

Learn From Your Peers Webinar | Adobe Workfront

Unlock the Power of Canvas Dashboards in Adobe Workfront

August 26th, 2026

Our webinar will begin shortly.

While we wait, say hello to your fellow attendees in the chat!

Learn From Your Peers Webinar | Adobe Workfront

Unlock the Power of Canvas Dashboards in Adobe Workfront

August 26th, 2026

Adobe

Today's Agenda:

Time (PST)	Topic
8:00 a.m.	Welcome and housekeeping
8:05 a.m.	Unlock the power of Canvas Dashboards
8:45 a.m.	Audience Q&A
8:55 a.m.	Wrap-up and next steps

Our Speakers



Host

Jenna Martinez
Adoption Marketing Manager
Adobe



Skye Hansen
Lead Functional Architect
Merkle



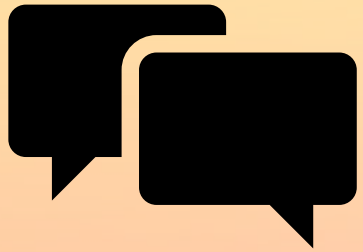
Matt Mitchell
Principal Product Manager
Adobe



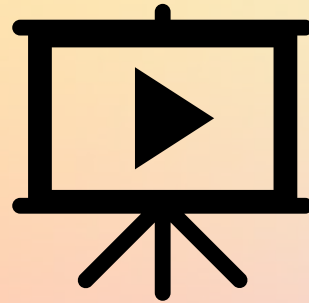
Hello!

Share in chat:

- Where are you joining us from?
- What are you hoping to learn today?
- What is your go-to pizza topping?



**Use the chat to
ask and answer
questions**



**This webinar is
being recorded –
we'll send you
the link**



**We'll share the
slides on the
Community**



**Tell us how
we did in the
survey**

Meet our presenters



Skye Hansen

Lead Functional Architect
Merkle

- Workfront nerd since 2014
- Community advisor, Adobe Champion
- Accent = Australian? Or English? Definitely American.



[Connect on LinkedIn](#)



Matt Mitchell

Principal Product Manager
Adobe

- 20 years of working with the Workfront product
- Literally wrote the book on textmode and advanced reporting for Workfront



[Connect on LinkedIn](#)

The Workfront Reporting Landscape

Each surface is purpose-built — use the one that fits the question you're trying to answer.



Classic Reporting

Real-time · Established · Workflow data

- Status reports and operational lists your team acts on daily
- Conditional formatting and inline editing within Workfront
- Distribute reports and dashboards via layout templates
- Share report links directly with Workfront users



Data Connect

Historical · Analytical · Cross-system

- Trend and variance analysis over months or quarters
- Join Workfront data with external systems of record
- Power BI, Tableau, or custom BI tool visualizations
- Deep diagnostic queries that require a data warehouse



Canvas Dashboards

Modern · Unified · Expanding data graph

- KPI tiles, charts, and flexible layouts in a single view
- Dashboard-level filters applied across all reports at once
- Reach Workfront Planning records — no other surface can
- Surface unified document approval status and decisions



AI & Conversational Reporting

Natural language · Contextual · Intent driven · Emerging

- Ask questions in plain language via Workfront AI Assistant
- Summarize project health, blockers, and next steps on demand
- Extend with external AI clients (Claude, Copilot) via MCP
- Best for exploratory questions, not structured recurring reports

Canvas Dashboards: One Surface, All Your Data

The modern reporting layer that spans classic Workfront and the full expanded platform.



Native charts & KPI tiles — purpose-built visualisations that go beyond tabular lists.



Flexible, freeform layout — arrange reports and widgets exactly as your audience needs them.



Workfront Planning data — the only reporting surface that reaches Planning records today.



Unified Document Approvals — surface approval status, reviewers, and decisions in one view.

Workfront Reporting Landscape

Classic Reports

Workflow data · Tabular & chart

Legacy Dashboards

Assembled reports · Fixed layout

Canvas Dashboards ✦

Charts · KPIs · Planning · Approvals

★ Only Canvas reaches
Planning & Approval data

Choose the Right Reporting Tool

When each surface best serves your team's reporting needs

✦ Stick with Classic Reporting When...

- **Daily operational lists & status reports**
Teams need real-time, act-on-it-today task views
- **Inline editing**
Making quick edits from the report itself
- **Advanced text-mode customization**
Complex field expressions, shared columns, iterated lists, etc.
- **Exporting data for external visualization**
Data Connect is the right way to do this moving forward

✦ Choose Canvas Dashboards When...

- **Leadership or executive audiences**
KPI tiles, charts, and visual layouts in a single polished view
- **Dashboard-level filtering**
One filter applied instantly across all reports on the canvas
- **Workfront Planning records**
The only reporting surface that reaches Planning data today
- **Unified document approval status**
Surface approval decisions and status alongside project data

Start with the end in mind.

Canvas Dashboards change how you build — not just what you see.

Classic Reporting

1 Define table columns & fields

2 Add groupings & aggregations

3 Hope it renders as a useful chart



Canvas Dashboards

1 Choose your output — Chart or Table

2 Define aggregations, metrics & series — with a live preview

3 Refine with filters & conditional formatting

The report type you choose isn't a final step — it's your starting point.

Choose your output first.

Each report type is purpose-built. Picking the right one before you build shapes everything that follows.

Charts & KPIs

USE WHEN YOU WANT TO:

- Enable quick visual pattern recognition across a dataset
- Surface headline metrics for leadership or executive audiences
- Show progress toward a goal (KPI scorecards)
- Define logic paths to find the data that needs your attention most

You start by defining the chart — aggregations, series, and metric — then optionally layer in filters and drill-down columns.

Table Reports

USE WHEN YOU WANT TO:

- Review itemized records — tasks, projects, or requests
- Enable click-through to underlying Workfront objects
- Support operational workflows that need row-level detail
- Complement a chart on the same dashboard with supporting data

You start by selecting the columns you need, then configure sorting, grouping, and conditional formatting to shape the view.

How to Canvas

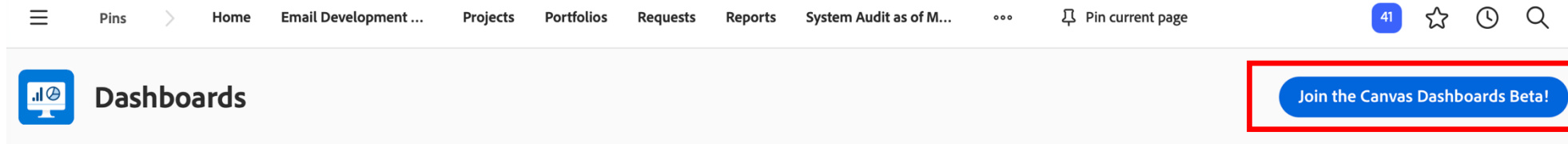
✓ Hang tight – we're going for a ride...

Canvas dashboards for beginners (setup)

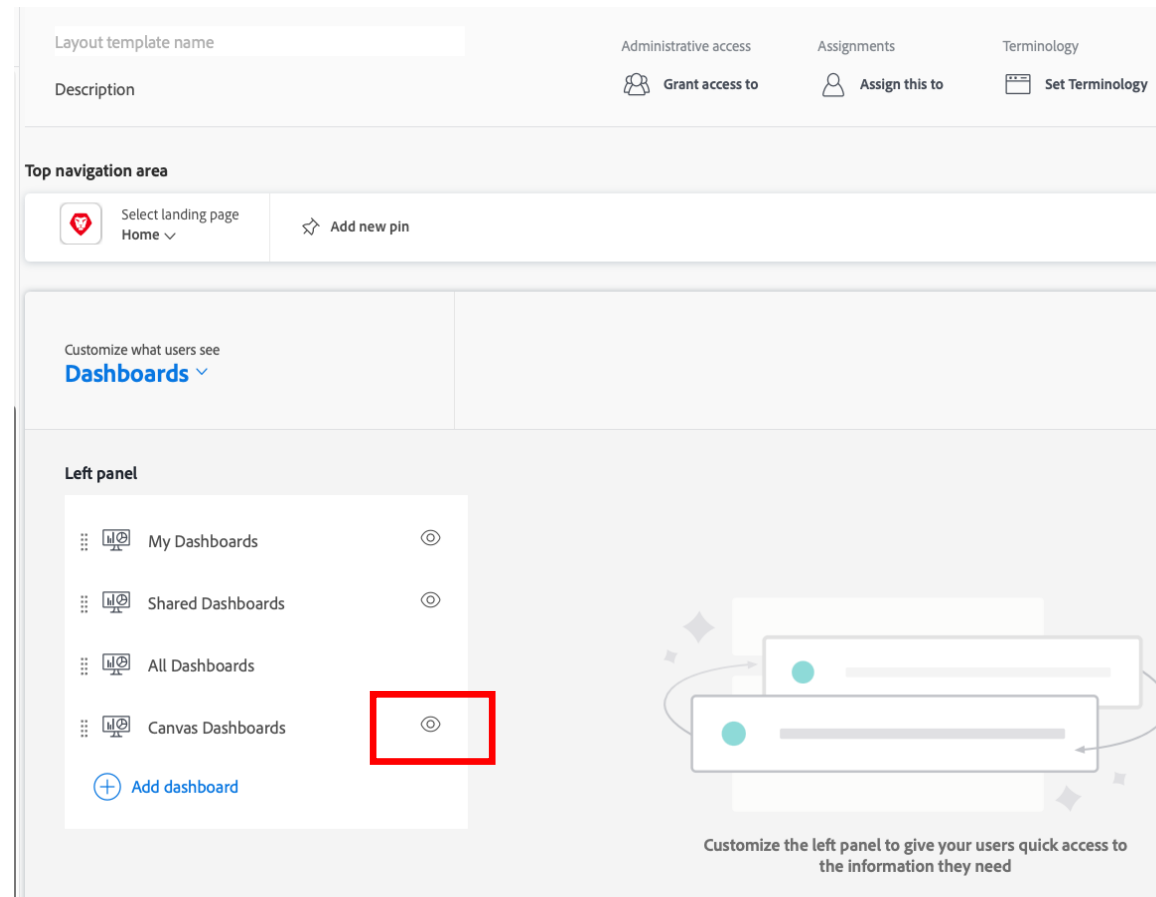


1) Admin needs to:

- enroll in the beta



- enable canvas dashboards on layout template/s for users who want to use this (make sure the eyeball is on).



Canvas dashboards for beginners (setup)



2) Create a dashboard: you can use instructions from

<https://experienceleague.adobe.com/en/docs/workfront/using/reporting/canvas-dashboards/create-dashboards/create-dashboards>

- Go back to your Dashboards area after you've enrolled and added it to your layout template
- Select Canvas Dashboards
- Click New Dashboard button: give it a name and a description; click Create

The screenshot shows the Adobe Workfront Dashboards interface. At the top, there's a navigation bar with a menu icon, 'PINS', a breadcrumb 'Workfront Product R...', and a 'Pin current page' button. On the right, there's a notification '10', a star icon, a clock icon, and a search icon. Below the navigation bar, the 'Dashboards' section is active, with a sub-header 'Canvas Dashboards'. In the sidebar, 'Canvas Dashboards' is selected and highlighted with a red box. The main content area features a search bar and a '+ New Dashboard' button, also highlighted with a red box. Below these, there are tabs for 'My Dashboards', 'Shared Dashboards', 'All Dashboards', and 'Favorite Dashboards'. The 'My Dashboards' tab is active. A table is displayed with the following columns: 'Name', 'Description', 'Created by', and 'Create date'. The table is currently empty.

Canvas dashboards for beginners (setup)



3) Click Add Report in the upper right corner of your **dashboard**, and then Create Report

Add report

Cancel

Create new report

Build a new report using the Canvas Dashboard report builder

Create report

Use existing report

Browse all existing reports to add to this Canvas Dashboard

View reports

Browse blueprints

Browse blueprint reports to add a premade visualization to this Canvas Dashboard

Coming Soon

Building a Chart

Exercise: Projects Created / Month

Intro to charts



In the Create new report popup, select your report type (Chart), then click Create Report

Create new report

CancelCreate report

Report Type

KPI
Summarize data that represent the health of your business as a single number output

Chart
Display data as a graphical visualization across multiple axes

Table
Display the properties of a record and related records as a list view

Pivot Table
Cross-tabulate and compare aggregated metrics across segments and dimensions

No report type selected

Select a report type from the menu to preview it here.

Note: if your browser window is too narrow, your report type column and subsequent report config columns might not appear.



Chart | Details



- 1 Details: Can be changed at any time: Give your chart a name, description and decide whether you want to show extra series as Other or not.
- 2 Then click on next icon *(or click the Build chart button – it's the same thing)*.

Configure chart



Details



Name

Projects per month



Description

Our first report!



