

Virtual User Group: Advanced Reporting

Tuesday, June 2, 2020

WELCOME!

We'll get started shortly.



*Please ensure your
microphones are
muted.*



*Enable your camera,
if possible.*



*Use the chat function
if you have any
questions.*

Today's Host

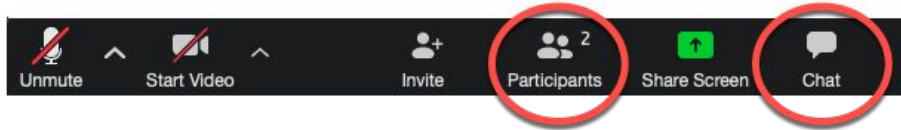


Heather Foeh

Sr. Director, Customer Success
Workfront

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

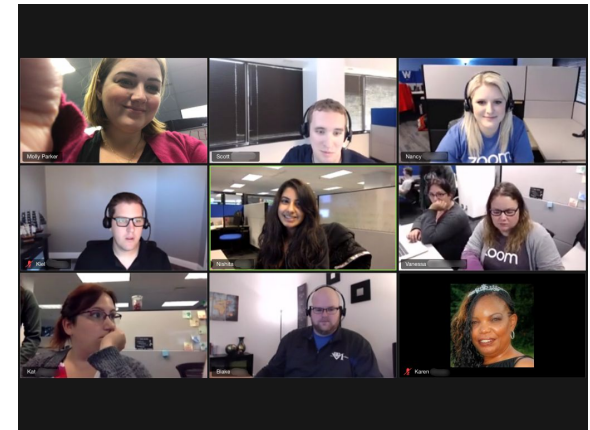
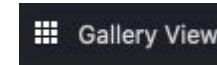
Housekeeping



Click the **Participant** and **Chat** icons at the bottom of the screen to open those windows.



Mute / Unmute by clicking the icons at the bottom of the screen. Adjust your settings by clicking the carrot.



Type
into
chat:

HELLO

my name is

- Company, Role and Location
- What do you hope to take away from today?
- First concert you attended

Agenda

- 11:00 a.m.* Welcome and Agenda
- 11:10 a.m. “Can’t Live Without”
Monique Evans, Stanley Black & Decker
- 11:40 a.m. Group Discussion - Breakouts
- 12:25 p.m. Wrap-up Next Steps
- 12:30 p.m. Event Ends

**Eastern time zone*



Presenter



Monique Evans

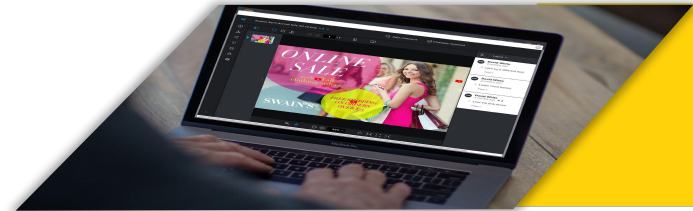
Workfront System Analyst
Stanley Black & Decker, Inc.



