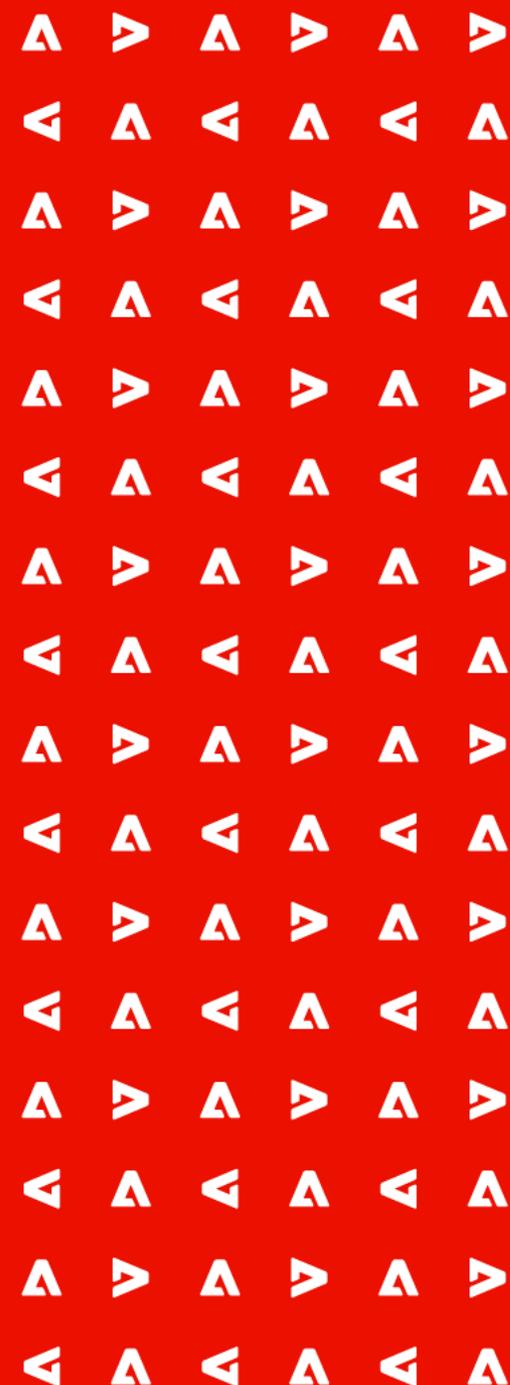




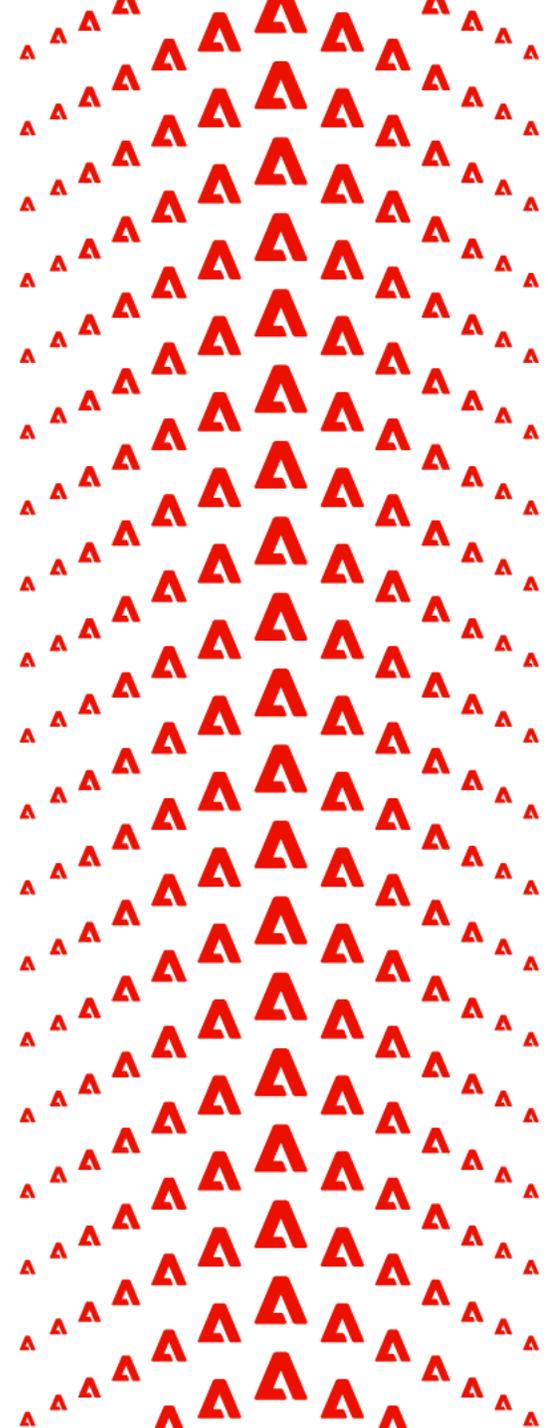
# 10 Tips for Using Text Mode in Adobe Workfront

