Fundamentals of Building Custom Reports

Hope you enjoyed Leap 2018! We know we covered a lot of ground in a short amount of time. A review of the key takeaways and processes you learned from the Workfront Training team can be found in this reference packet. We hope you picked up some new skills and information to help you tackle and tame your work chaos.

We would love to stay in contact! Email us at **training@workfront.com** with any questions or feedback.

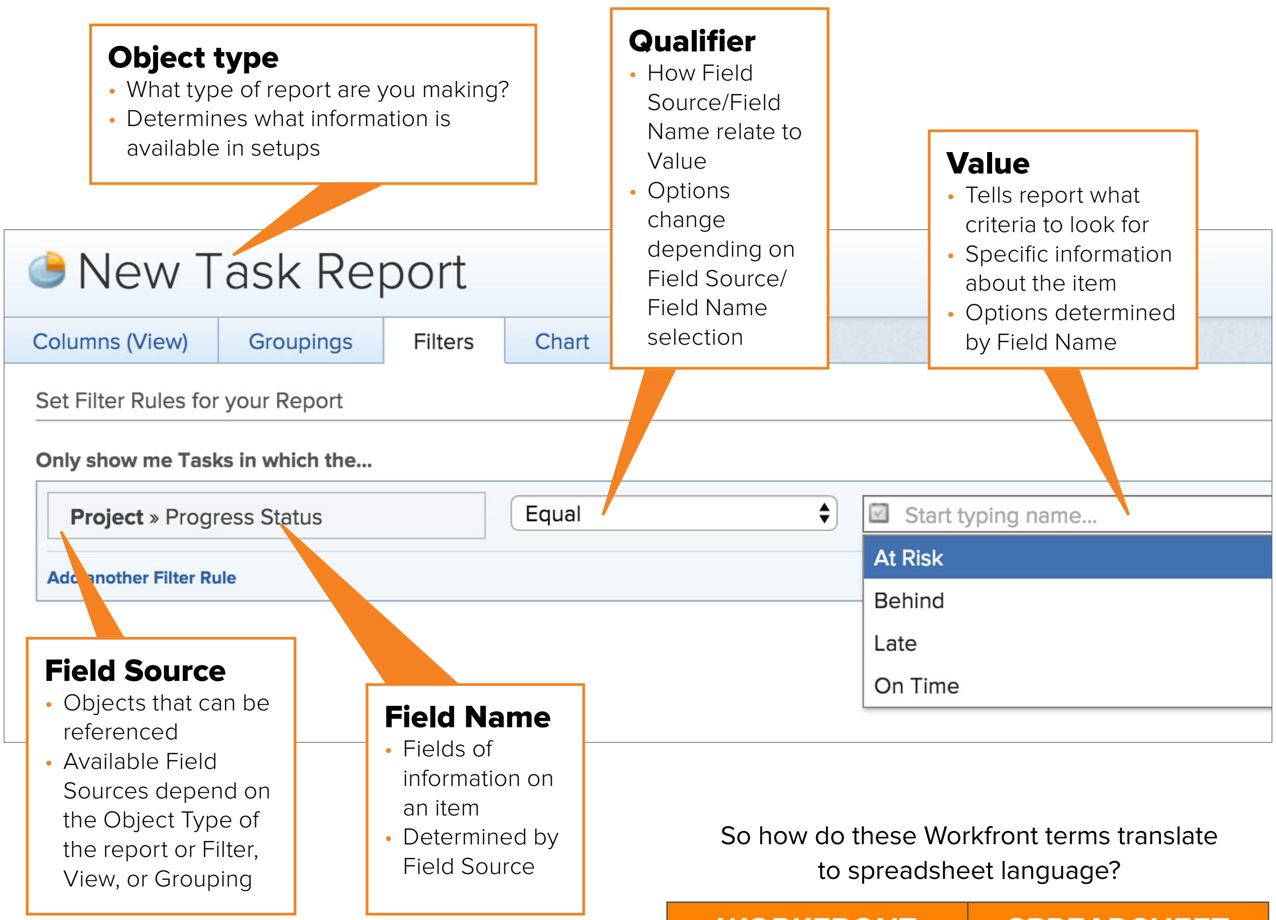
Hope to see you at Leap 2019!

Sincerely,
The Training Team

TRAINING

Reporting Terminology

If you're used to writing reports in a spreadsheet application, making the transition to Workfront reporting can be a bit confusing. But if you understand Workfront's terminology and know how it relates to a spreadsheet, you'll be a reporting master in no time.



So how do these Workfront terms translate to spreadsheet language?

WORKFRONT	SPREADSHEET
OBJECT TYPE	Spreadsheet workbook
FIELD SOURCE	Sheet
FIELD NAME	Column
VALUE	Information in cell

Which Element Do I Use?

The description for the report you need to create contains clues as to which elements are the Filters, what needs to be part of the View, and how the information should be grouped.

