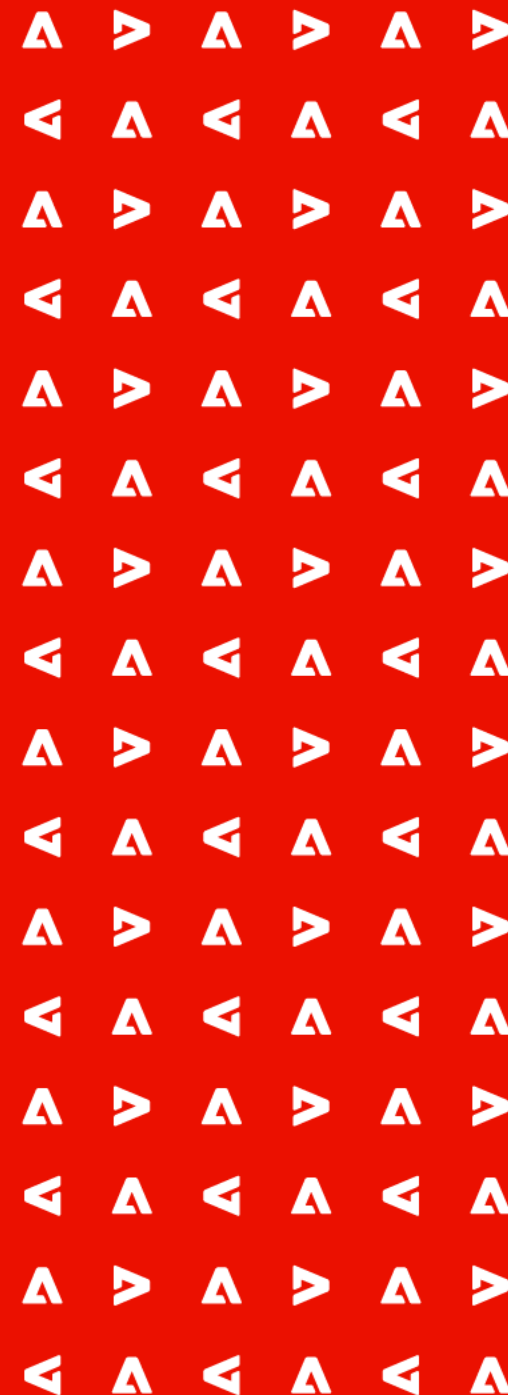




# Create the Dataset You Need Using Calculated Custom Fields

Customer Success Workshop – May 11, 2023



# Agenda

Start 10:30am MT / 12:30pm ET

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Welcome & Introductions 2 minutes

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Custom Form and Field Tips 10 minutes

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Live Walkthrough / Build 35 minutes

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Short Exercise: Other ideas for Calculated Custom Fields 3 minutes