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



# Adobe Workfront Scale Customer Success Team



**Cynthia Boon**

Customer Success Manager,  
Adobe Workfront

 [Connect on LinkedIn](#)

Experience League Community  
Profile: @CynthiaBoon



**Leslie Spier**

Customer Success Manager,  
Adobe Workfront

 [Connect on LinkedIn](#)

Experience League  
Community Profile: @LeslieSpier



**Nichole Vargas**

Customer Success Manager,  
Adobe Workfront

 [Connect on LinkedIn](#)

Experience League Community  
Profile: @NicholeVargas

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](mailto: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.

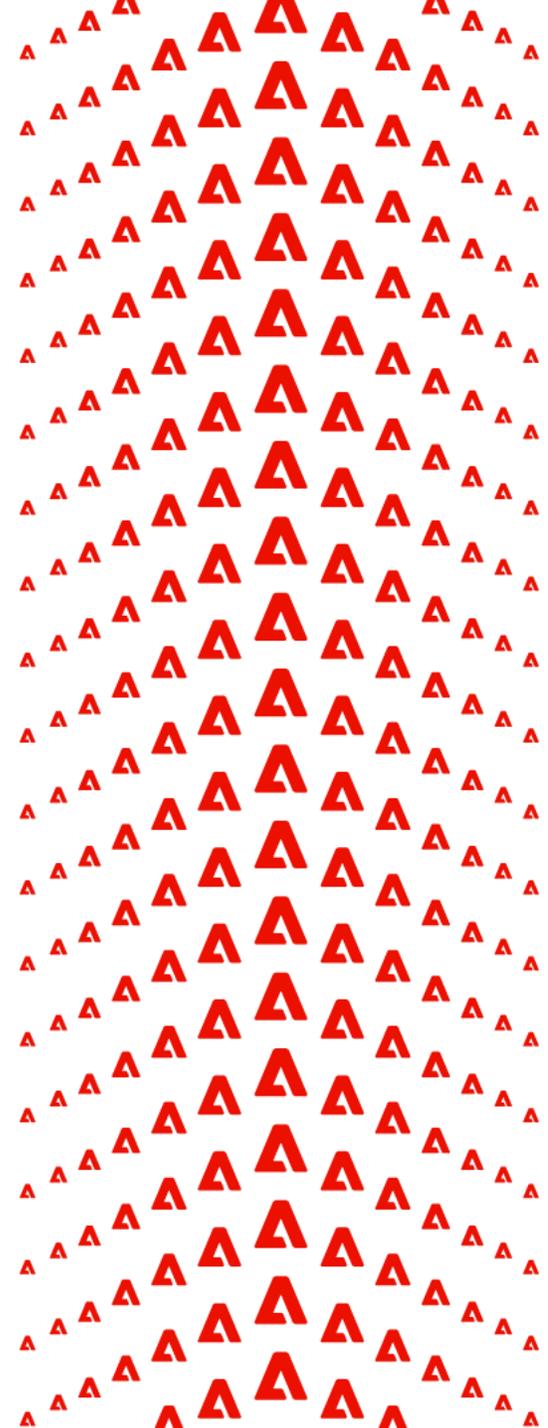
### **When should text mode be used?**

- 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

The screenshot shows the API Explorer interface. On the left, there is a sidebar titled 'Objects' with a search filter set to 'All' and a dropdown menu for 'API Unsupported'. Below this is a list of object names: APIVersionMetadata, Access Level, AccessLevelPermissions, Access Request, Share, AccessRulePreference, AccessScope, Access Scope Action, AccessToken, Account Rep, Acknowledgement, ActivityLog, AgileColumn, AgileColumnField, Agile View, Team Stories, and Goals. The main area on the right is titled 'Objects' and has a filter set to 'task'. Below the filter, there are tabs for 'fields', 'references', 'collections', 'search', 'actions', and 'TASK'. The 'fields' tab is selected, showing a table of fields for the 'Task' object.

ID	ID
URL	URL
accessorIDs	accessorIDs
Actual Completion Date	actualCompletionDate
Actual Cost	actualCost
Actual Duration	actualDuration
Actual Duration Minutes	actualDurationMinutes
Actual Expense Cost	actualExpenseCost
Actual Labor Cost	actualLaborCost
Actual Revenue	actualRevenue
Actual Start Date	actualStartDate
Actual Hours	actualWork
Actual Hours	actualWorkRequired
actualWorkRequiredDouble	actualWorkRequiredDouble
Approval Path Completion Date	approvalCompletionDate
Approval Estimated Start Date	approvalEstStartDate
Approval Planned Start Date	approvalPlannedStartDate

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**

[API Explorer](#)