WHEN DO I USE A...	
FILTER	Descriptive words (adjectives) that narrow in on something like time, ownership, assigned to, status, condition, progress status, etc. **Words to watch for: or, assigned to, late, my, owned by, complete**
VIEW	What information do you want or need to see? Is there any numerical data you want summarized? Options for summarizing are record count, total, average, minimum, and maximum.
GROUPING	**Look for the word "by."** How do you want things organized horizontally? What do you want as a header for each section of the report?

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Custom Report Examples

Reports give increased visibility for all Workfront users into the work being done. Adding **charts to reports** presents information in a way that's visually appealing and easy to understand. And don't forget to **share reports** with other Workfront users so they can access the information. You can also set up a **scheduled delivery** of reports to key stakeholders by email address.

My tasks, organized by project

Report Type

- Task

Filters

- Assignment Users»Name → Equal → (name of person/people)

Note: Assignment Users searches all people assigned to a task. Assigned To searches only the primary assignment on the task. Including the project status ensures only tasks from active projects are displayed.

Optional: Add a project portfolio, program, planned completion date range, status, etc., to further narrow down your options.

View

Include columns that are needed for you to complete your work, such as:

- Task»Name
- Project»Name
- Task»Planned Hours
- Task»Planned Start Date
- Task»Planned Completion Date

Grouping

- Project»Name

My late tasks on incomplete projects

Report Type

- Task

Filters

- Assignment Users»Name → Equal → (name of person/people)
- Task»Progress Status → Equal → Late
- Project»Status → Equal → Current

Note: Assignment Users searches all people assigned to a task. Assigned To searches only the primary assignment on the task. Including the project status ensures only tasks from active projects are displayed.

Optional: Add a project portfolio, program, planned completion date range, etc., to further narrow down your options.

View

Include columns that are needed for you to complete your work, such as:

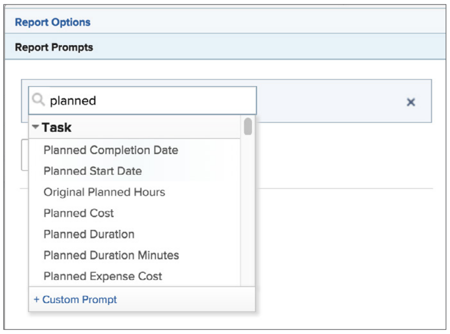
- Task»Name
- Project»Name
- Task»Planned Hours
- Task»Planned Start Date
- Task»Planned Completion Date

Grouping

- Project»Name

Report Prompts

Use **prompts** to get more mileage from your reports. Filters allow you to build criteria into your reports that are used every time the report is run. Filters are built one time and “hard coded” into the report. Prompts are open filters that can be customized and applied differently every time you run a report. For example, you have a report that shows active projects for your team. But sometimes you want to narrow this list down to projects that are due this month. Just add a prompt for project planned completion date, and you can add it to the report anytime you need it.

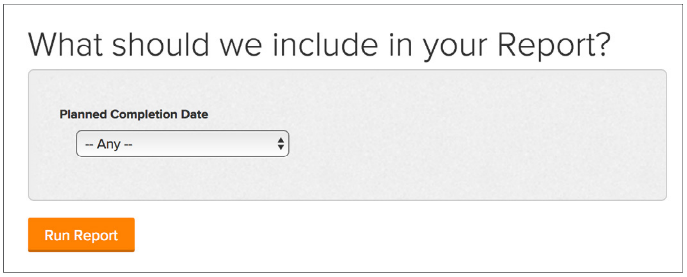


Create a prompt

1. Run the report you want the prompt on. Go to Report Actions and select Edit.
2. Click Report Settings in the upper-right corner.
3. Click Add a Prompt.
4. Select the field source and field name for the prompt.
5. Add multiple prompts, if desired.
6. Click Done, then click Save & Close to save the changes to the report.

Use a prompt on a report

1. Run the report that has a prompt.
2. The prompts will display before the report runs.



3. Choose an option for the desired prompt and fill out the required fields.
   - If you leave all of the prompts blank, the report runs as it was written, using the report filters.
   - If you populate one or more prompts, the report is filtered by those criteria, in addition to the regular report filters.
4. Click Run Report.
5. To add or remove filters once the report is run, click the Prompts tab and make changes. Click Run to execute the report again.

NOTE: Prompts can only be used by people with a Workfront license. If you set up delivery of a report, the report does not include the prompts.

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Do You Know These Field Sources and Field Names?

There are hundreds of field source/field name combinations in Workfront's report builder. Finding what you need can be daunting. Let us help by sharing a few of our favorites and some lesser-known options.

