10 Tips for Using Text Mode in Adobe Workfront

Customer Success Workshop - April 18, 2024

Agenda

5 minutes	Welcome & Introductions
10 minutes	What is Text Mode?
35 minutes	10 Text Mode Tips
10 minutes	Open Q&A
-	Additional Resources

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Available to all customers, you can find or contact us:

- During our free virtual events. View the calendar of Events on Experience League. Register now!
- On Experience League. Tag us on the Community
- Send us an email at csatscale@adobe.com
- Connect with us on LinkedIn.

What is Text Mode?

Provides the ability to modify or manipulate custom views, filters, and groupings created through the standard report builder.

When should text mode be used?

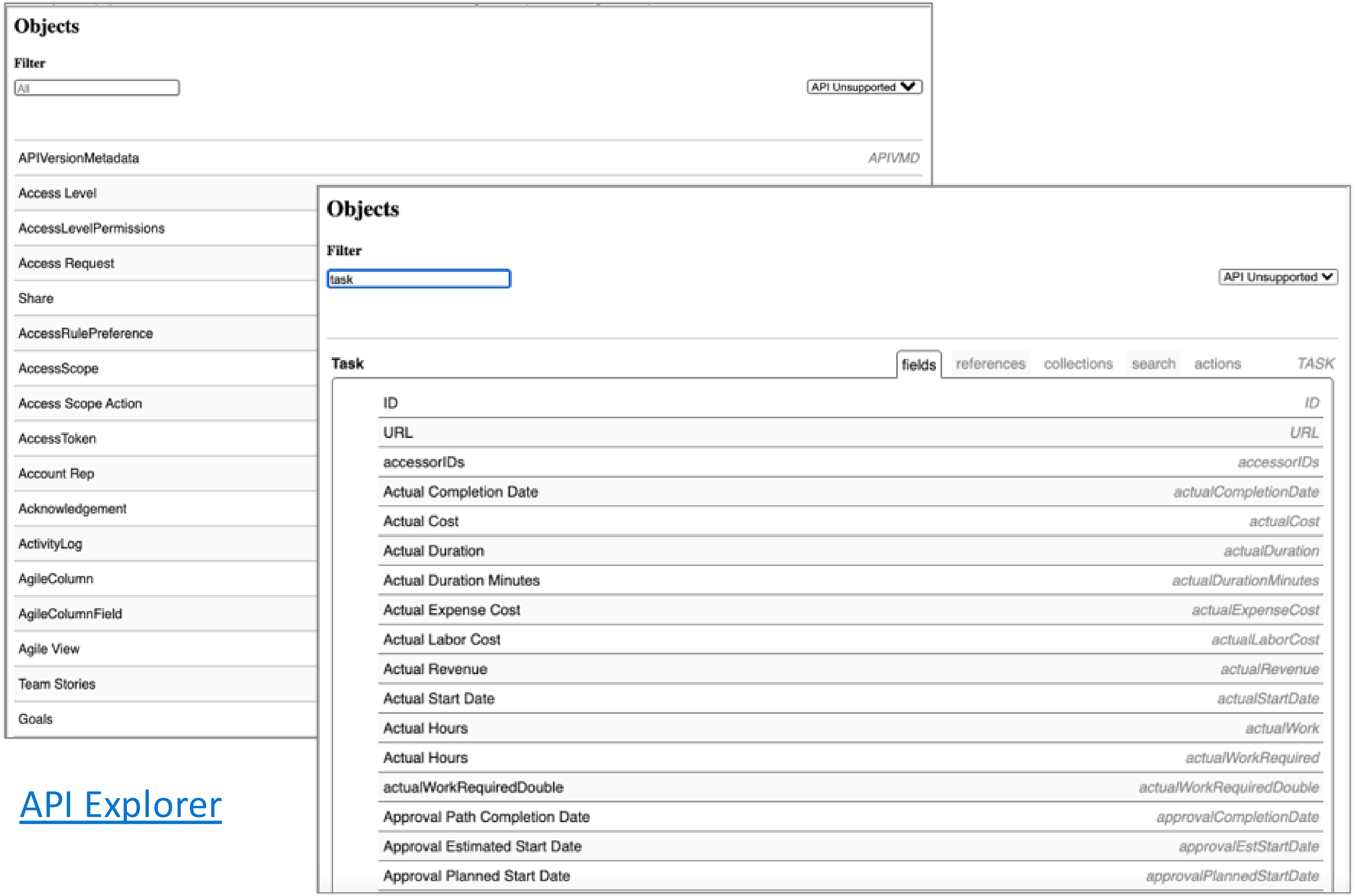
- Standard builder field limit
- Calculations
- Additional display format
- Grouping limit

Written in Camel Case (or camelCase)

- actualStartDate
- enteredBy

[Documentation] Text Mode Overview

The API Explorer



API Explorer

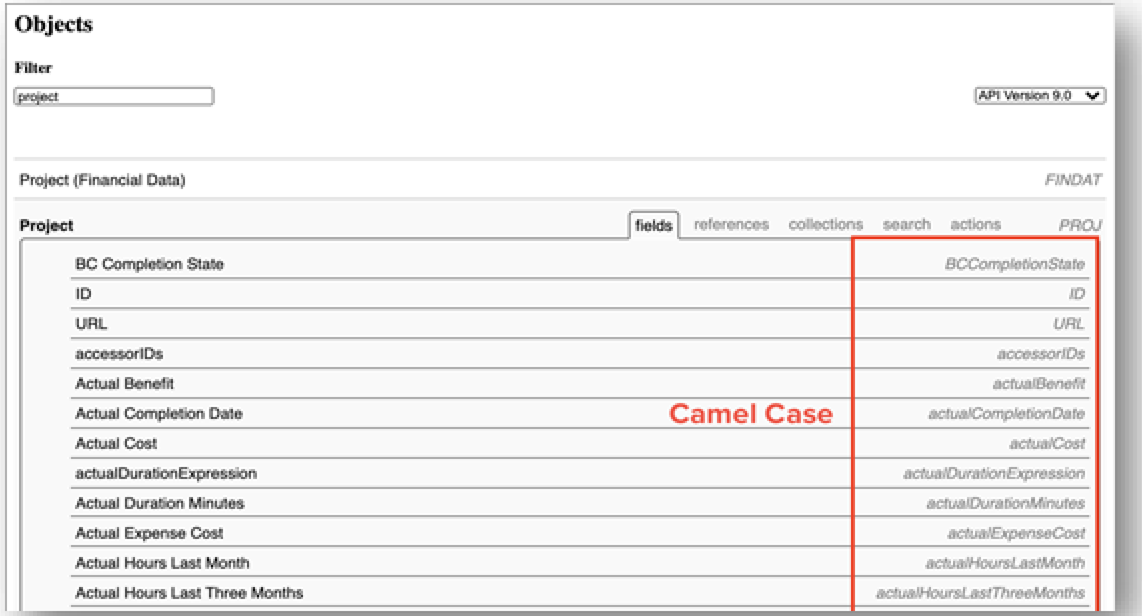
Each object is displayed in a table. To start, filter for a specific object (ex: task)

Each table has 5 sections:

- **Fields**
- **References** (1:1 relationship)
- **Collections** (1:many relationship)
- Search
- Actions

Fields vs References

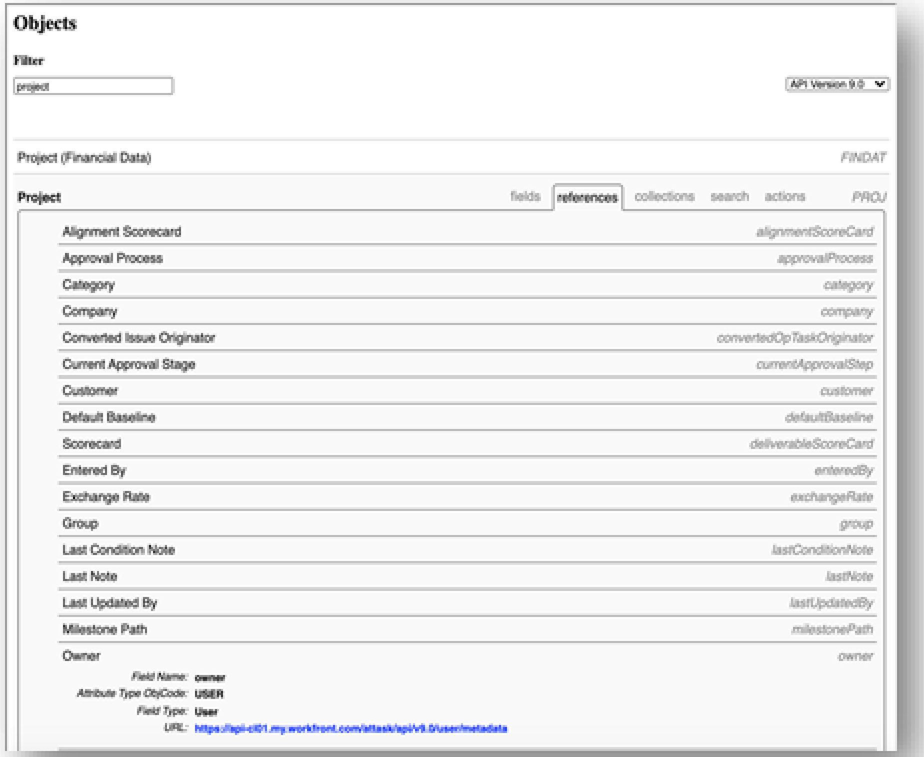
FIELDS



Identifies the fields or columns available for the specified object. These are the fields you'll see in the standard report builder for that object.