GLOBAL CUSTOMER EXPERIENCE

WORKFRONT USER GROUP: ADVANCED REPORTING SAMPLES

Monique Evans, GCX Workfront System Analyst

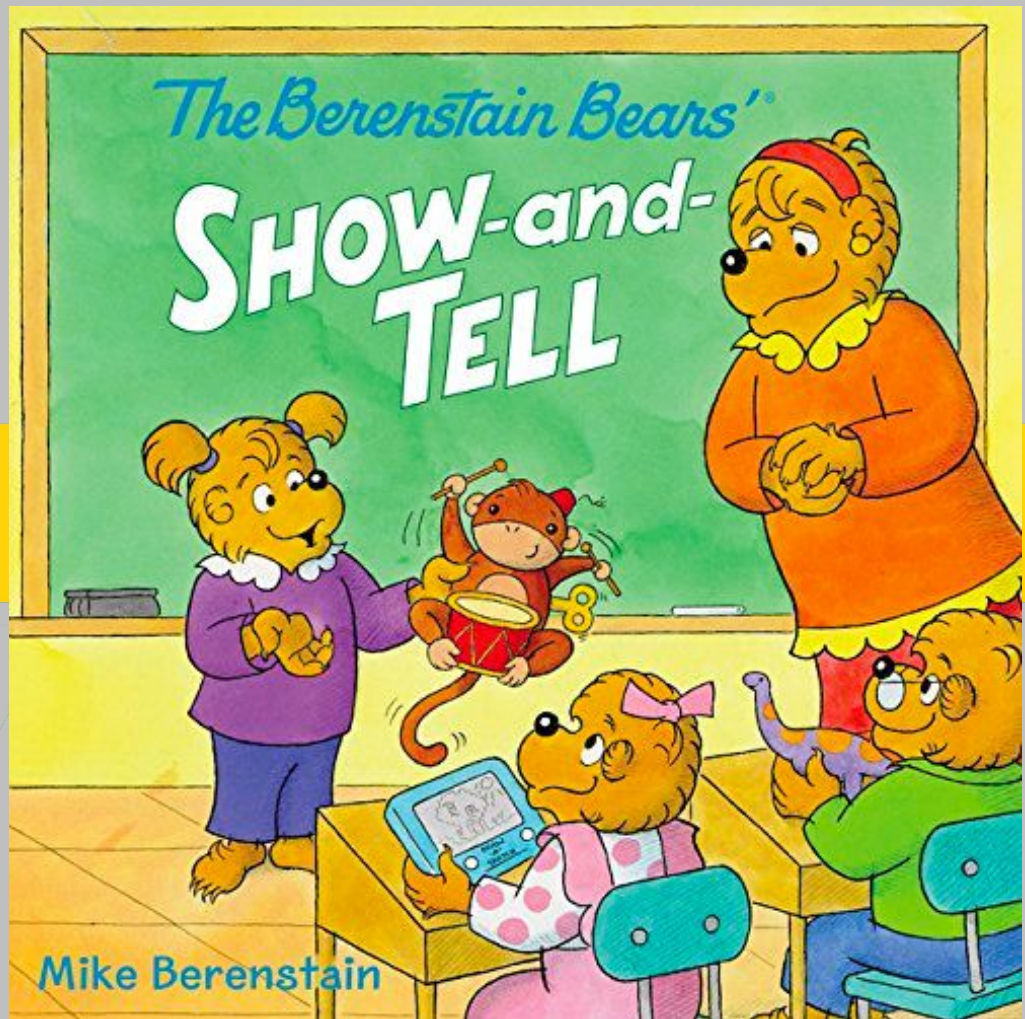


Monique Evans



- **Stanley Black & Decker, Marketing Team (GCX)**
- **Workfront Customer since March 2015**
- **Graphic Designer turned Project Manager turned Workfront Admin**
- **Self-Proclaimed Reporting Ninja**
- **Movie and Theme Park Aficionado**





The Group's Needs

- Creatives had trouble navigating the “Projects I’m On” tab
 - Complained projects showed although their part was done
- Project Owner’s needed a way to see the progress without opening the project
- Assignment report shows too many tasks and project data is no longer in-line editable
- Individual teams use different custom fields








“My most prized
possession is my
imagination.”

