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

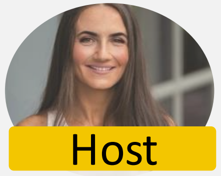
August 26th, 2026

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



Jenna Martinez
Adoption Marketing Manager
Adobe

Skye Hansen
Lead Functional Architect
Merkle

Matt Mitchell
Principal Product Manager
Adobe

Adobe

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

Adobe

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

Adobe

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

Adobe

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	→ Canvas Dashboards
1 Define table columns & fields	**1 Choose your output — Chart or Table**
2 Add groupings & aggregations	**2 Define aggregations, metrics & series – with a live preview**
3 Hope it renders as a useful chart	**3 Refine with filters & conditional formatting**

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

Adobe

TWO CORE REPORT TYPES

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.

Adobe

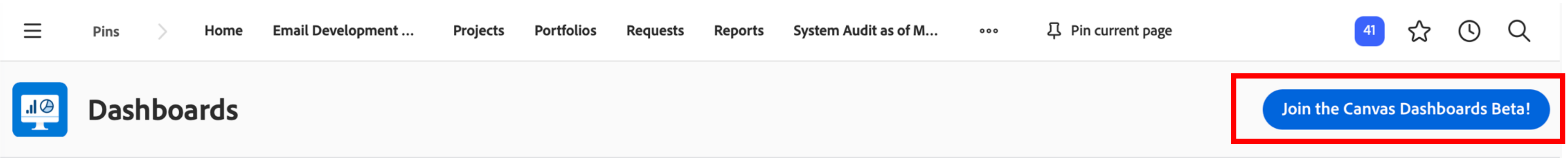
How to Canvas

✅ **Hang tight – we’re going for a ride…**

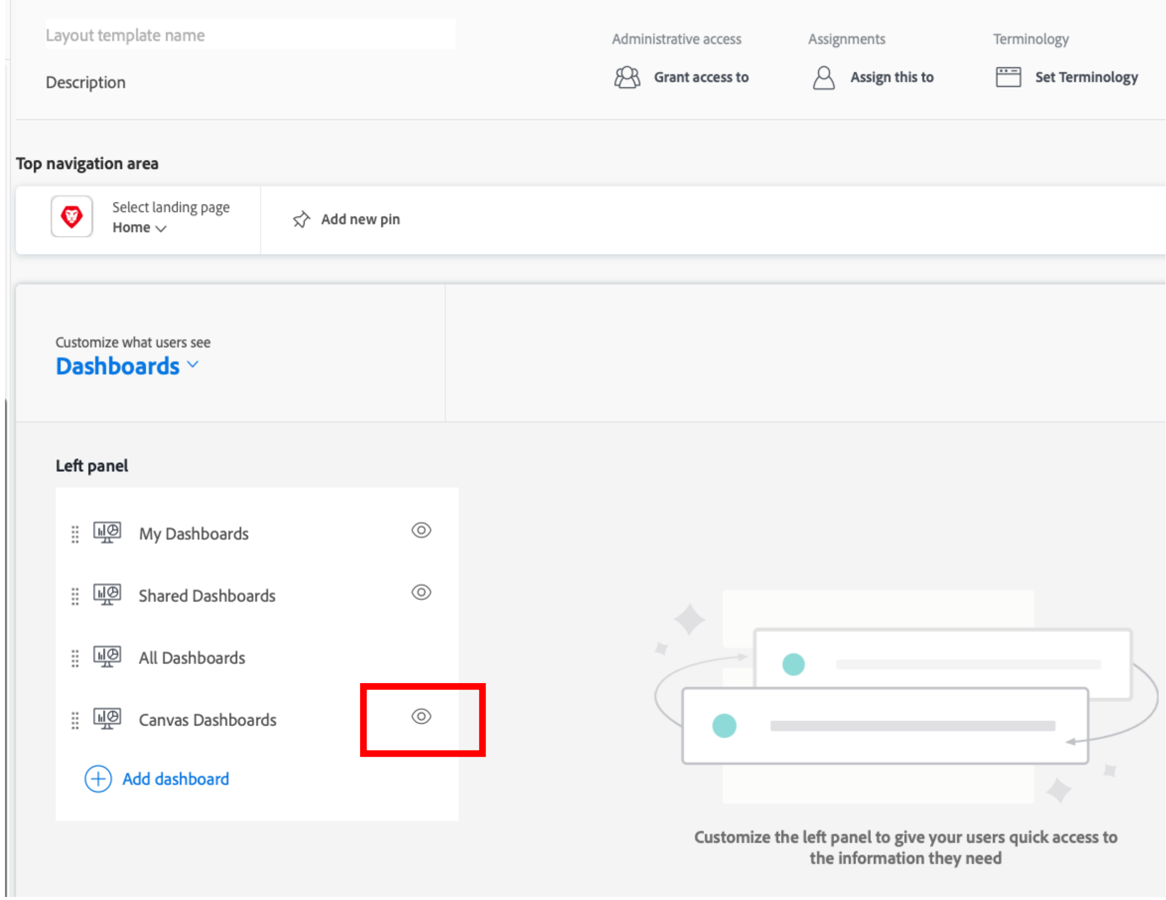
Canvas dashboards for beginners (setup)