FIELD SOURCE >> FIELD NAME	REPORT TYPE	REPORT ELEMENTS	FILTER EXAMPLE	DESCRIPTION
Task»Indent	Task	Filter View	Task»Indent → Greater Than → 0 Task»Indent → Equal → 0	This filter finds tasks based on the number of indents they have on a project's task list. Indented tasks are children tasks. The parent task has an indent of 0 (zero), so anything greater than 0 is a child task below the first level. The Task»Indent → Equal → 0 filter finds only parent-level tasks (i.e., tasks with no indent). These tasks may or may not have child tasks. The view displays a number that represents the level of indent for the task. 0=parent task; 1=first-level child task; 2=second-level child task; etc.
Task»Number of Children	Task	View		Shows the total number of children tasks for the task.
Assigned To»License	Task Issue	Filter View Grouping	Assigned To»License → Equal → Plan	Filters find information that matches the license type selected when setting up the filter. The example at left will find tasks that are assigned to users who have a Plan license type. A view displays the license type, and a grouping will organize report results by license type. If multiple users are assigned to a task or issue, Assigned To»License applies only to the task or issue owner.

FIELD SOURCE >> FIELD NAME	REPORT TYPE	REPORT ELEMENTS	FILTER EXAMPLE	DESCRIPTION
Assigned To»Home Group ID	Task Issue	Filter View Grouping	Assigned to»Home Group ID → Equal → $$USER.homeGroupID	When used as a filter, this shows only tasks or issues that are assigned to the same home group as the logged-in user. Refers to the field 'Home Group' on a user's profile information in Workfront. Note: This is not the same as Group»Name.
Task»Assignments	Task	View		Displays all teams, job roles, and users the task is assigned to. All users are displayed, even if they're not the task owner.
Assignment»Assigned To ID	Assignment	Filter	Assignment»Assigned To ID → Equal → $$USER.ID	Finds tasks and issues the logged-in user is assigned to, even if they're not the item owner.
Task»Assigned To ID	Task	Filter View	Task»Assigned To ID → Equal → $$USER.ID	Look only at the primary assignee of the task (task owner). *Note: A similar field exists for issues.*
Task»Personal	Task	Filter View Grouping	Task»Personal → Equal → True	Filters pull in tasks that were created with the New Task button in the My Work area of Workfront. Add the column to a view to display a true/false. Grouping by Task»Personal groups by true/false. Includes tasks assigned to you and not assigned to you.
Issue»Source	Issue	View		Displays the name of the project or task the issue was created on.
Issue»Category Name	Issue	View		'Category' in Workfront refers to a custom form. This field will display the names of all custom forms attached to the issue. *Note: There is a similar field name for all items that can have custom forms.* For more information about referencing custom form information in reports, see the Workfront Help Center article titled **Referencing Custom Forms in a Report**.

FIELD SOURCE >> FIELD NAME	REPORT TYPE	REPORT ELEMENTS	FILTER EXAMPLE	DESCRIPTION
Hour»Entry Date	Hour	Filter View Grouping	Hour»Entry Date ➔ This Week	Workfront sees hours as entered, not logged (which is why we often refer to entering hours). Entry Date is the day you entered your hours FOR, not the actual date you logged the hours. In other words, if today is May 5 and you log hours for May 3, then the report will pull May 3 as the entry date.
Hour»Hours	Hour	Filter View Grouping		The number of hours entered. In the view, set the column to Sum to total up all of the hours into one entry.
Issue»Last Updated By ID	Issue	Filter View		Pulls in the person who made the last update on the issue. Includes when someone simply types an update or comment in the text field, without changing the state, condition, or commit date. Use a filter to find issues last updated by a specific person. Or use the column in a view to see who the last updater was. *Note: A similar field exists for tasks and projects.*
Queue»Is Public	Project	Filter	Queue»Is Public ➔ Equal ➔ None	Example at left will exclude reports that are marked as request queues from reports.