Anne Geddes

Projects I'm On

<input type="checkbox"/>	Brand	Status	Project & Program	Owner ↑	Due On	Current Task	Last Update	Status Comments - Click to Type
▼ Alex (2)								
<input type="checkbox"/>		Current ⚠	BD PTA A+ Content - BDA91109	Alex	6/8/20	Studio Review - Victoria - 4/23/20		Above the fold content for BDA91109 is ready for creative review! Please let me know if you have any questions. – Lyndsay 6/1/20 10:46 AM
<input type="checkbox"/>		Current ⚠	B+D HP Steam Mop A+ Content Updates-TGT WMT LWS	Alex	6/5/20	Studio Review - - 5/21/20 Hybris Sheet Updates - - 6/4/20		Proof Comment: This should actually be 2in1. Can you please adjust? – Alex 6/1/20 11:34 AM
▼ Andrew (1)								
<input type="checkbox"/>		Current ⬠	ST - Ecomm - Levels, Storage, Mech Set Enhanced Content (DAX)	Andrew	6/30/20	Update A+ Content Tracker - Andrew Design - Avan - 6/1/20		Proof Comment: see "durable Materials" icon in the cheat sheet as a reference – Andrew 6/1/20 9:38 AM
▼ Ashley (2)								
<input type="checkbox"/>		Current ⚠	DW - OPG - Ecomm - DWPW2400 A+ Content	Ashley	6/5/20	Hybris Sheet Updates - Ashley Design - Brian - 5/26/20		Thanks, Ashley. I apologize for the confusion, Sam. I was on autopilot and didn't realize that was this request. – Amanda 4/28/20 3:51 PM
<input type="checkbox"/>		Current ●	DW - OPG - Blower THD DAX Content 20-DW: Ecomm Refresh-Phase 3	Ashley	5/26/20	Brand Review - Ashley - 5/14/20 Final Review - Ashley - 5/21/20 Update A+ Content Tracker - - 5/26/20		Hi Ashley The ecomm contents of all 7 sku are released to BOX and below is the link:

Showing 52 projects

Status	Project & Program	Owner?	Due On	Current Task	Last Update	Status Comments - Click to Type
Brand						
▼ Alex (2)						
<input type="checkbox"/>						
<input type="checkbox"/>						
▼ Andrew (1)						
<input type="checkbox"/>						
▼ Ashley (2)						
<input type="checkbox"/>						
<input type="checkbox"/>						

This column is a shared column and uses conditional formatting to display images based on the choices in the custom field “Brand”
This is not in-line editable

- Column 0
 - Conditional formatting for each choice to display its corresponding logo
 - Images are hosted in a WF project for ease
- Column 1
 - Shows text if the Brand choice is not a specific brand ie. Unbranded or Multi-branded
 - ***Make sure you use tabs between each choice***

Brand	Status	Project Name	Assignee	Start Date	End Date	Comments
Alex (2)	Current	Studio Review - Victoria	Victoria	4/23/20		Above the fold content for BDA91109 is ready for creative review! Please let me know if you have any questions. -- Lyndsey 6/1/20 10:46 AM
BLACK & DECKER	Current	Studio Review - Alex	Alex	6/5/20	Hybris Sheet Updates -	Proof Comment: This should actually be 2in1. Can you please adjust? -- Alex 6/1/20 11:34 AM
* Andrew (1)	Current	Update A+ Content Tracker - Andrew	Andrew	6/30/20		Proof Comment: see "durable Materials" icon in the cheat sheet as a reference -- Andrew 6/1/20 9:38 AM
STANLEY	Current	Hybris Sheet Updates - Ashley	Ashley	6/5/20		Thanks, Ashley. I apologize for the confusion, Sam. I was on autopilot and didn't realize that was this request. -- Amanda 4/28/20 3:51 PM
* Ashley (2)	Current	Brand Review - Ashley	Ashley	5/14/20		Hi Ashley
DEWALT	Current	Update A+ Content Tracker -		5/26/20		The econm contents of all 7 sku are released to BOX and below is the link.

This is a shared column combining Project Status and Progress Status Icon
This is in-line editable for Status

```

column.2.displayName=
column.2.enumclass=com.attask.common.constants.ProjectStatusEnum
column.2.enumtype=PROJ
column.2.linkedname=direct
column.2.namekey=status
column.2.querysort=status
column.2.sharecol=true
column.2.textmode=true
column.2.type=enum
column.2.usewidths=true
column.2.valuefield=status
column.2.valueformat=val
column.2.width=200
column.3.sharecol=true
column.3.textmode=true
column.3.value=&nbsp;
column.3.valueformat=HTML
column.3.width=1
column.4.displayName=Status
column.4.linkedname=direct
column.4.namekey=progressstatusicon
column.4.textmode=true
column.4.title.name=component.progressstatusicon
column.4.valueformat=HTML
column.4.viewalias=progressstatusicon
    
```