Field names are written on the left, and field camel case is written on the right in italics.

REFERENCES



Displays links to other tables the object is directly related to (1:1 relationships).

Reference name and field name are separated by a colon in a valuefield and a period in a valueexpression

- valuefield=project:status
- valueexpression={project}.{status}

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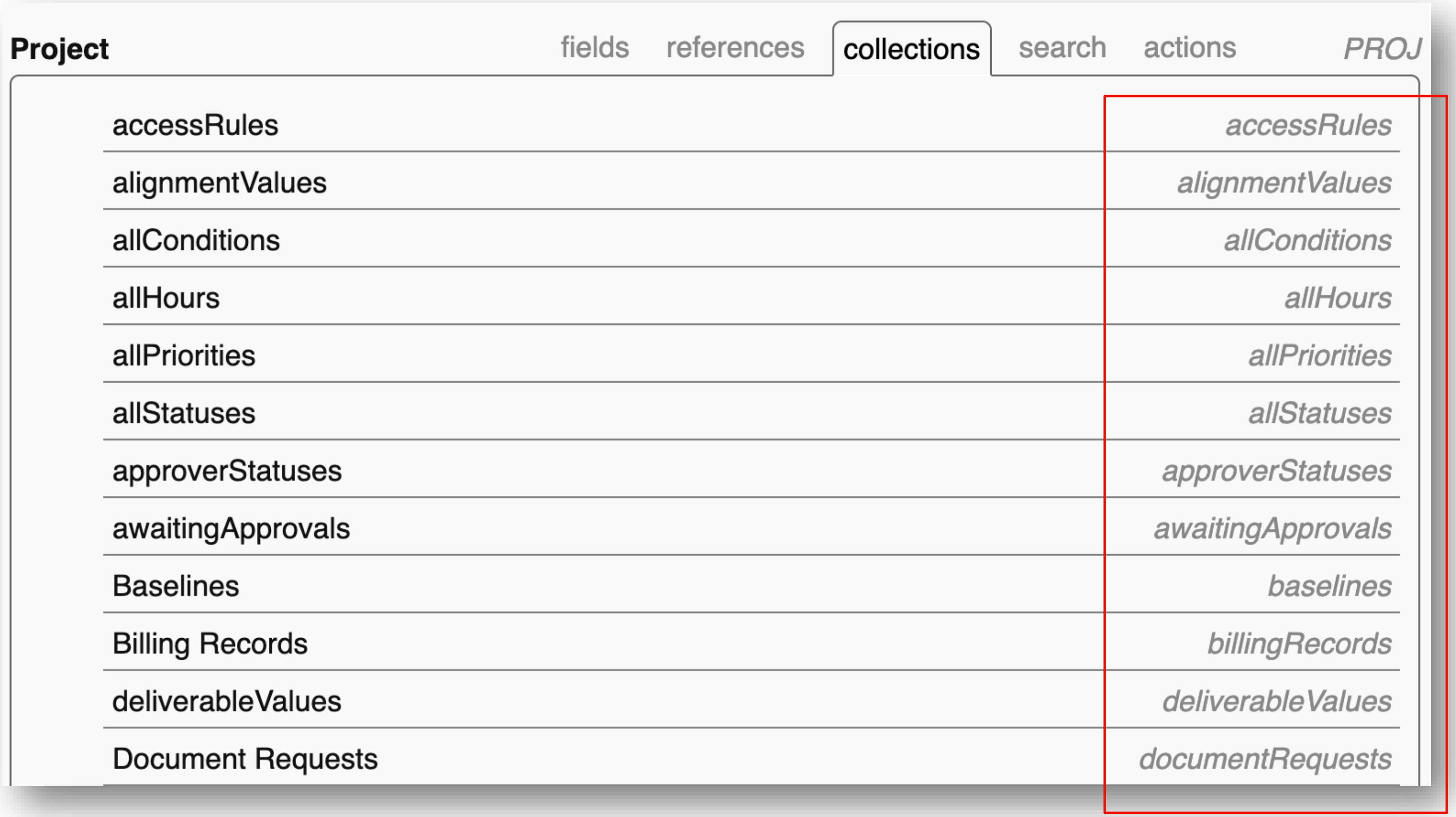
Collections



Displays links to other tables the object has a 1:many relationship with (for example, 1 project has many tasks). The collection object is written in italics on the right side.

REFERENCING A COLLECTION

displayname=INSERT NAME OF COLUMN HERE
listdelimiter=<p>
listmethod=nested(OBJECT).lists
textmode=true
type=iterate
valuefield=FIELD
valueformat=HTML

PROJECT REPORT
displayname=Tasks with 0 Hours Logged
listdelimiter=<p>
listmethod=nested(tasks).lists
textmode=true
type=iterate
valueexpression=IF({actualWorkRequired}=0,{name},"")
valueformat=HTML

Essential Text Mode Components for Columns

displayname=	The line represents the name of your desired column header.
valueformat=	This line represents the format used to display the text, number, or date. Examples include HTML, doubleAsPercent, atDate Learn more: • Format dates in text mode reports • Format numbers, currency, and percentages in text mode reports
valuefield= OR valueexpression=	This line tells the system what information needs to be pulled into the column. A valuefield is a direct reference to the object, and is formatted using a colon (ex: valuefield=project:status). A valueexpression utilizes calculations to pull in a specific field or fields. Valueexpressions require { } around field names and oftentimes periods, commas, and parenthesis (ex: valueexpression=CONCAT({project}.{name},” – “,{project}.{description}) Learn more: Calculated data expressions