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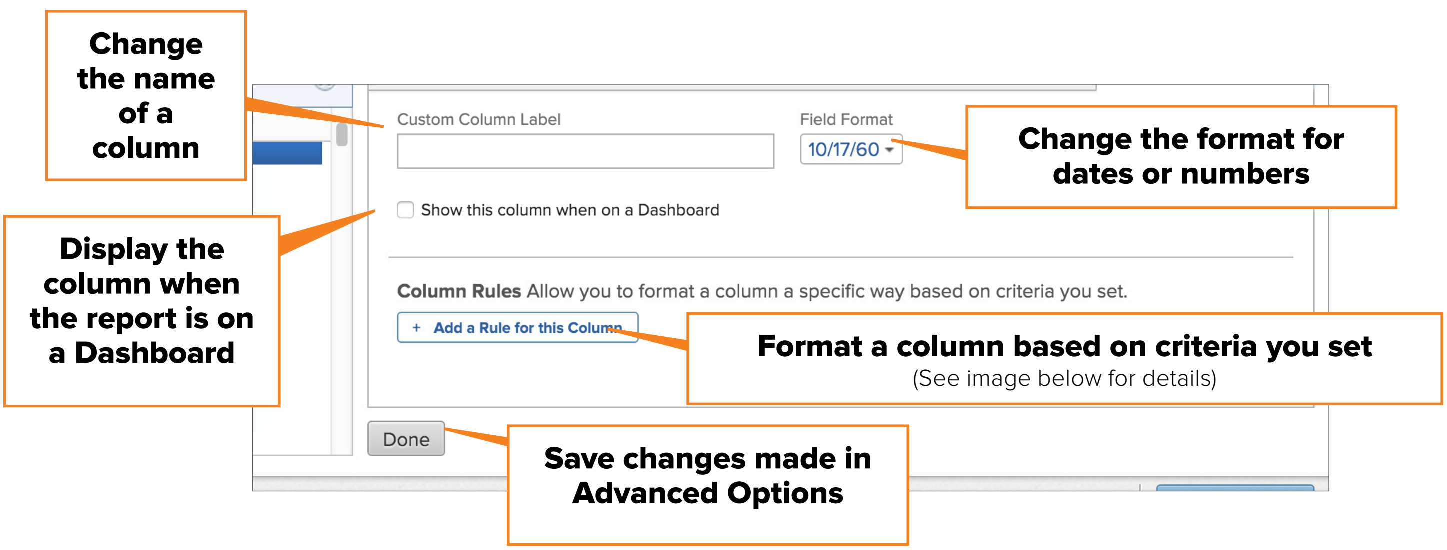
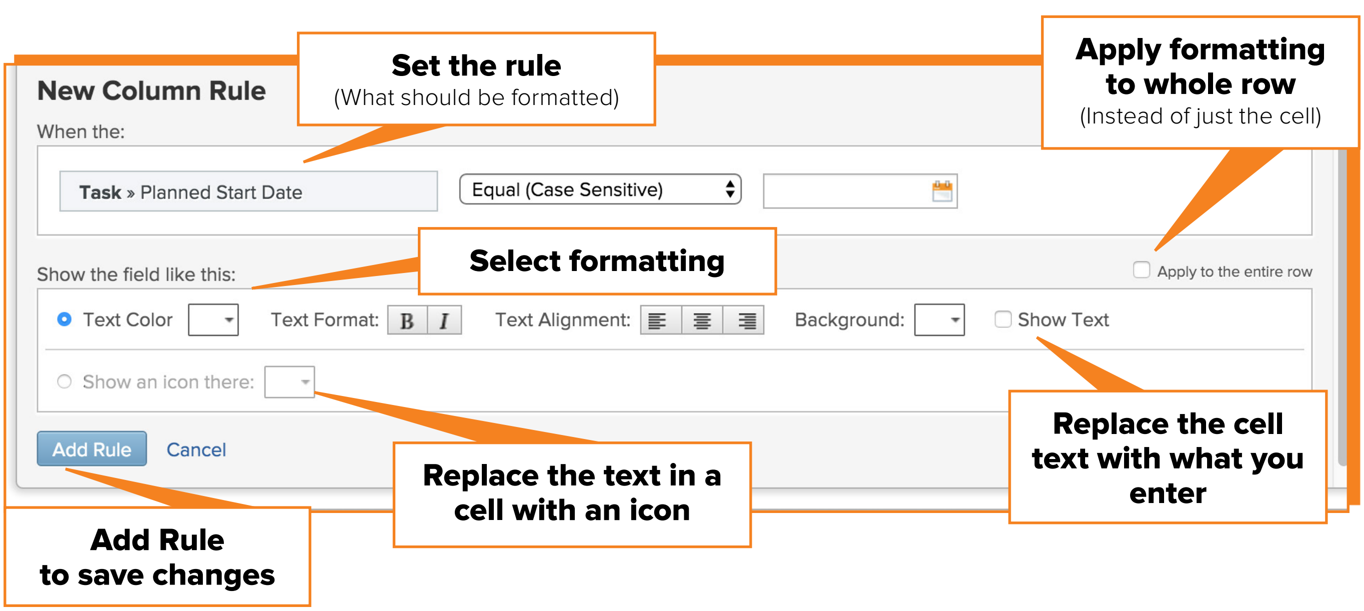
Advanced Options for a View

When creating a View, the Advanced Options let you customize each column. You can change a column header to fit your organization's terminology, change the date format, or create rules to apply formatting to specific information in a column. Select a column in the preview area, then click Advanced Options in the upper-left corner.





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Matrix Reports

A matrix report presents summary information in an aggregated table format, making it easier to view than if it were displayed in a list like a traditional report. A matrix report requires two or more groupings, with a maximum of four. Information in a matrix report is displayed as a numerical value. See **Creating a Matrix Report** for more information.

Hours logged by users in a specific group, organized by month and week

Report Type
- Hour

Filters
- Hour»Entry Date ➜ Equal ➜ desired time period (specific dates, quarter, etc.)
- Owner»Home Group ID ➜ Equal ➜ group name

Note: Add filter criteria as needed to view the hours and owners desired.