Brand	Status	Project & Program
Alex (2)		
	Current	BD PTA A+ Content - BDA91109
	Current	B+D HP Steam Mop A+ Content Updates-TGT WMT LWS
Andrew (1)		
	Current	ST - Ecomm - Levels, Storage, Mech Set Enhanced Content (DAX)
Ashley (2)		
	Current	DW - OPG - Ecomm - DWPW2400 A+ Content
	Current	DW - OPG - Blower THD DAX Content 20-DW: Ecomm Refresh-Phase 3

This is a shared column combining Project Name and Project's Program Name
This is in-line editable for Project Name

```

column.5.descriptionkey=name
column.5.displayName=Project & Program
column.5.link.linkproperty.0.name=ID
column.5.link.linkproperty.0.valuefield=ID
column.5.link.linkproperty.0.valueformat=int
column.5.link.lookup=link.view
column.5.link.valuefield=objCode
column.5.link.valueformat=val
column.5.linkedname=direct
column.5.listsort=string(name)
column.5.namekey=name.abbr
column.5.querysort=name
column.5.section=0
column.5.sharecol=true
column.5.shortview=false
column.5.stretch=30
column.5.textmode=true
column.5.valuefield=name
column.5.valueformat=HTML
column.6.sharecol=true
column.6.textmode=true
column.6.value=<p>
column.6.valueformat=HTML
column.6.width=1
column.7.displayName=Program
column.7.linkedname=program
column.7.namekey=view.relatedcolumn
column.7.namekeyargkey.0=program
column.7.namekeyargkey.1=name
column.7.querysort=program.name
column.7.textmode=true
column.7.valuefield=program.name
column.7.valueformat=HTML
    
```


Current Task

This is a Task collection displaying Task Name, Assigned To Name (Primary Assignee), and Planned Completion Date

The collection filters out not ready and completed tasks

This is not in-line editable

```

displayname=Current Task
listdelimiter=<div>
listmethod=nested(tasks).lists
textmode=true
type=iterate
usewidths=true
valueexpression=IF((numberOfChildren)=0,IF((canStart),IF(CONTAINS("CPL",{status}),""),CONCAT({name}," - ",{assignedTo},{name}," - ",{plannedCompletionDate})))
valueformat=HTML
width=400
    
```

Due On	Current Task	Last Update	Status Comments - Click to Type
6/8/20	Studio Review - Victoria - 4/23/20		Above the fold content for BDA91109 is ready for creative review! Please let me know if you have any questions. - Lyndsey 6/1/20 10:46 AM
6/5/20	Studio Review - - 5/21/20 Hybris Sheet Updates - - 6/4/20		Proof Comment: This should actually be 2in1. Can you please adjust? - Alex 6/1/20 11:34 AM
6/30/20	Update A+ Content Tracker - Andrew Design - Avan - 6/1/20		Proof Comment: see "durable Materials" icon in the cheat sheet as a reference - Andrew 6/1/20 9:38 AM
6/5/20	Hybris Sheet Updates - Ashley Design - Brian - 5/26/20		Thanks, Ashley. I apologize for the confusion, Sam. I was on autopilot and didn't realize that was this request. - Amanda 4/28/20 3:51 PM
5/26/20	Brand Review - Ashley Final Review - Ashley Update A+ Content Tracker - - 5/26/20		Hi Ashley The econm contents of all 7 sku are released to BOX and below is the link.

