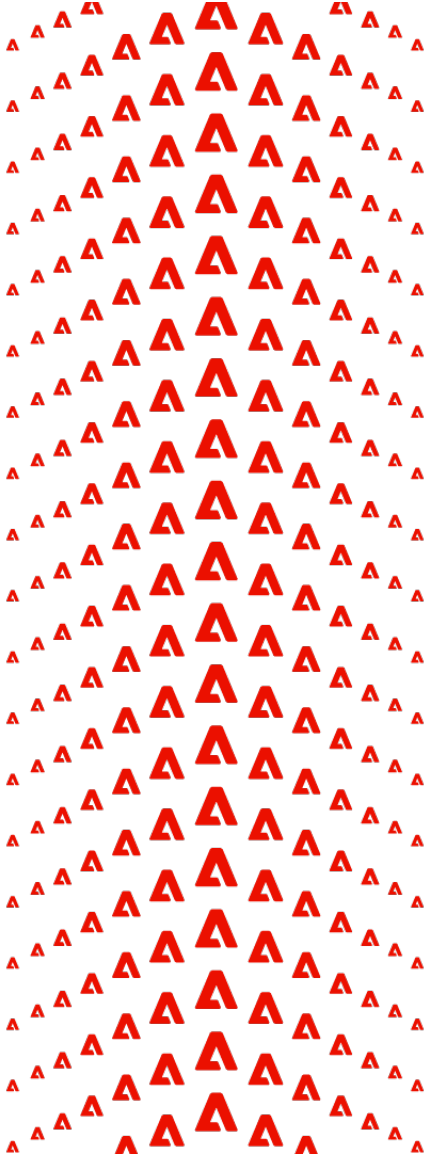
# Presenter



**Betsey West**

Learning Program Manager

Adobe Workfront



**Found all the fields you need in Workfront?**



# What is a custom form and what does it do?

A virtual way to capture unique data specific to your organization.

## Additional Request Information

This form is to gather the details needed in order to fulfill your request. Any information that is missing will make it more difficult to complete the request to your specifications or wishes. If you have additional questions about what we need to complete the request, please click the link provided to access our discussions page.

[Training Discussion Page \(Submit questions here\)](#)

### Purpose of Request

Fulfill contract training for large customer

### Request Considerations

Custom Training Project

### Unique or Unusual Assignment

Yes  No

If this is a Unique or Unusual Assignment what do you need to accomplish this task?

They want to do 1/2 virtual and 1/2 on site training at different sites at different times throughout the year. They are pre-paying for everything up front along with documentation. They would like the

### Custom Training

#### Custom Ed Checklist

Project been created in Hub  Travel Arrangements made  Primary Point of Contact designated



# Product Project Form

Case Study Environment Username

Assigned Test Drive Username

Assigned Test Drive Password

How many test drives requested?

Purpose of Project

What is the product being worked on/updated?

Expected Delivery Date

Team or teams involved with project

# Product Project Form

Case Study Environment Username

Assigned Test Drive Username

**All test drives MUST have the same password: PassWord0001**

How many test drives requested?

Purpose of Project

What is the product being worked on/updated?

Expected Delivery Date

Team or teams involved with project

- |  |  |                                  |
|--|--|----------------------------------|
| <input type="checkbox"/> Finance           | <input type="checkbox"/> Operations            | <input type="checkbox"/> Product |
| <input type="checkbox"/> Product Marketing | <input type="checkbox"/> Professional Services | <input type="checkbox"/> Sales   |
| <input type="checkbox"/> Support           | <input type="checkbox"/> Training              | <input type="checkbox"/> Other   |

# Custom Form Logics and Custom Fields

# Custom Form Logics

Purpose of Project

What is the product being worked on/updated?  
**-- Select --**

Expected Delivery Date

Team or teams involved with project

<input type="checkbox"/> Finance	<input type="checkbox"/> Operations	<input type="checkbox"/> Product
<input type="checkbox"/> Product Marketing	<input type="checkbox"/> Professional Services	<input type="checkbox"/> Sales
<input type="checkbox"/> Support	<input type="checkbox"/> Training	<input type="checkbox"/> Other