☒ Show extra series as "Other" 



Run this report with the Access Rights of:

Search by name...

▼



1 Details



2 Build chart



3 Filter



4 Drilldown columns settings



5 Drilldown group settings



Chart | Build chart

Configure chart

2



Build chart

Chart type



Column



Column type



Simple



Left (Y) axis

Update field

Aggregation type ⓘ

Select...



Bottom (X) axis

Select field

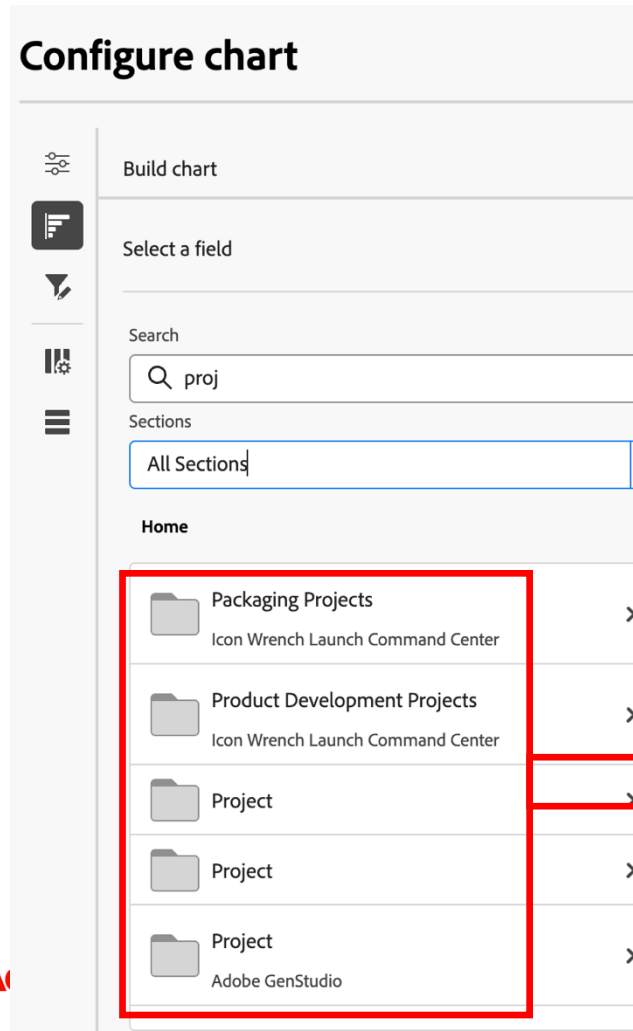
We picked a Column chart type, and left it at Simple.

Next, click Update field on your first axis (for the column chart, it's the left (Y) axis).
The canvas dashboard interface is intuitive and doesn't let you select anything else on this section.

Chart | Build chart

A. **Selecting that first folder from Home:** this is the equivalent of selecting a report type in Classic reporting.

How it looks in Canvas.



Coming Soon

Plans to move this “report selection” (folder picking) to the Details section

How it looks in Classic.

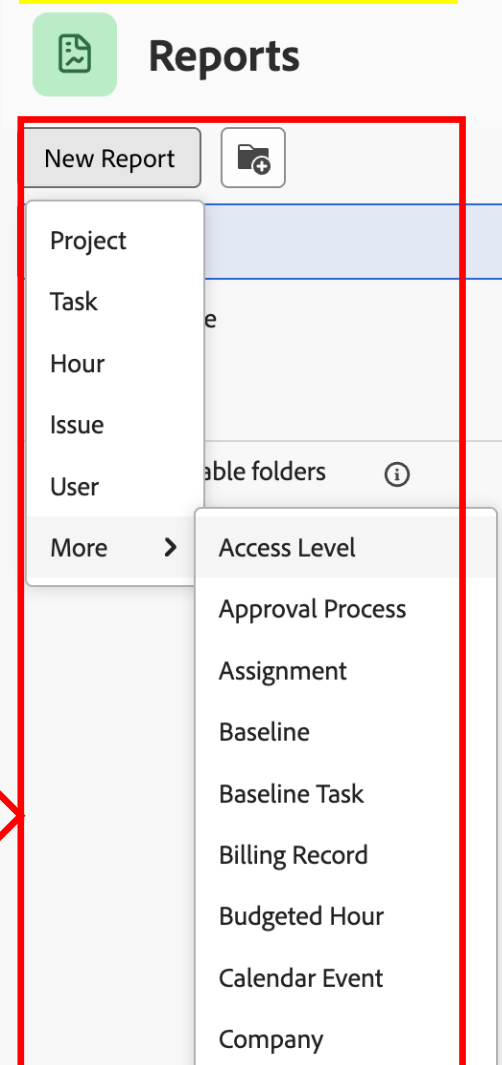
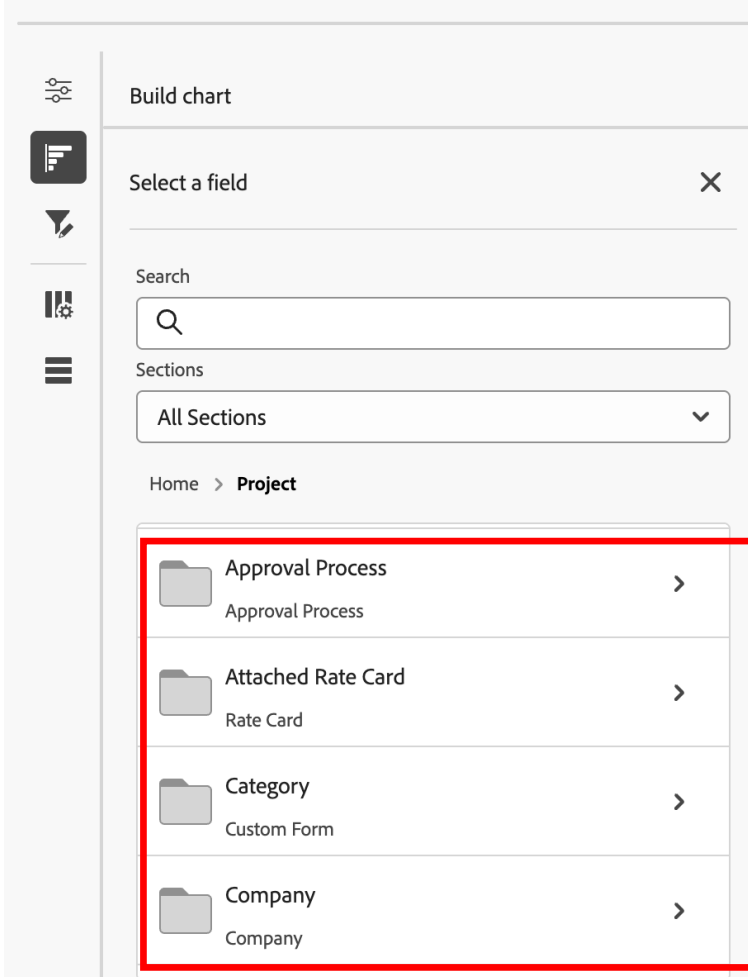


Chart | Build chart

When you select your report type, you are shown all your available fields – in Classic the Project fields are in the Project folder and all other folders underneath, but in Canvas all the folders are in the Project folder.

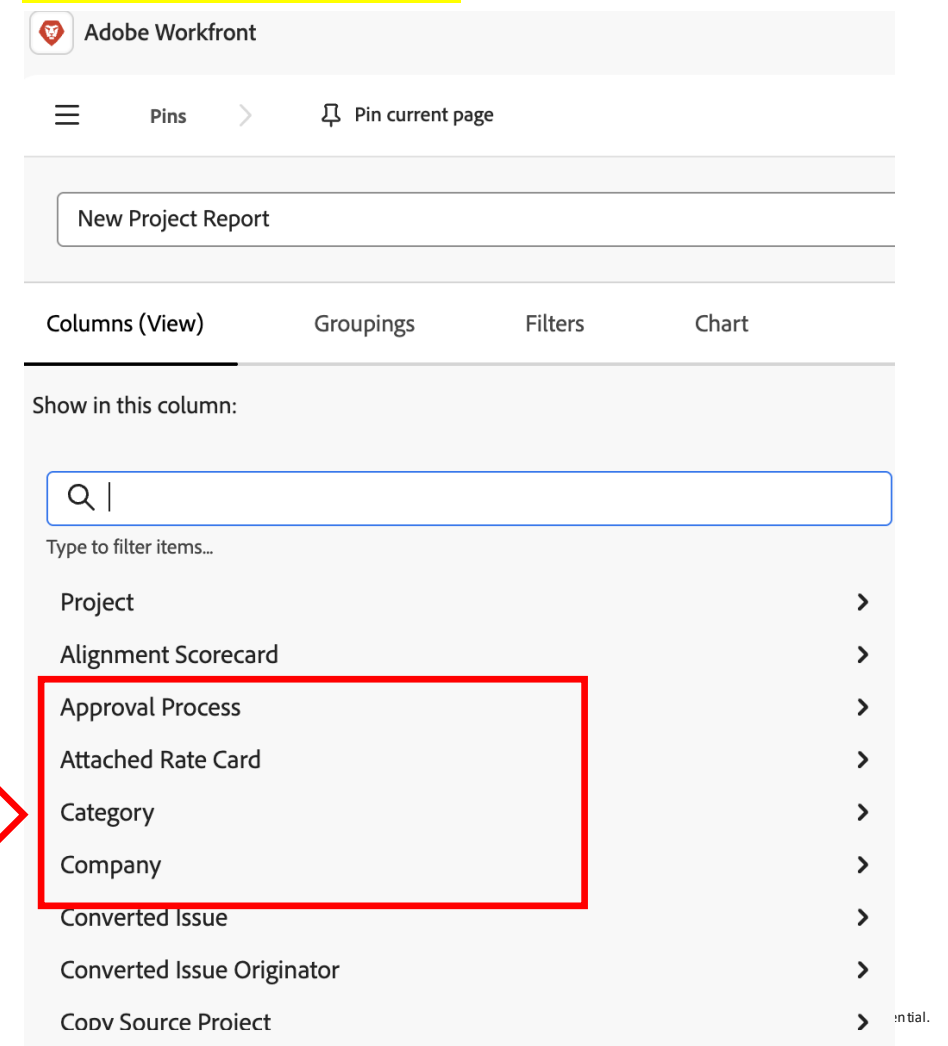
How it looks in Canvas.

Configure chart



The 'Configure chart' interface in Canvas shows a sidebar with icons for Build chart, Select a field, and a funnel icon. The main area has a search bar and a 'Sections' dropdown menu set to 'All Sections'. Below this, a list of folders is displayed under the breadcrumb 'Home > Project'. The folders are: Approval Process (Approval Process), Attached Rate Card (Rate Card), Category (Custom Form), and Company (Company). A red box highlights these folders, and a red arrow points from this box to the 'Classic' interface.

How it looks in Classic.



The 'Configure chart' interface in Classic shows the Adobe Workfront logo at the top. Below the logo are tabs for Columns (View), Groupings, Filters, and Chart. The 'Columns (View)' tab is active, showing a search bar and a list of items. The items are: Project, Alignment Scorecard, Approval Process, Attached Rate Card, Category, Company, Converted Issue, Converted Issue Originator, and Conv Source Project. A red box highlights the 'Approval Process', 'Attached Rate Card', 'Category', and 'Company' items, which correspond to the folders highlighted in the Canvas interface.



Chart | Build chart



Configure chart

Build chart

Select a field

Search

proj

Sections

All Sections

Home

- Packaging Projects
Icon Wrench Launch Command Center
- Product Development Projects
Icon Wrench Launch Command Center
- Project
- Project
- Project
Adobe GenStudio



Pro tip: If there are too many “Project” folders, change your Sections dropdown to something more specific (for this report, Workfront objects worked better).

Sections

All Sections

Product

- All Sections
- Workfront Objects
- Planning Record Types



Chart | Build chart

Configure chart

The screenshot shows the 'Build chart' configuration interface. On the left is a sidebar with icons for settings, chart building, filters, and a menu. The main area is titled 'Build chart' and contains a 'Select a field' section with a search bar and a list of fields. A red box highlights the 'Name' field, which is a string type. Below it is the 'Sponsor' field, which is a string type with a value of 'CHAMP - SKYE - Sponsor Name'.

Search
name
Sections
All Sections
Home > Project
Name string
Sponsor CHAMP - SKYE - Sponsor Name

- B. Next, picking your field: Think in terms of the kind of count you want (All fields have **Count Distinct** and **Count**; date fields additionally have **Min** & **Max**; and number fields have all of the above, plus **Avg** & **Sum**).

We wanted a straight **Count** of the number of projects per month. The “Count” functionality counts number of records no matter what field we picked, so don’t overthink it!