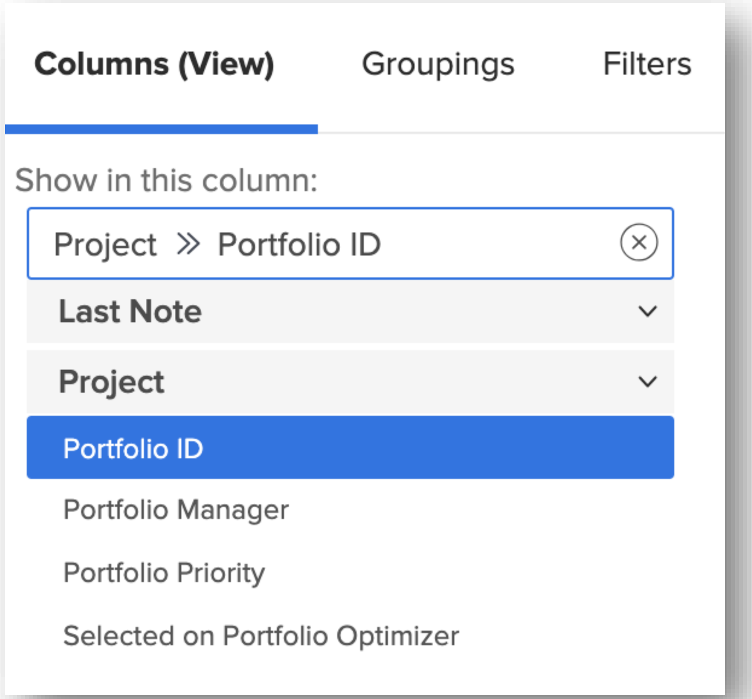
Text Mode Syntax Overview

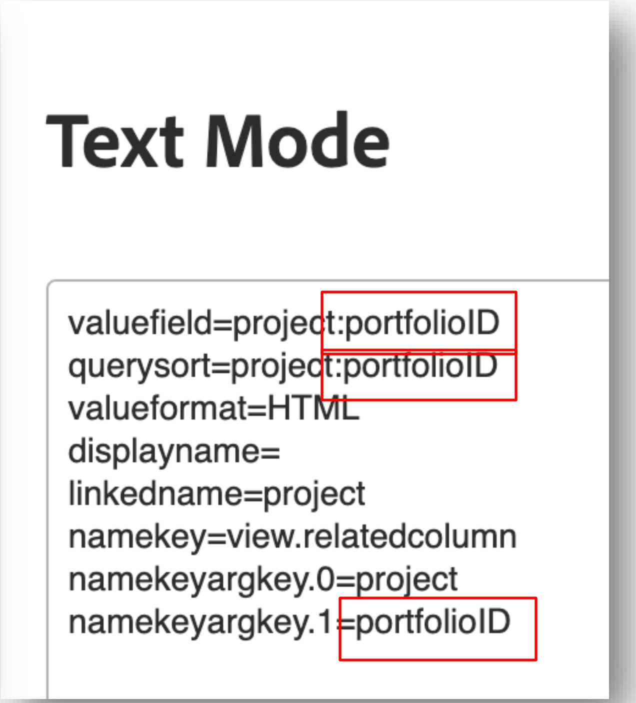

TOP 10

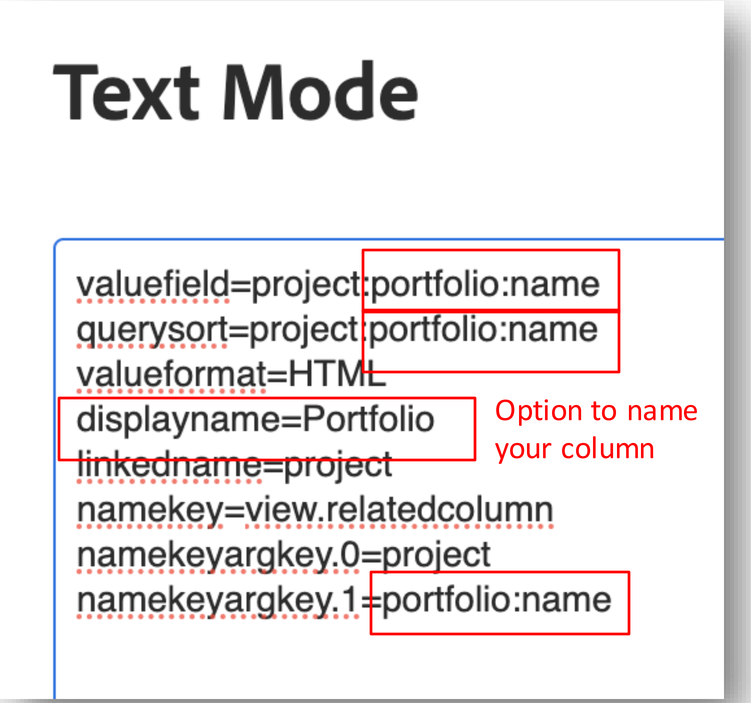
TIP #1: Change ID to Name in a View

View the name, rather than the alphanumeric ID associated with the object selected

Replace ID with :name in text mode

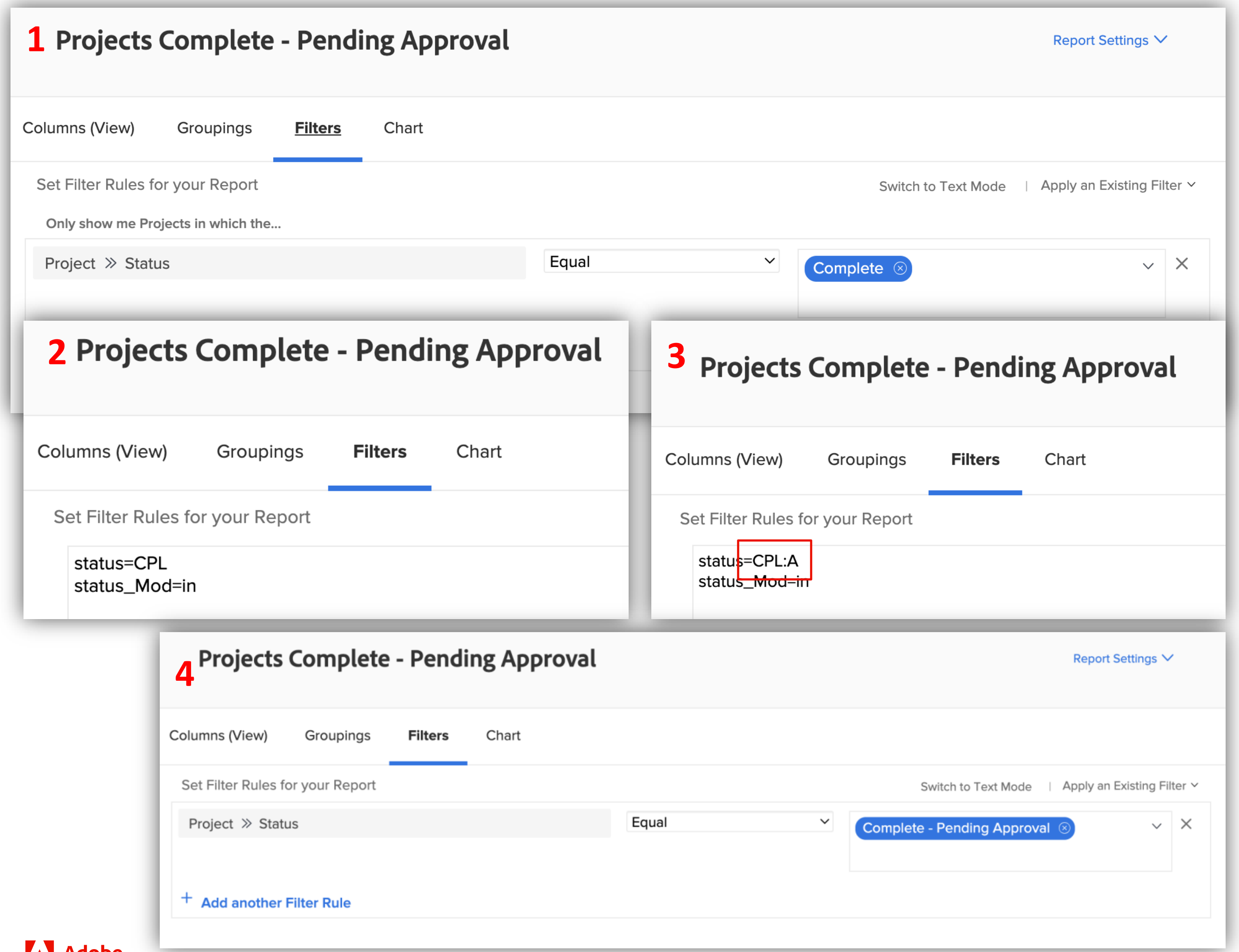






For example, on a Task report, you want to add a column for the Portfolio name but only Project Portfolio ID is available in the standard builder. Everywhere you see portfolioID, replace with portfolio:name

TIP #2: Filter for Work Pending Approval



Pending Approval cannot be selected in the standard report builder as a status, so text mode is required.

To do this:

- Choose the status the approval is associated with and use that as your placeholder (ex: Project Status > Equal > Complete)
- Switch to text mode
- **Add :A** to the status key in text mode
- Switch back to Standard Mode, and voila!