# Fields vs References

## FIELDS

Field Name	Field Name (Camel Case)
BC Completion State	<i>BCCompletionState</i>
ID	<i>ID</i>
URL	<i>URL</i>
accessorIDs	<i>accessorIDs</i>
Actual Benefit	<i>actualBenefit</i>
Actual Completion Date	<i>actualCompletionDate</i>
Actual Cost	<i>actualCost</i>
actualDurationExpression	<i>actualDurationExpression</i>
Actual Duration Minutes	<i>actualDurationMinutes</i>
Actual Expense Cost	<i>actualExpenseCost</i>
Actual Hours Last Month	<i>actualHoursLastMonth</i>
Actual Hours Last Three Months	<i>actualHoursLastThreeMonths</i>

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

Reference Name	Field Name
Alignment Scorecard	<i>alignmentScoreCard</i>
Approval Process	<i>approvalProcess</i>
Category	<i>category</i>
Company	<i>company</i>
Converted Issue Originator	<i>convertedOpTaskOriginator</i>
Current Approval Stage	<i>currentApprovalStep</i>
Customer	<i>customer</i>
Default Baseline	<i>defaultBaseline</i>
Scorecard	<i>deliverableScoreCard</i>
Entered By	<i>enteredBy</i>
Exchange Rate	<i>exchangeRate</i>
Group	<i>group</i>
Last Condition Note	<i>lastConditionNote</i>
Last Note	<i>lastNote</i>
Last Updated By	<i>lastUpdatedBy</i>
Milestone Path	<i>milestonePath</i>
Owner	<i>owner</i>

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}

# Collections

Project	fields	references	collections	search	actions	PROJ
accessRules			<i>accessRules</i>			
alignmentValues			<i>alignmentValues</i>			
allConditions			<i>allConditions</i>			
allHours			<i>allHours</i>			
allPriorities			<i>allPriorities</i>			
allStatuses			<i>allStatuses</i>			
approverStatuses			<i>approverStatuses</i>			
awaitingApprovals			<i>awaitingApprovals</i>			
Baselines			<i>baselines</i>			
Billing Records			<i>billingRecords</i>			
deliverableValues			<i>deliverableValues</i>			
Document Requests			<i>documentRequests</i>			

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=	<p>This line represents the format used to display the text, number, or date. Examples include HTML, doubleAsPercent, atDate</p> <p>Learn more:</p> <ul style="list-style-type: none"><li>• <a href="#">Format dates in text mode reports</a></li><li>• <a href="#">Format numbers, currency, and percentages in text mode reports</a></li></ul>
valuefield=  OR  valueexpression=	<p>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).</p> <p>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})</p> <p>Learn more: <a href="#">Calculated data expressions</a></p>

[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**

Columns (View) Groupings Filters

Show in this column:

Project >> Portfolio ID

Last Note

Project

Portfolio ID

Portfolio Manager

Portfolio Priority

Selected on Portfolio Optimizer

## Text Mode

```
valuefield=project:portfolioID
querysort=project:portfolioID
valueformat=HTML
displayname=
linkedname=project
namekey=view.relatedcolumn
namekeyargkey.0=project
namekeyargkey.1=portfolioID
```

## Text Mode

```
valuefield=project:portfolio:name
querysort=project:portfolio:name
valueformat=HTML
displayname=Portfolio
linkedname=project
namekey=view.relatedcolumn
namekeyargkey.0=project
namekeyargkey.1=portfolio:name
```

Option to name your column

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

The image displays four sequential screenshots of a report builder interface, labeled 1 through 4, illustrating the process of filtering for 'Work Pending Approval'.

- Screenshot 1:** Shows the 'Filters' tab with a filter rule: 'Project >> Status' set to 'Equal' with the value 'Complete'.
- Screenshot 2:** Shows the 'Filters' tab with the filter rule text: 'status=CPL' and 'status\_Mod=in'.
- Screenshot 3:** Shows the 'Filters' tab with the filter rule text: 'status=CPL:A' and 'status\_Mod=in'. The 'A' in 'CPL:A' is highlighted with a red box.
- Screenshot 4:** Shows the 'Filters' tab with the filter rule: 'Project >> Status' set to 'Equal' with the value 'Complete - Pending Approval'.