**Test Drive Information**

Test Environment Needed?  
 Yes  No

Purpose of Project

What is the product being worked on/updated?  
**-- Select --**

Expected Delivery Date

Team or teams involved with project

<input type="checkbox"/> Finance	<input type="checkbox"/> Operations	<input type="checkbox"/> Product
<input checked="" type="checkbox"/> Product Marketing	<input type="checkbox"/> Professional Services	<input type="checkbox"/> Sales
<input type="checkbox"/> Support	<input type="checkbox"/> Training	<input type="checkbox"/> Other

**Product Marketing**

Name of campaign - Code number

Media Type

Event related?  
 Yes  No

Virtual or On Site  
 Virtual  On Site

**Test Drive Information**

Test Environment Needed?

Purpose of Project

What is the product being worked on/updated?  
**-- Select --**

Expected Delivery Date

Team or teams involved with project

<input type="checkbox"/> Finance	<input type="checkbox"/> Operations	<input checked="" type="checkbox"/> Product
<input checked="" type="checkbox"/> Product Marketing	<input type="checkbox"/> Professional Services	<input type="checkbox"/> Sales
<input type="checkbox"/> Support	<input type="checkbox"/> Training	<input type="checkbox"/> Other

**Product Marketing**

Name of campaign - Code number

Media Type

Event related?  
 Yes  No

Virtual or On Site  
 Virtual  On Site

**Product**

Production budget

Test Drive Domain

Media Type

-- Select --

Event related?

Yes  No



Virtual or On Site

Virtual  On Site



On Site Address

[Empty text input field]

# Custom Fields

Virtual or On Site  
 Virtual  On Site

On Site Address

Team or teams involved with project

<input type="checkbox"/> Finance	<input type="checkbox"/> Operations	<input checked="" type="checkbox"/> Product
<input checked="" type="checkbox"/> Product Marketing	<input type="checkbox"/> Professional Services	<input type="checkbox"/> Sales
<input type="checkbox"/> Support	<input checked="" type="checkbox"/> Training	<input type="checkbox"/> Other

Event related?  
 Yes  No

Virtual or On Site  
 Virtual  On Site

# Custom Fields

Field settings configuration interface for a custom field named "Pipeline Revenue Recognized".

**Field settings**

- Label (Required)**: Pipeline Revenue Recognized
- Name (Required)**: Pipeline Revenue Recognized
- Instructions**: IF(Status="CUR",ROUND((Planned Revenue\*.8),2),IF(Status="DED",ROUND((Planned Revenue\*0),2),IF(Status="ONH",ROUND((Planned
- Format**: Text
- Additional settings**
  - Calculation**: IF(Status="CUR",ROUND((Planned Revenue\*.8),2),IF(Status="DED",ROUND((Planned Revenue\*0),2),IF(Status="ONH",ROUND((Planned
  - Expressions (Double-click to add to calculation.)**: Type to filter items...

**Additional Project Info**

Purpose of Project

Pipeline Revenue Recognized ?  
12345

IF(Status="CUR",ROUND((Planned Revenue\*.8),2),IF(Status="DED",ROUND((Planned Revenue\*0),2),IF(Status="ONH",ROUND((Planned Revenue\*.7),2),IF(Status="PLN",ROUND((Planned Revenue\*.7),2),IF(Status="CPL",ROUND((Planned Revenue\*1),2),IF(Status="REQ",ROUND((Planned Revenue\*.2),2),IF(Status="APR",ROUND((Planned Revenue\*.5),2),IF(Status="REJ",ROUND((Planned Revenue\*0),2),IF(Status="IDA",ROUND((Planned Revenue\*.1),2))))))))))

# Days to Completion

WEEKDAYDIFF(Actual Start Date,Actual Completion Date)

REPORT All Tasks Report Actions ▾ As of Aug 30, 2021 10:30 pm Mountain Daylight Time