NOTE: Can be applied to any status

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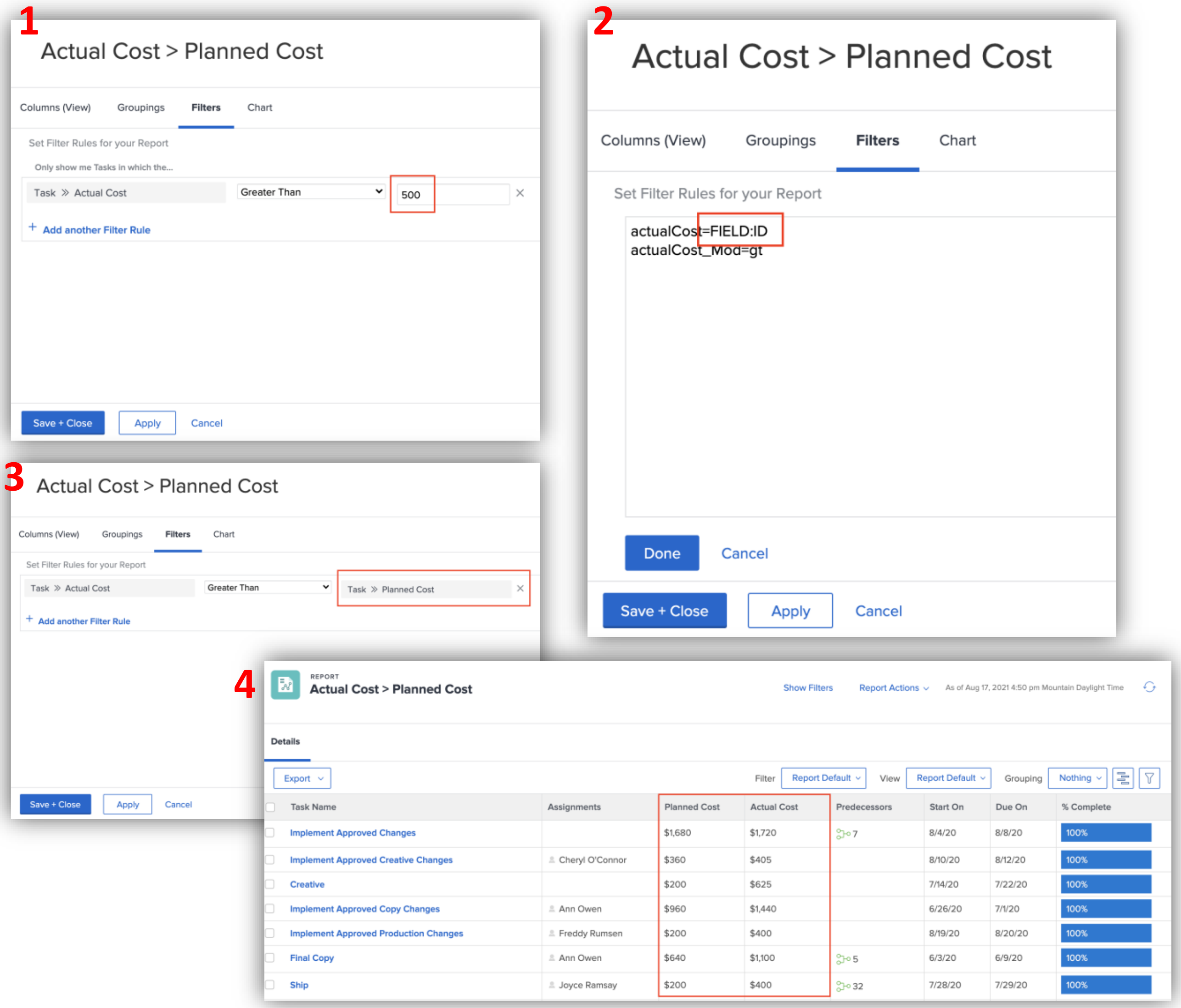
TIP #3: Compare Two Fields in a Filter



- Choose a field from the library. Select a qualifier and add a placeholder value
- Switch to text mode, delete the placeholder and add FIELD:ID
- Navigate back to Standard Mode. There, you will see the dropdown menu to select a comparison field
- **NOTE:** When comparing Planned vs Actual Hours, you need to update the field values. Planned hours should be workRequired and Actual Hours should be actualWorkRequired in text mode.

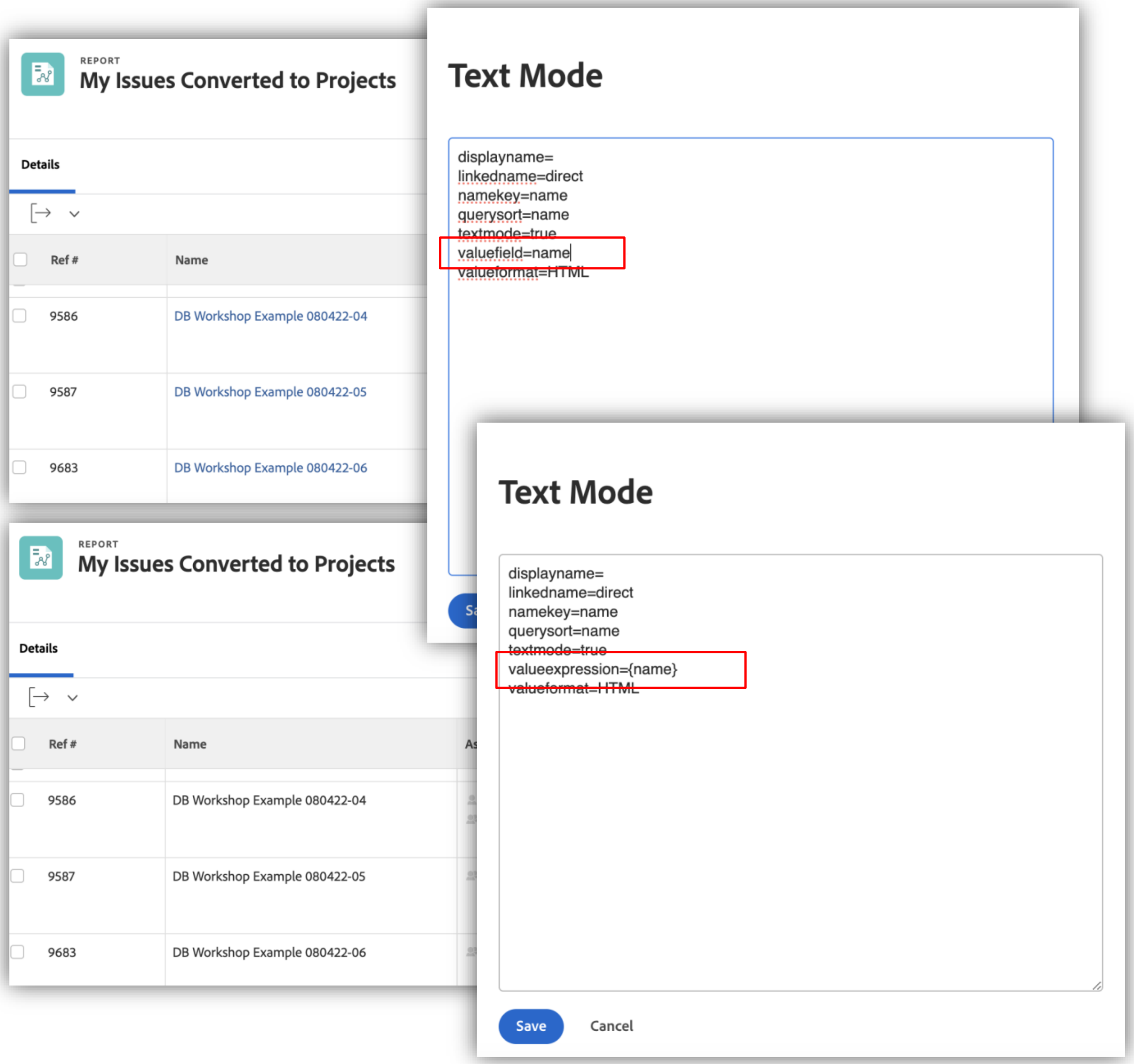
BONUS: Compare 2 fields in conditional formatting (ex: Planned Start Date < Actual Start Date). Follow step-by-step instructions here.

TIP #4: Remove hyperlink in view

For example, on an Issue/Request Report, you can remove the link to the original issue and only keep the resolving object. This ensures that users cannot navigate back, and all communication efforts are kept in a single place.

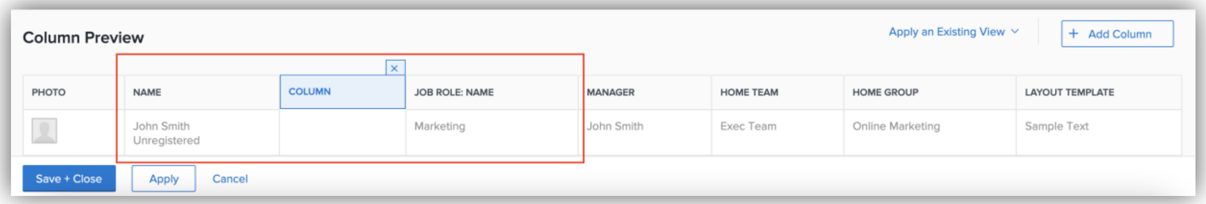
This report can replace the “Requests” area allowing you to customize which fields/columns are visible to users.

