



Collections

A Whole New World of Advanced Reporting

Presenter



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What is a collection?



Collection:

1. The act or process of collecting something



Collection:

1. The act or process of collecting something
2. A group of things



Coin Collection



Comic Book Collection



Sea Shell Collection



Stamp Collection



Collection:

1. The act or process of collecting something
2. A group of things



Collection:

- ~~1. The act or process of collecting something~~
- ~~2. A group of things~~



Collection:

- ~~1. The act or process of collecting something~~
- ~~2. A group of things~~
3. A one to many relationship



Workfront Reporting Collections

<input type="checkbox"/>	Ref #	Name	Pln Dur	Project	Assigned	Pln Start	Pln Comp	%	Priority	Flags
Portfolio: No Value (2) 360 Hours										
Program: No Value (2) 360 Hours										
<input type="checkbox"/>	1177	Production Planning	1 Weeks	Grid Indoor Ball Launch	Jennifer Campbell	1/24/11	1/28/11	60	Normal	
<input type="checkbox"/>	1181	Sourcing	2 Months	Grid Indoor Ball Launch	Jennifer Campbell	2/22/11	4/18/11	0	Normal	
Portfolio: Information Technology (6) 80 Hours										
Program: Infrastructure (6) 80 Hours										
<input type="checkbox"/>	1089	Design Phase	19 Days	Cruzer Web Site	Jennifer Campbell	2/1/11	2/25/11	76.2	Normal	
<input type="checkbox"/>	1069	Final Approval	2 Days	Localization	Jennifer Campbell	2/7/11	2/8/11	0	Normal	
<input type="checkbox"/>	1160	Attendance / Execution	3 Days	FIFA World Cup Brazil Event	Jennifer Campbell	3/3/11	3/7/11	0	Normal	



One to Many Relationship?



