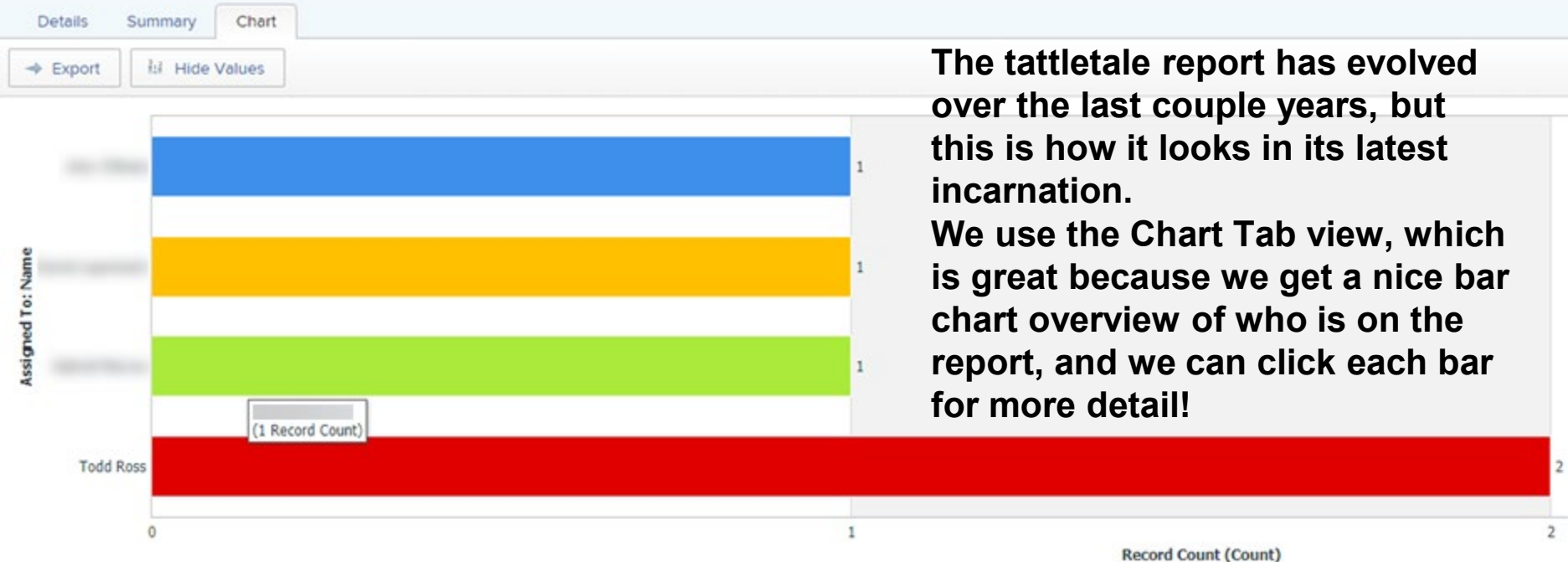


How to build a Tattletale Report

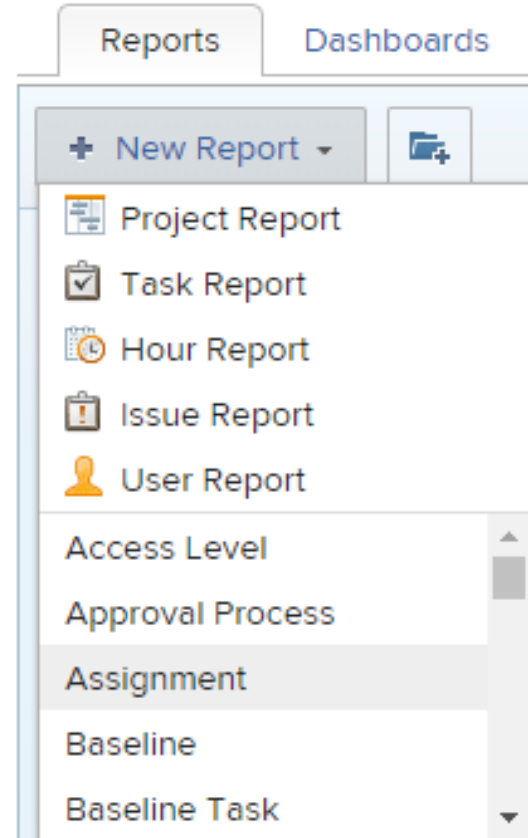
04-COPS - Tattletale - OVERDUE / LATE TASKS



The tattletale report has evolved over the last couple years, but this is how it looks in its latest incarnation.

We use the Chart Tab view, which is great because we get a nice bar chart overview of who is on the report, and we can click each bar for more detail!

First start a new assignment report.



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Columns (View)
Groupings
Filters
Chart

Set Filter Rules for your Report

Only show me Assignments in which the...