LIFE HACK: The fields you pick populate your drilldown (aka View) with a column, so for a straight count, pick a field you’d normally want to see (for us, this is the project name).



Chart | Build chart



Configure chart

Project



Build chart



Column type

Simple



Left (Y) axis



Selected field

Project · Name

Update field

Aggregation type ⓘ

Count

Axis label

☐ Hide axis

Bottom (X) axis

Select field

The story so far: we've selected Project Name for our first axis, and Count as the aggregation type. It's optional to set an axis label or hide it. Now it's time to work on the second axis (in our column chart, this is the X axis).

- X axis: Think of this as your “initial grouping”. Click on Select field. Type in “entry date” and select this field. It defaults to grouping by Month, so nothing else needed here.

Configure chart

Project



Build chart



Select a field



Search

entry



Sections

All Sections



Project

Entry Date
dateTime

Note that unlike Y, this axis field came in with an object preselected. You previously selected Project, so this is why Project automatically comes up. No need to go “backwards” – anything Project is connected, to shows up at the bottom of this list.



Chart | Build chart



Pro tip: Filling out some minimum entry on your axes has caused the Save button to finally light up. Now would be a good time to save.

Configure chart

Project

Save

Close

Build chart

Reference line value

100

Line type

Dashed

Bottom (X) axis

Selected field

Project • Entry Date

Update field

Group by

Month

Axis label

Hide axis

Projects per month

Project • Name

200

150

100

50

0

Mar 2023

Apr 2023

May 2023

Mar 2025

Apr 2025

May 2025

Jul 2025

Aug 2025

Sep 2025

Oct 2025

Nov 2025

Dec 2025

Jan 2026

Mar 2026

Apr 2026

May 2026

Jun 2026

Jul 2026

Project • Entry Date

Selecting the three dots in the upper right corner of each report and edit, will bring you back to your report config page.

...

Edit

Duplicate

Delete

Disable Filters

Chart | Filter



Click on the filter icon, then Edit filter.

3



Configure chart

Project

Save

Close



Filter

Edit filter

If

No rule

Projects per month ⓘ

200



Chart | Filter | Condition



+ Add condition

+ Add filter group

What is a condition? It's equivalent to a single “filter rule” in Classic reporting.

New Project Report

Columns (View)GroupingsFiltersChart

Set Filter Rules for your Report:

Your report does not currently have any filters

Add a Filter Rule

Chart | Filter | Condition



In **Canvas**, you would +Add condition.

Configure chart Project

Filter

Set Filter

If

empty empty empty ×

And

empty empty empty ×

+ Add condition **+ Add filter group**

In a **Classic** report, you would “Add another filter rule”.

New Project Report

Columns (View) Groupings

Set Filter Rules for your Report:

Select a field

AND ▼

Select a field

Add another Filter Rule

Chart | Filter | Filter group



+ Add condition

+ Add filter group

What is a filter group? It's equivalent to a set of filter rules (or canvas conditions) that you want to be filtered **together**.

How it looks in Classic.

Columns (View) Groupings **Filters** Chart

Set Filter Rules for your Report:

Project >> Status

⊖

Equal

Current ×

AND

Portfolio >> Name

⊖

Equal

Q

Transform The Customer Experience ×

[Add another Filter Rule](#)

OR

Project >> Status

⊖

Equal

Planning ×

AND

Portfolio >> Name

⊖

Equal

Q

Marketing Operations ×

[Add another Filter Rule](#)

How it looks in Canvas.

Configure chart **Project**

Filter

Set Filter

If

And

Status eq Current ×

Portfolio Name eq Transform The Customer Experience ×

+ Add condition

Or

And

Status eq Planning ×

Portfolio Name eq Marketing Operations ×

+ Add condition

Chart | Filter | Filter group

More than that: Filter groups let you use OR in the group, which Classic does not allow. Example:

(Condition 1 OR 2) AND (Condition 3 OR 4)

Tasks either:

1. Assigned to Awesome Team

2. **OR** task named Customer Success

AND either

3. Due within the next 7 days

4. **OR** Marked High priority

Sample Task name	Assigned to	Due date	Priority
Random Task Name 1	Awesome Team	12/1/26	High
Customer Success	John Smith	9/1/26	Low
Customer Success	Awesome Team	11/1/26	High
Random Task Name 3	Mary Smith	9/1/26	High
Customer Success	Awesome Team	9/1/26	Low

In **Canvas**, it looks like this

Filter

Set Filter

If

Or

Team Name eq Awesome Team

Name like Customer Success

+ Add condition

And

Or

Planned Completion Date between \$\$TODAY - \$\$TODAY+1w

Priority eq High, Urgent

+ Add condition



Chart | Filter | Filter group

Set Filter Rules for your Report: Apply an Existing Filter Switch to Text Mode

Assignment Teams >> ID

Equal



AND

Task >> Planned Completion Date

Between

☐ Set relative date ⓘ

☐ Set relative date ⓘ

[Add another Filter Rule](#)

OR

Task >> Name

Contains

AND

Task >> Planned Completion Date

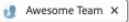
Between

☐ Set relative date ⓘ ☐ Set relative date ⓘ[Add another Filter Rule](#)

OR

Assignment Teams >> ID

Equal



AND

Task >> Priority

Equal

High 

Urgent 

[Add another Filter Rule](#)

OR

Task >> Name

Contains

AND

Task >> Priority

Equal

High 

Urgent 

[Add another Filter Rule](#)

In **Classic**, it looks like this:

(Condition 1 OR 2) AND (Condition 3 OR 4) =

1 AND 3,

OR

1 AND 4,

OR

2 AND 3,

OR

2 AND 4

Chart | Filter | Filter group



One more filter group “OR” example:

(Condition 1 AND 2) AND (Condition 3 OR 4)

Tasks either:

1. Assigned to Awesome Team
2. AND task named Customer Success

AND either

3. Due within the next 7 days
4. OR Marked High priority

Sample Task name	Assigned to	Due date	Priority
Random Task Name 1	Awesome Team	12/1/26	High
Customer Success	John Smith	9/1/26	Low
Customer Success	Awesome Team	11/1/26	High
Random Task Name 3	Mary Smith	9/1/26	High
Customer Success	Awesome Team	9/1/26	Low

In Canvas, it looks like this

Filter

Set Filter

If

And

Team Name eq Awesome Team

Name like Customer Success

Add condition

And

Planned Completion Date between \$TODAY - \$TODAY+1w

Priority eq High, Urgent

Add condition

Chart | Filter | Filter group



Set Filter Rules for your Report: Apply an Existing Filter Switch to Text Mode

Assignment Teams >> ID

Equal

 Awesome Team 

AND

Task >> Planned Completion Date

Between

\$\$TODAY

☐ Set relative date ⓘ

\$\$TODAY+1w

☐ Set relative date ⓘ

AND

Task >> Name

Contains

Customer Success

[Add another Filter Rule](#)

OR

Assignment Teams >> ID

Equal

 Awesome Team 

AND

Task >> Priority

Equal

High 

Urgent 



AND

Task >> Name

Contains

Customer Success

[Add another Filter Rule](#)

In **Classic**, it looks like this:

(Condition 1 AND 2) AND (Condition 3 OR 4) =

1 AND 2 AND 3,

OR

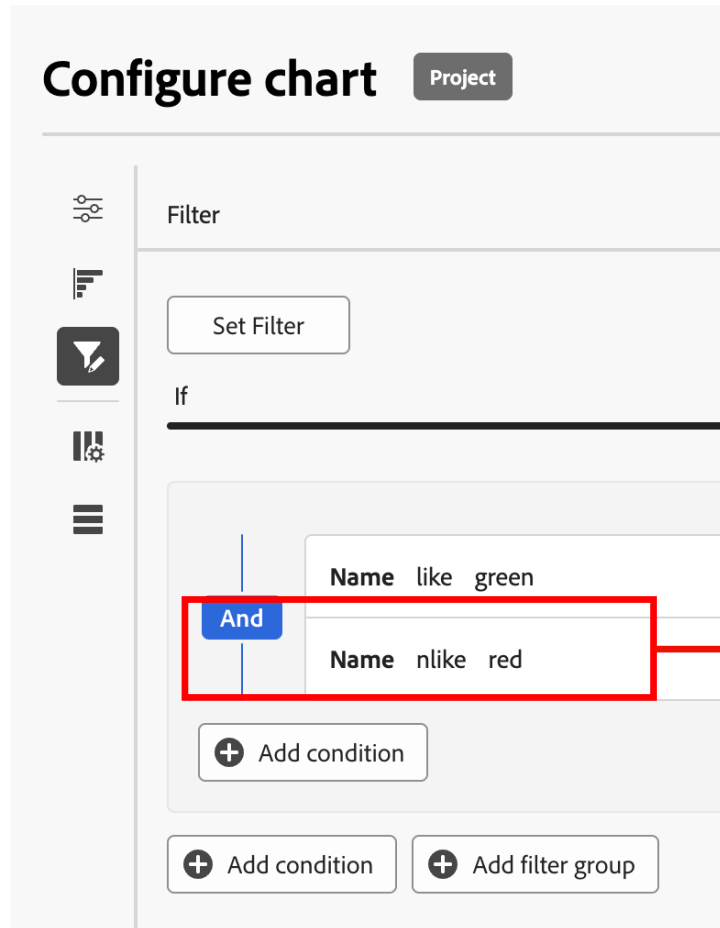
1 AND 2 AND 4

Chart | Filter | Filter group



One more note...

In **Canvas** there is no text mode to learn.



In a **Classic** Report you might need to learn text mode.

Create multiple filter rules that reference the same field

1. Go to a list of tasks.
2. From the **Filter** drop-down menu, select **New Filter**.
3. Click **Text Mode**.
4. In the box displayed, add the following code:



```
name=green  
name_Mod=cicontains  
AND:1:name=red  
AND:1:name_Mod=cinotcontains
```

TIP

To build similar filters, build the first statement first. For example:

Chart | Filter



In the interest of time, we skipped over demoing a filter build. Some great beginner examples for filters practice for your project report are:

- Entry date is this year *(note, this will take some work as Canvas doesn't have a "this year" shortcut)*
- Status not equal to cancelled or on hold
- Project isn't in the Workfront Admin's portfolio *(yes, we all have one!)*
- Project isn't a queue

But feel free to use some filter groups as well!



Chart | Drilldown columns



Configure chart Project

4

Drilldown Column Settings

Add column

Current columns

Entry Date	
Name	

“Drilldown columns” are the collection of rows and columns that appear when you click on a bar in your chart. You can already see that because we selected entry date and name as our axes, we pre-populated 2 columns. Similar to picking an axis or a filter condition, after the initial axis is chosen, other options are based on your initial axis. In this example, since we picked Project, we’ll be shown columns based on project fields and project references.

Some great examples for practice to add to your columns are:

- Owner name *(note, this will lead to you selecting the Owner folder and looking for name)*
- Planned completion date
- Status
- Percent Complete

Be sure and experiment with the advanced settings under each field and well as changing the order of the columns.

Chart | Drilldown groups



Configure chart

Project



Drilldown Group Settings



Add grouping



Current groupings



5

Drilldown groups are the additional groupings that appear after you click on an individual bar in your chart (in your table view).

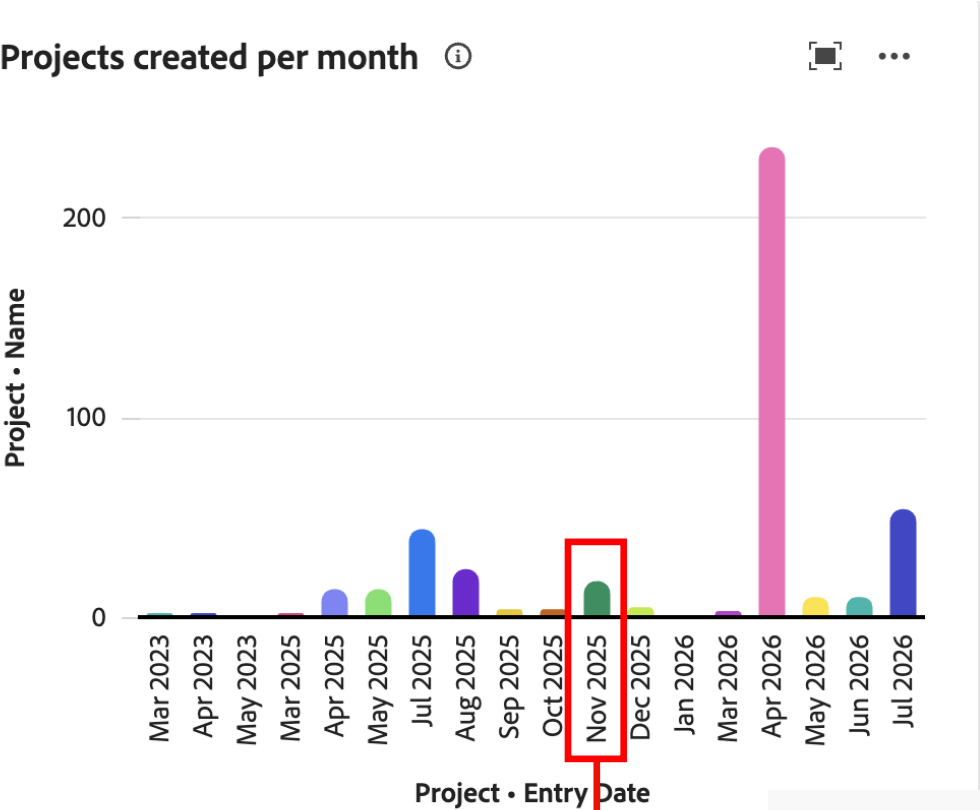
Some great examples for practice to add to your groupings are:

- Portfolio name *(note, this will lead to you selecting the Portfolio folder and looking for name)*
- Program name

Intro to charts (result)



Projects created per month ⓘ



Projects created per month • Nov 2025 (COUNT): 18

Owner Name: Chris Thygersen 1 of 1			
Name	Entry Date	Owner Name	Status
Chris Thygersen's Tasks	11/5/25	Chris Thygersen	Current

Intro to charts (additional options)



Now that we have a basic foundation, we can use this to create more charts. Some additional options we didn't talk about are below, along with their Classic counterparts:

How it looks in Canvas.