1) Admin needs to:

- enroll in the beta



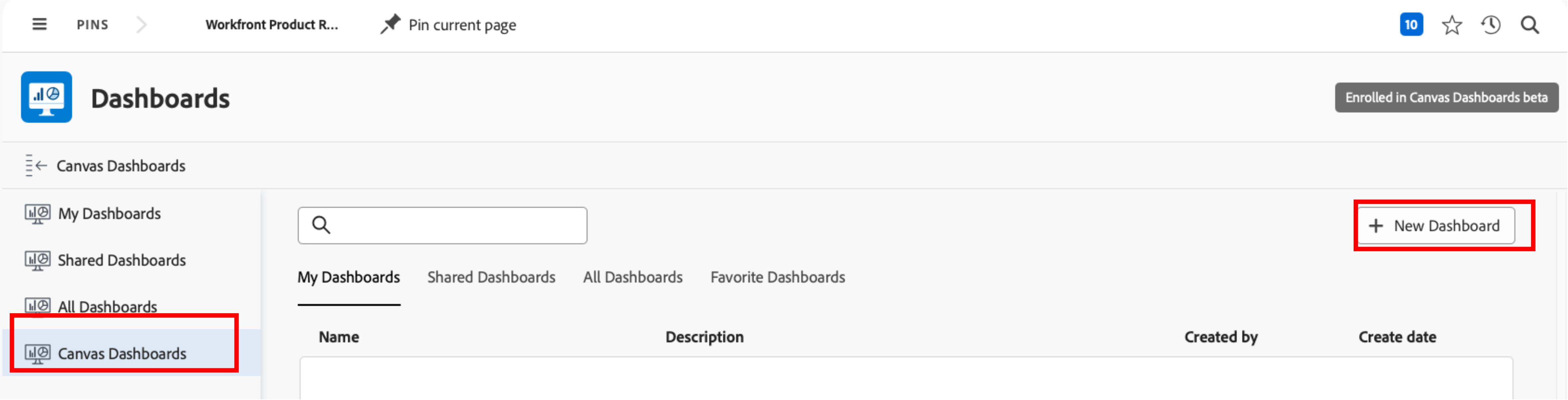
- enable canvas dashboards on layout template/s for users who want to use this (make sure the eyeball is on).