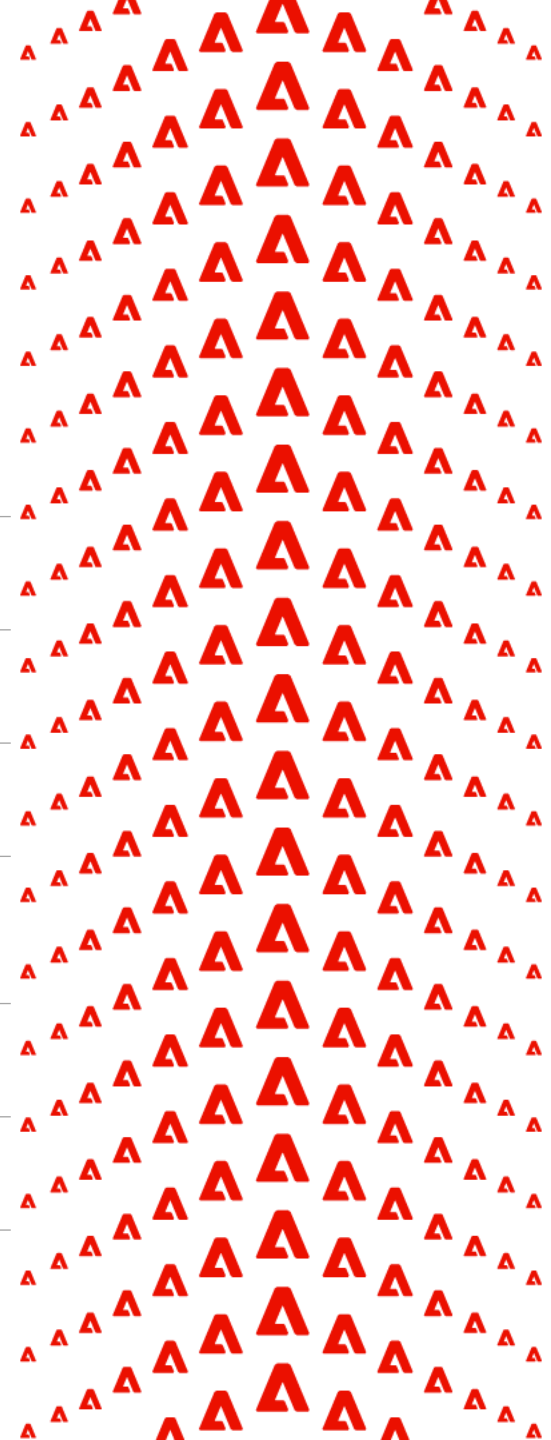
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Open Q&A 10 minutes

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End 11:30am MT / 1:30pm ET

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# Meet the Team – Introduce Yourself



**Nichole Vargas**

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Adobe Workfront

Salt Lake City, UT



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Customer Success Manager,  
Adobe Workfront

Denver, CO



## **Introduce Yourself!**

- Name and Company
- Where you're located
- How long you've been a Workfront Sys Admin
- What are you hoping to get out of today's session?



- Reuse fields, when possible, rather than creating new
- Limit the number of fields – keep it short for users
- Display fields side-by-side to help with form length
- Utilize logic so only relevant fields are visible
- Leverage Section Breaks to hide calculations, archived fields, admin-only fields
- Add instructions to all fields – this helps avoid any confusion or provides clarification as to what the field will be used for (adds a little bubble users can hover over)
- Know the difference between Name and Label
- Be sure to select the appropriate format before saving as this cannot be changed afterwards

- Double check before deleting – don't lose historical data!
- Use the View, Filter, and Grouping functions for your Custom Forms, Fields and Sections – make these lists more readable
- Replace your text mode columns with calculated custom fields, if possible – allow for filtering, grouping, SUM, AVG

What else? Come off mute and share your best practices and I'll add them to this list!