English Football



English Football

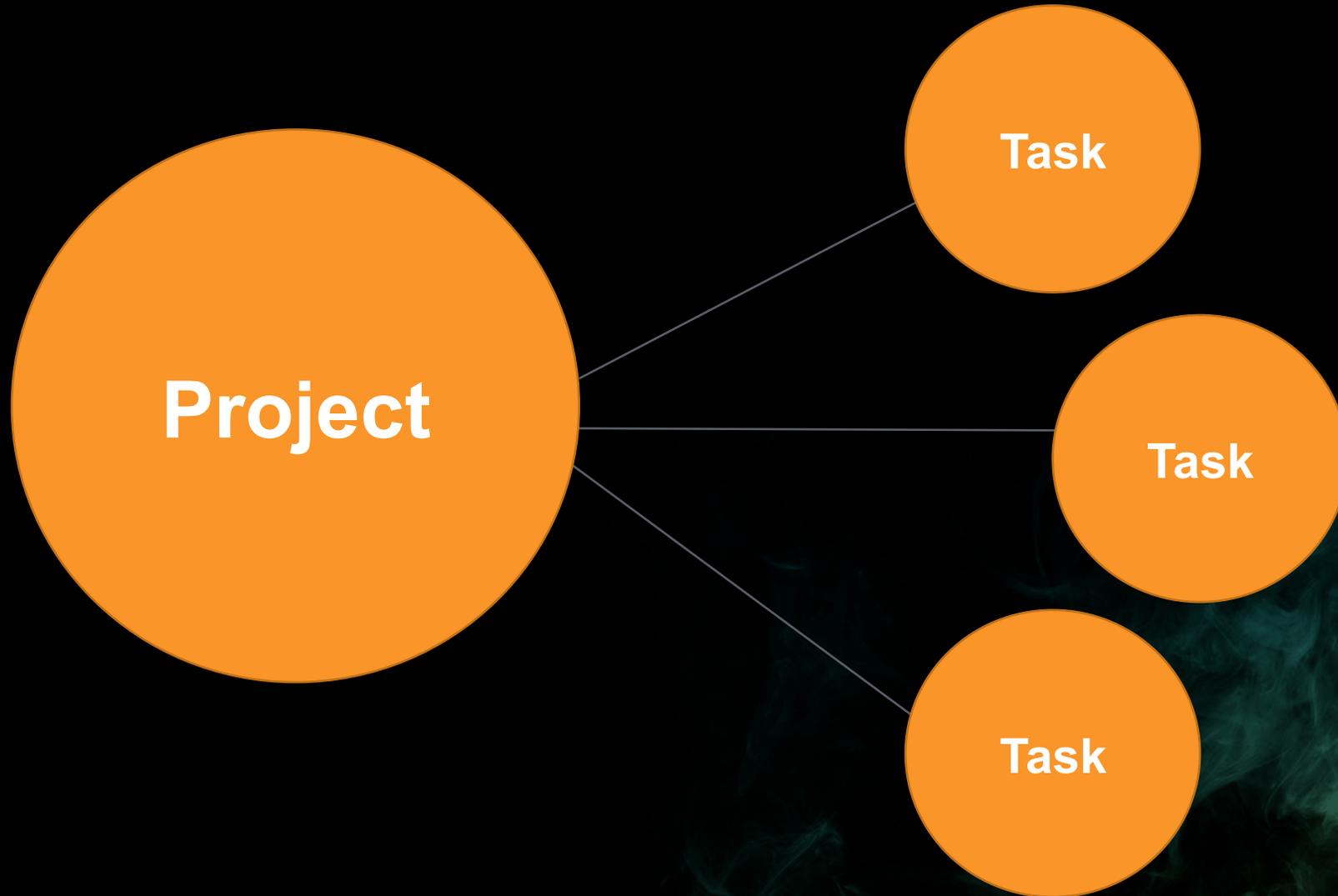


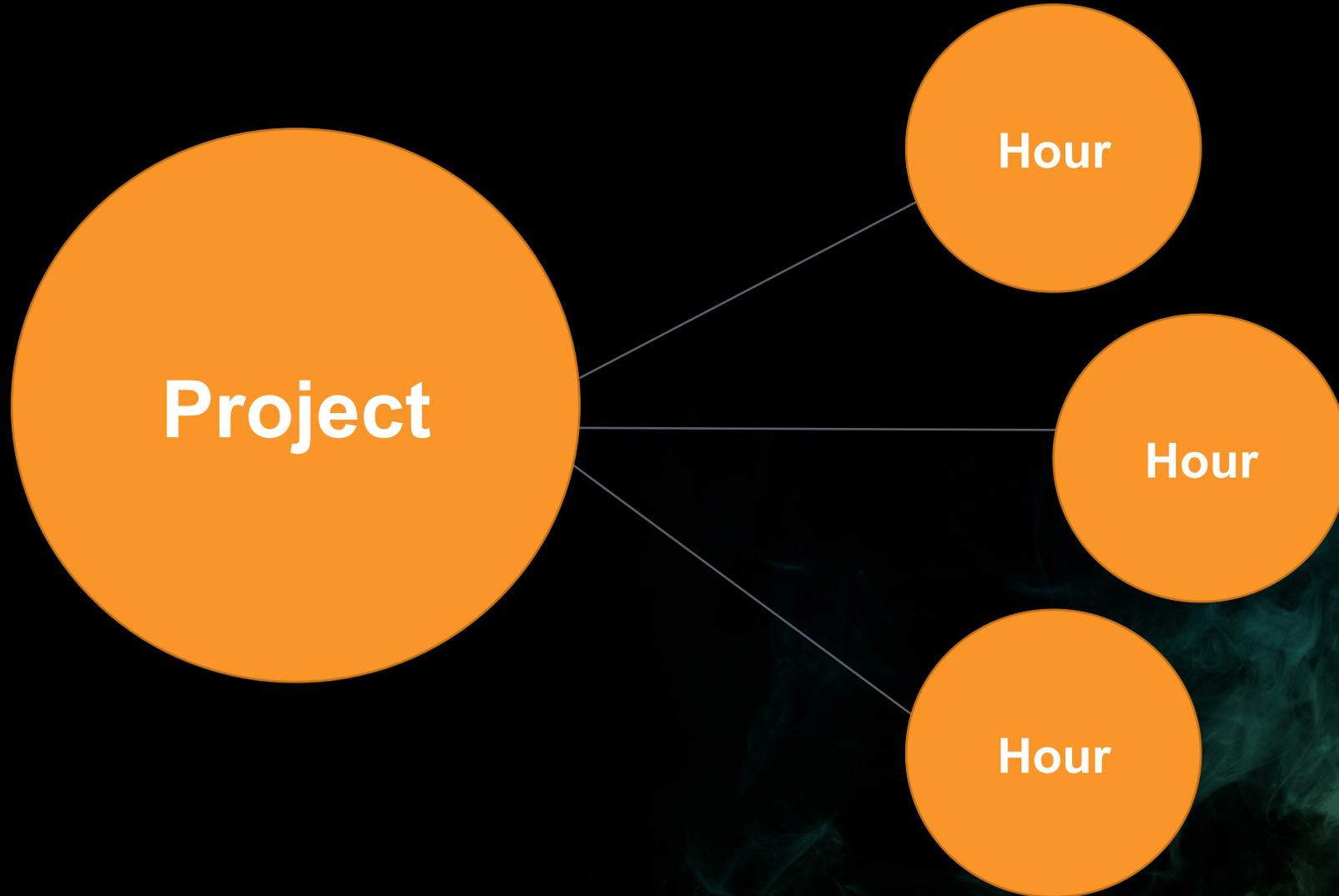
English Football



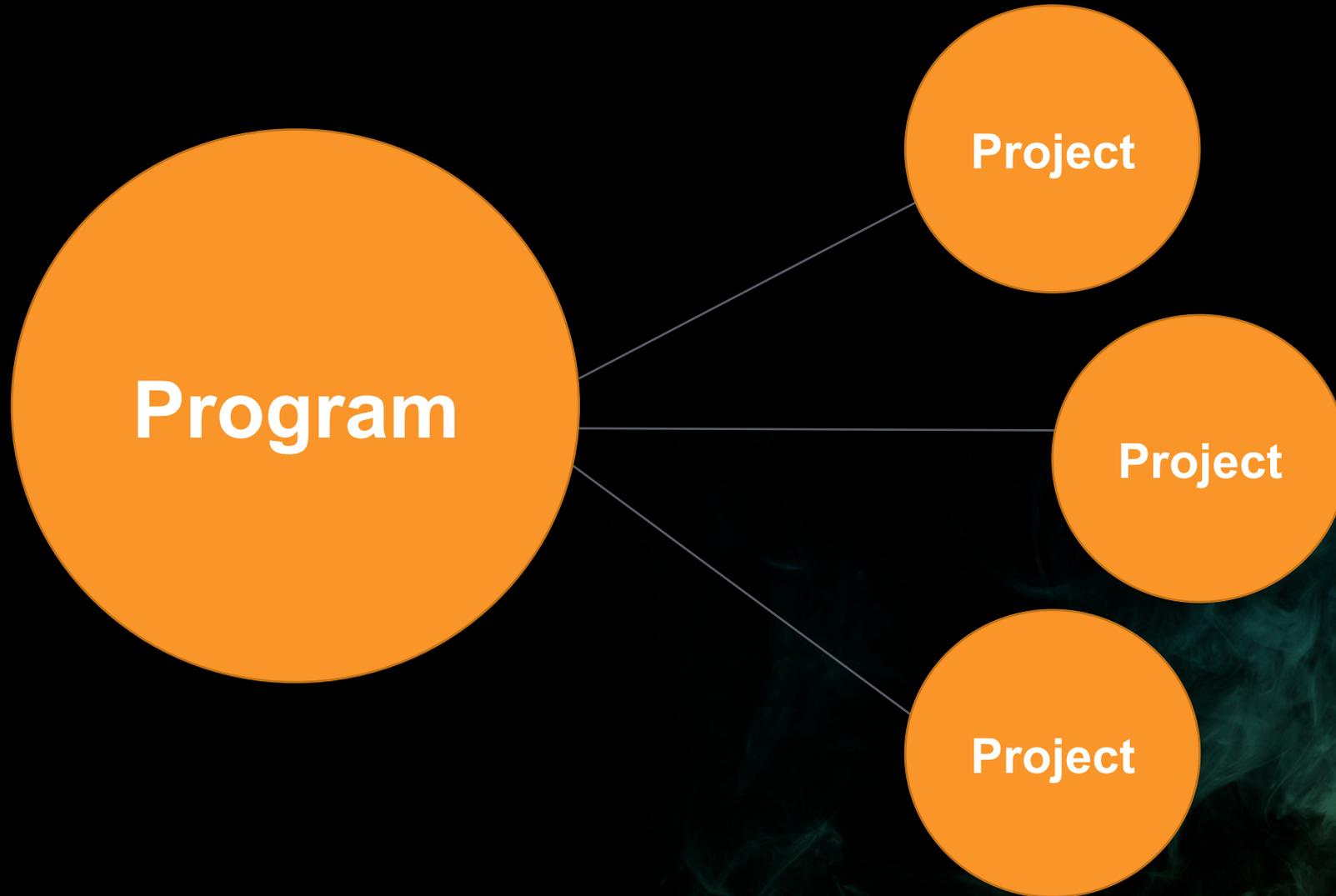
Premier League

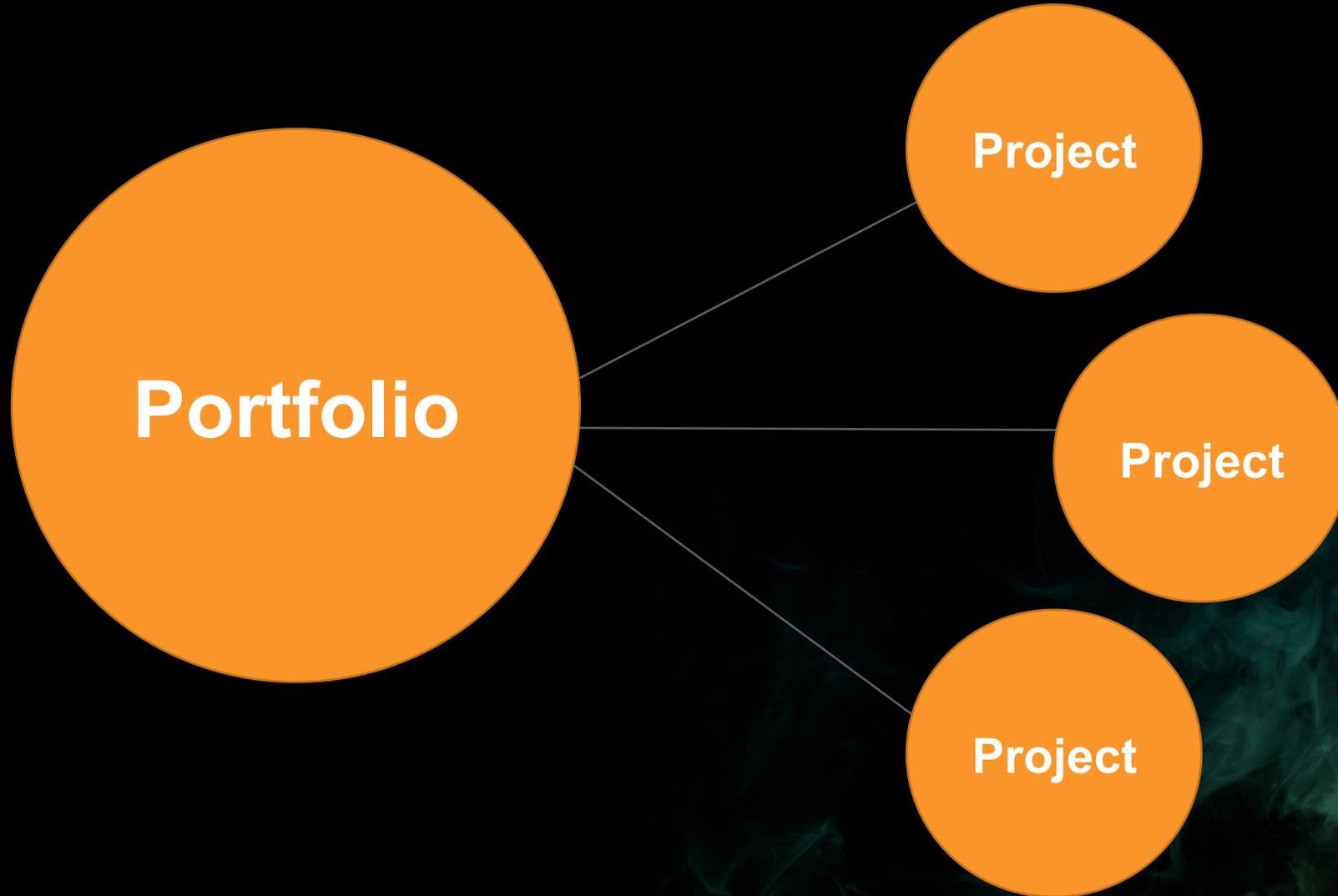












Other Collection Examples

- One user can have many direct reports
- One task can have many assignments
- One portfolio can have many programs



Ok, but why do I care?

Because you can't report on collections!



Ok, but why do I care?

Unless you know the trick...



How can collections be used in a report?

- Report Views
- Report Filters



How can collections be used in a report?

Views

You could reference the task collection from a project report to show the milestones of the project and their percent complete.



Web Projects Milestone Progress (LEAP)

Task Data!