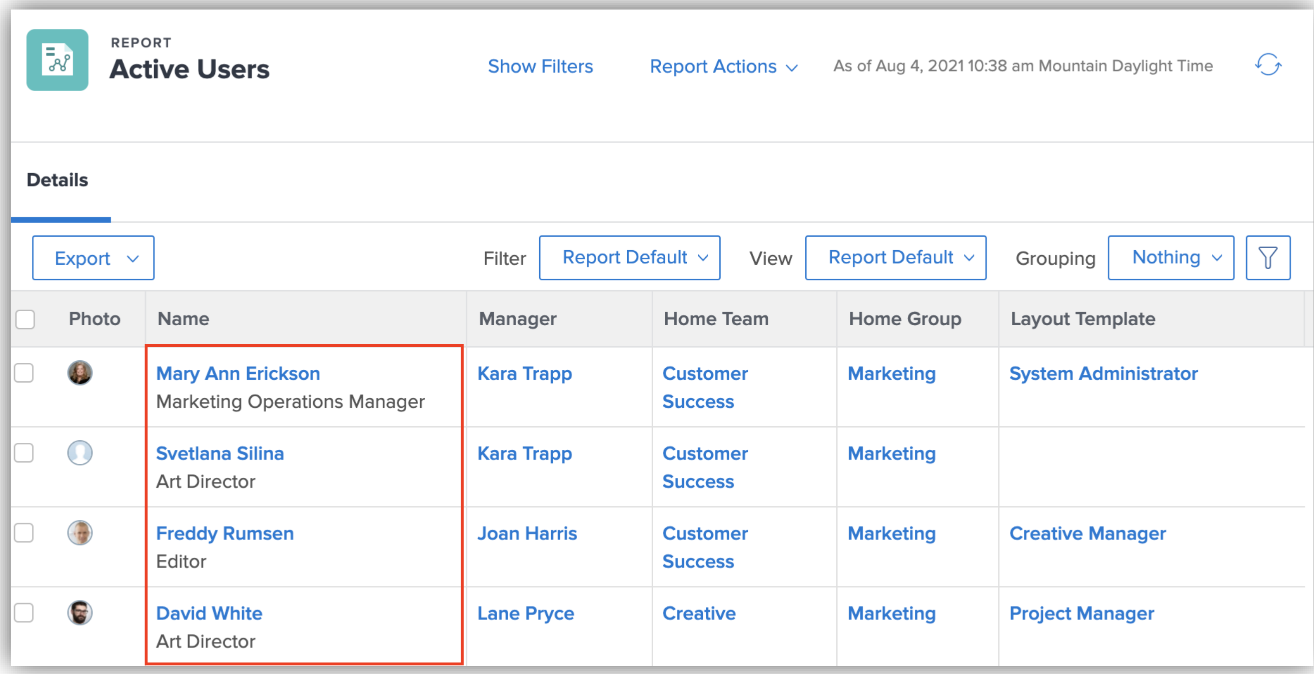
To do this, switch to text mode and replace the line for valuefield with valueexpression. In this case, it would be swapping valuefield=name with valueexpression={name}.



REMEMBER: Valueexpressions always have { } around field names whereas valuefields do not.

TIP #5: Merge data from multiple columns in a View





[Merge data from two columns with a line break]

For example, combine name and access level into a single column in a User Report

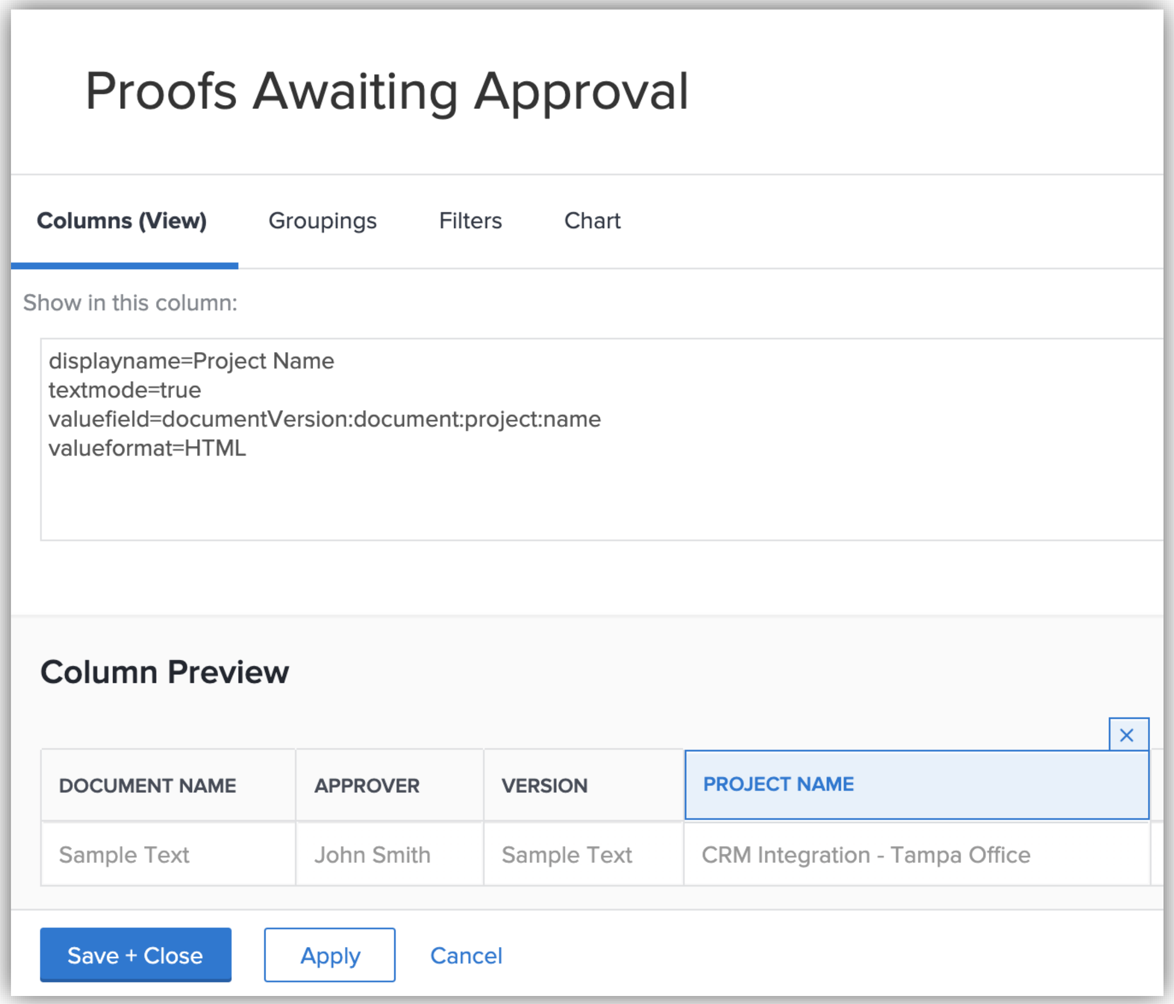
- Add a third column between the two columns you want to merge. Switch to text mode and add the following:

  value=
  valueformat=HTML
  width=1
  sharecol=true

- In the first, or left, column, switch to text mode and add **sharecol=true** to the bottom

[[VIDEO] Top 3 Reasons to Create a Shared Column Report]

TIP #6: Reference Project Information from Proof Approval Report



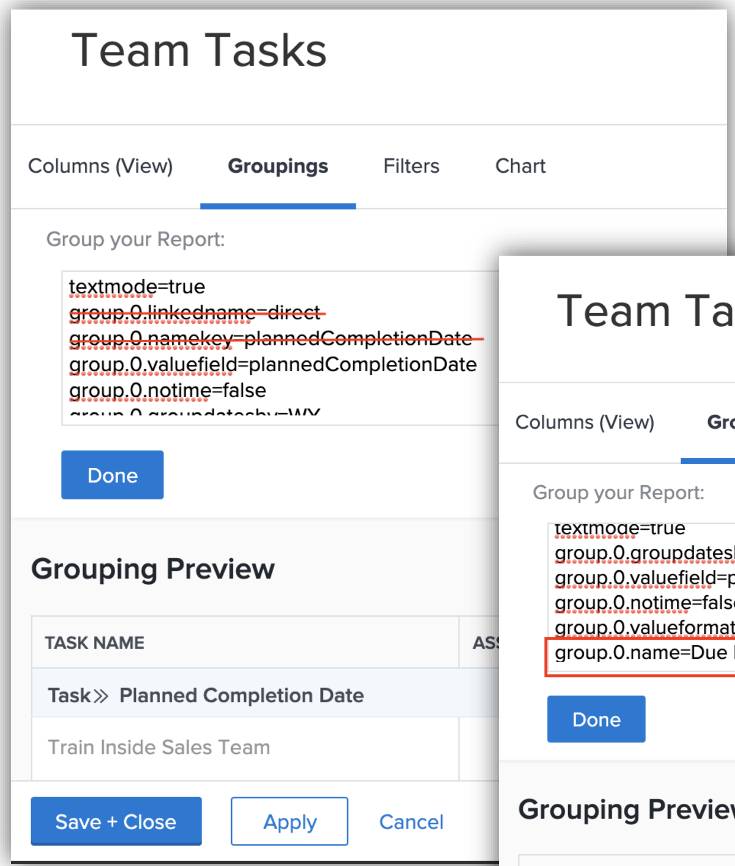
- Quickly see the project name each proof is associated with in a column
- Organize or group results by project name
- Project name in a view (column)