Configure chart Project

Build chart

Chart type

Column

Column type

Simple

Simple

Multi-series

Stacked

Adobe

How it looks in Classic.

New Project Report

Columns (View) Groupings Filters **Chart**

Column Bar Pie Line Gauge Bubble X

Left (Y) Axis

Record Count

Bottom (X) Axis

Entry Date (Month)

Show in 3D

Group Columns

Side by Side Stacked Stacked to 100%

Knowledge add-on: references

Object traversal / Object references

The object you pick in a Workfront report is connected to other things in Workfront.



Drilldown Column Settings

Select a field ×

Search

×

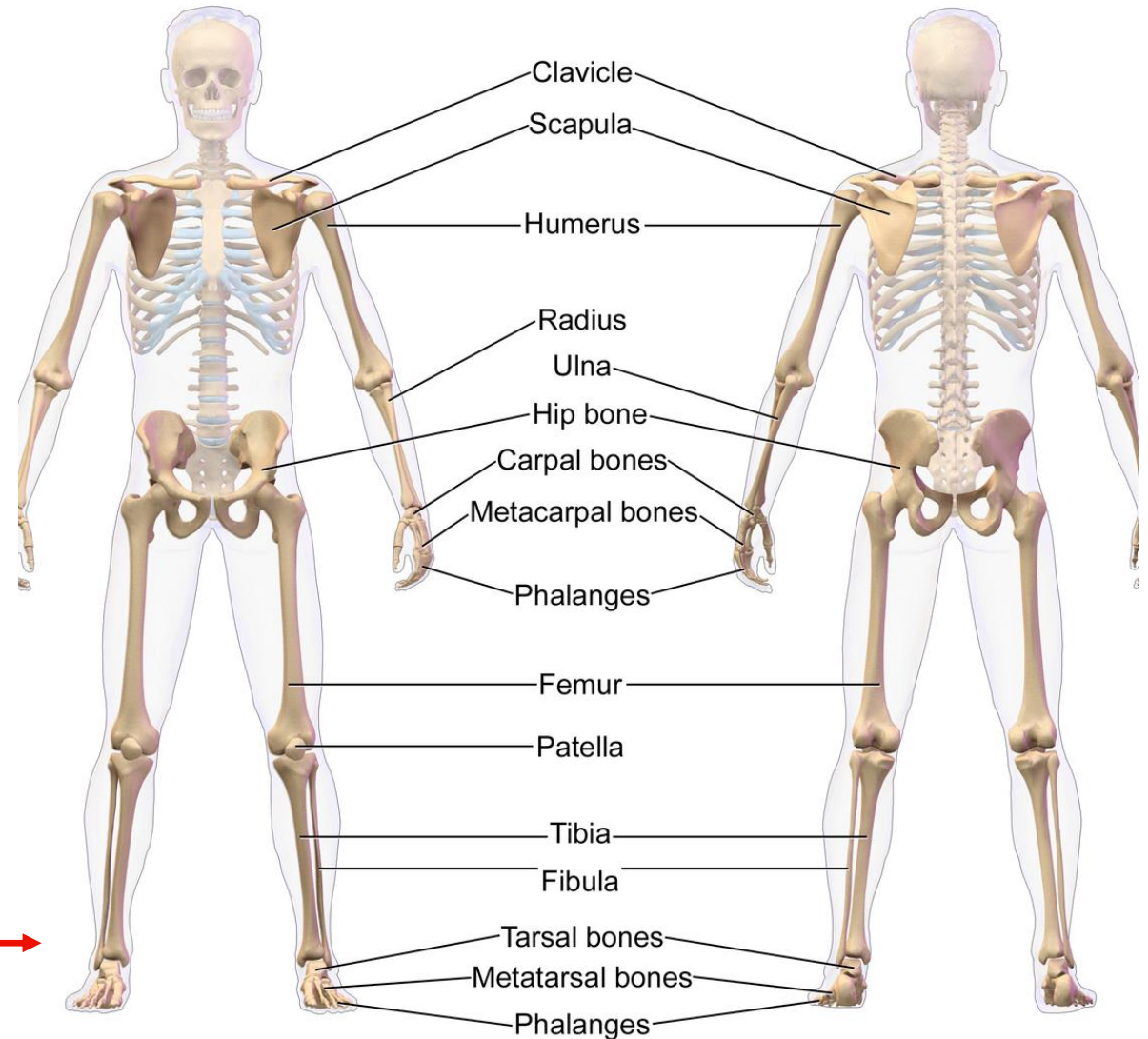
Sections

All Sections ▼

Project > Owner > Manager > **Manager**

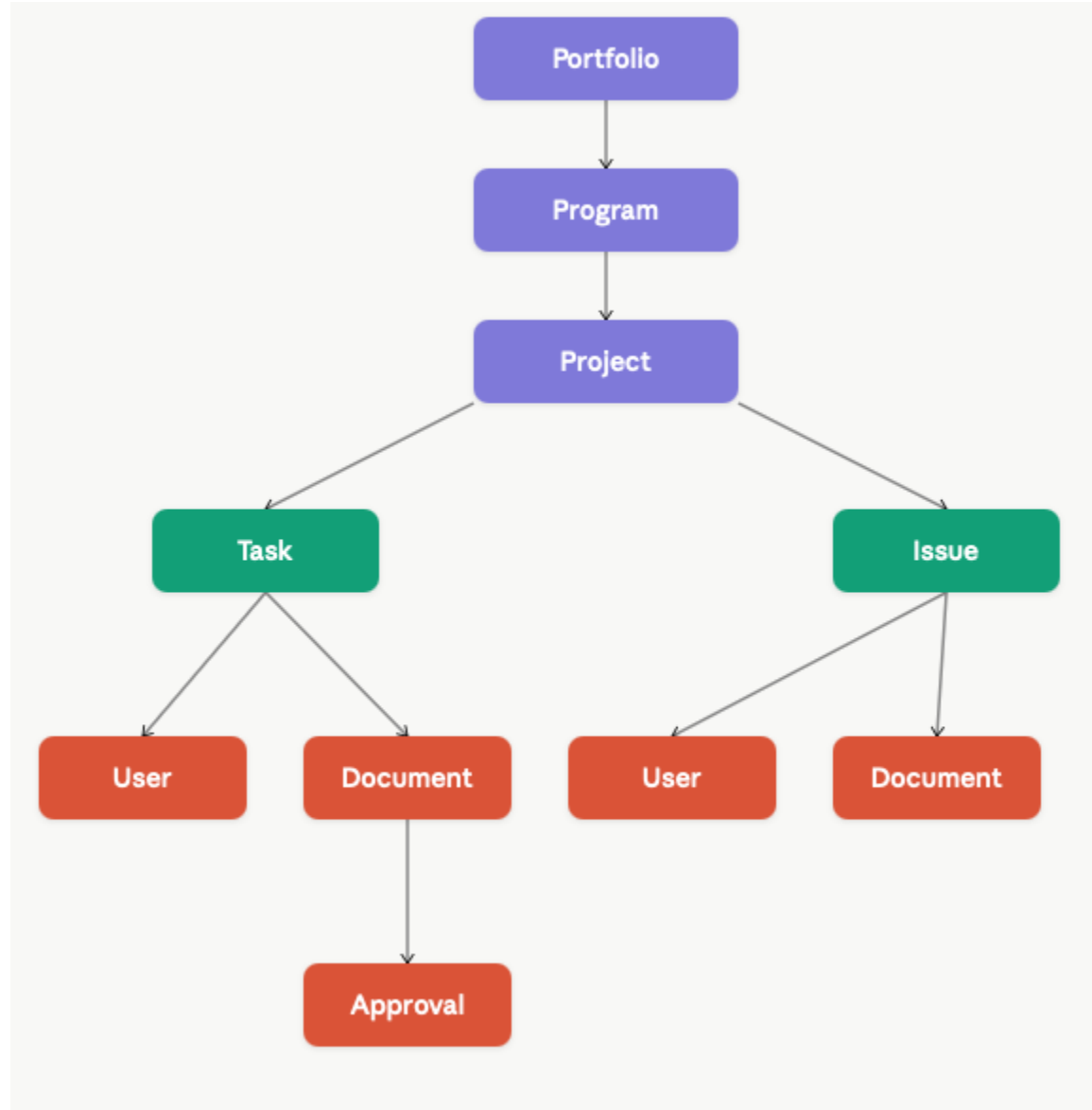
Name

string



Object traversal / Object references

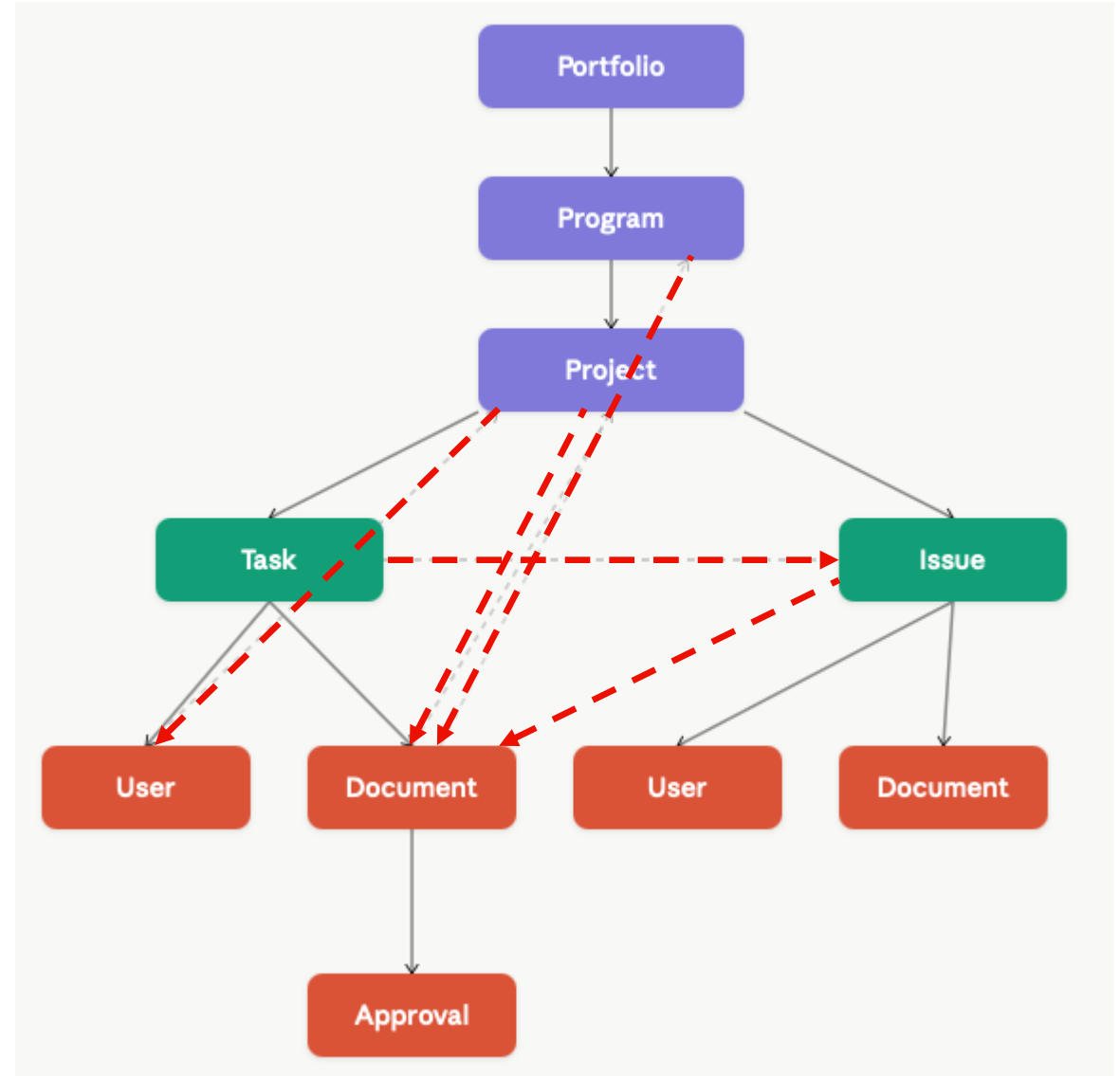
The object you pick in a Workfront report is connected to other things in Workfront.