This is a wildcard project report the pulls active projects that the logged in user sponsors, owns, or has upcoming assigned tasks and/or issues. ***This utilizes Wildcard, Or Statements, and EXISTS filters***

sponsorID=\$\$USER.ID sponsorID_Mod=in status=DED CPL VNC status_Mod=notin	OR:2:EXISTS:b:\$\$EXISTSMOD=EXISTS OR:2:EXISTS:b:\$\$OBJCODE=OPTASK OR:2:EXISTS:b:actualCompletionDate_Mod=isnull OR:2:EXISTS:b:assignmentsUsersMM:ID=\$\$USER.I	OR:3:EXISTS:a:\$\$EXISTSMOD=EXISTS OR:3:EXISTS:a:\$\$OBJCODE=TASK OR:3:EXISTS:a:actualCompletionDate_Mod=isnull OR:3:EXISTS:a:assignmentsUsersMM:ID=\$\$USER.I
OR:1:ownerID=\$\$USER.ID OR:1:ownerID_Mod=in OR:1:status=DED CPL VNC OR:1:status_Mod=notin	D OR:2:EXISTS:b:assignmentsUsersMM:ID_Mod=in OR:2:EXISTS:b:projectID=FIELD:ID OR:2:status=DED CPL VNC OR:2:statusEquatesWith=CPL DED OR:2:statusEquatesWith_Mod=notin OR:2:status_Mod=notin	D OR:3:EXISTS:a:assignmentsUsersMM:ID_Mod=in OR:3:EXISTS:a:projectID=FIELD:ID OR:3:status=DED CPL VNC OR:3:statusEquatesWith=CPL DED OR:3:statusEquatesWith_Mod=notin OR:3:status_Mod=notin

Was also able to make a variation for managers to see their team's projects with the same criterion

The Report

<input type="checkbox"/> Brand	Status	Project & Program	Owner ↑	Due On	Current Task	Last Update	Status Comments - Click to Type
▼ Alex (2)							
<input type="checkbox"/>	Current ⚠	BD PTA A+ Content - BDA91109	Alex	6/8/20	Studio Review - Victoria - 4/23/20		Above the fold content for BDA91109 is ready for creative review! Please let me know if you have any questions. – Lyndsay 6/1/20 10:46 AM
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Showing 52 projects



My Time Off This Year (Time Off Report)

My Time Off This Year

Displays all time off for current user this calendar year.
Dates are colored based on timeline

- Past dates = grey
- In the next 10 days = blue
- Today = green

Show Filters Report Actions As of Jun 1, 2020 5:52 pm Eastern Daylight Time

Details Summary

Export

Filter Report Default View Report Default Grouping Report Default

<input type="checkbox"/> Start Date ↑	End Date ↑	Total Time Off
User: Name: Monique Evans (14)		19
<input type="checkbox"/> Wed, Jan 22, 2020 12:00 AM	Thu, Jan 23, 2020 11:59 PM	2 days
<input type="checkbox"/> Fri, Jan 24, 2020 9:00 AM	Fri, Jan 24, 2020 1:00 PM	0.5 days
<input type="checkbox"/> Mon, Aug 10, 2020 12:00 AM	Mon, Aug 10, 2020 11:59 PM	1 days
<input type="checkbox"/> Thu, Sep 24, 2020 12:00 AM	Thu, Sep 24, 2020 11:59 PM	1 days
<input type="checkbox"/> Mon, Sep 28, 2020 12:00 AM	Mon, Sep 28, 2020 11:59 PM	1 days
<input type="checkbox"/> Wed, Oct 7, 2020 12:00 AM	Mon, Oct 12, 2020 11:59 PM	4 days
<input type="checkbox"/> Fri, Nov 6, 2020 9:00 AM	Fri, Nov 6, 2020 1:00 PM	0.5 days
<input type="checkbox"/> Fri, Nov 13, 2020 9:00 AM	Fri, Nov 13, 2020 1:00 PM	0.5 days
<input type="checkbox"/> Fri, Nov 20, 2020 9:00 AM	Fri, Nov 20, 2020 1:00 PM	0.5 days
<input type="checkbox"/> Thu, Nov 26, 2020 12:00 AM	Mon, Nov 30, 2020 11:59 PM	1 days
<input type="checkbox"/> Fri, Dec 4, 2020 9:00 AM	Fri, Dec 4, 2020 1:00 PM	0.5 days
<input type="checkbox"/> Mon, Dec 7, 2020 12:00 AM	Fri, Dec 11, 2020 11:59 PM	5 days

Total Time Off

My Time Off This Year

This value expression calculates the time between the start and end dates in Work Minutes, rounds it, and divides by 480.