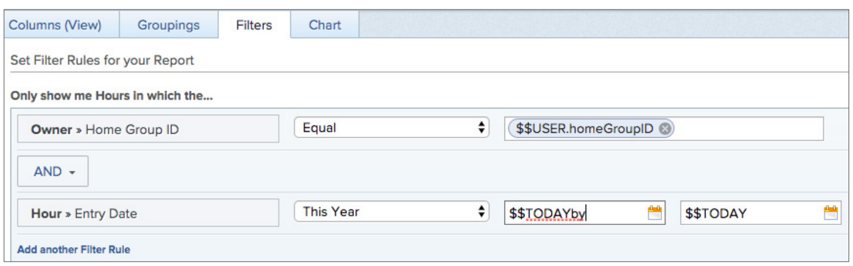
View
- Hour»Entry Date
- Hour»Hours
- Hour»Actual Cost
- Hour»Resource Revenue

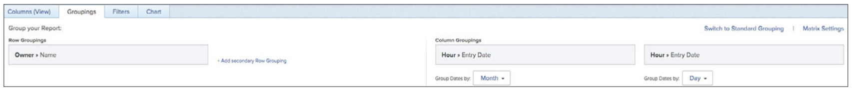
Note: For the Hours column to display the total hours logged, be sure to summarize the column by Sum. Do the same for the cost and revenue columns.

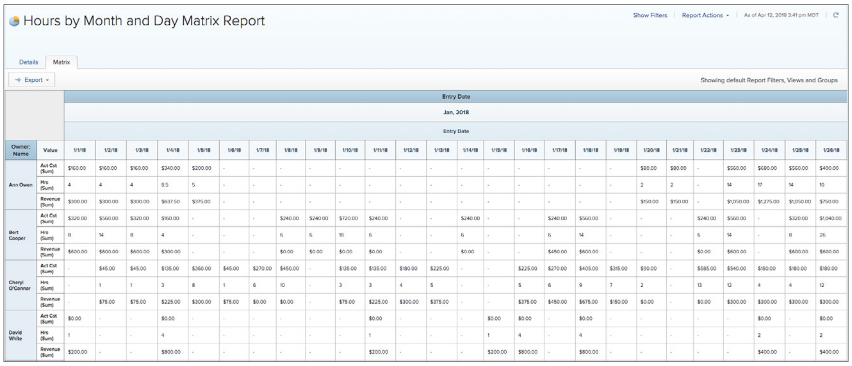
Grouping
Note: Click the Switch to Matrix Grouping in the upper-right corner.

Row groupings
- Owner»Name

Column groupings
- Hour»Entry Date (group by month)
- Hour»Entry Date (group by day)







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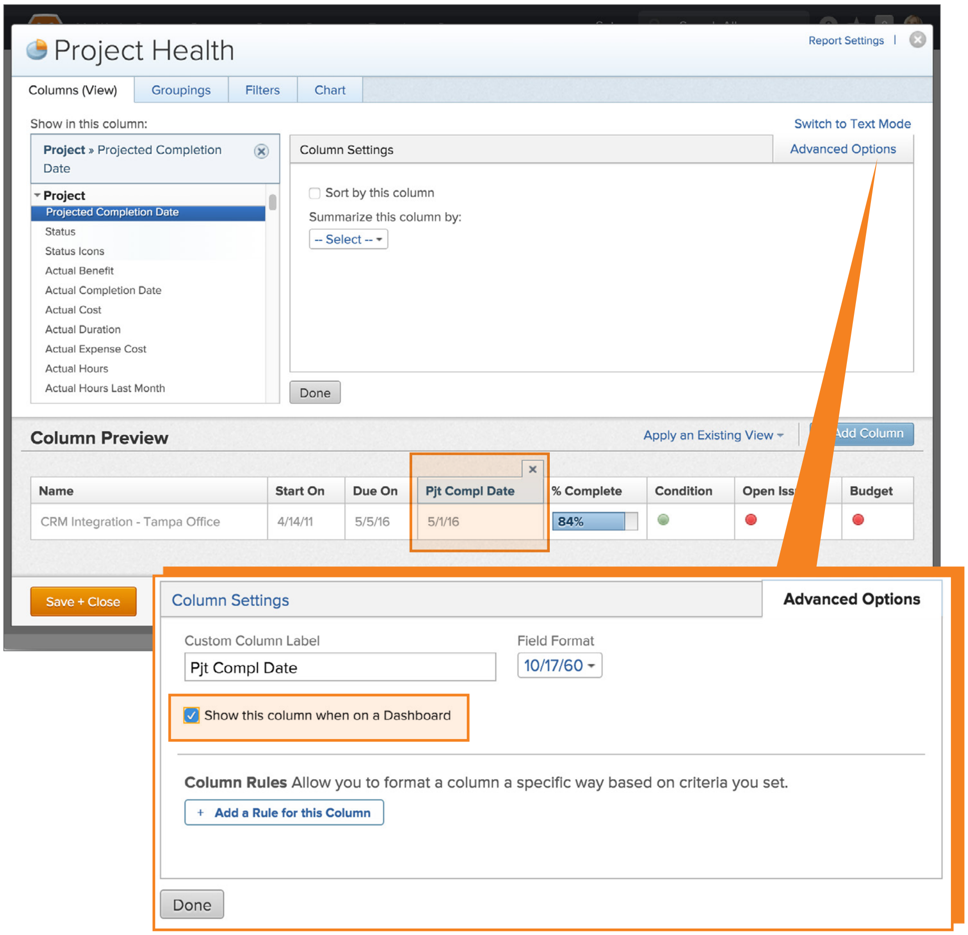
Reporting Tips and Tricks