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

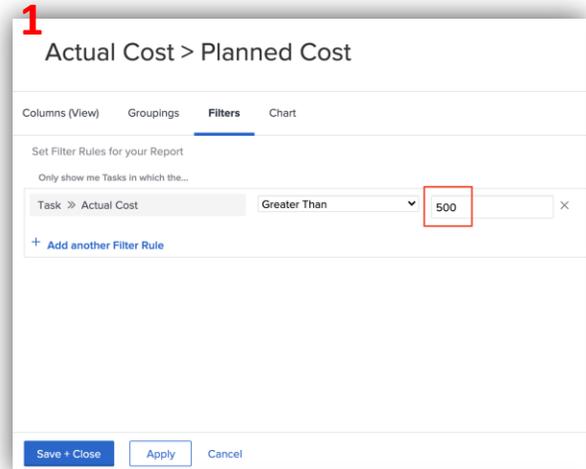
To do this:

- 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

# TIP #3: Compare Two Fields in a Filter

**1** Actual Cost > Planned Cost



Columns (View) Groupings **Filters** Chart

Set Filter Rules for your Report

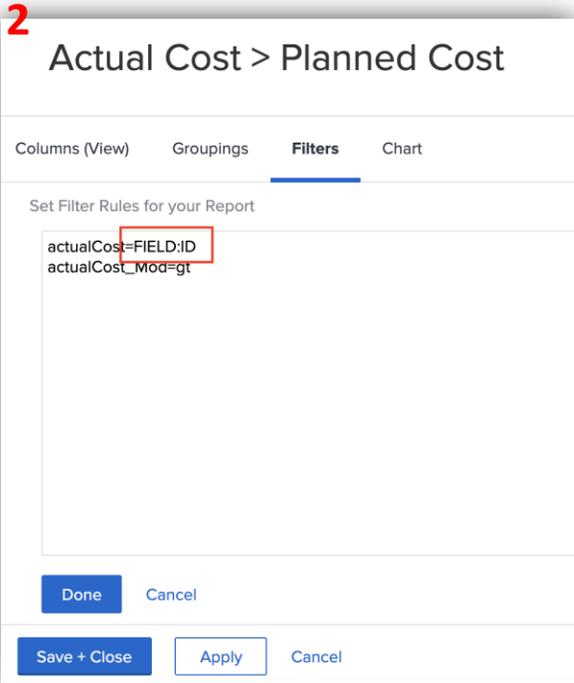
Only show me Tasks in which the...

Task » Actual Cost Greater Than 500

+ Add another Filter Rule

Save + Close Apply Cancel

**2** Actual Cost > Planned Cost



Columns (View) Groupings **Filters** Chart

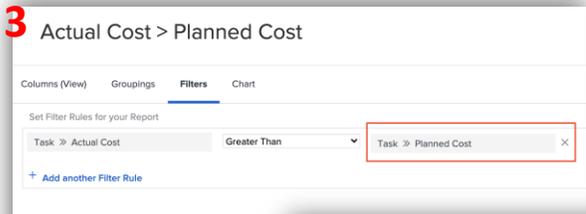
Set Filter Rules for your Report

actualCost=FIELD:ID  
actualCost\_Mod=gt

Done Cancel

Save + Close Apply Cancel

**3** Actual Cost > Planned Cost



Columns (View) Groupings **Filters** Chart

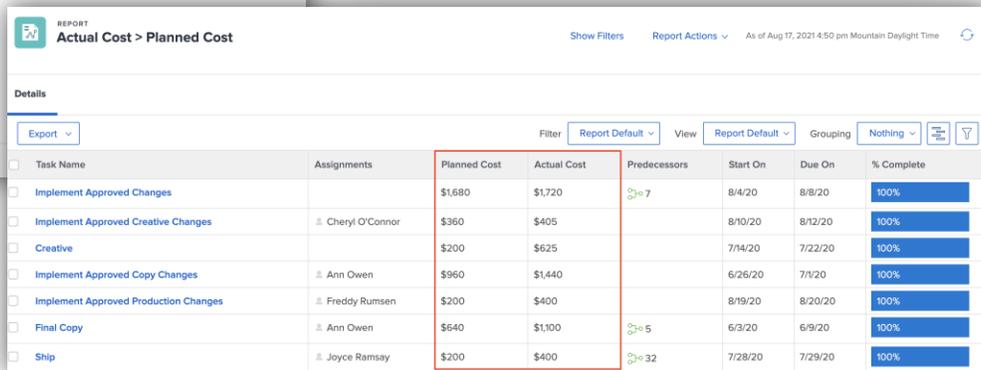
Set Filter Rules for your Report

Task » Actual Cost Greater Than Task » Planned Cost

+ Add another Filter Rule

Save + Close Apply Cancel

**4**



REPORT Actual Cost > Planned Cost

Show Filters Report Actions As of Aug 17, 2021 4:50 pm Mountain Daylight Time

Details

Export Filter Report Default View Report Default Grouping Nothing

Task Name	Assignments	Planned Cost	Actual Cost	Predecessors	Start On	Due On	% Complete
Implement Approved Changes		\$1,680	\$1,720	7	8/4/20	8/8/20	100%
Implement Approved Creative Changes	Cheryl O'Connor	\$360	\$405		8/10/20	8/12/20	100%
Creative		\$200	\$625		7/14/20	7/22/20	100%
Implement Approved Copy Changes	Ann Owen	\$960	\$1,440		6/26/20	7/1/20	100%
Implement Approved Production Changes	Freddy Rumsen	\$200	\$400		8/19/20	8/20/20	100%
Final Copy	Ann Owen	\$640	\$1,100	5	6/3/20	6/9/20	100%
Ship	Joyce Ramsay	\$200	\$400	32	7/28/20	7/29/20	100%

Save + Close Apply Cancel

- 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=name` with `valueexpression={name}`. In this case, it would be swapping `valuefield=name` with `valueexpression={name}`.