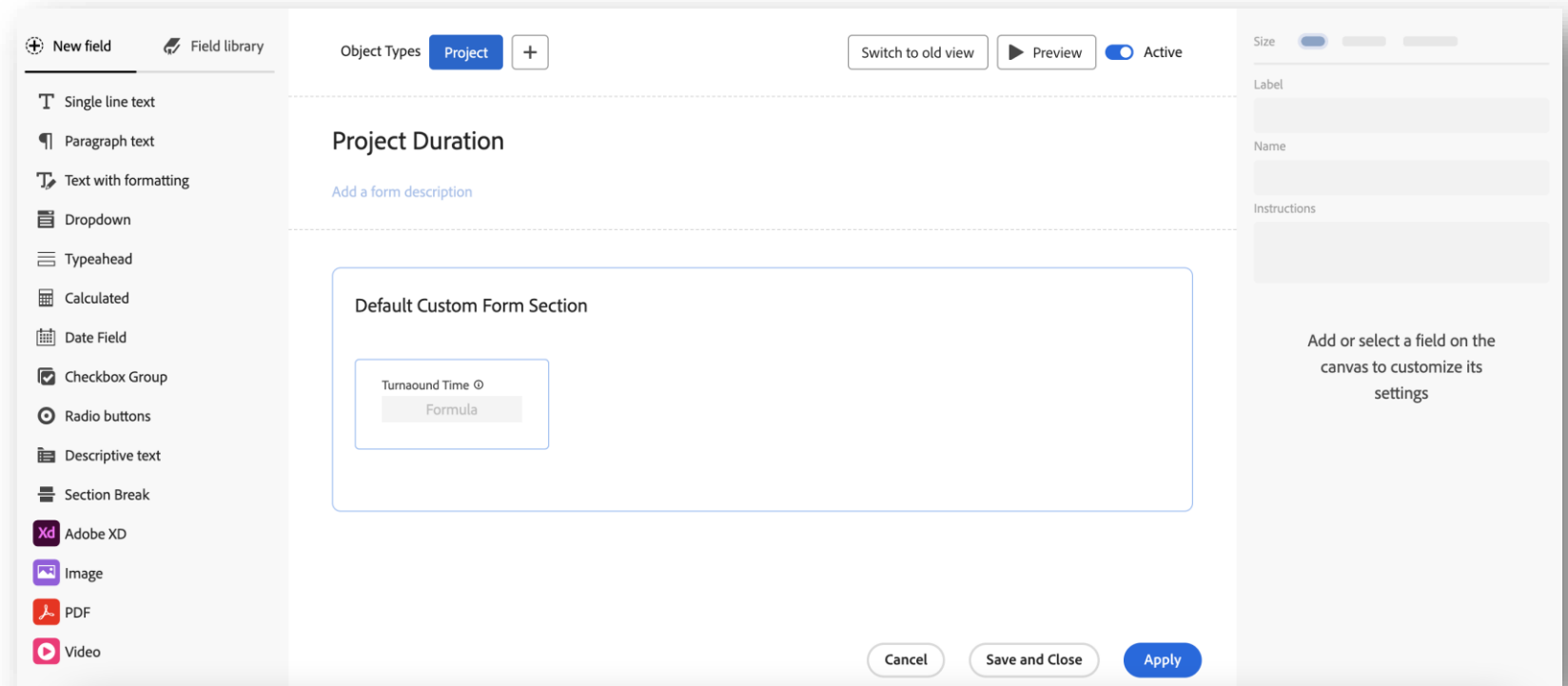
- Use naming convention for custom fields in shared instance with multiple groups or companies for clarity on who owns what to avoid adjustment.
- Flag similar to that conditional formatting
- Know the character limits for each field – single vs paragraph

# Beta – Form Designer

Try out the [new form designer](#) Beta!

## What's new:

- **Copy a field:** You can now copy existing fields by clicking on the Copy icon on the fields directly from the canvas.
- **Change the size for Descriptive text:** You can now assign small, medium, or large sizes to Descriptive text fields. You can also use them on the same row with other fields.
- **Use a Default section:** If the form creator has not added a section at the top of the form, a Default section is now visible in the canvas, so that users can adjust the permissions for fields that have no custom section assigned.



## Coming Soon:

- Adjust the size of descriptive text
- Display/Skip logic
- Filter for typeahead fields

## What's been removed:

- Form Settings, Form Sharing, Field Sharing tabs
- Track field changes in update feeds (now found under Setup > Interface > Tracked Fields)

# Identify the date(s) of status changes

See how long a work item stays within a specific status (ex: On Hold). This field captures the date and time that a particular status was *first* triggered and when it *first* left.

Leverages the status key found in Setup. For this example, the status key for On Hold is ONH.