Ever wonder why certain columns in a View don't show up on a Dashboard? Need a good way to review hours logged on a project? Want your reports to reflect your organization's terminology? Reports can help. Just keep reading …

Define which columns are displayed on a dashboard

Not every field in a View shows up by default when a report is displayed on a dashboard. It's a space thing — dashboard areas often aren't wide enough to display an entire report. But you can set which fields you want to show up so the information is relevant to your users.

1. From the Report Actions menu on a report, select Edit.
2. In the Columns (View) tab, select a column in the preview area.
3. Click Advanced Options in the upper-right corner.
4. Check the box for Show This Column When on a Dashboard.
5. Repeat for all desired columns.
6. Click Save+Close.



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Get an overview of hours logged

Make it easy for project managers to review hours that have been logged. This information is best viewed in a matrix table.

User hour report

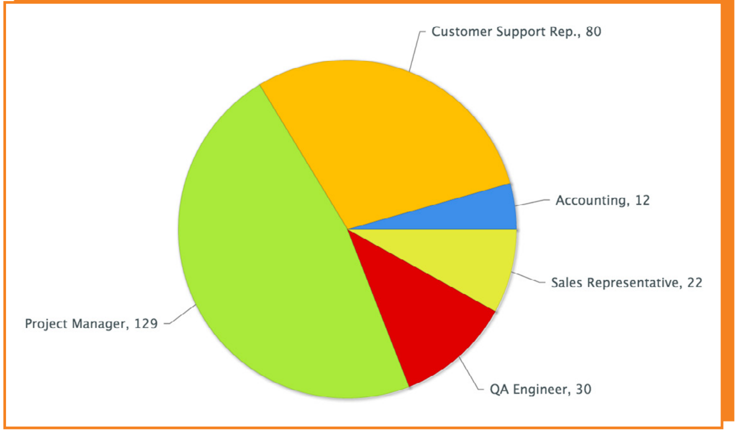
Show Filters | Report Actions | As of Apr 8, 2016 12:51 pm MDT

Details | Matrix | Chart

Export

Showing default Report Filters, Views and Groups

			Entry Date					
Owner: Name	Job Role: Name	Value	4/2/16	4/3/16	4/4/16	4/5/16	4/6/16	Total
Elizabeth Powell	Project Manager	Hrs (Sum)	2	3	-	-	-	5
Jack Oliver	Sales Representative	Hrs (Sum)	3	3	2	-	-	8
Jenna Nunez	QA Engineer	Hrs (Sum)	-	-	-	-	30	30
Jennifer Campbell	Project Manager	Hrs (Sum)	9	1	-	2	112	124
Joe Stevens	Accounting	Hrs (Sum)	-	-	-	-	12	12
Marci Watson	Sales Representative	Hrs (Sum)	-	-	-	-	14	14
Matt Fazzio	Customer Support Rep.	Hrs (Sum)	1	2	3	-	-	6
Susan Smith	Customer Support Rep.	Hrs (Sum)	-	-	-	-	74	74
Total		Hrs (Sum)	15	9	5	2	242	273



TIP
To prevent other columns that display numerical information (such as cost or revenue) from showing up on the matrix report, make sure the columns do not have Sum selected in the "Summarize This Column By" dropdown.

1. Create an Hours report.
2. Select the desired columns for the View, making sure to include Hours.
3. Select the Hours column in the preview area. Select Sum from the Summarize This Column By dropdown.
4. Click the Grouping tab and select Switch to Matrix Grouping in the upper-right corner.
5. Set the row grouping to Owner»Name and Job Role»Name.
6. Set the column grouping to Hour»Entry Date (be sure to group by day).
7. Add Filters and/or Prompts, as desired.
   - For example, filter by Hour»Entry Date or add a prompt for Project»Name.
8. From the Chart tab, select the pie chart.
9. Set the Value to Hours and the Wedges to Job Role.
10. Save+Close to finish