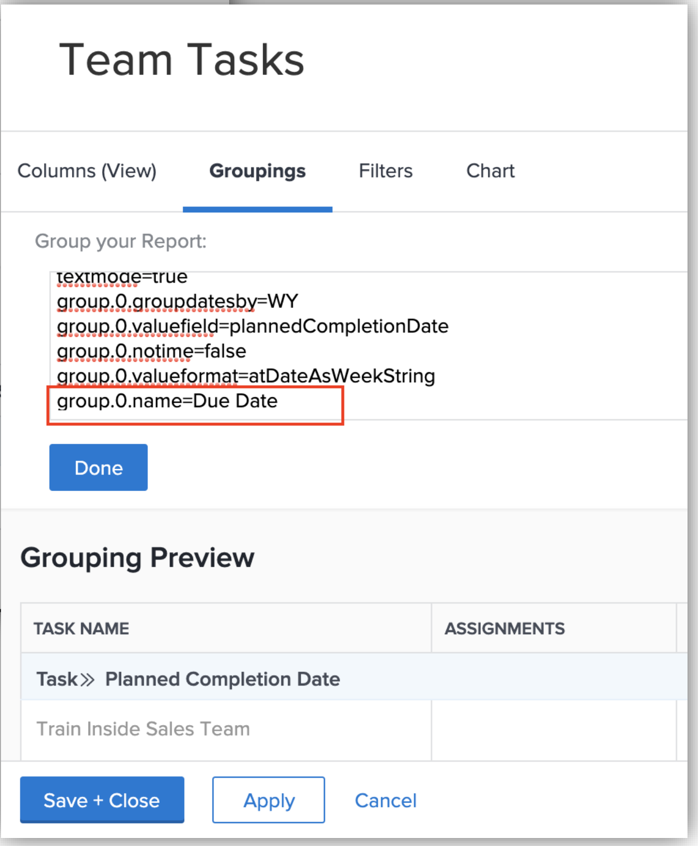
  displayname=Project Name
  valueformat=HTML
  valuefield=documentVersion:document:project:name

- Organize results by project name (grouping)

  group.0.displayname=Project Name
  group.0.valueformat=HTML
  group.0.valuefield=documentVersion:document:project:name

TIP #7: Rename Report Grouping

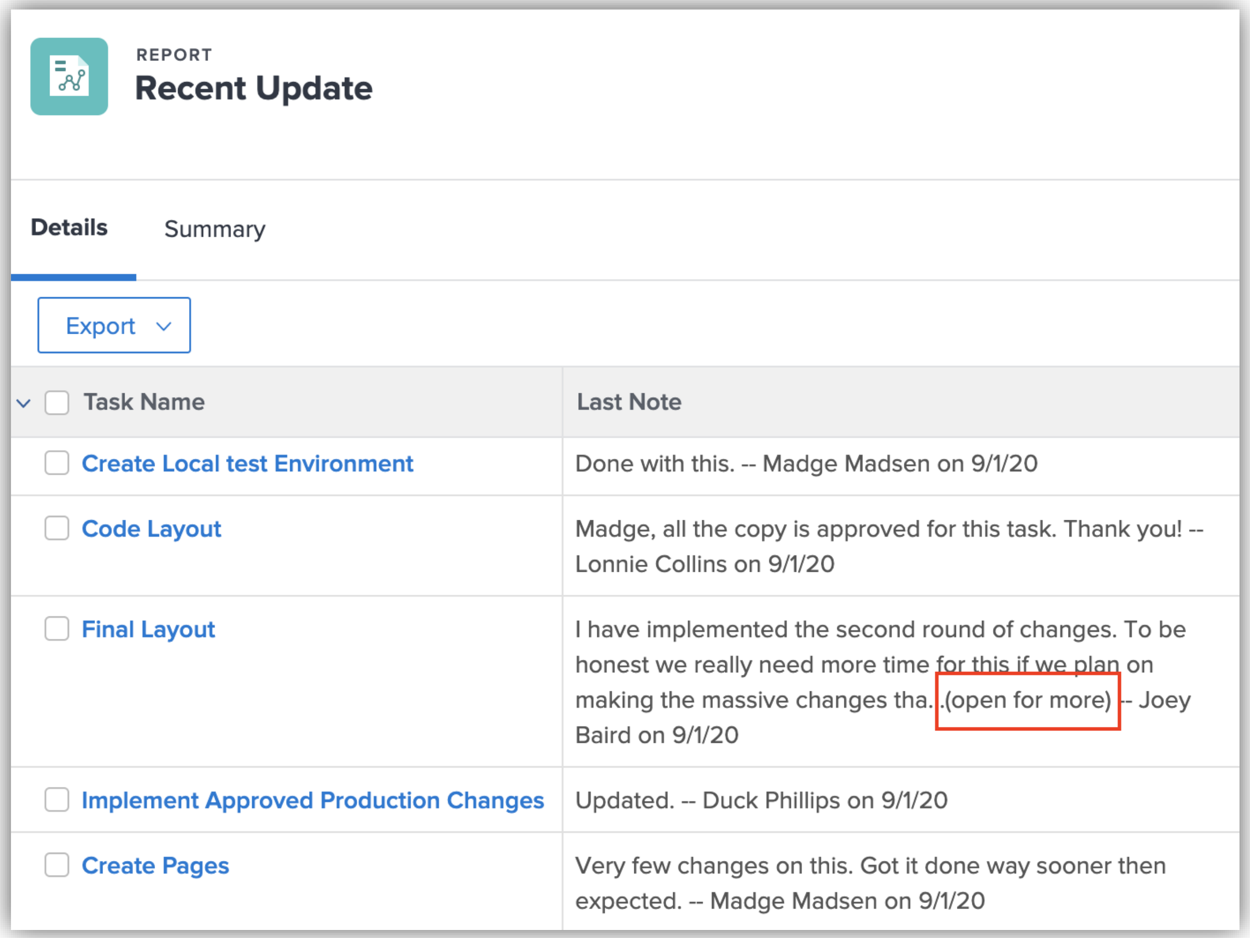




[Edit Display Name in Report Grouping]

- Rename grouping to something else. For example, you want to rename Planned Completion Date to Due Date in report grouping
  - Add grouping, switch to text mode and remove all the lines with the word "name" in them
  - Add a text mode line for group.0.name=Due Date
- Remove grouping name altogether and just have it show the value
  - Remove all the lines in the text mode interface of the grouping that have the word "name" in them
  - Add a text mode line for group.0.name=