**IMPORTANT:** *This will work MOVING FORWARD but will not retroactively fill in status change dates.*

Date of On Hold Status Trigger (set as Date format)

```
IF({status}="ONH",IF(ISBLANK({DE:Date of On Hold Status Trigger}),$$NOW,{DE:Date of On Hold Status Trigger}},{DE:Date of On Hold Status Trigger})
```

Date Left On Hold Status (set as Date format)

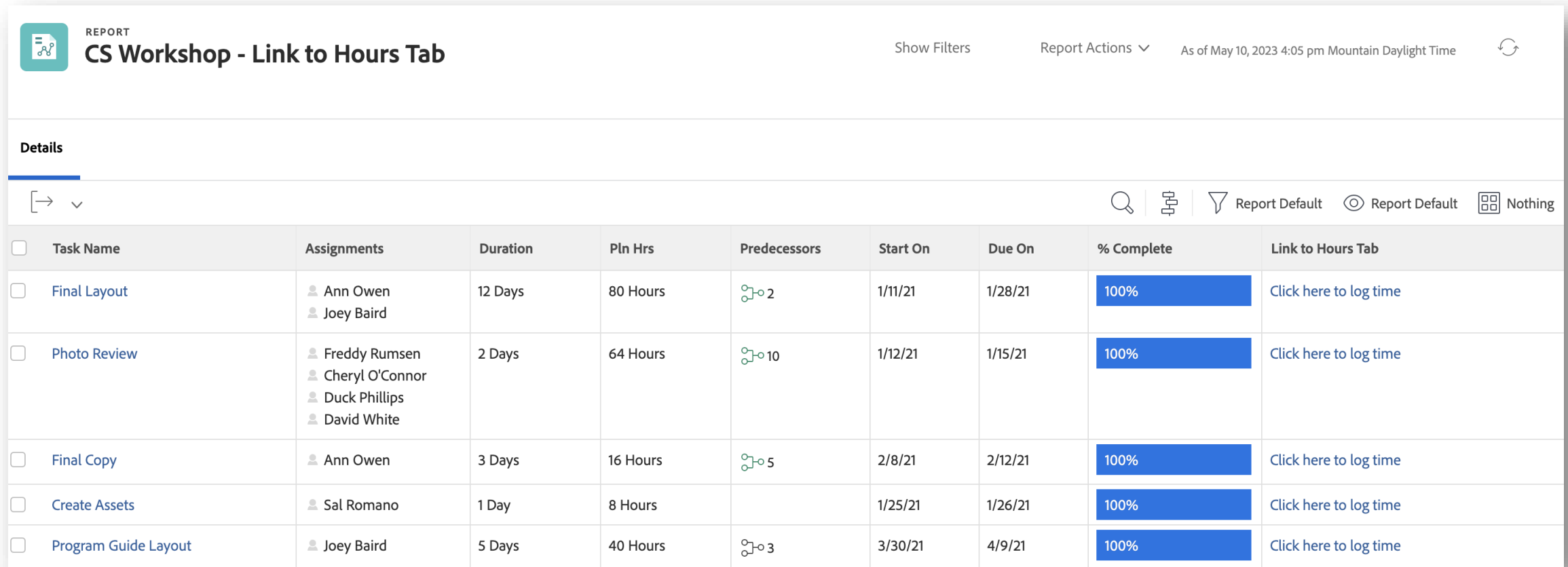
```
IF({previousStatus}="ONH",IF(ISBLANK({DE:Date Left On Hold Status}),$$NOW,{DE:Date Left On Hold Status}},{DE:Date Left On Hold Status})
```

The screenshot shows a report interface with a table. The table has three columns: 'Name', 'Date of On Hold Status Trigger', and 'Date Left On Hold Status'. The first row is 'DB Workshop Example 080422-06 - Brochure' with a trigger date of 5/10/23 and a left date of 5/10/23. The second row is 'Summer Catalog' with a trigger date of 5/10/23 and an empty left date cell. The interface includes a 'Show Filters' button, 'Report Actions' dropdown, and a timestamp 'As of May 10, 2023 3:50 pm Mountain Daylight Time'.