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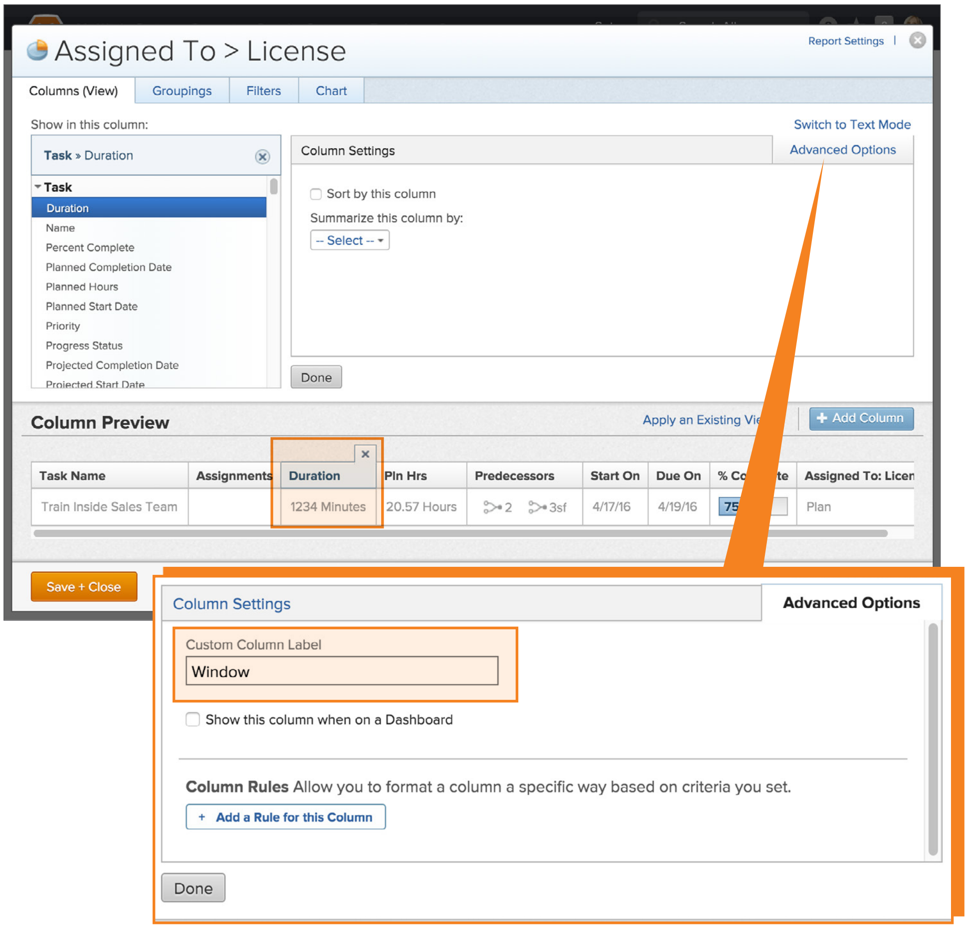
Make reports speak your organization's language



When you create a View, columns are labeled with Workfront's terminology. But that doesn't always match the lingo of your organization. Edit the column headers so the report and your users are speaking the same language.

1. Edit an existing report or View
2. Select the column to rename in the preview area
3. Choose Advanced Options in the upper-right corner
4. Enter the desired column name in the Custom Column Label Field
5. Click Done to save the change
6. Repeat for all columns desired
7. Save the report or view when you're done

Text Mode

```
textmode=false
valuefield=durationMinutes
valueformat=compound
viewalias=duration
descriptionkey=duration
listsort=intAsInt(durationMinutes)
name=durationMinutes
displayname=Window
querysort=durationMinutes
section=0
shortview=false
stretch=0
width=90
linkedname=direct
```

TAKE IT UP A NOTCH

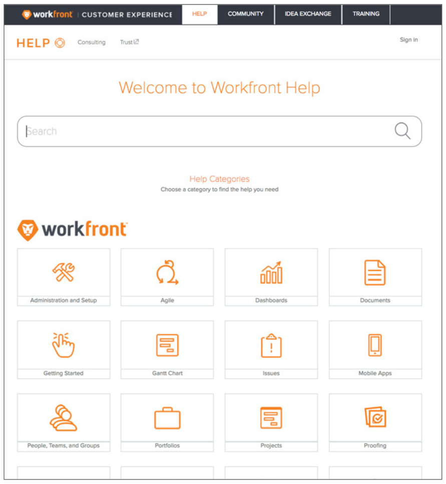
You can also use text mode to rename a column.

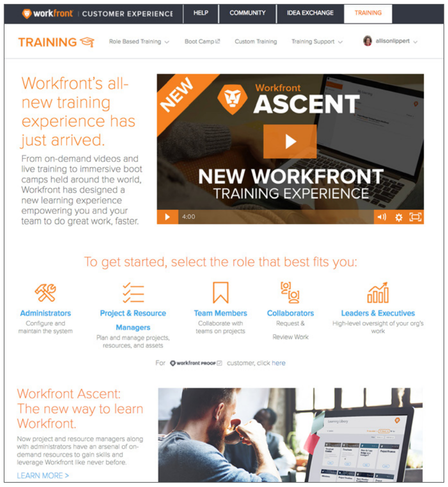
- Edit an existing report or View (or create a new one)
- Select the column
- Click Switch to Text Mode in the upper-right corner
- Replace 'namekey=' with 'name'
- Add a new line and enter 'displayname='
- Then enter the desired column name
- Be sure to save

TRAINING

Workfront Help & Training

Find answers to software questions on the Workfront Help website. Complete self-paced training in Workfront Ascent and the Workfront Training Center.