Object traversal / Object references

A few examples to add on a bit more complexity....

- Projects have users (owners)
- Programs, projects, tasks and issues can all have documents
- Tasks can have issues



Object traversal / Object references

In **Classic**, if you wanted to report on a document's version, and show:

- the document name
- the name of issue or task it's in
- the project name
- the program name
- the portfolio name

You might need some textmode.
And you won't be able to make a chart unless you have a few calculated fields.

Column Preview

Hide Preview

DOCUMENT: NAME	DOCUMENT: TASK ID	DOCUMENT: PROJECT ID	DOCUMENT: PROGRAM ID	DOCUMENT: PORTFOLIO ID
Sample Text	Sample Text	Sample Text	Sample Text	Sample Text

Show in this column:

```
valuefield=document:taskID
querysort=document:taskID
valueformat=HTML
linkedname=document
namekey=view.relatedcolumn
namekeyargkey.0=document
namekeyargkey.1=taskID
```

Edit Text Mode

```
valuefield=document:task:name
querysort=document:task:name
valueformat=HTML
linkedname=document
namekey=view.relatedcolumn
namekeyargkey.0=document
namekeyargkey.1=task:name
```

Apply an Existing View

Add Column

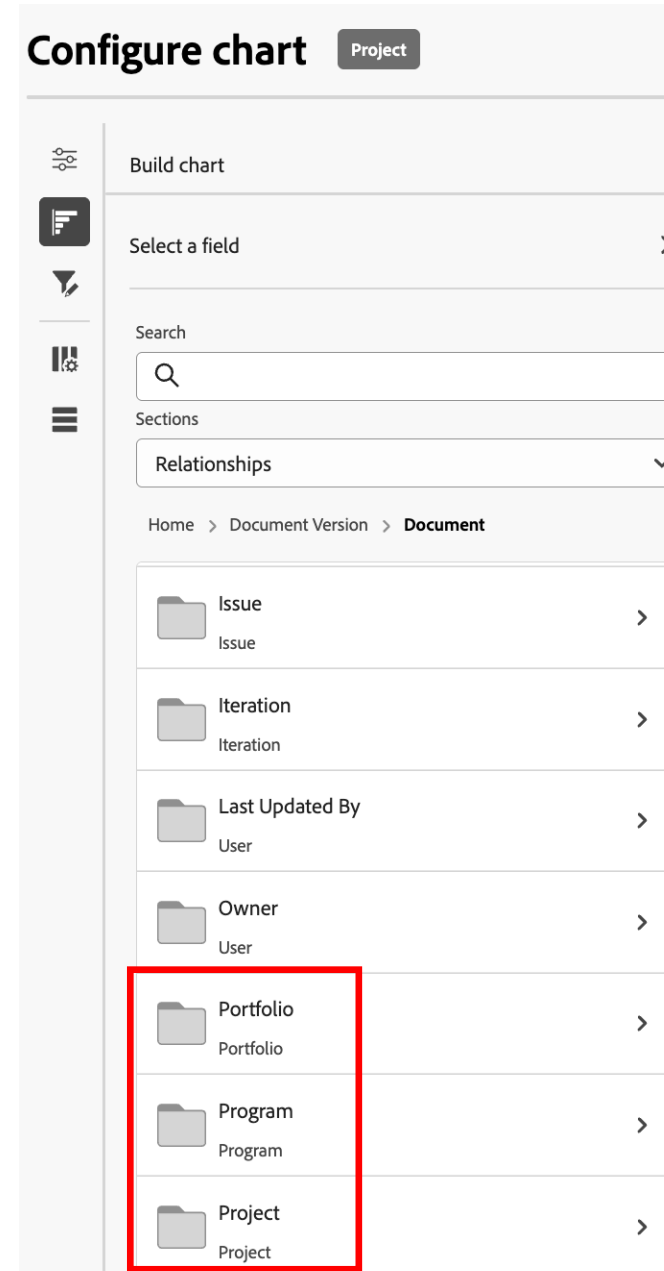
Object traversal / Object references

In **Canvas**, there's no text mode, so all of this:

- the document name
- the name of issue or task it's in
- the project name
- the program name
- the portfolio name

is available from the folders Canvas provides to you.

You can also make a chart right away – without needing to make calculated fields.



Unique to Canvas

KPIs and why we like them



- How to make a good report.

Table: "Which specific records are involved?"

Chart: "What's driving this?"

KPI: "Do I need to pay attention?"

- Uses the same principles – pick a thing to count, and based on your field type, you'll get some options
(count/count distinct, min/max, avg/sum)

- **KPIs are meant to answer the question: should I care?**

Used in that vein, here are some good examples.

- Tasks due this month (*3 tasks due – normal.*
500 tasks due – something is wrong)
- Projects at risk
- Approvals that are late
- Running tallies (emails sent this year, web pages built this year)

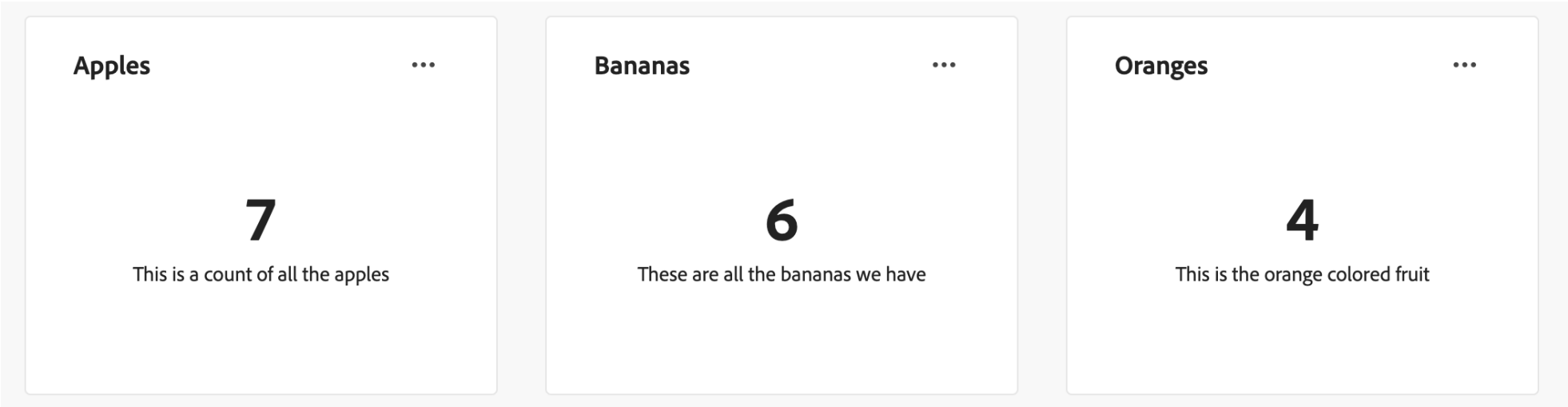


KPIs and why we like them



- Can be used as a workaround for some small, multi-select fields.

Name		Fruit
6		Banana,Apple
3		Apple
10		Orange,Banana
4		Apple,Banana
9		Banana,Apple



Dashboard filters and prompts



Dashboards > CHAMP - Skye - Canvas Dashboard Webinar  [Leave feedback](#)

Dashboard prompts

Show records where...

  **Filters**

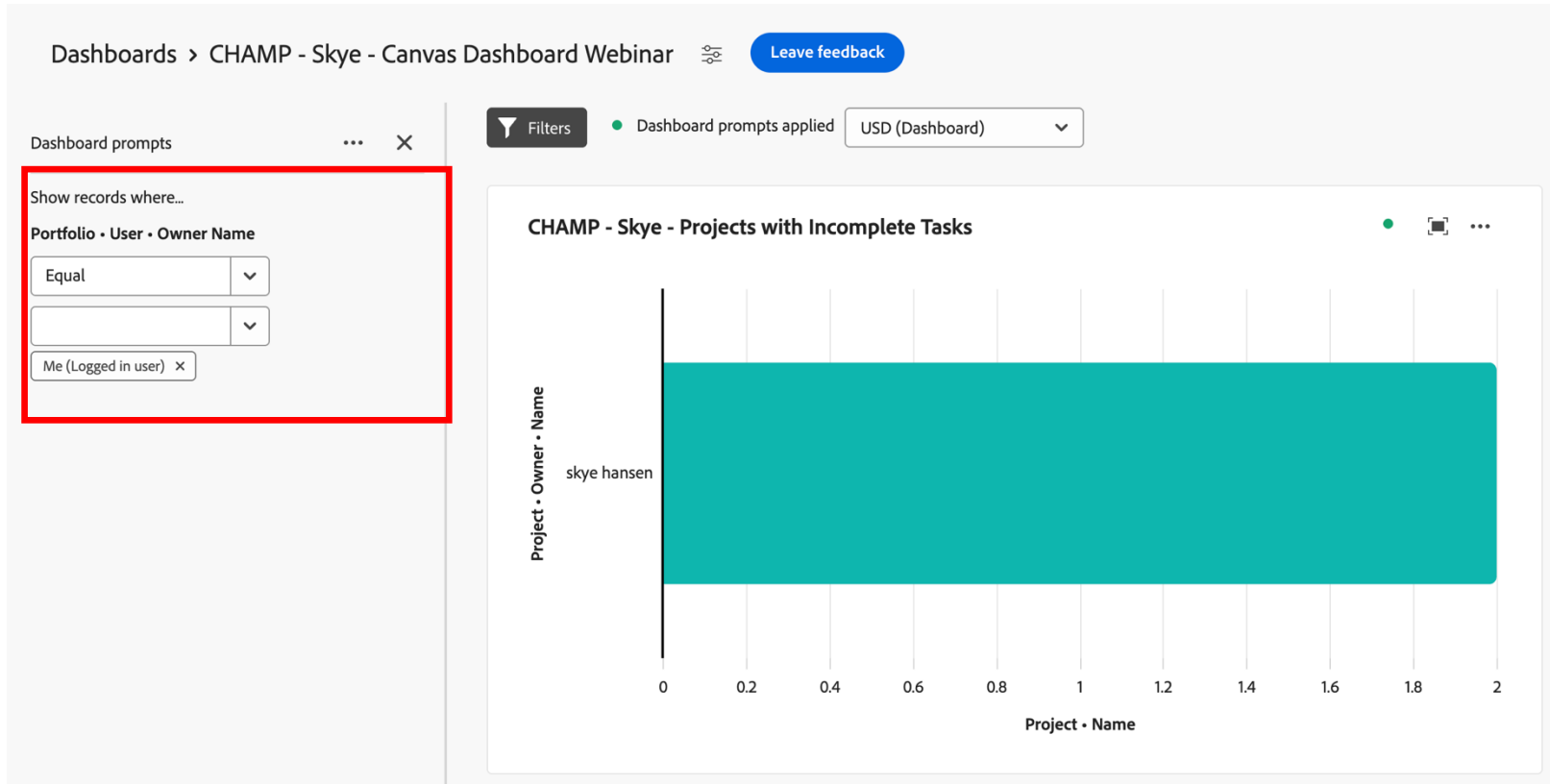
-  Edit filters
-  Apply dashboard defaults
-  Set as default prompts
-  Reset defaults

CHAMP - Skye - Projects with Incomplete Tasks

Claudia Jones			
Tim Wyckoff			
Jeremy Flores			
Oznur Aytekin			

Dashboard filters are filters that affect all canvas reports on your dashboard. We use this a lot in Classic reporting so that everyone can repurpose the same report. This just takes that concept and applies it to the whole dashboard.

Dashboard filters and prompts



You can use the same dashboard for both a look at the whole system, as well as filter all reports to show your own personal focus.