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

Ref #	Name
9586	<a href="#">DB Workshop Example 080422-04</a>
9587	<a href="#">DB Workshop Example 080422-05</a>
9683	<a href="#">DB Workshop Example 080422-06</a>

### Text Mode

```
displayname=  
linkedname=direct  
namekey=name  
querysort=name  
textmode=true  
valuefield=name  
valueformat=HTML
```

Ref #	Name
9586	DB Workshop Example 080422-04
9587	DB Workshop Example 080422-05
9683	DB Workshop Example 080422-06

### Text Mode

```
displayname=  
linkedname=direct  
namekey=name  
querysort=name  
textmode=true  
valueexpression={name}  
valueformat=HTML
```

Save Cancel

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

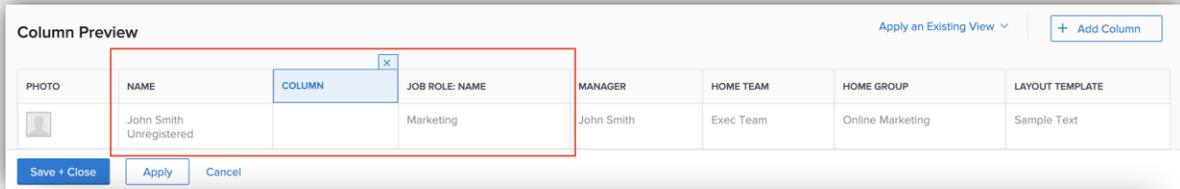


Photo	Name	Manager	Home Team	Home Group	Layout Template
<input type="checkbox"/>	<a href="#">Mary Ann Erickson</a> Marketing Operations Manager	<a href="#">Kara Trapp</a>	<a href="#">Customer Success</a>	<a href="#">Marketing</a>	<a href="#">System Administrator</a>
<input type="checkbox"/>	<a href="#">Svetlana Silina</a> Art Director	<a href="#">Kara Trapp</a>	<a href="#">Customer Success</a>	<a href="#">Marketing</a>	
<input type="checkbox"/>	<a href="#">Freddy Rumsen</a> Editor	<a href="#">Joan Harris</a>	<a href="#">Customer Success</a>	<a href="#">Marketing</a>	<a href="#">Creative Manager</a>
<input type="checkbox"/>	<a href="#">David White</a> Art Director	<a href="#">Lane Pryce</a>	<a href="#">Creative</a>	<a href="#">Marketing</a>	<a href="#">Project Manager</a>

[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=<br>
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

## Proofs Awaiting Approval

Columns (View) Groupings Filters Chart

Show in this column:

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

### Column Preview

DOCUMENT NAME	APPROVER	VERSION	PROJECT NAME
Sample Text	John Smith	Sample Text	CRM Integration - Tampa Office

Save + Close Apply Cancel

- 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

**Team Tasks**

Columns (View) **Groupings** Filters Chart

Group your Report:

```
textmode=true  
group.0.linkedname=direct  
group.0.namekey=plannedCompletionDate  
group.0.valuefield=plannedCompletionDate  
group.0.notime=false  
group.0.groupdatesby=MY
```

Done

**Grouping Preview**

TASK NAME	ASSIGNMENTS
Task» Planned Completion Date	
Train Inside Sales Team	

Save + Close Apply Cancel

**Team Tasks**

Columns (View) **Groupings** Filters Chart

Group your Report:

```
textmode=true  
group.0.groupdatesby=WY  
group.0.valuefield=plannedCompletionDate  
group.0.notime=false  
group.0.valueformat=atDateAsWeekString  
group.0.name=Due Date
```