Canvas dashboards for beginners (setup)

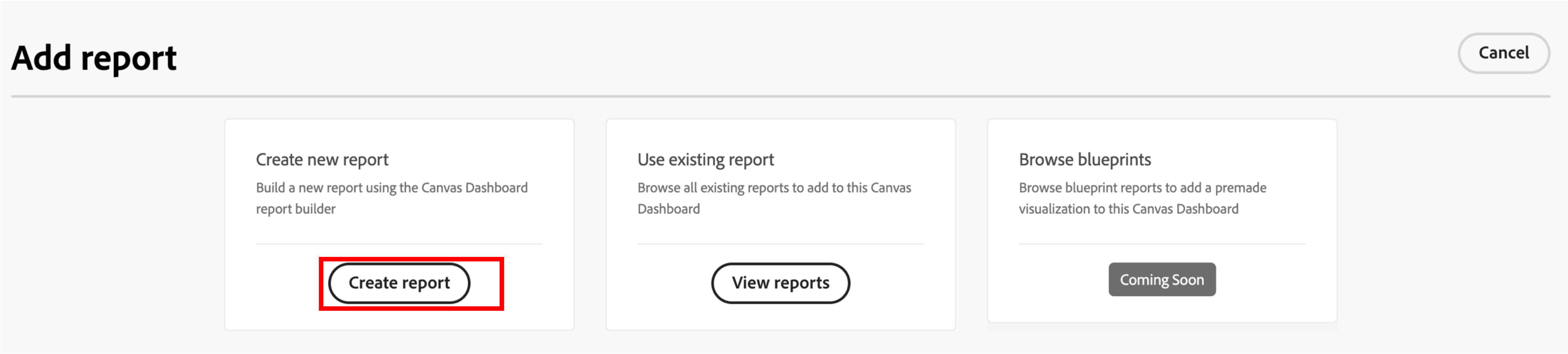
2) Create a dashboard: you can use instructions from https://experienceleague.adobe.com/en/docs/workfront/using/reporting/canvas-dashboards/create-dashboards/create-dashboards

   - 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



Canvas dashboards for beginners (setup)