$$480 \text{ minutes} = 8 \text{ hours} = 1 \text{ day}$$

We calculate in Work Minutes, so holidays aren't included in the count

This is not in-line editable

Mon, Aug 10, 2020 12:00 AM

Thu, Sep 24, 2020 11:59 PM

```
aggregator.function=SUM
aggregator.name=Duration
aggregator.valueexpression=CONCAT((ROUND(WORKMINUTESDIFF({endDate},{startDate}),2))/480,"
days")
```

```
aggregator.valueformat=html
```

```
displayname=Total Time Off
```

```
linkedname=direct
```

```
shortview=true
```

```
textmode=true
```

```
valueexpression=CONCAT((ROUND(WORKMINUTESDIFF({endDate},{startDate}),2))/480," days")
```

```
valueformat=HTML
```

Mon, Dec 7, 2020 12:00 AM

Thu, Jun 23, 2020 11:59 PM

Fri, Jun 24, 2020 1:00 PM

Mon, Aug 10, 2020 11:59 PM

Thu, Sep 24, 2020 11:59 PM

Mon, Sep 28, 2020 11:59 PM

Fri, Nov 6, 2020 1:00 PM

Fri, Nov 13, 2020 1:00 PM

Fri, Nov 20, 2020 1:00 PM

Fri, Dec 4, 2020 1:00 PM

Show Filters Report Actions As of Jun 1, 2020 5:52 pm Eastern Daylight Time

Filter Report Default View Report Default Grouping Report Default

Total Time Off

19

2 days

0.5 days

1 days

1 days

1 days

4 days

0.5 days

0.5 days

0.5 days

1 days

0.5 days

5 days

Time Off Calendar

Calendars

- TowDoc TDC Calendar
- Email Calendar*
- GDS Trade Show Calendar
- My HomeGroup Project Calendar
- Email Calendar - Deploy & Confirm*
- My Team's Tasks and Mine*
- Time Off Calendar**
- + New Calendar

View Month ◀ **08/24/2020 - 11/20/2020** ▶ Today Calendar Actions

Time Off Calendar

- Brand
- Creative Studio
- ID
- Insights
- Me
- My Direct Reports
- My Staff
- My Team

[Add to Calendar...](#)

Monday	Tuesday	Wednesday	Thursday	Friday
31	Sep 1	2	3	4
7	8	9	10	11
Jason Lego: Time Off				
14	15	16	17	18
21	22	23	24	25
			Monique Evans: Time Off	
28	29	30	Oct 1	2
Monique Evans: Time Off				
5	6	7	8	9

What is your top tip when building an advanced report?

Tips for success



-
- 1.** Remember the target audience and goal
 - 2.** Build as much as possible using Basic Reporting before converting to text mode
 - 3.** Create Text Mode Library
 - 4.** Take the Live Courses
 - 5.** Use Community!!!
-