<input type="checkbox"/>	Name	Date of On Hold Status Trigger	<sup>1</sup> Date Left On Hold Status
<input type="checkbox"/>	DB Workshop Example 080422-06 - Brochure	5/10/23	5/10/23
<input type="checkbox"/>	Summer Catalog	5/10/23	

# Link to a tab on an object (ex: Link to Hours tab on task list or report)

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 'Details' section with a table of tasks. The table has columns for Task Name, Assignments, Duration, Pln Hrs, Predecessors, Start On, Due On, % Complete, and Link to Hours Tab. The 'Link to Hours Tab' column contains a calculated field that links to the 'Hours' tab for each task.

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.](#)

# Link to a tab on an object (ex: Link to Hours tab on Task List / Report)

## 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.



# Calculate the number of days between Actual and Planned dates

Number of Days Between Actual Start Date and Planned Start Date

$\text{ROUND}(\text{DIV}(\text{WORKMINUTESDIFF}(\{\text{actualStartDate}\},\{\text{plannedStartDate}\}),480),2)$

Number of Days Between Actual Completion Date and Planned Completion Date

$\text{ROUND}(\text{DIV}(\text{WORKMINUTESDIFF}(\{\text{actualCompletionDate}\},\{\text{plannedCompletionDate}\}),480),2)$

**IMPORTANT:** *Set both custom field formats as Number*

Things to think about:

- Look at this at a task level – group results by Template Task Name
- Identify bottlenecks - which tasks are continuously taking longer than expected
- Have a conversation with the assigned user(s) to help understand why
- Do template task durations / planned hours need updating? Does this take longer than anticipated?
- Is there an approval process associated with this task – how long is that approval taking? Who is the designated approver? Are they reviewing and approving the work in time?
- You can use a similar formula to calculate the number of days between Entry Date and Actual Start Date or incoming requests or issues.

Name	Owner	Start On	Actual Start Date	Due On	Actual Completion Date	% Complete	Days Between Actual and Planned Completion	Days Between Actual and Planned Start
Holiday Party - Customer Success	Tom Freeman	8/18/21	11/11/21	11/17/21	8/16/22	100%	193.64	61
60 Second TV Spot (Sweepstakes)	Joan Harris	6/29/20	6/29/20	2/25/21	10/25/21	100%	172.88	0.13
Valentines Day Sale Direct Mailer	Stan Rizzo	12/28/20	6/4/20	2/4/21	7/12/20	100%	147.5	145.88
Vintage Fashion Expo Booth 2020	Stan Rizzo	9/2/20	9/2/20	11/3/20	11/10/20	100%	5	0
Summer Catalog	Roy Campbell	8/1/20	8/1/20	11/6/20	11/11/20	100%	3	0
Spring Catalog	Stan Rizzo	4/29/20	4/29/20	7/29/20	7/26/20	100%	2.25	0
Full Page World Cup Sweepstakes Magazine Ad	Joan Harris	7/27/20	7/27/20	8/27/20	8/26/20	100%	1.13	0

