

Introduction to Text Mode Reporting

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





Text Mode Resources

As you start learning text mode in Workfront, you'll want to keep a few web pages handy. Click the blue links on this PDF to access the URLs.

API Explorer

The **API Explorer** is where you will find the proper database name for native fields in Workfront. It provides a full list of how objects relate to each other and what can be referenced from one object to another. As you use text mode for reporting, you'll be frequently referring to the API Explorer tables.


Workfront Help Center articles

Filter and condition

modifiers allow you to build filters and establish conditions for formatting report results.

Filter variables (wildcards) can be used to define filters, searches, calculated custom data, and views. Wildcards make reports dynamic so they can be utilized over time or by various users. Workfront has date-based and user-based wildcards.

There's also a good overview article about **text mode** that you might find helpful.



API Explorer

The following objects are available through the Workfront API.

Click an object to display all the information that can be accessed. For more detailed information about using the API Explorer, see ["Using the API Explorer."](#)

Objects

Filter

API Version 9.0

APIVersionMetadata	APIVMD
Access Level	ACSLVL
AccessLevelPermissions	ALVPER
Access Request	ACSREQ
Share	ACSRUL
AccessRulePreference	ARPPREF
Team Stories	ACKAGLEWK
Announcement	ANCMNT
AnnouncementAttachment	ANMATT
AnnouncementRecipient	ANCREC
Approval	APPROVAL
Approval	ARVPTH

Text Mode Language: camelCase

camelCase refers to a way to write text mode elements to string multi-word attributes together. This is the way that items are found in the database. Although most item names follow the camelCase rules, there are some variations.

camelCase rules

- First word is lowercase
- No space between words
- First letter of any subsequent word is uppercase

VARIATIONS IN VERBIAGE	
STANDARD BUILDER	TEXT MODE IN DATABASE
Planned Hours	workRequired
Original Planned Hours	originalWorkRequired
Actual Hours	actualWorkRequired
Issue	opTask
Issue Type	opTaskType
Number of Open Issues	numberOpenOpTasks



Text Mode: Filter Qualifiers

When working with filters in text mode, you do not need to have the “and” between filter lines. Just enter another criteria on a new line and ensure there is a modifying qualifier for each criteria.

QUALIFIERS		
QUALIFIER	TEXT MODE SYNTAX	EXAMPLE
Regular Attributes used		_Mod=
Equal	in	status=CUR,PLN,APR status_Mod=in
Equal (must equal exactly)	eq	name=XYZ Email Project name_Mod=eq
Not Equal	notin	status=CPL,DED,ONH status_Mod=notin
Not Equal (must not equal)	ne	name=XYZ Email Project status_Mod=ne
Contains (case insensitive)	cicontains	name=email name_Mod=cicontains
Contains (match exactly)	contains	name=Email name_Mod=contains
Greater Than	gt	hours=10 hours_Mod=gt
Greater Than or Equal To	gte	numberOpenOpTasks=5 numberOpenOpTasks_Mod=gte
Less Than	lt	hours=10 hours_Mod=lt
Less Than or Equal To	lte	numberOpenOpTasks=15 numberOpenOpTasks_Mod=lte
Is Blank/Null	blank/null	actualCompletionDate_Mod=blank
Is Not Blank/Not Null	isnotblank/ notnull	ownerID_Mod=notnull
Date Ranges/Ranges used		_Mod= _Range=
Between	between	numberOpenOptTask=1 numberOpenOptTask_Mod=between numberOpenOptTask_Range=10
Not Between	notbetween	numberOpenOptTask=1 numberOpenOptTask_Mod=notbetween numberOpenOptTask_Range=10



Text Mode: Views

Views in text mode use camelCase, but they have a different text mode structure. There are four lines of code that each column should have.

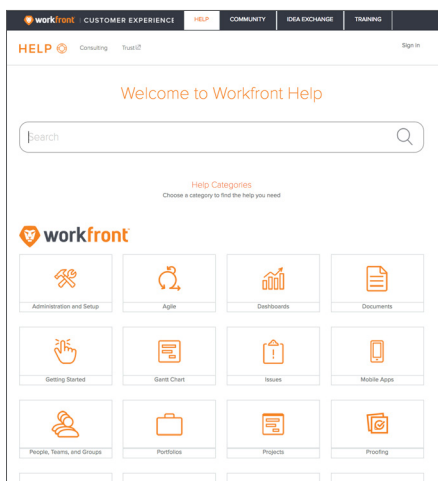
ESSENTIAL COMPONENTS OF A COLUMN VIEW	
SAMPLE LINE	DESCRIPTION
valuefield=	Determines what information the system will pull into the column.
valueformat=	Tells the system how the information should be displayed in the column.
name= displayname=	Defines the column header or title
querysort=	Tells the system what information to sort by when the column header is clicked on

To display information from two columns into a single column in a view, use this syntax.

CODE FOR SHARED COLUMNS		
COLUMN A TO SHARE	BLANK COLUMN	COLUMN B TO SHARE
"sharecol=true displayname=Name Column	value= valueformat=HTML sharecol=true width=1	Nothing needs to be added to this column

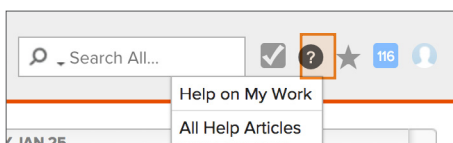
Workfront Help & Training

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

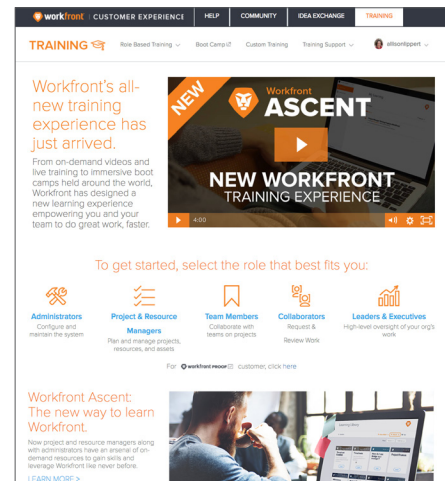


Workfront Help website support.workfront.com

- 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.

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

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

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.