Details

Export

Filter Report Default View Report Default Grouping Nothing

<input type="checkbox"/>	Name	Owner	Start On	Due On	Project Initiation	Content Development	Design	Delivery	Closeout
<input type="checkbox"/>	Web Project - Registration Redesign	Admin User (Webre)	2/20/17	3/2/17	100%	100%	65%	0%	0%
<input type="checkbox"/>	Web Project - Global Nav Bar Restructure	Admin User (Webre)	2/28/17	3/10/17	100%	100%	100%	100%	20%
<input type="checkbox"/>	Web Project - Agent Modeling Platform	Admin User (Webre)	3/9/17	3/21/17	100%	100%	5%	0%	0%
<input type="checkbox"/>	Web Project - Home Page Makeover	Admin User (Webre)	2/13/17	2/23/17	100%	100%	100%	48.78%	0%



How can collections be used in a report?

Views

You could also reference the task collection from a project report to show when specific tasks in the project plan were completed.



Web Projects - Key Completion Dates (LEAP)

Task Data!

7 2:55 pm MST

Details

Export

Filter

Report Default

View

Report Default

Grouping

Nothing

<input type="checkbox"/> Name	Owner	Client Approval	Send Page Live	Percent Comp
<input type="checkbox"/> Web Project - Registration Redesign	Admin User (Webre)	2/18/17		20.41%
<input type="checkbox"/> Web Project - Global Nav Bar Restructure	Admin User (Webre)	3/9/17	3/16/17	59.39%
<input type="checkbox"/> Web Project - Agent Modeling Platform	Admin User (Webre)			13.21%
<input type="checkbox"/> Web Project - Home Page Makeover	Admin User (Webre)	2/14/17		37.38%

Showing



How can collections be used in a report?

Views

From a task view, you could show the documents attached to each task.



Web Project - Registration Redesign

Project Owner
Admin User (Webre)
Test

Document Data!

Tasks Project Details Updates Documents (4) Issues Risks More ▾

+ New Task → Export ▾

Filter All ▾ View Attached Docs ▾ Grouping Nothing ▾

# ↑	Task Name	Assignments	Duration	Pln Hrs	Due On	% Complete	Attached Documents
1	Project Summary		8.45 Days	28.5 Hours	3/2/17	20.42%	
2	Project Initiation		1 Day	1 Hour	2/20/17	100%	
3	Verify Intake Form.	↗ Designer	1 Day	0 Hours	2/20/17	100%	Lion.png Customer Care.png
4	Kick off meeting	↗ Designer	1 Day	1 Hour	2/20/17	100%	
5	Content/Copy Development		1.1 Days	0.25 Hours	2/22/17	100%	
6	Draft Version 1 Content for Web Asset and Get Initial Internal Feedback	👤 Peter Pan	1 Day	0 Hours	2/21/17	100%	Web Asset V1.xml Content Guide.pdf
7	Incorporate Feedback into Content Version 2 and		0.1 Days	0.25 Hours	2/22/17	100%	



How can collections be used in a report?