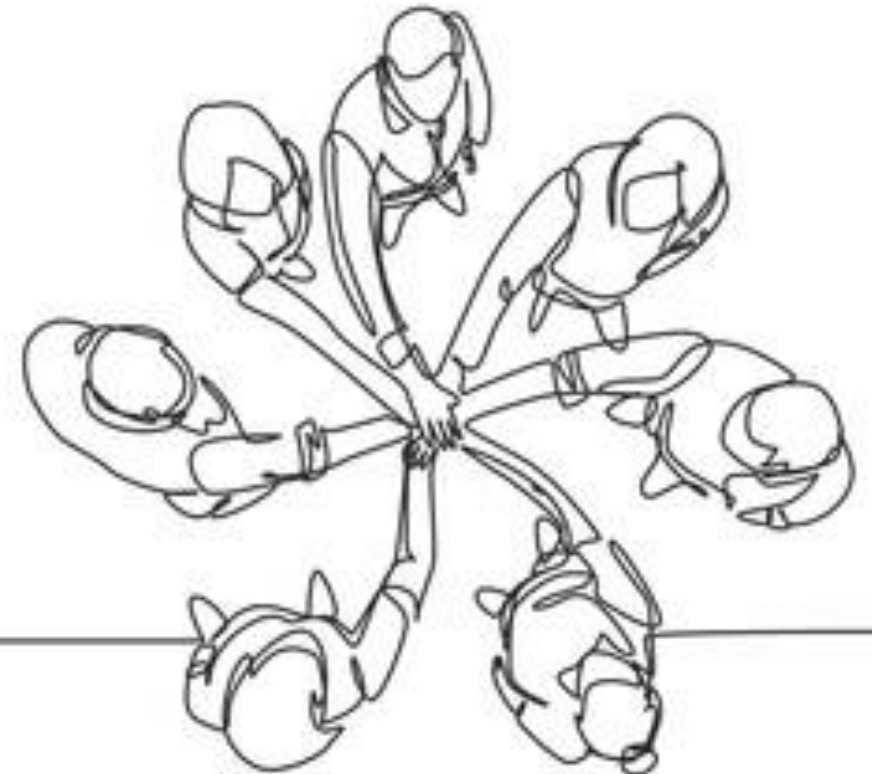
## Other ideas for calculated custom fields

- Create a Job Number based on naming conventions, department or business unit
- Score projects using a custom priority score based on certain field selections
- Bucket percent complete into categories for easy grouping or charting (0, 1-25%, 26-50%, 51-75%, 76-99%, 100%)
- Capture the date and time a team is assigned to a task or issue
- Count the number of times an object has been rejected
- Count how many selections were made in a multi-select field

What do you use calculated custom fields for? Let's add ideas together!

- Manager hierarchy (User custom form)
- Days between Entry and Completion
- "History" field – based on status comments

*My ask of you: Add your formulas to the follow-up Community post for others to take advantage of!*



# Questions?

If you don't have any for me, I have some for you. [Take this short \(anonymous\) survey to share feedback from today's sessions](#)



# [FREE] Upcoming Events for System Administrators



**May 15**

**7:00 – 8:00am MT**

Strategic Admin Chat  
[Open Office Hours]



**May 17**

**9:00 – 10:00am MT**

[Webinar] System Admin  
Essentials: Foundations of  
Project Templates



**May 18**

**9:00 – 10:00am MT**

Getting Started with  
Resource Management in  
Adobe Workfront



**May 23**

**1:00 – 2:00pm MT**

Introduction to Scrum  
with Adobe Workfront



**May 25**

**10:30 – 11:30am MT**

[Office Hours] Resource  
Management

Live on Experience League! Register for all upcoming sessions on the [Events](#) page.

# System Administrator Resources

- Workfront [Training](#) – review the curated learning experiences to empower your users to do their best work
- Ask questions and get answers, ideas, and best practice recommendations from other like-minded System Admins on the Workfront [Community](#)
- **Register** for hot-topic webinars, interactive workshops and open Ask the Expert office hours through the [Events](#) page
- Stay in the know! If you aren't receiving the monthly Workfront customer newsletter, sign up [here](#)
- Post your suggestions for product improvements to the [Ideas tab](#) and "like" others to up-vote. (Must be logged in and designated as an Authorized Support Contact)
- Keep an eye out for a monthly Announcement Center message with a calendar of events for the upcoming month
- Mark your calendars for quarterly releases and review [product release notes](#) to see what changes are coming
- Leverage the [Customer Support](#) team for technical questions and troubleshooting
- Access hands-on training through [Adobe Digital Learning Services \(ADLS\)](#) - \$\$
- Stay in touch with your Account Executive!
- Answers to your top 5 Experience League questions. [Download the guide.](#)