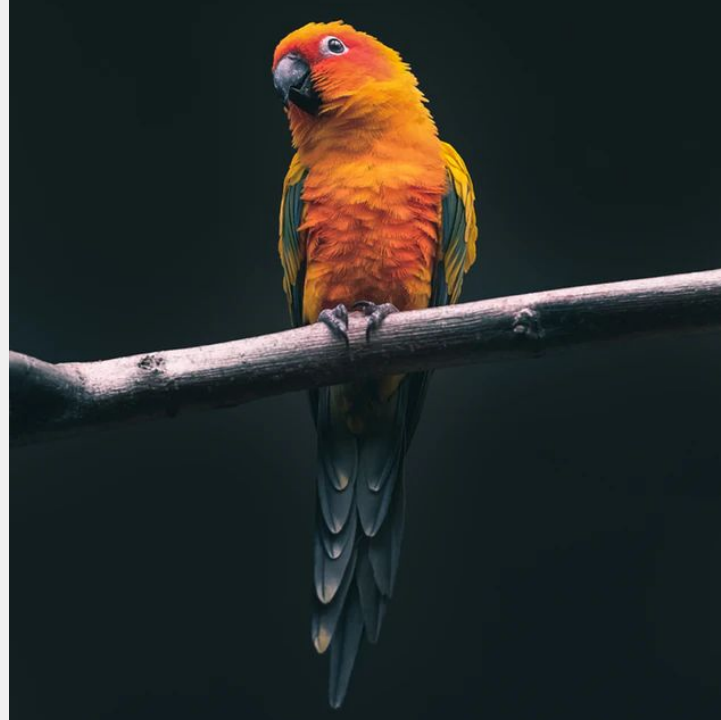
GCX

GLOBAL CUSTOMER EXPERIENCE

THANK YOU

“Birds of a Feather” Group Discussions

Reporting Show & Tell





Wrap-up and Next Steps



**What did you think
of this format?**

**What are other topics you'd
like to meet and discuss?**

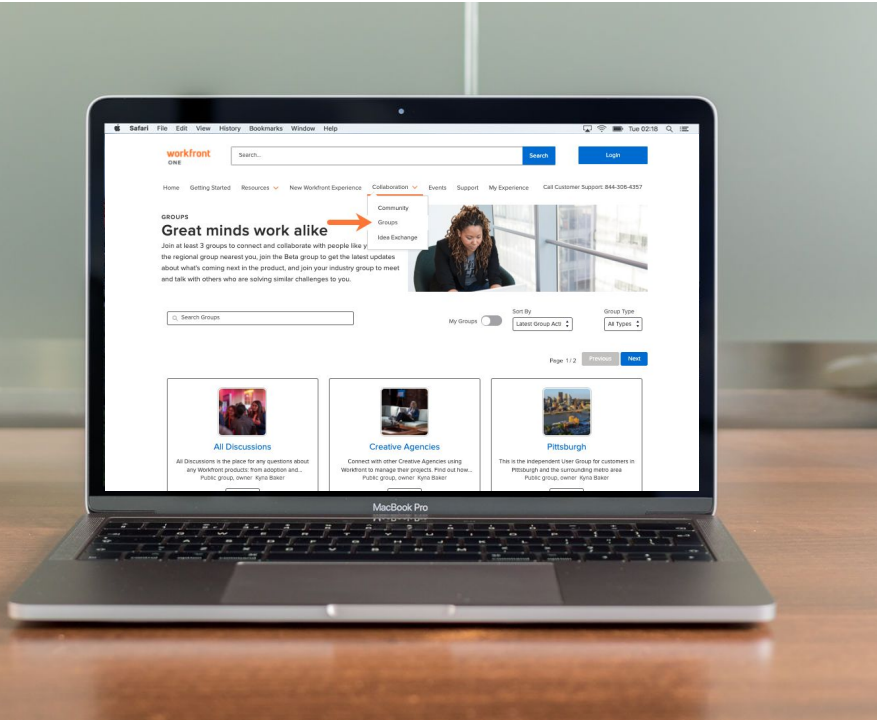
workfront[®]

ONE

Workfront One was built to provide all the resources you need to succeed in enterprise work management—all in one place.

- Group discussions
- Upcoming events
- Weekly Tips (“Workfront Wednesday”)
- New Workfront Experience feedback and updates
- Regional and Industry Groups

 *Are you a member?*



Virtual User Groups - Spring/Summer 2020

one.workfront.com/events

- **June 16 - Creative Services: Reporting & Dashboards**
- **Week of June 29 - Special Edition Leap User Groups!**
 - Implementation & Adoption
 - All Things Reporting
 - Emails & Notifications
 - Marketing Workflows & Approvals
 - IT Workflows & Approvals
 - Audit Trails & Compliance
 - Resource and Capacity Planning
 - Getting Started with Agile
- ***July and August schedule is coming soon!***





Leap Virtual Conference

workfront.com/leap

June 24, 2020 - 8:00 a.m. PDT

- Enjoy keynotes and 75+ breakout sessions - all free
- See the latest and greatest from the Workfront product team
- Network virtually with a global Workfront audience

Thank you.

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