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

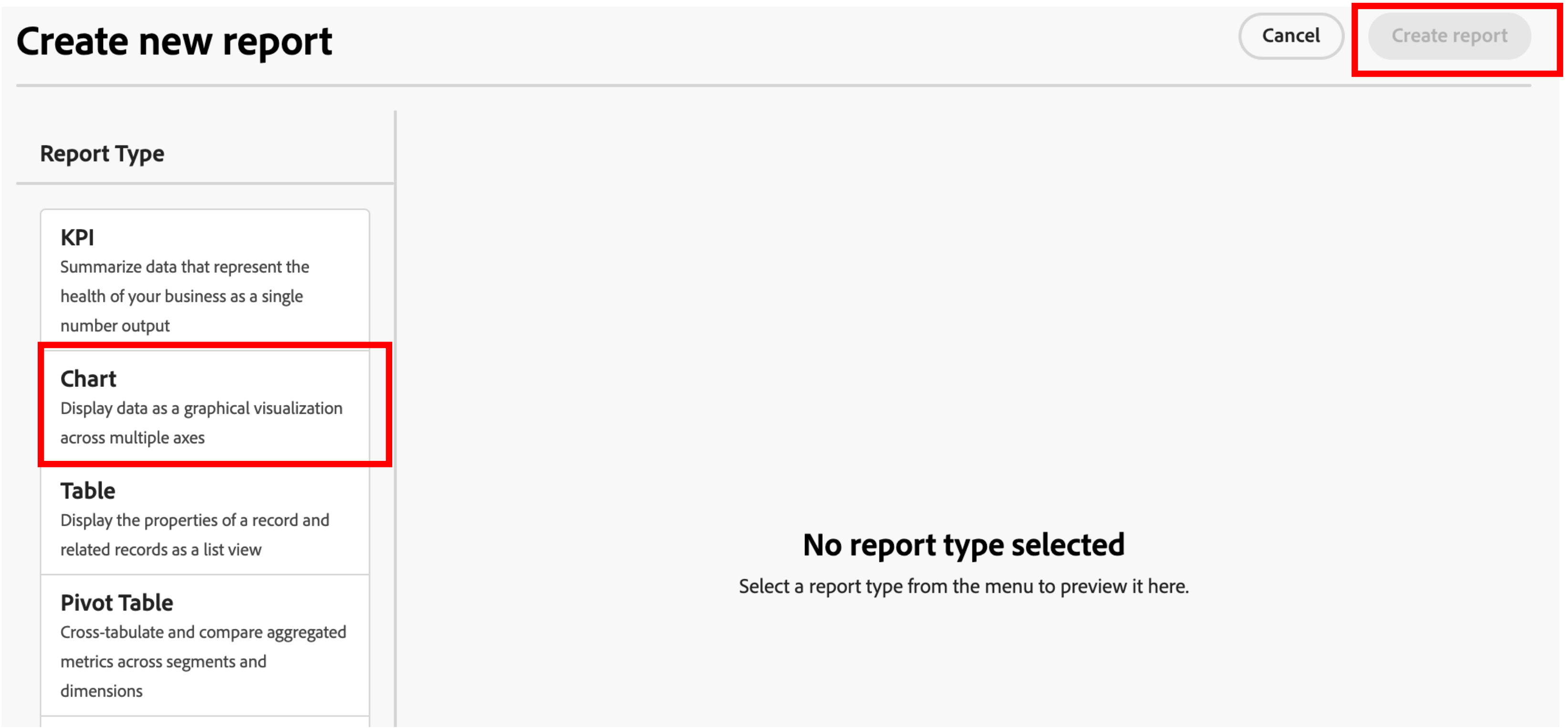


Building a Chart

Exercise: Projects Created / Month

Intro to charts

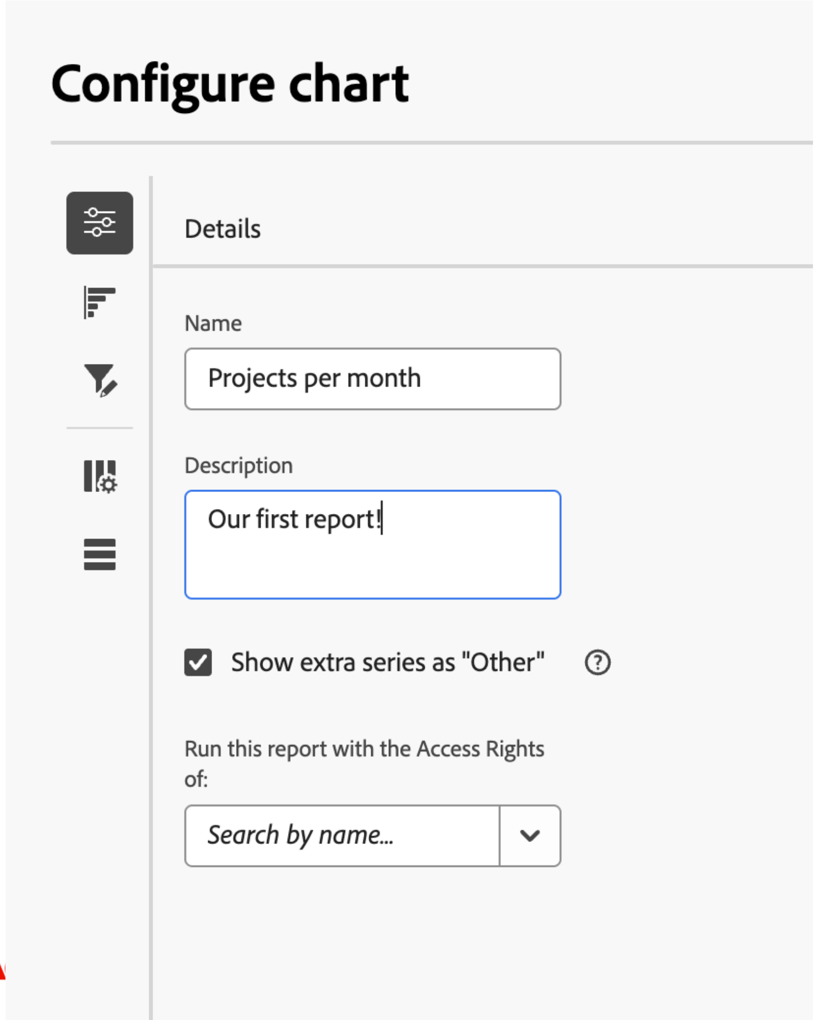
In the Create new report popup, select your report type (Chart), then click Create Report