Some great examples might be records where:

- The logged in user is the portfolio's owner
- The logged in user was assigned to the approval
- Project entry date is this year

PLANNING (locating workspaces)



Configure chart Project

Build chart

Select a field ×

Search

Sections

All Sections ▼

Product

All Sections ✓

Workfront Objects

Planning Record Types

Planning Workspaces

SkyeH Enterprise: Marketing Management

WKND Marketing Hub

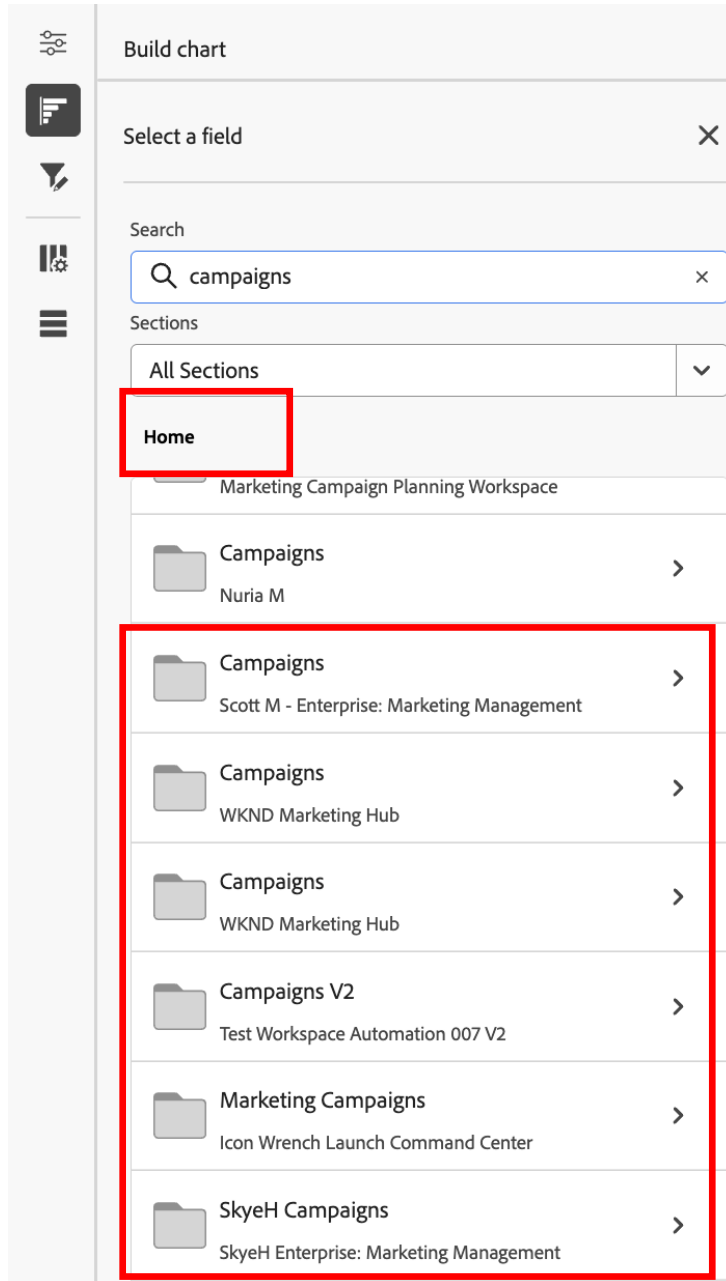
Planning records and their connected objects are available to report on in Canvas Dashboards. You can show Planning objects in several ways:

- 1) Planning Records (search for Record Type name paired with a workspace)
- 2) Their Connected Records or objects (whatever your record type is connected to – other record types, or connected projects, programs, etc.)
- 3) For the admins: Workspace report or Record Type report for governance

Note:

- Visibility of workspaces – if you can see it in Planning, you can see it in Canvas.
(Note: the Workspace names showing up in the Sections dropdown are those Workspaces shared with the user who is building a Canvas report)
- Planning Connection fields (Connected Records) such as Project connections will be available to select as an object using the connection object name, e.g. “Project”. If you bring in connected project information to a number of workspaces they will all be listed separately with the name of their workspace in smalltext – so you may see a long list of “Project” listings, each with a Workspace

PLANNING (locating record types)



- Record Types come in as a folder with the Record Type name first and the Workspace name underneath in small print.
- You can access Record Types right from Home.
- Reminder to Admins: You can also lower your visibility to only Workspaces that are shared with you. Just use the Sections dropdown.
- If you're attending a class, everyone creating a workspace in the same way will generate multiple, identical Record Type and Workspace names.
- If you have a global record type being used by numerous "secondary" workspaces, this will only be available to pick from the primary workspace.

PLANNING (locating connected objects)



Configure chart

Build chart

Select a field ×

Search

Sections

All Sections ▼

Home > SkyeH Campaigns

string

Start Date
dateTime

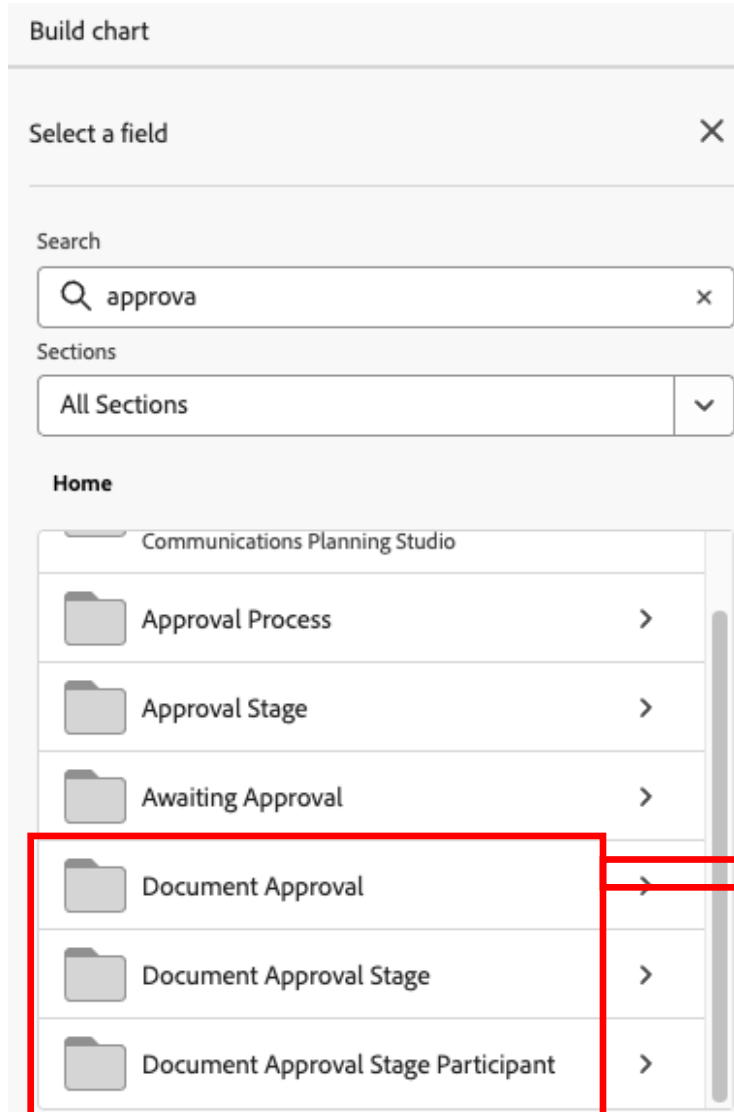
Status
string

Tracking code
string

Connected Region
Regions

- Connected Objects come in as a folder as well. The column name displays first and the Connected Record Type name is underneath in small print.
- You can access Connected Objects from the Record Type with that connection.
- Skye likes to name her column names as uniquely as possible just in case she has to locate something in Canvas.

DOCUMENT APPROVALS



Knowing what kind of approval report to ask for is a little like knowing whether to use a project, task, or assignment report.

Analogy:

Project → Approval

Task → Stage

Assignment → Reviewer/approver decision

At what level do you start to care?

- What is the status of the overall document approval?
- What is the status of the stage within an approval?
- What is the status of a single participant review?

DOCUMENT APPROVALS

Configure table

Document Version

Save

Close

Build table

Add column

Current columns

Document Name

Approvals Status

Project Name

Advanced Settings

Document Version - Approvals - Status

Column label

Is Link

Doc Approvals

Row Height

Document Name	Approvals Status	Project Name
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 80
Kurt_JonesTue421		
Kurt_Jones_Sun419		
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 60
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 64
WF champ zoom background		
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 44
Firefly (1)	reviewed	Frescopa New Flavor Campaign
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 73
Whale-pink (1)		Test
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 74

Showing a preview of 20 rows out of 201 total results.

Configure table

Document Approval

Save

Close

Build table

Add column

Current columns

Document Name

Status

Project Name

User Name

Advanced Settings

Document Approval - Approvals - Status

Column label

Is Link

Doc Approvals

Row Height

Document Name	Status	Project Name
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 03
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 162
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 158
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 174
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 22
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 53
coffee-image-export	reviewed	Frescopa New Flavor Campaign
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 133
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 60
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 175
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign - Seat 09

Showing a preview of 20 rows out of 139 total results.

Configure table

Document Approval Stage

Save

Close

Build table

Add column

Current columns

Document Name

Approval Status

Project Name

Name

Advanced Settings

Document Approval Stage - Approvals - Status

Column label

Is Link

Doc Approvals

Row Height

Document Name	Approval Status	Project Name	Name
This is called quote	pending review	CHAMP - Skye Test Project	Path 2
Adobe Workfront Lab Overv	pending review		Legal
image 2	reviewed	Frescopa New Flavor Campaign	Stage 1
WUG GRAPHIC	needs work	[Becky's Test Project]	Stage 1
This is called quote	pending review	CHAMP - Skye Test Project	Path 1
Citadel Web Banner v1	in review	Basic Campaign Requests (Project Level)	Stage 1
Screenshot 2026-03-30 at 5.5	in review	Untitled Project	Stage 2
WF champ zoom background	needs work	CHAMP - Turner - 070826 - Test	Stage 1
Adobe_CC_v1	in review		Stage 1
image 2	reviewed	Frescopa New Flavor Campaign	Stage 1
Campaign_Brief_2026-04-25	reviewed		Stage 1

Showing a preview of 20 rows out of 31 total results.

Configure table

Document Approval Stage Participant

Save

Close

Build table

Add column

Current columns

Document Name

Approval Status

Project Name

Decision User Name

Participant User Name

Advanced Settings

Document Approval Stage Participant - Approval Stage - Approval - Document Version - Document - Name

Column label

Is Link

Doc Approvals

Row Height

Document Name	Approval Status	Project Name
workflow-icon-13	reviewed	New Microsite Template - BL Project
WUG GRAPHIC	needs work	[Becky's Test Project]
email v2 png	pending review	Frescopa New Flavor Campaign
Photos Library.photoslibrary	pending review	Oznur test
Screenshot 2026-03-30 at 5.5	in review	Untitled Project
This is called quote	pending review	CHAMP - Skye Test Project
Campaign_Brief_2026-04-25	reviewed	
Whale-pink	pending review	Frescopa Spring PR & Media Outreach Campaign proje
Screenshot 2026-03-30 at 5.5	in review	Untitled Project
Firefly (1)	reviewed	Frescopa New Flavor Campaign
Citadel Web Banner v1	in review	Basic Campaign Requests (Project Level)

Showing a preview of 20 rows out of 27 total results.

In the lab & on the roadmap



Introducing: Reporting AI Tools

Explain what you want and let the LLM do the work

Current experience

- 1 Click-heavy report configuration**
Creating a report can require a lot of clicks.
- 2 Expert knowledge of object relationships**
Creating a report requires detailed knowledge of how objects are connected to determine which object to start with to get the intended results.
- 3 Rebuilding To Duplicate**
Copying a dashboard or report means manually recreating every widget and setting from scratch rather than cloning it.

Intent driven report creation

WHAT TO EXPECT

Conversational Dashboard Creation

Customers and agents can spin up a new Canvas dashboard directly from a request.

One-Step Report Generation

KPI, chart, and table reports can be created and placed on a dashboard in a single conversational step.

One-Click Duplication

Dashboards and reports — including all widgets and prompt configuration — can be cloned in one step.

Instant AI-Generated Summaries

An agent can read a report's or an entire dashboard's definition and produce a plain-language summary or cross-report.



Introducing: Reporting AI Tools

Project KPIs by due date

Show me three KPIs for:
Projects I own due last month
Projects I own due this month
Projects I own due next month

Querying Workfront projects filtered by ownership and due dates

I'll pull the live counts from Workfront. Let me first load the required query docs.

Used Adobe Workfront integration

Now let me discover the exact field paths for project owner and due date.

Architected parallel queries across three temporal windows

The field paths are confirmed. Now let me pull the three counts in parallel.