TIP #8: Limit Character Count on Updates in a View

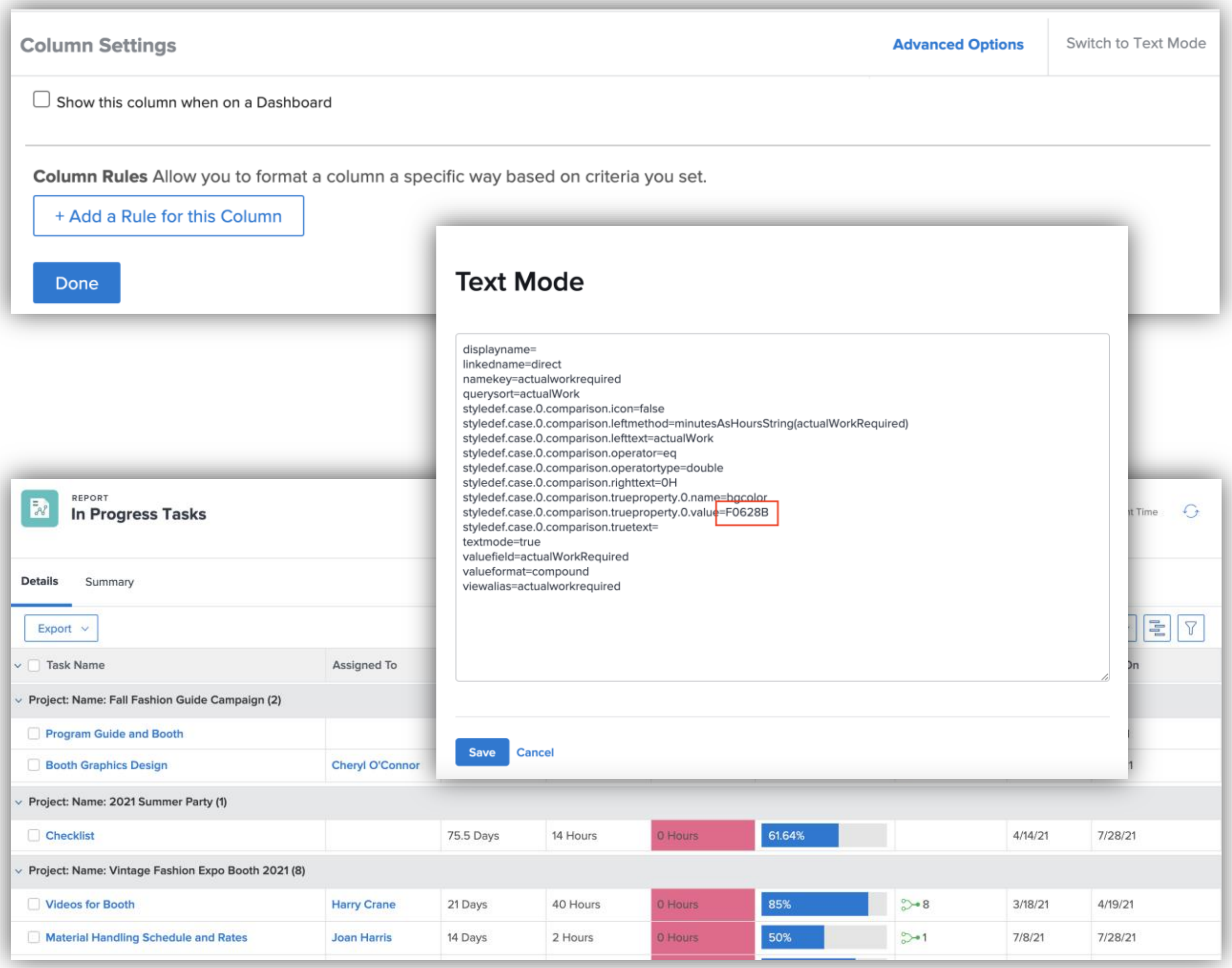


[Customer Reporting Cookbook]

- Can be used for any object with updates
- Column width is fixed
- Limit of 140 characters, but reads "open for more" if comment is longer

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

TIP #9: Custom Colors in Charts and Column Rules



Column Rules – text mode required

- Change the color of specific field values or highlight cells/rows based on certain criteria you select
- Add a placeholder color and then update the hexadecimal color value using text mode

Customize Chart Colors – no text mode required

- Specify a hexadecimal color value instead of selecting one from the color samples available
- Match colors in a report to your company's style guide

TIP #10: Common Text Mode Calculations to Add to Your View

Add a new column to your list or report, switch to text mode and paste the following. Can be used for any object that has cost or hours associated.

Planned vs Actual Cost – Did this go over or under budget, by how much.

displayname=Difference in Cost
textmode=true
valueexpression=SUB({actualCost},{plannedCost})
valueformat=currencyStringCurrencyRounded

Planned vs Actual Hours – Did this require more or less time than expected, by how much.

displayname=Difference in Hours
textmode=true
valueexpression=CONCAT(DIV(SUB({actualWorkRequired},{workRequired})/60)," Hours")
valueformat=HTML

TIP #10: Common Text Mode Calculations (continued)

REPORT
Planned vs Actuals

Show Filters | Report Actions | As of Aug 9, 2021 10:58 am Mountain Daylight Time

Details

Export | Filter: Report Default | View: Report Default | Grouping: Nothing

Task Name	Assignments	Planned Cost	Actual Cost	Difference in Cost	Planned Hours	Actual Hours	Difference in Hours
Collateral & Swag & Video		$8,500	$0	($8,500)	242 Hours	0 Hours	-242 Hours
Videos for Booth	Paul Kinsey Harry Crane	$5,100	$0	($5,100)	120 Hours	0 Hours	-120 Hours
Audio for Booth	Harry Crane	$1,600	$0	($1,600)	40 Hours	0 Hours	-40 Hours
Booth Graphics Design	Cheryl O'Connor	$1,350	**$4,375**	$3,025	30 Hours	**35 Hours**	5 Hours
Collateral Design	Cheryl O'Connor	$1,800	$0	($1,800)	40 Hours	0 Hours	-40 Hours
Program Guide Copy	Ann Owen	$1,600	**$1,720**	$120	40 Hours	**43 Hours**	3 Hours
Program Guide and Booth		$2,950	**$14,845**	$11,895	162 Hours	148 Hours	-14 Hours

TIP #10: Common Text Mode Calculations (continued)

Understanding how many workdays occurred between two dates, based on the associated project schedule and excluding weekends.

Timeliness - Number of days between the entry date and start date.

displayname=Timeliness
textmode=true
valueexpression=CONCAT(ROUND(WORKMINUTESDIFF({entryDate},{actualStartDate})/480,2)," Days")
valueformat=HTML

Turnaround time – Number of days between the actual start date and actual completion date

displayname=Turnaround Time
textmode=true
valueexpression=CONCAT(ROUND(WORKMINUTESDIFF({actualStartDate},{actualCompletionDate})/480,2)," Days")
valueformat=HTML

TIP #10: Common Text Mode Calculations (continued)

REPORT
Completed Issues

Show Filters | Report Actions | As of Aug 9, 2021 11:20 am Mountain Daylight Time

Details

Export | Filter: Report Default | View: Report Default | Grouping: Nothing

Ref #	Name	Assignments	Entry	Actual Start Date	Actual Completion Date	Timeliness	Turnaround Time
952	Vintage Fashion Expo Booth		8/21/20	9/2/20	11/10/20	7.73 Days	48.5 Days
956	Gainesville Fashion Week		8/22/20	7/3/20	9/10/20	35.48 Days	47.75 Days
1576	Need PowerPoint for executive offsite	Sal Romano Creative	6/15/20	6/16/20	6/24/20	1 Days	6 Days
1525	Review email blast for east-coast markets	Sal Romano Creative	5/17/20	5/18/20	6/7/20	1 Days	14 Days
1624	Update style guide for Mother's Day campaigns	Sal Romano Creative	6/30/20	7/1/20	7/10/20	1 Days	7 Days

BONUS: Open Proof Approvals on Completed Projects

Using an EXISTS statement, pull a list of all outstanding proof approvals associated with completed or closed projects. The built-in columns will show you the name of the approver so you can easily identify who missed making a decision.

Report Type: Proof Approval
Text Mode Filter:

REPORT
Open Proofs on Completed Projects

Show Filters   Report Actions   As of Apr 8, 2024 1:35 pm Mountain Daylight Time

Details

Report Default   Report Default   Nothing

Document Name	Approver	Version	Proof Creator	Proof Creation Date	Approver Decision	Proof Owner	Project Actual Completion Date	Project Status
Flowers - Proof	Svetlana Silina	1	Svetlana Silina	2/3/21	Pending	Svetlana Silina	3/4/21	CPL

EXISTS:a:$$OBJCODE=DOCU

EXISTS:a:project:status=CPL

EXISTS:a:project:status_Mod=in

EXISTS:a:versions:ID=FIELD:documentVersionID

approverDecision=pending

approverDecision_Mod=cieq

isCurrentDocumentVersion=true

isCurrentDocumentVersion_Mod=eq

Text mode for the column, Project Actual Completion Date

displayname=Project Actual Completion Date

textmode=true

valuefield=documentVersion:document:project:actualCompletionDate

valueformat=HTML

***Adding as a bonus because I am no EXISTS expert – these come with the help of Professional Services!*

Text Mode Resources

Documentation

- Text Mode Overview
- Common Uses for Text Mode
- API Explorer
- Text Mode Syntax Overview

Connect with your Peers

- Reporting Cookbook – Customer favorites with step-by-step instructions
- Ask questions and get ideas from other Workfront users on the Community

Blogs

- Basic Text Mode Groupings for Beginners
- Basic Text Mode Filters for Beginners

Sign up to be a part of the BETA programs!