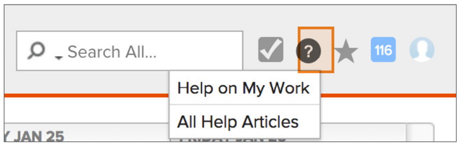




Workfront Help website

support.workfront.com

- Search for articles about Workfront software features
- View collections of articles about specific topics with the Help Categories
- Keep up with new product features in the Product Announcements area (bottom of the window)



- Click the Help icon in the global navigation bar inside Workfront to view Help articles specific to the Workfront area you're on or to access the overall Help website.

Workfront Training Center

training.workfront.com

- Project managers can find additional training in Workfront Ascent. Click the Project & Resource Managers icon to sign in.
- Team members and collaborators (request and review users) can find training through the Workfront Training Center. Click the appropriate icon to access short videos.
- Click the Training Support link at the top of the window to access a variety of articles about Workfront's training program, including a list of all courses offered.

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Workfront Training PDU Credits

Many of the Workfront Training courses offered at Leap count toward PDUs (Professional Development Units) at PMI (Project Management Institute). Project Manager Fundamentals is a prerequisite for all PDU-eligible courses.

WORKFRONT COURSE NAME	PDUs	ACTIVITY CODE
Boredom vs. Burnout: Managing Your Team's Workload	1	W-009
Driving User Adoption	1	W-013
Essential Skills for Getting Stuff Done	1	W-012
Get Strategic with People Management	1	W-008
Helpful Reports to Get You from Demand to Delivery	1	W-019
Introduction to Agile Work Management	1	W-014
Manage Reviews & Approvals in Workfront	1	W-017
Moving from Legacy to New Resource Management Solutions	1	W-011
Project Time Management	1	W-016
Queue Management	1	W-018
Review & Approval Administration, Part 1	1	000-039
Review & Approval Administration, Part 2	1	000-040
Scrum and Kanban in Workfront	1	W-015
Setting Up Workfront for Better People Management	1	W-010

Claim your PDUs

Occasionally Workfront will retire course codes at PMI. Activity codes for Leap courses will expire at the end of 2018, so be sure to claim them before then. To verify an activity code is still active or claim a credit, go to:

http://www.pmi.org/ > Certifications > Maintain Certification > Visit CCRs > Search Activities > Search for Workfront

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Workfront Training

Ensuring users receive thorough and appropriate training on how to use Workfront is a vital part of a successful implementation and continued adoption. The Workfront Training team offers a variety of training options to fit your organization's needs throughout your Workfront experience.

THE WORKFRONT TRAINING CENTER	
Team members and collaborators can access sessions in the Workfront Training Center to prepare for launch. Anyone who will be using Workfront needs to attend training.	• Included with your Workfront purchase • No registration or login required for Workfront Training Center • Training available for Work license users (team members, executives/ leaders), Collaborator license users, and Workfront Proof users • Online learning and live courses available • Print-ready resources for review and additional learning
Get started at **training.workfront.com**	

WORKFRONT ASCENT	
Your core team can prepare for your Workfront implementation by taking training through Workfront Ascent.	• Included with your Workfront purchase • Online, self-paced learning focuses on the needs of project managers, resource managers, system administrators, and others with Plan licenses • Option to take live courses to supplement online learning • Print-ready resources for review and additional learning
Get started at **training.workfront.com/ascent**	

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SYSTEM ADMINISTRATOR BOOT CAMP

New and beginner-level Workfront system administrators are invited to spend time at Workfront headquarters in Lehi, Utah. Or join us at varying locations across the country.

- Administrator-specific standard training courses
- Courses designed specifically for the system administrators attending Boot Camp, based on pre-session surveys and phone calls
- Not intended for experienced, long-time Workfront system administrators or back-end developers

For dates of upcoming sessions or to register, visit the **Boot Camp** webpage

CUSTOM TRAINING

Custom Training is a collaborative process between your organization's core team and the Workfront Training team. Our goal is to empower users with the knowledge, skills, and resources they need to get the most value from Workfront.

This collaboration leads to successful training and development of custom documentation — and ultimately a successful Workfront launch.

Dedicated Standard Course

- Dedicated course date/time for users
- Virtual or on-site course delivery
- No content customization
- Course taught with Workfront test drives

Dedicated Custom Course

- Dedicated course date/time for users
- Virtual or on-site course delivery
- Course topic selection; customer workflows can be incorporated
- Course taught using customer's live or sandbox environment

Custom Documentation

- Documentation captures your processes and workflows within Workfront's feature functionality
- Custom documentation can be added to custom training purchase or purchased separately

Train the Trainer

- Training consultation and/or working session with Workfront trainer
- Customized course training outline for team members or project managers
- Customer delivers training to end-users

Contact your Workfront sales representative for details.