Done

**Grouping Preview**

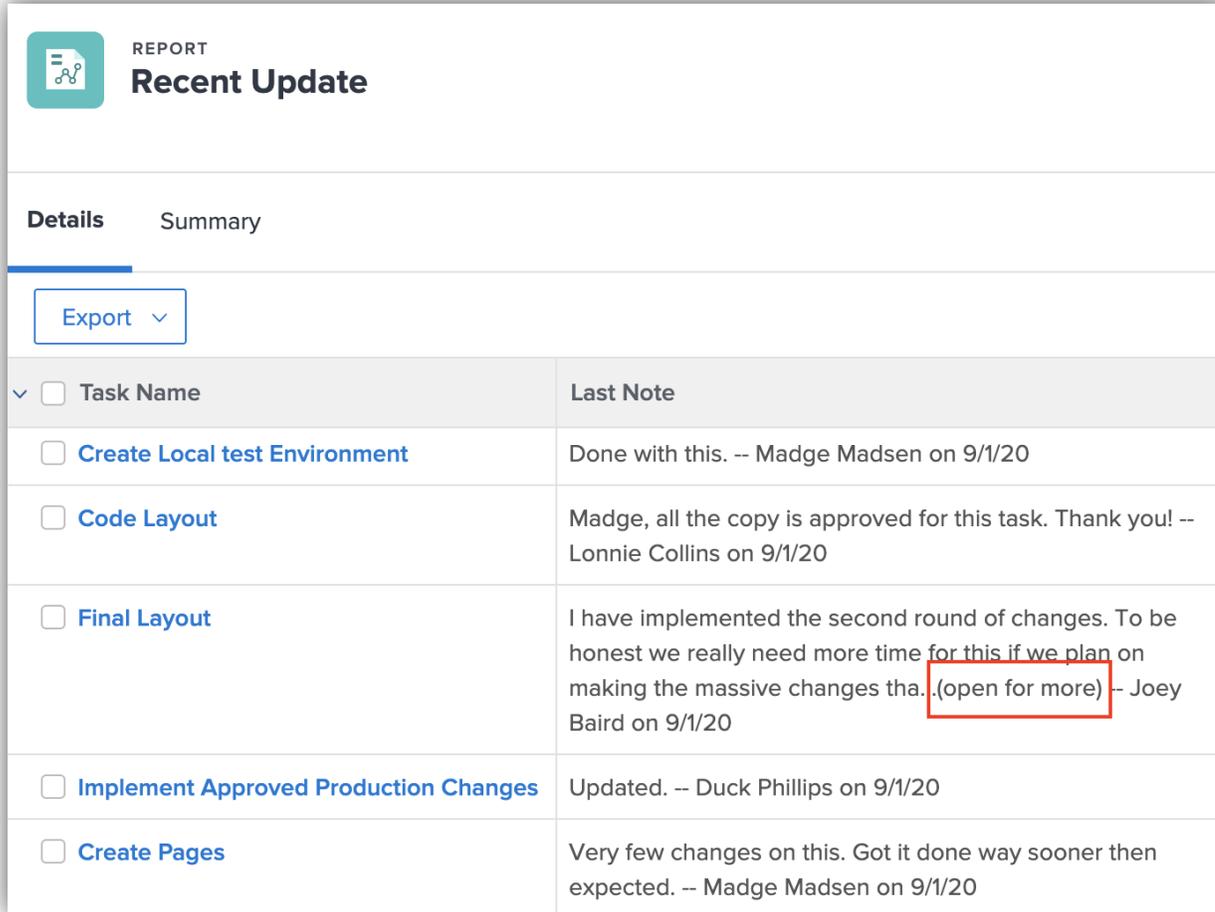
TASK NAME	ASSIGNMENTS
Task» Planned Completion Date	
Train Inside Sales Team	

Save + Close Apply Cancel

[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



REPORT  
**Recent Update**

Details Summary

Export ▾

<input type="checkbox"/> Task Name	Last Note
<input type="checkbox"/> Create Local test Environment	Done with this. -- Madge Madsen on 9/1/20
<input type="checkbox"/> Code Layout	Madge, all the copy is approved for this task. Thank you! -- Lonnie Collins on 9/1/20
<input type="checkbox"/> Final Layout	I have implemented the second round of changes. To be honest we really need more time for this if we plan on making the massive changes tha... (open for more) -- Joey Baird on 9/1/20
<input type="checkbox"/> Implement Approved Production Changes	Updated. -- Duck Phillips on 9/1/20
<input type="checkbox"/> Create Pages	Very few changes on this. Got it done way sooner then expected. -- Madge Madsen on 9/1/20