We are thrilled to announce the launch of the Workfront Data Lake (Beta) on April 15, 2024. Beta participants will be able to connect their business intelligence tool (Tableau, Power BI, Domo, Looker, etc.) to the Workfront data lake to supply data visualizations with the following types of data available:

1. Low latency, current state data views
2. Change event records for point-in-time comparisons
3. Daily historic snapshots for trend analysis

This beta will require the following resources from your organization:

- A **Workfront System Administrator**, who is familiar with how Workfront is configured and who is familiar with reporting needs not currently addressed through the existing Workfront reporting capabilities.
- A **Business Analyst**, **Data Scientist** or someone with an equivalent skillset, who has access to your organization's business intelligence tools (e.g., Tableau, PowerBI, Looker, Domo, etc.) and who is familiar with creating business visualizations with those tools.
- A **BI Administrator**, who has rights to establish connections to and ingest from external data sources for business analysts and data scientists to use.

If you are interested, please register for the beta with the following link:
adobe.ly/workfrontdatalake

At Adobe Summit, the team announced registration for the Canvas Dashboards Visualization Beta is now open.

The primary purpose of the reporting capabilities provided in Canvas Dashboards is to extend the reportable objects in Workfront. In short, we are making objects such as Boards, Document review and approval, and (shortly) Workfront Planning data available in chart and table reports alongside the other primary Workfront objects like projects, tasks, issues, etc. This extended set of reportable objects will only be available on reports created through the Canvas Dashboards area.

Along the way, we are also incorporating feedback provided through previous reporting betas, customer conversations, and your posts the Innovation Lab to improve report creation experiences.

Please join us for this beta to gain early access to this new capability and to help shape our roadmap for the next iterations of Canvas Dashboards.

We plan on enabling this capability for organizations that have pre-registered for the beta on April 30, 2024.

If you are interested, please register for the beta with the following link:
adobe.ly/workfrontcanvasdashboards

Questions?

If you don't have any for me, I have some for you!

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Appendix | Customer Submitted Text Mode Examples

Advisors Excel | Current Task Information on Project Report

Description: On a project report, pull in the current task that is ready to start but not complete. Each item has an emoji next to it, and if there are multiple items, they will be displayed on their own line. This makes it easier to read when multiple tasks are happening on the project at a given time.
Report Type: Project
Text Mode Column:

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

Description: On a project report, pull in the person, team, or group assigned to the current task that is ready to start but not complete. If the task is assigned to a person, a smile emoji and the person's name will display. If assigned to a team, the team name will display. If the task is unassigned a question mark and the words "unassigned" will display.
Report Type: Project
Text Mode Column:

```
displayname=Task Assigned To
listdelimiter=<div>
listmethod=nested(tasks).lists
textmode=true
type=iterate
valueexpression=IF({numberOfChildren}=0,IF({canSt
art},IF(CONTAINS("CPL",{status}),"",IF({assignedToID}
!="",CONCAT("REPLACE WITH EMOJI
",{assignedTo}.{name}),IF({team}.{ID}!="",CONCAT("R
EPLACE WITH EMOJI ",{team}.{name}),"?
Unassigned")))))
valueformat=HTML
```

Description: On a project report, pull in the planned completion date of the current task that is ready to start but not complete. The icon next to the task due date will appear green if today or greater, and red if past due.
Report Type: Project
Text Mode Column:

```
displayname=Task Due
listdelimiter=<div>
listmethod=nested(tasks).lists
textmode=true
type=iterate
valueexpression=IF({numberOfChildren}=0,
IF({canStart},IF(CONTAINS("CPL",{status}),"
",IF({plannedCompletionDate}<$$TODAY,C
ONCAT(" ",{plannedCompleREPLACE WITH
EMOJI tionDate}),CONCAT("🟢
",{plannedCompletionDate})))))
valueformat=HTML
```

DSW | Identifying current, prior, and next tasks

Description: Quickly see what child task(s) are currently being worked on in a Project Report

Report Type: Project

Text Mode Column:

```
displayname=Current Task
listdelimiter=<div>
listmethod=nested(tasks).lists
textmode=true
type=iterate
valueexpression=IF({numberOfChildren}=0,IF({canStart},IF(ISBLANK({actualCompletionDate}),CONCAT({name}," "),"")))
valueformat=HTML
width=300
```

Current Task
Retouching Placed in Artwork Design Releases Artwork to SharePoint

Description: Prior Task in Task Report - see what tasks were previously worked on with task name, assignee, due date and task status

Report Type: Task

Text Mode Column:

```
displayname=Prior Task and Assignee
listdelimiter=<br>
listmethod=nested(predecessors).lists
textmode=true
type=iterate
valueexpression=CONCAT({predecessor}.{name}," | ",{predecessor}.{assignedTo}," | ",{predecessor}.{plannedCompletionDate}," | ",{predecessor}.{status})
valueformat=HTML
```

Description: See the Next Task in the process in a Task Report - due date, assignee and task name

Report Type: Task

Text Mode Column:

```
displayname=Next Task
listdelimiter=
listmethod=nested(successors).lists
textmode=true
type=iterate
valueexpression=CONCAT({successor}.{plannedCompletionDate},' - ',{successor}, ' - ',{successor}.{assignedTo}.{name})
valueformat=HTML
```

Prior Task and Assignee	Name	Assignments	Start On	Due On ↑	Complete Status	Date Set to Current Status	Next Task
2508695_[redacted]							
Layout Delivered | Katie [redacted] | 4/1/24 | CPL	Copy Delivered	[redacted]	4/2/24	4/4/24	Not Completed	3/27/24	4/5/24 - Copy Placed in Layout - Katie [redacted]
Copy Placed in Layout | Katie [redacted] | 4/5/24 | NEW	Copy Approves Layout	[redacted]	4/8/24	4/9/24	Not Completed	3/27/24	4/10/24 - Project Manager Approves - Angela [redacted]

Avalere Health | Issue Submission to Project Completion Based on Project Schedule

If you have multiple schedules in your instance and create calculated text mode expressions like WORKMINUTESDIFF, the calculation is done based on the *default* schedule.

To use a **particular** schedule, you can customize your text mode expression. For example, I use this text mode to calculate the time from request submission to project completion based on the **project's** schedule:

```
displayname=Request Submission to Project Completion
textmode=true
valueexpression=ROUND(WORKMINUTESDIFF({project}.{convertedOpTaskEntryDate},{project}.{actualCompletionDate},{project}.{scheduleID})/60,2)
valueformat=HTML
```

You can also create calculated custom fields referencing a specific schedule – just replace the INSERT SCHEDULE ID with the alphanumeric ID of the schedule.

ROUND(WORKMINUTESDIFF(Project.Entry Date,Actual Start Date,Project,"**INSERT SCHEDULE ID**")/60,2)

Hospital Corporation of America | Link to a tab on an object

Create a calculated field that links to a direct tab (ex: Hours). This field can be pulled into a report view to help drive adoption with users – one less click, right there in their dashboard/report for easy access.

REPORT

CS Workshop - Link to Hours Tab

Show Filters | Report Actions | As of May 10, 2023 4:05 pm Mountain Daylight Time

Details

Report Default | Report Default | Nothing

Task Name	Assignments	Duration	Pln Hrs	Predecessors	Start On	Due On	% Complete	Link to Hours Tab
Final Layout	Ann Owen Joey Baird	12 Days	80 Hours	2	1/11/21	1/28/21	100%	Click here to log time
Photo Review	Freddy Rumsen Cheryl O'Connor Duck Phillips David White	2 Days	64 Hours	10	1/12/21	1/15/21	100%	Click here to log time
Final Copy	Ann Owen	3 Days	16 Hours	5	2/8/21	2/12/21	100%	Click here to log time
Create Assets	Sal Romano	1 Day	8 Hours		1/25/21	1/26/21	100%	Click here to log time
Program Guide Layout	Joey Baird	5 Days	40 Hours	3	3/30/21	4/9/21	100%	Click here to log time

Can use a similar formula for "Click here to post an update" which would take a user to the Updates page. More information here.

Hospital Corporation of America | Link to a tab on an object (continued)

Step 1: Create the custom field

- Create a calculated custom field. Be sure to update the domain with the domain of your Workfront instance.

```
CONCAT("https://domain.my.workfront.com","/","task/view?ID=",{ID},"&activeTab=list-task-hours")
```

- Click Apply.
- Go back into your newly created custom field and scroll down on the left-hand side. Check the box for "Update previous calculations in the background" – this will fill in the field.
- Save and close your form.
- If needed, attach custom form (ideally in bulk) to tasks or template tasks.

Step 2: Add this column to your report

- Create a new task report. Add this custom field as a column.
- Under the Advanced Options area, add a Column Rule to this column. Set your rule to be: IF this field IS NOT BLANK, display text – Click here to log time. Add rule.
- Switch to text mode. Add a line for link.url=DE:Link to Hours Tab (or name of custom field)
- Save and close report.