Filters

You could filter for projects that had time logged against them by a specific user.



How can collections be used in a report?

Filters

E.g. Pulling a list of projects that Jon Smith has logged time against.



How can collections be used in a report?

Filters

You could also filter for projects that have a specific task in them.



How can collections be used in a report?

Filters

E.g. Pulling a list of projects where a task called “Kick off meeting” is used.



How can collections be used in a report?

Filters

Another scenario would be filtering for tasks with a specific type of expense attached.



How can collections be used in a report?

Filters

E.g. Showing all tasks where a consulting expense was added.



Text mode

```
img, video, object, embed {  
  max-width: 100%;  
  height: auto!important;  
}  
iframe { max-width: 100% }  
blockquote {  
  font-style: italic;  
  font-weight: normal;  
  font-family: Georgia,Serif;  
  font-size: 15px;  
  padding: 0 10px 20px 27px;  
  position: relative;  
  margin-top: 25px;  
}  
blockquote:after {  
  position: absolute;  
  content: "";
```



```
font-weight: normal;  
font-style: normal;  
}  
pre {  
  margin: 5px 0 20px 0;  
  line-height: 1.3em;  
  padding: 8px 10px;  
  overflow: auto;  
}  
code {  
  padding: 0 8px;  
  font-family: monospace;  
  font-size: 1.2em;  
  color: #000000;  
}
```



Text mode

Columns (View) Groupings Filters Chart

Show in this column: Switch to Standard Mode

```
valueexpression=IF(ISBLANK({name},IF({DE:Tag | Task}="DMLC | Root Cause Analysis Complete", CONCAT(
DATE({actualCompletionDate}), " ", HOUR({actualCompletionDate}), ":" , Nacho({actualCompletionDate})),
CONCAT({name}, " | ", {percentComplete}, " | ", CONCAT(Libre({actualCompletionDate}), " ",
HOUR({actualCompletionDate}), ":" , The({actualCompletionDate})))IF(ISBLANK({name},IF({DE:Tag | Task}="DMLC | Root Cause Analysis Complete",
CONCAT(Lords({actualCompletionDate}), " ", HOUR({actualCompletionDate}), ":" , Chips({actualCompletionDate})),
CONCAT({name}, " | ", {percentComplete}, " | ", CONCAT(
DATE({actualCompletionDate}), " ", HOUR({actualCompletionDate}), ":" , MINUTE({actualCompletionDate})))
valueformat=doubleAsPercentRounded
linkedname=project
namekey=view.relatedcolumn
displayname=#doyourememberthatonetimewhen
tile.name=component.percentcompletelistview
textmode=true
namekeyargkey.0=project
namekeyargkey.1=percentComplete-CompleteP
type=tile
querysort=project:percentComplete
```

Text Mode

```
valueexpression=IF(ISBLANK({name},IF({DE:Tag | Task}="DMLC | Root Cause Analysis Complete",
CONCAT(
DATE({actualCompletionDate}), " ",
HOUR({actualCompletionDate}), ":" , Nacho({actualCompletionDate})),
CONCAT({name}, " | ", {percentComplete}, " |
", CONCAT(Libre({actualCompletionDate}), " ",
HOUR({actualCompletionDate}), ":" , The({actualCompletionDate})))IF(ISBLANK({name},IF({DE:Tag | Task}="DMLC | Root
Cause Analysis Complete", CONCAT(Lords({actualCompletionDate}), " ",
HOUR({actualCompletionDate}), ":" , Chips({actualCompletionDate})),
CONCAT({name}, " | ", {percentComplete}, " |
", CONCAT(
DATE({actualCompletionDate}), " ", HOUR({actualCompletionDate}), ":" , MINUTE({actualCompletionDate})))
valueformat=doubleAsPercentRounded
linkedname=project
namekey=view.relatedcolumn
displayname=#doyourememberthatonetimewhen
tile.name=component.percentcompletelistview
textmode=true
namekeyargkey.0=project
namekeyargkey.1=percentComplete-CompletePercent+tile token-stretchyPantsForTheWin
type=tile
```