- 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
```

[Customer Reporting Cookbook](#)



## 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

<input type="checkbox"/>	Task Name	Assignments	Planned Cost	Actual Cost	Difference in Cost	Planned Hours	Actual Hours	Difference in Hours
<input type="checkbox"/>	Collateral & Swag & Video		\$8,500	\$0	(\$8,500)	242 Hours	0 Hours	-242 Hours
<input type="checkbox"/>	Videos for Booth	Paul Kinsey Harry Crane	\$5,100	\$0	(\$5,100)	120 Hours	0 Hours	-120 Hours
<input type="checkbox"/>	Audio for Booth	Harry Crane	\$1,600	\$0	(\$1,600)	40 Hours	0 Hours	-40 Hours
<input type="checkbox"/>	Booth Graphics Design	Cheryl O'Connor	\$1,350	<b>\$4,375</b>	\$3,025	30 Hours	<b>35 Hours</b>	5 Hours
<input type="checkbox"/>	Collateral Design	Cheryl O'Connor	\$1,800	\$0	(\$1,800)	40 Hours	0 Hours	-40 Hours
<input type="checkbox"/>	Program Guide Copy	Ann Owen	\$1,600	<b>\$1,720</b>	\$120	40 Hours	<b>43 Hours</b>	3 Hours
<input type="checkbox"/>	Program Guide and Booth		\$2,950	<b>\$14,845</b>	\$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:

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

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

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](https://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.

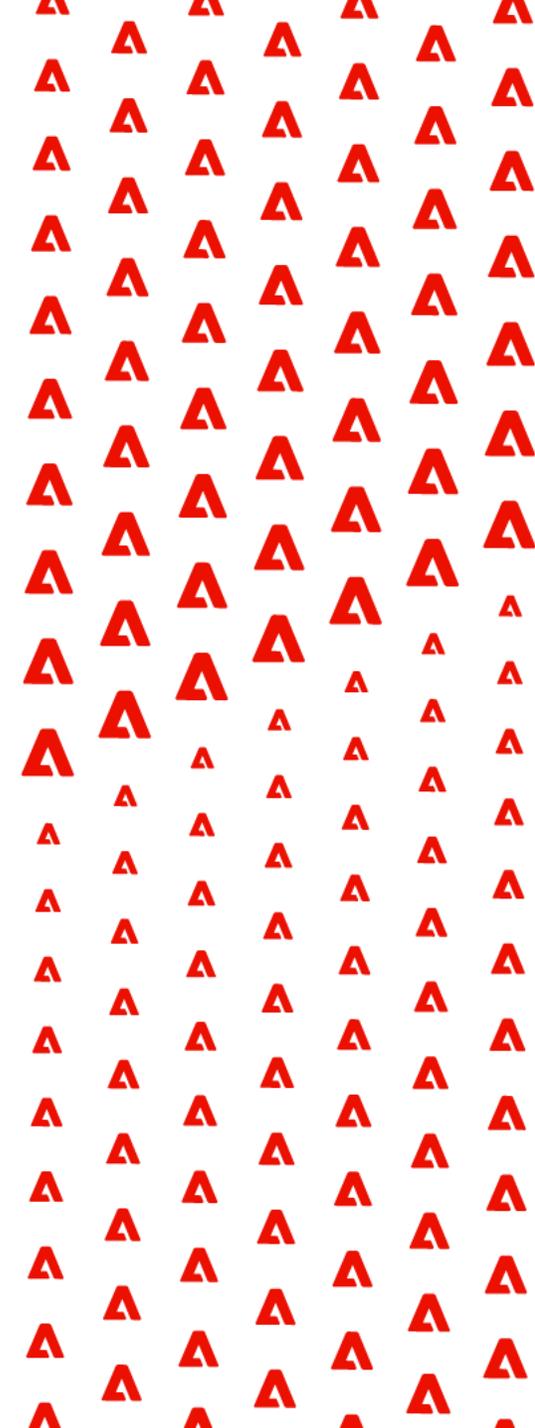
If you are interested, please register for the beta with the following link:

[adobe.ly/workfrontcanvasdashboards](https://adobe.ly/workfrontcanvasdashboards)



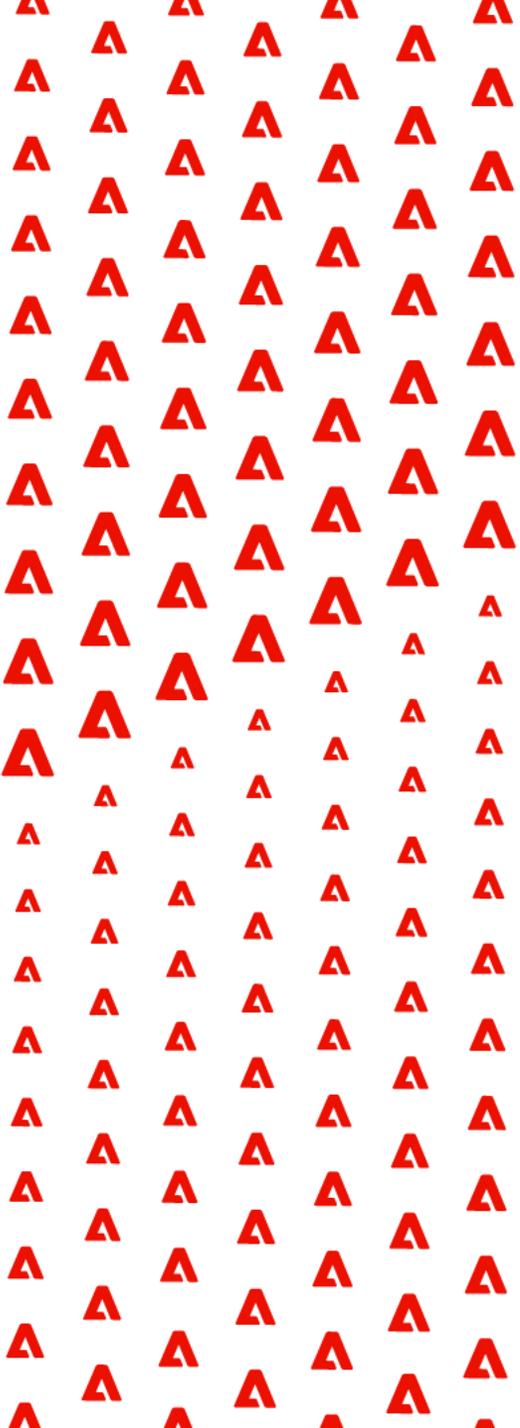
# Questions?

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





# 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
```