Task » Status

Not Equal

Complete

AND

Project » Portfolio ID

Equal

Customer Operations

AND

Task » Planned Completion Date

Less Than

\$\$TODAY-1w

AND

Project » Status

Equal

Current - DO NOT USE, Content Develo...
Initiation, Idea
Planning
Estimate

AND

Task » Name

Does Not Contain

kickoff

Add another Filter Rule

Filter the information down to exactly what you need. In this case, I want only tasks that aren't complete, everything that's in my Portfolio ID, with a task planned completion date older than 1 week old, a project status that is equal current related, and that the task doesn't contain the word kickoff. We have a separate tattletale report for kickoffs overdue, but the same logic that follows applies.

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Columns (View)

Groupings

Filters

Chart

Group your Report:

First by:

Assigned To » Name

+ Add another Grouping

**Then, assign one grouping, which I only care about who the task is assigned to.
The best catch-all for this is Assigned To >> Name.**


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Columns (View)


Groupings


Filters


Chart



Column


Bar


Pie


Line


Gauge


Bubble

Bottom (X) Axis

Record Count ▾

Left (Y) Axis

Assigned To » Name ▾

[Custom Colors >](#)

☐

Show in 3D
Display chart in 3D

☐

Group Bars
Select an additional grouping and define how your chart should be grouped

☐

Combination Chart
Combine your chart by an additional field value

Next, choose the best type of chart that works for you. In our case, we found that the bar chart worked the best. The Bottom X Axis is set to Record Count. The Left Y Axis is set to Assigned To >> Name.

Report Options

Report Title

Description

Run this report with the Access Rights of:

When the Report loads, show the:

When the report loads on a dashboard, show:
 items

☒ Allow View to be changed on the report

☒ Allow Group to be changed on the report

☒ Allow Filter to be changed on the report

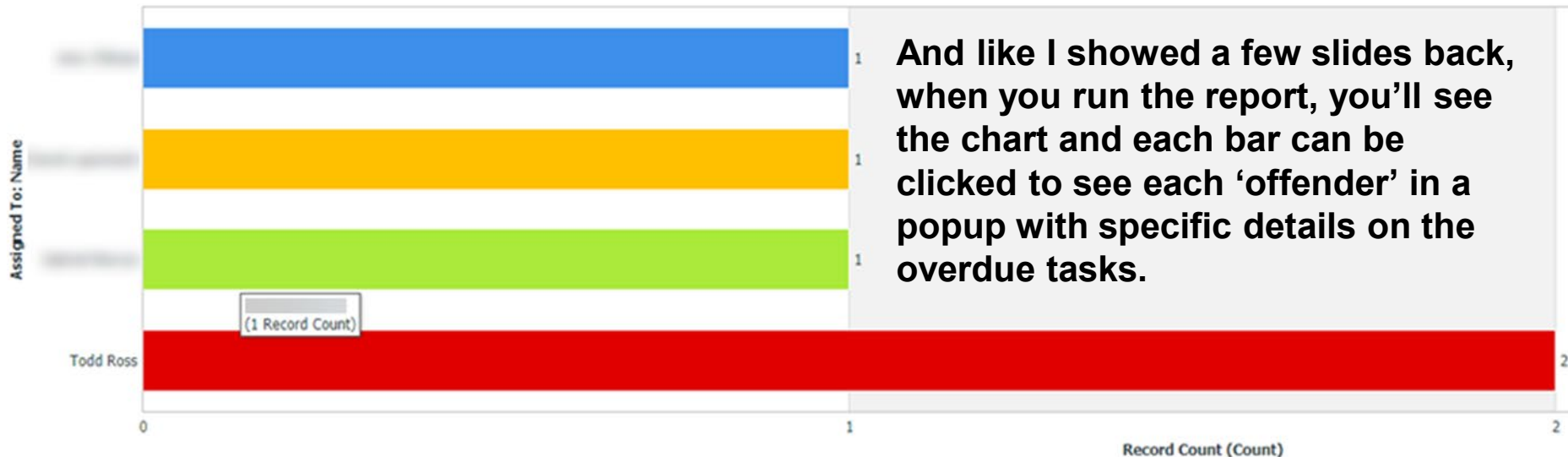
Finally, select the Report Options, and select When the Report loads, show the: Chart Tab. It's also a great idea to change the amount of items to 200 from the default of 15, so you can capture them all.

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Details Summary **Chart**

→ Export

Hide Values



And like I showed a few slides back, when you run the report, you'll see the chart and each bar can be clicked to see each 'offender' in a popup with specific details on the overdue tasks.

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➔

Export

▼

View

Report Default

▼

Grouping

<div><div><div><div></div><div>▼</div></div></div>User</div>	Project: Name	Task: Name	Task: Assignments	Task: Due Date	Task: Percent Complete
▼ Assigned To: Name: Todd Ross (2)					
<div><div><div><div></div><div></div></div></div>Todd Ross</div>	818370 - Todd Ross - Workfront Leap 2019 Project	Launch	<div><div><div></div></div>Todd Ross</div>	1/16/19	<div><div>0%</div></div>
<div><div><div><div></div><div></div></div></div>Todd Ross</div>	818370 - Todd Ross - Workfront Leap 2019 Project	Development	<div><div><div></div></div>Todd Ross</div>	1/15/19	<div><div>0%</div></div>

Simply click any bar, and you'll see the specific overdue tasks.