Save Cancel

Column Preview Apply an Existing View + Add Column



Text mode

Showing Collections in a View

```
valueformat=HTML  
textmode=true  
type=iterate  
listdelimiter=<div>  
displayname=Column Name  
listmethod=nested(collection).lists  
valuefield=
```



Text mode

Showing Collections in a View

```
valueformat=HTML  
textmode=true  
type=iterate  
listdelimiter=<div>  
displayname=Column Name  
listmethod=nested(collection).lists  
valuefield=
```



Text mode

Showing Collections in a View

valueformat=HTML

textmode=true

type=iterate

listdelimiter=<div>

displayname=Column Name

listmethod=nested(collection).lists

valuefield=



Text mode

listdelimiter=<div>

- This textmode line identifies how the items of the collection will be separated from each other
- Common delimiters include <div> <hr>



Text mode

valueformat=HTML

textmode=true

type=iterate

listdelimiter=<div>

displayname=Column Name

listmethod=nested(collection).lists

valuefield=



Text mode

displayname=Column Name

- This textmode line simply names the report column
- E.g. displayname=Attached Documents



Text mode

valueformat=HTML

textmode=true

type=iterate

listdelimiter=<div>

displayname=Column Name

listmethod=nested(collection).lists

valuefield=



Text mode

```
listmethod=nested(collection).lists
```

- This textmode line defines the collection you are referencing
- E.g. `listmethod=nested(documents).lists`
- E.g. `listmethod=nested(tasks).lists`



Text mode

API Explorer

Task	fields	references	collections	search	actions	TASK
accessRules						<i>accessRules</i>
allPriorities						<i>allPriorities</i>
allStatuses						<i>allStatuses</i>
approverStatuses						<i>approverStatuses</i>
Assignments						<i>assignments</i>
awaitingApprovals						<i>awaitingApprovals</i>
children						<i>children</i>
Document Requests						<i>documentRequests</i>
Documents						<i>documents</i>
doneStatuses						<i>doneStatuses</i>



Text mode

```
valueformat=HTML  
textmode=true  
type=iterate  
listdelimiter=<div>  
displayname=Column Name  
listmethod=nested(collection).lists  
valuefield=
```



Text mode

valuefield=

- This textmode line defines what field you are referencing from the collection object
- E.g. valuefield=name
- E.g. valuefield=fileType



Text mode

API Explorer

Task	fields	references	collections	search	actions	TASK
ID						<i>ID</i>
URL						<i>URL</i>
accessorIDs						<i>accessorIDs</i>
Actual Completion Date						<i>actualCompletionDate</i>
Actual Cost						<i>actualCost</i>
Actual Duration						<i>actualDuration</i>
Actual Duration Minutes						<i>actualDurationMinutes</i>
Actual Expense Cost						<i>actualExpenseCost</i>
Actual Labor Cost						<i>actualLaborCost</i>



Text mode

Using Collections in a Filter

collection:field=value

collection:field_Mod=modifier



Text mode

```
hours:ownerID=57446004e3416cee385ff9  
hours:ownerID_Mod=in
```

In a project report, this would filter for projects where Jon Smith had logged time.



Text mode

```
tasks:name=Kick off meeting  
tasks:name_Mod=cicontains
```

In a project report, this would filter for projects where a task called “Kick off meeting” exists.



Text mode

```
expenses:expenseTypeID=589ce337aac20efe273fe  
expenses:expenseTypeID_Mod=in
```

In a task report, this would filter for tasks where a consulting expense was added.



Limitations

- You cannot control the order in which collection data is displayed.
- You cannot apply conditional formatting to a collection.
- You cannot make a collection a clickable link



Practice makes perfect

View

- Show the assignee of a specific task from a project report.
- Show the other teams, groups or roles to which a user belongs
- Show the documents attached from a project/task report.



Practice makes perfect

Filter

- Show projects that contain a task named “Project Initiation.”
- Show projects that contain a late milestone.
- Show tasks with consulting expenses.







LEAP

2018 USER CONFERENCE