Architected temporal KPI dashboard with project metrics

Here are the three KPIs for projects you own, based on planned completion date pulled live from Workfront:

Due last month - Jul 2026

Due this month - Aug 2026

Due next month - Sep 2026

4

17

13

Project KPIs by due date

A couple of notes on how these are counted: each KPI is projects where you're the project owner and the planned completion date falls in that calendar month. The 4 for last month are all incomplete-status carryovers still dated 7/31, so if any have actually closed they'd still show here since I didn't filter by status.

Want me to break any of these down — for example, split this month's 17 by status to see what's genuinely at risk, or list the projects behind each number?

create a chart that displays the count of projects I own by month for the previous, current, and next months

Synthesized monthly project data and architected visual comparison

There's your chart — projects you own by planned completion month across the three-month window. August is your heaviest at 17, tapering to 13 in September, with 4 wrapping up from July.

Want me to add a trailing few months for more trend context, or overlay a status split (e.g. on-track vs at-risk) within each bar?

Write a message...

Opus 4.8 Medium

Project KPIs by due date

put all of these reports on a new dashboard called "My Projects Summary"

Mapping Canvas Dashboard tools to consolidate reports

I'll build the Canvas Dashboard with these widgets. Let me load the reporting tools.

Architecting dashboard layout with temporal KPI widgets

All the reporting tools are loaded. I'll create the dashboard, then add the three KPIs and the chart. Creating it now.

Architected dashboard with filtered KPI widgets

Dashboard created. Now the first KPI — projects due last month.

Architected monthly dashboard consolidating filtered task metrics

Three KPIs in place. Now the chart — a column chart of project count by month across the window.

Create Chart Widget

Done. Your new **My Projects Summary** dashboard is live in Workfront with all four reports:

<https://hub.workfront.com/canvasDashboard/6a725b4722895c3389d3e4e>

Adobe Workfront

Adobe Internal Workfront

Pin

Roadmap Report

Features

WIP Planning: Initiatives

Monthly Commit

Eng Teams

Workflow Insights M...

WIA Initiative Release 1

Insights Squad Issues

Lists, Reporting & Da...

R&D Customer Feedb...

Customer 1 Feedback

Dashboards

Pin current page

Search

Dashboards > My Projects Summary

Leave feedback

Add report

Share

Edit layout

Filters

Projects due last month

Projects due this month

Projects due next month

4

17

13

Owned by me - Jul 2026

Owned by me - Aug 2026

Owned by me - Sep 2026

Projects I own by planned completion month

Planned completion month



Introducing: Pivot Table Reports

The reporting type customers have been working around for years — now purpose-built in Canvas.

Current experience

1 Collapsed table report

Define rollup columns, group by a dimension, collapse groupings by default. Works — but loads far more data than needed, making reports slow.

2 Export to Excel

Run the same table, export to Excel, pivot there. Functional — but manual, repetitive, and data immediately grows stale outside Workfront.

3 Matrix report

Not quite right, but closest native option. Customers make do with a tool that approximates the output they actually need.

Pivot Table — built the right way

WHAT TO EXPECT

Define dimensions & metrics

Choose what to aggregate and roll up — without building a full table first.

Fast by design

Only summary data loads to render the pivot. Raw records stay out of the request until you need them.

Drill-down on any bucket

Every aggregated cell is a doorway. Click to view underlying records without reloading the full dataset.

Data stays in Workfront

No more exporting to Excel. Everything lives in Canvas — live, current, and connected.

Introducing: Pivot Table Reports

The reporting

Current expense

1 Collapse
Define role
collapse g
far more c

2 Export to
Run the s
Functiona
immediat

3 Matrix r
Not quite
Customer
the output

ender the
the request

everything
, and

Adobe Workfront

Staging

Workfront Reporting

Pins

Planning

Dashboards

Reports

Setup

Log In As

Layout Templates

Users

International SOR

International Leaders...

Marketing Ops Tech ...

Multi-select field test

Pin current page

Configure pivot table

Weekly Updates

Save

Close

123

+

Metrics

Add metric

Current metrics

GNARR Actual

GNARR Target

Selected field

Weekly Updates - GNARR Target

Column label

Aggregation type

Sum

Format

£1,234.56

Lock currency for metric

Currency

GNARR Spend by Region and Week

Row Segments	Metrics	
Region	GNARR Actual (SUM)	GNARR Target (SUM)
Fiscal Week: FY26 Q1 wk1		
APAC	£160,000.00	£120,000.00
EMEA	£80,000.00	£40,004.00
LATAM	£120,000.00	£80,000.00
FY26 Q1 wk1 Overall	£360,000.00	£240,004.00
Fiscal Week: FY26 Q1 wk2		
APAC	£200,000.00	£240,000.00
EMEA	£200,000.00	£160,000.00
LATAM	£240,000.00	£200,000.00
FY26 Q1 wk2 Overall	£640,000.00	£600,000.00
Fiscal Week: FY26 Q1 wk3		
APAC	£200,000.00	£120,000.00
Overall	£3,200,000.00	£2,640,004.00



Introducing: Combination Charts

Two measures, two axes, one story — combo charts bring it all into a single view

Current experience

1 Two charts to tell one story

Comparing two differently-scaled attributes — like spend in dollars and conversion rate as a percentage — against the same records requires building two separate charts entirely.

2 Reconciling by eye

There's no way to line up column, bar, and line series on independent axes, so report creators have to build them apart and reconcile the relationship visually.

3 Exporting to see the full picture

Analysts often have to export data into another tool to build the combined view they actually need.

Configuring combination charts

WHAT TO EXPECT

Two measures, one chart

Compare two independently-scaled attributes against the same record set in a single view.

Independent axes, independent aggregations

Column and Line combos each with its own attribute and aggregation type.

Familiar chart types, new depth

Available as an option directly within the Bar, Column, and Line chart types you already know.

Spend-vs-Performance, side by side

See spend as columns and conversion rate as a line, broken out by channel, without leaving the report builder.



Introducing: Combination Charts

Two measure

Current expense

- 1

Two cha

Comparin

like spend

percentage

building t
- 2

Reconcil

There's no

series on

have to b

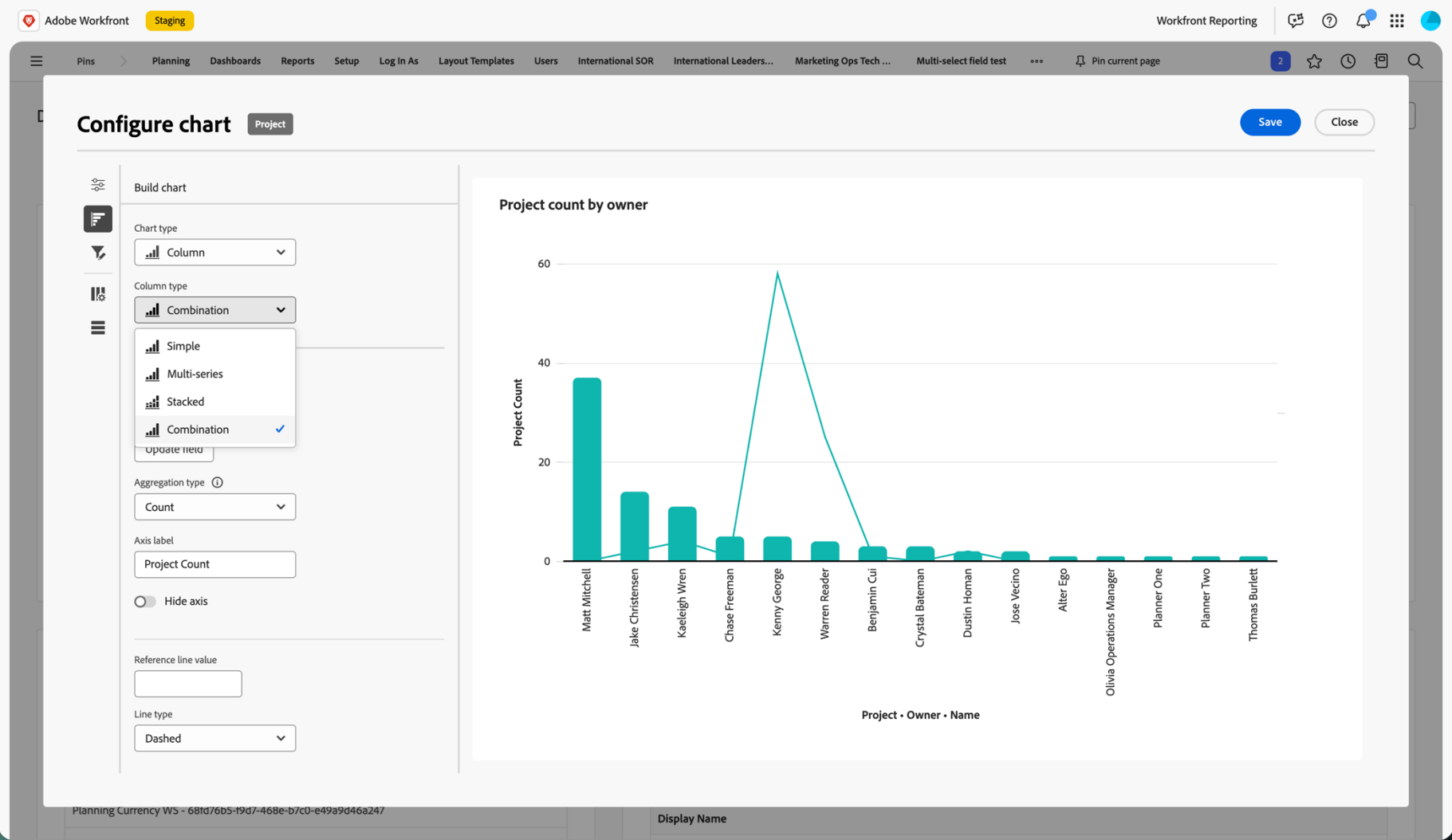
relationships
- 3

Exportin

Analysts c

tool to bu

need.





Introducing: Filtering on Collections

Answering queries through the detailed attributes held by sub-objects

Current experience

1 Requires textmode

For classic reports, users must learn a specific query syntax and apply changes as textmode filter configuration

2 No way to browse collections

The relationship picker doesn't provide collections relationships, so the user must rely on API or table of relationships to surface possibilities.

3 Not available in canvas dashboards

Canvas Dashboards reports have limited relationships defined that allow for collection relationships to be used in filters.

Using sub-objects in report filters

WHAT TO EXPECT

Curate actionable lists of data

Present the data you need without complicated workarounds that move the report focus to another object.

Dedicated collections segment

A Collections option appears in the field chooser everywhere filters are built.

Guardrailed, precise traversal

Traversal rules limit users to one level of nesting and one degree of separation with no loop-backs.

Independence from textmode

Customers who currently rely on advanced text-mode collection filters get a maintainable, UI-driven equivalent.



Introducing: Filtering on Collections

The screenshot displays the Adobe Workfront 'Configure chart' dialog, which is used to create and filter reports. The dialog is divided into two main sections: 'Filter' and 'Chart'.

Filter Section:

- Filter:** A section for defining the data filter.
- Select a field:** A dropdown menu to choose the field to filter on.
- Search:** A search bar to find fields.
- Sections:** A list of sections to filter by, including 'All Sections', 'All Fields', 'Custom Fields', 'Workfront Fields', 'Relationships', and 'Collections'.
- Filter Rule:** A rule defined as 'Tasks Status eq New, In Progress'.
- Buttons:** 'Add condition' and 'Add filter group' buttons are visible.

Chart Section:

- Chart Type:** A horizontal bar chart.
- Chart Title:** 'Projects with incomplete tasks by owner'.
- Y-axis:** Labeled 'Project - Owner - Name'.
- X-axis:** Labeled 'Project - Name'.
- Data:** A list of owners and their corresponding project counts.

Project - Owner - Name	Project - Name
Jake Christensen	5
Kaeleigh Wren	4
Benjamin Cui	3
Dustin Homan	2
Warren Reader	2
Chase Freeman	1
Crystal Bateman	1
Kenny George	1
Matt Mitchell	1
Olivia Operations Manager	1
Planner One	1
Planner Two	1
Thomas Burlett	1



Introducing: Collections in Table views

From hidden data to first-class columns — collections have a home in table reports

Current experience

1 Requires textmode

For classic reports, users must learn a specific query syntax and apply changes as textmode filter configuration

2 Canvas reporting limitations

When pulling data from children records, it appears to multiply the results as opposed to creating a list of children objects in a single column.

Using sub-objects in report columns

WHAT TO EXPECT

List children in a single row

Define a table column from any collection relationship, displaying child records inline within their parent row.

Control quantity of results

Columns can be capped at 1, 5, 10, or All items— giving creators control over the density-versus-load-time tradeoff.

Filter children results

Filter a collection column to a relevant subset (e.g., only incomplete tasks or only pending approvals).

Link to child records

Provide navigation offramps to the sub-object data without changing the focus of the report to a different object.