✓ Invoice	😊 Jenifer Mills	🔴 4/25/23
✓ Invoice	😊 Jenifer Mills	🔴 5/5/23

**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({canStart},IF(CONTAINS("CPL",{status}),"",IF({assignedToID}!="",CONCAT("REPLACE WITH EMOJI ",{assignedTo}.{name}),IF({team}.{ID}!="",CONCAT("REPLACE 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,CONCAT(" ",{plannedCompletionDate}),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
```

Prior Task and Assignee	Name	Assignments	Start On	Due On ↑	Complete Status	Date Set to Current Status	Next Task
2508695							
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]

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
```

# 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)
```

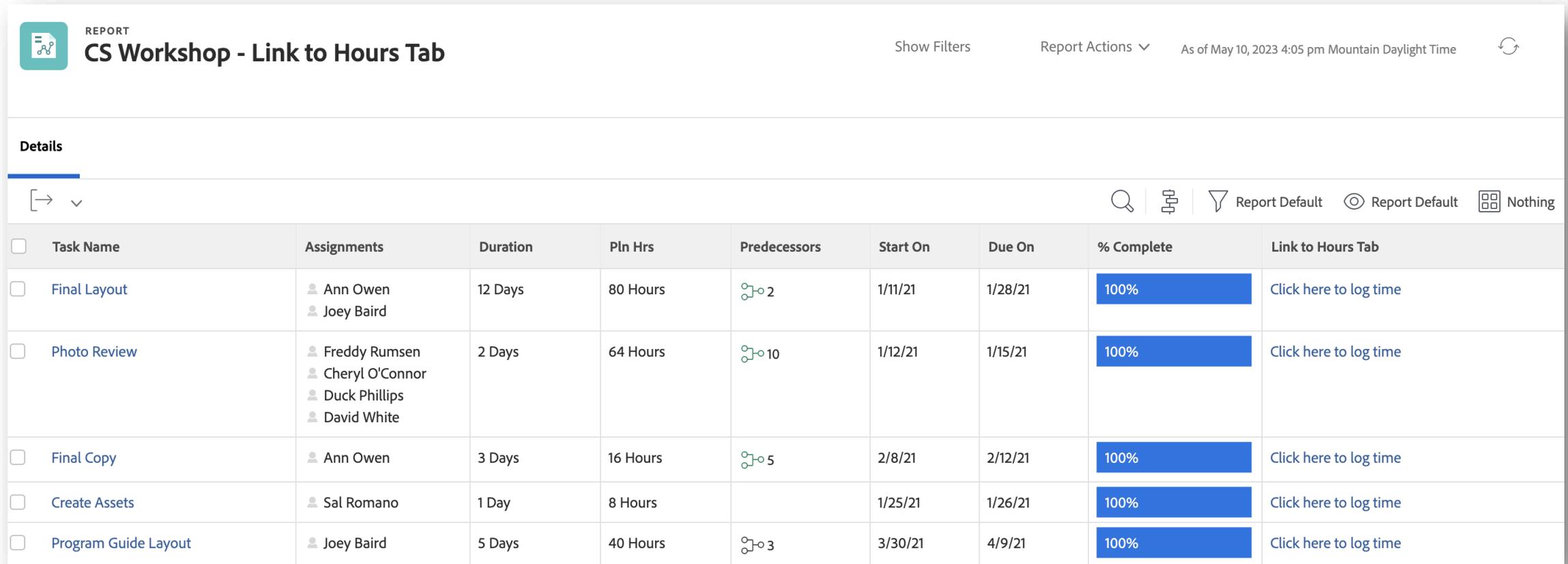
```
valueformat=HTML
```

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.



The screenshot shows a report interface for 'CS Workshop - Link to Hours Tab'. The report includes a search bar, filter icons, and a table with the following columns: Task Name, Assignments, Duration, Pln Hrs, Predecessors, Start On, Due On, % Complete, and Link to Hours Tab. The % Complete column uses blue progress bars to show 100% completion for all tasks. The Link to Hours Tab column contains a blue button labeled 'Click here to log time' for each task.

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

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.