Details

Export ▾ Filter: All incomplet... ▾ View: Planned Dura... ▾ Grouping: Nothing ▾

<input type="checkbox"/> Task Name	Assignments	Duration	Days to Completion	Predecessors	Start On	Due On	% Complete
<input type="checkbox"/> NWE - Training content		60 Days	29		7/21/21	10/12/21	100%
<input type="checkbox"/> Rebrand existing training content		60 Days	29		7/21/21	10/12/21	100%
<input type="checkbox"/> Review and Research		7 Days			11/17/20	11/25/20	22.22%
<input type="checkbox"/> Create Copy & Layout		13 Days			12/1/20	12/17/20	30.77%
<input type="checkbox"/> Determine formats for art print deliverables		3 Days	174	3	1/12/21	1/14/21	100%
<input type="checkbox"/> Proof_version 2: Creative review	Creative Director Project Manager	1 Day	2	10	5/24/21	5/25/21	100%
<input type="checkbox"/> Creative		4 Days			5/19/21	5/25/21	61.54%
<input type="checkbox"/> Final Layout	Designer	2 Days	2	2	9/9/21	9/10/21	100%
<input type="checkbox"/> Create Copy & Layout		8.5 Days			9/6/21	9/16/21	70.59%

## Unique Item ID

CONCAT(RIGHT(Entry Date,2),"-",LEFT(Owner,1),SUBSTR(Entered By,SEARCH(" ",Entered By)+1,SEARCH(" ",Entered By)+2),"-",Reference Number)

<input type="checkbox"/> Project ID #	Name ↑	Entered By: Name	Reference Number	Entered By: Entry Date
<input type="checkbox"/> 20-AO-78202	<a href="#">2021 User Conference</a>	<a href="#">Ann Owen</a>	78202	9/7/16
<input type="checkbox"/> 19-DC-47868	<a href="#">5/15/19 Reviewing Proofs Class</a>	<a href="#">Daniel Clark</a>	47868	5/1/19
<input type="checkbox"/> 20-AO-93005	<a href="#">Advertisement: New development_Macey's Way</a>	<a href="#">Ann Owen</a>	93005	9/7/16
<input type="checkbox"/> 19-DC-47850	<a href="#">AGILE TASKS AND ISSUES</a>	<a href="#">Daniel Clark</a>	47850	5/1/19
<input type="checkbox"/> 20-AO-96773	<a href="#">Allison test queue</a>	<a href="#">Ann Owen</a>	96773	9/7/16
<input type="checkbox"/> 17-AO-6900	<a href="#">AL test queue</a>	<a href="#">Ann Owen</a>	6900	9/7/16
<input type="checkbox"/> 20-AO-86442	<a href="#">Banner for...</a>	<a href="#">Ann Owen</a>	86442	9/7/16



# Wrap-up and next steps



# Continue the conversation on Adobe Workfront One

- Collaborate with others in a similar industry or department
- Harness the power of your peers to crowdsource inspiration and solutions
- Learn about upcoming events

The screenshot shows the Adobe Workfront One community homepage. At the top, there is a search bar and a navigation menu with links for Home, Getting Started, Resources, New Workfront Experience, Collaboration, Events, Support, My Experience, and Call Customer Support. A red banner below the navigation encourages users to join fellow experts and access a vast library of content. The main content area features three featured items: an Adobe Summit event, a report on COVID-19's impact on digital work, and a Lion Awards announcement. Below this is a 'Community discussions' section with a 'Share an update...' form and a list of recent posts. On the right, there is a 'Product updates' sidebar with links to 'What's new in Workfront', 'Workfront Fusion 2.0', and 'Other' updates.

# Adobe Workfront Customer Reporting Cookbook

## Where is it?



Find it on the Adobe Workfront Community at [one.workfront.com](https://one.workfront.com)

## What is it?



10 report recipes from your fellow customers



Step-by-step instructions to create each report in your own environment



A simple way to score big with leadership and your peers by getting more out of Workfront

## Upcoming meetups

Full list and on-demand recordings:  
<http://one.workfront.com/events>

Coming soon!

- *Workfront Fusion: Workfront to Workfront Automations*
- *Workfront Fusion: Extending Workfront with Integrations*
- *End User Onboarding - Requesters/Collaborators*
- *Transitioning to the new Workfront experience*

*What other topics would you like to see?*



**Thank you!**