Want to give feedback on this feature?

Introducing: Collections in Table views

From hidden

Current exp

1 Require
For class
query sys
configura

2 Canvas
When pu
appears
creating
column.

Adobe Workfront

Staging

Workfront Reporting

PINS

Planning Dashboards Reports Setup Log In As Layout Templates Users International SOR International Leaders... Marketing Ops Tech ... Multi-select field test ...

Pin current page

Configure table

Project

Save Close

Build table

Advanced Settings

Project • Tasks • Name

Column label

Collection

Items to display

5

Display as

Comma-separated

Sort order

Descending

Ascending

Descending

Is Link

Conditional Formatting Rules (0)

Projects with incomplete tasks

Project Name	Status	Tasks Name
Crystal Test Project	Planning	Webinar Setup, Q3 Launch Plan,
Project with a . in the name	Planning	Landing Page Copy, Email Nurtu
Project with a + in the name	Planning	Webinar Setup, Social Calendar, C
Kae Test3	Planning	Webinar Setup, Social Calendar, I
Test Currency	Planning	Acme Rebrand
Project with a ! in the name	Planning	Webinar Setup, Social Calendar, C
Project with a \$ in the name	Planning	Landing Page Copy, Creative Rev
Testing	Planning	Q3 Launch Plan, Press Kit, Paid M
Alpha	Current	Webinar Setup, Social Calendar, I
Project with a ` in the name	Planning	Webinar Setup, Social Calendar, C
Project with a > in the name	Planning	Webinar Setup, Social Calendar, I
Project with a // in the name	Planning	Q3 Launch Plan, Creative Review
J's Task Currency Test Project	Planning	Webinar Setup, Q3 Launch Plan,

Showing a preview of 20 rows out of 78 total results.



Introducing: Copy Dashboard

Spend less time creating similar dashboards by copying a dashboard and then making tweaks to it

Current experience

- 1 Rebuilding dashboards from scratch**
Audience-specific variations of a dashboard must be recreated entirely by hand.
- 2 Over-sharing as the workaround**
Without a duplicate action, teams often just share a single dashboard across audiences, exposing content meant for one group to another.
- 3 Reporting setup slows teams down**
Organizations managing multiple stakeholder tiers spend significant time on setup work that a duplicate action would collapse into seconds.

Copying a Canvas Dashboard

WHAT TO EXPECT

One-click dashboard duplication

Users see a "Duplicate dashboard" action to make a full copy — including widgets, filters, and prompts — in seconds.

Granular Control Over What Copies

Be selective in which of the source dashboard's widgets, filters, and prompts individually are copied over.

Safe handling of sensitive settings

"Run as user" configurations are only preserved for the designated user or a system administrator.

Smart defaults, no guesswork

The new dashboard is pre-named with "(Copy)" appended and inherits the same Description and Currency fields.



Introducing: Copy Dashboard

Spend less time

Current expense

1 Rebuild Audience be recreated

2 Over-share Without a single dashboard content m

3 Reporting Organizat spend significant duplicate

Adobe Workfront

Staging

Workfront Reporting

PINS > Reports Setup Log In As Layout Templates Users International SOR International Leader... Marketing Ops Tech ...

Pin current page

Dashboards > Combo chart exploration

Leave feedback

Dashboard prompts available USD (Dashboard)

Project count by status

Project • Name

6

4

2

0

Current

Project • Status

Duplicate dashboard

Combo chart exploration

Dashboard details

Widgets

Filters & Prompts

Dashboard details

Name *

Combo chart exploration (Copy)

Description

Currency

USD

Cancel

Copy dashboard

...

Add report

Share

Edit layout

...

...

Kaelaigh Wren

Dustin Homan

Planner Two

Project • Owner • Name



Introducing: Move Widget

Build once, copy, and then move reports to another dashboard to avoid creating a report for multiple audiences

Current experience

1 Rebuilding to relocate

A report creator has no way to get that same report onto another team's dashboard without recreating it from scratch.

2 Configuration drift across copies

Manually recreated reports inevitably drift apart from the original over time, leading to inconsistent numbers across dashboards meant to show the same thing.

3 Reorganizing doesn't scale

The cost of manually maintaining equivalent reports across surfaces compounds with every restructuring.

Using sub-objects in report columns

WHAT TO EXPECT

One-click relocation

Use the "Move report" action to relocate a widget to a target dashboard in a single step — no recreation required.

Move to a new dashboard, too

A report can be relocated to a dashboard that doesn't exist.

Clean handoff, no duplication

Once moved, the report is available on the target dashboard and removed from the source.

Confirmation with a direct link

A success toast links straight to the target dashboard, so users can access it immediately on its new dashboard.



Introducing: Move Widget

Build reports across surfaces compounds with restructuring.

or multiple audiences

Adobe Workfront

Examples Dashboard Approvals Dashboard Setup Dashboards Requests Request Management Marketing Dashboard Log In As Pin current page

Dashboards > Move Reports Example

USD (Dashboard)

Active Projects

1.1K

Project Name (COUNT)

Planning Projects

My Documents

View Icons	Name	Owner
☐	Screenshot 2026-04-03 at 2.51.04 PM	Matt Mitchell
☐	Screenshot 2026-04-03 at 2.52.42 PM	Matt Mitchell

Adobe Workfront

Examples Dashboard Approvals Dashboard Setup Dashboards Requests Request Management Marketing Dashboard Log In As Pin current page

Dashboards > Move Reports Example

USD (Dashboard)

Active Projects

1.1K

Project Name (COUNT)

Planning Projects

My Documents

View Icons	Name	Owner
☐	Screenshot 2026-04-03 at 2.51.04 PM	Matt Mitchell
☐	Screenshot 2026-04-03 at 2.52.42 PM	Matt Mitchell

Move report

Planning Projects

Search dashboards

+ New dashboard

- ☐ Q2 Executive Summary
- ☐ Channel Marketing Performance
- ☐ Engineering Team Health
- ☐ Project Risk Overview
- ☐ Sprint Velocity Tracker

Cancel Move

New objects with custom data are reportable

Expanding custom data support in Canvas-based reports

Current experience

1 Reporting inconsistency

In classic reporting, custom data on Workfront objects that recently gained custom data support are reportable, but not in Canvas Dashboards.

2 Filtering and grouping break down

In Canvas Dashboards, it's impossible to filter, group, or visualize this work the way the underlying Workfront data model now actually supports.

Using sub-objects in report columns

WHAT TO EXPECT

Complete, accurate agency reporting

Campaign managers can report on objects in Canvas Dashboards without missing fields or broken filters.

A more trustworthy canvas dataset

The Canvas Dashboard dataset becomes more complete and accurate as the underlying Workfront platform evolves.

1 Reportir

2 Filtering

In Canvas group, or underlying supports.



et becomes
as the
m evolves.

THE HOMEWORK SLIDE

BEGINNER:

✓ Get started: sign up for the Canvas Beta and create a dashboard.

✓ Build your muscle memory: come up to speed by building out KPIs, bar charts and table reports.

<https://experienceleague.adobe.com/en/docs/workfront/using/review-and-approve-work/document-reviews-and-approvals/manage-asset-review-and-approval/create-review-and-approval-dashboard>

✓ More practice: build the webinar's example bar chart in your own instance, as well as experimenting with multi-series and stacked charts (e.g. projects/month+status) and formatting your columns. Build out webinar KPI examples as well.

INTERMEDIATE:

✓ Object traversal/references practice: use the table instructions in the doc approval dashboard as a starter (link above).

Keep going by thinking of the largest groupings you can make (e.g. grouping an issue report by portfolio owner name – try this in classic vs canvas) or referencing a far away object in a view (e.g. issue report with columns for portfolio name, portfolio owner name, portfolio owner manager name...)

✓ Experiment with dashboard filters and prompts.

<https://experienceleague.adobe.com/en/docs/workfront/using/reporting/canvas-dashboards/manage-canvas-dashboards/filter-canvas-dashboard>

PLANNING:

✓ Build a Workspace and Record Type report to find out who has been using Planning, and what for.

Questions?



Upcoming Events

WORKFRONT USER GROUPS (WUGs)

- August 27: The Workfront Admin's Automation Playbook
- Check the WUG event calendar often for upcoming events and topics
 - <https://usergroups.adobe.com/events/#/list>

WEBINARS & COMMUNITY EVENTS

- September 1: Unlock Access, Maintain Control: Permissions & Business Profiles in Workfront
- September 9: Adobe Insider Tour Chicago: Adobe Workfront
- September 15: Making the Switch: Preparing for Your Move to Unified Review and Approvals
- September 16: Adobe Insider Tour Minneapolis: Adobe Workfront
- Monthly Office Hours with our knowledgeable Workfront Champions. Check this link often for the monthly schedule.
 - <https://usergroups.adobe.com/workfront-champion-office-hours/>



JOIN A
CHAPTER
TODAY!

Adobe Workfront User Groups

Workfront User Groups (WUGs) bring people together to network, share ideas and best practices, collectively problem-solve, and provide ongoing education.

Have you joined yet?

- ▶ Find your chapter
- ▶ Connect with your people
- ▶ Join the conversation

Adobe

Visit the [User Group site](https://usergroups.adobe.com/) and join a chapter!

<https://usergroups.adobe.com/>



Check back often as new chapters and events are always being added!

Thank you!



Appendix

Appendix: Canvas Dashboards vs. Legacy Dashboards

Feature-level comparison · ✓ Available Planned Coming soon ✗ Not available

Feature	Legacy Dashboards	Canvas
CONTENT & LAYOUT		
Add existing classic reports	✓	✓
Add calendars	✓	Planned
Add external pages	✓	✗
Add app extensions	✗	Planned
Add Home widgets	✗	✓
Add Canvas visualizations	✗	✓
Flexible report placement	✗	✓
Full-screen view of individual reports	✗	✓
FILTERS & INTERACTIVITY		
Dashboard-level filters	✗	✓
Dashboard-level prompts	✗	✓
Generate AI summary of contents	✗	Planned
Send dashboard summary	✗	Planned

Feature	Legacy Dashboards	Canvas
SHARING & ACCESS		
Share dashboards	✓	✓
Pin as top navigation tab	✓	✓
Place via layout template	✓	✓
Add as ad hoc left nav item	✓	✗
Inherited permissions via layout template	✓	✓
Favorite dashboard	✓	✓
Global dashboard search	✓	✓
Access recent dashboards	✓	✗
Request access for shared URL	✓	In Progress
PLATFORM & EXTENSIBILITY		
Re-use canvas reports across dashboards	✗	Planned
Copy dashboard	✓	In Progress
Place dashboard on Planning record	✗	Planned
Place Planning views on dashboard	✗	Planned
Time-phased KPI reports	✗	✓
Blueprints available	✓	Planned
Environment promotion	✓	Planned

Appendix: Canvas Visualizations vs. Classic Reports

Feature-level comparison · ✓ Available Planned Coming soon ✗ Not available

Feature	Classic Reports	Canvas
CHART & VISUALIZATION TYPES		
Bar chart (simple, multi-series, stacked)	✓	✓
Stacked bar / column chart to 100%	✓	✗
Column chart	✓	✓
Pie chart	✓	✓
Line chart	✓	✓
Gauge & Bubble chart	✓	✗
Matrix report	✓	✗
Combo chart	✓	In Progress
KPI / big number	✗	✓
Pivot table	✗	✓
Table with groupings	✓	✓
TABLE & CHART CUSTOMIZATIONS		
Conditional formatting — cells/rows	✓	✓
Conditional formatting — chart series	✓	Planned
Rename column headers	✓	✓
Rename chart axes	✗	✓
Collapse / expand row heights	✗	✓
Column aggregation rollups	✓	Planned
Inline editing	✓	✗
Ad hoc column adjustments by end user	Requires new view	✓
Display sub-objects in a column	Requires textmode	Planned
Document / image thumbnails	✓	Planned

Feature	Classic Reports	Canvas
DATA GRAPH & FILTERS		
Workfront Planning data	✗	✓
Unified review & approval data	✗	✓
Proof data	✓	✗
Filter on data > 2 relationships away	Requires textmode	✓
Fields > 4 relationships (columns/groups)	✗	✓
Filter on collections	Requires textmode	Partial
NOTEXISTS filters	Requires textmode	✗
Field comparisons in filter evaluations	Requires textmode	Planned
Count distinct values	✗	✓
OR filter conditions	✓	✓
Report-level / dashboard prompts	✓	✓
DISTRIBUTION & SHARING		
Place on Canvas Dashboard	✓	✓
Place on legacy dashboard	✓	✗
Access report outside a dashboard	✓	✗
Public links	✓	✗
Send / export report results	✓	Planned
Copy report	✓	✓
Environment promotion	✓	Planned
Blueprints available	✓	Planned
Run as... user	✓	✓
Toggle between views / filters / groupings	✓	✗