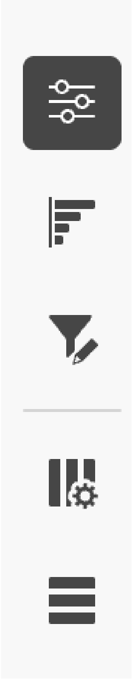


Note: if your browser window is too narrow, your report type column and subsequent report config columns might not appear.

Chart | Details

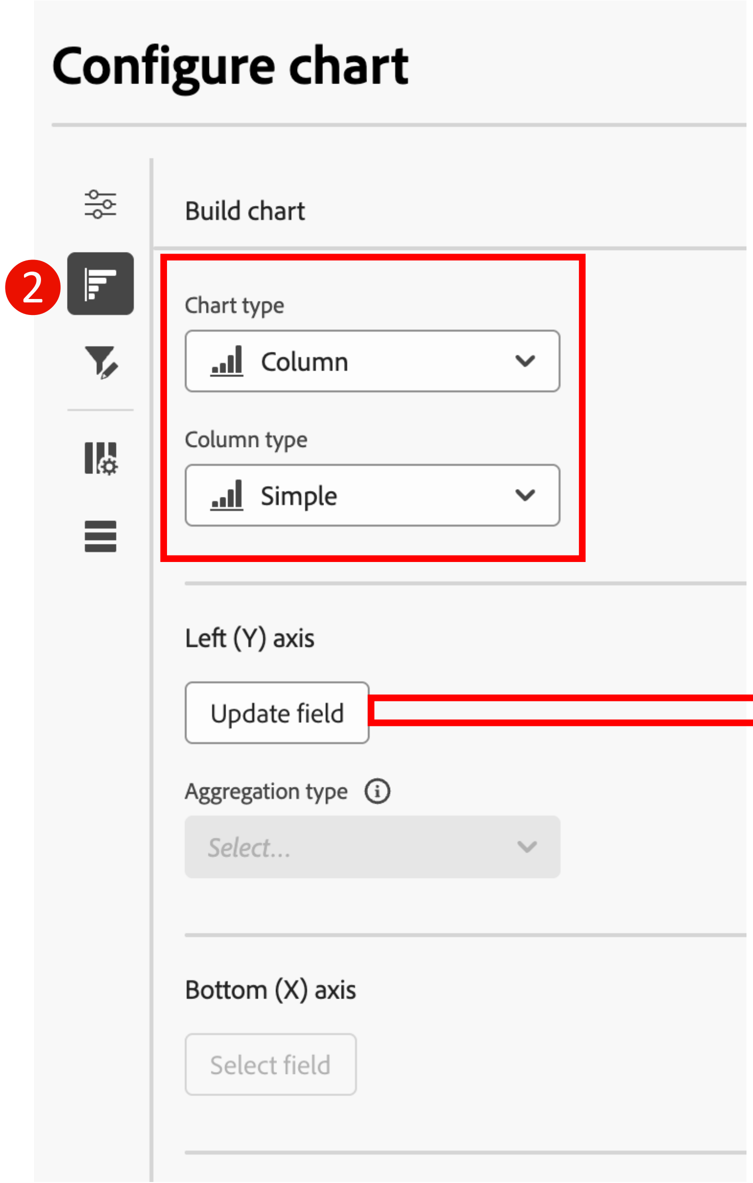
1. Details: Can be changed at any time: Give your chart a name, description and decide whether you want to show extra series as Other or not.
2. Then click on next icon *(or click the Build chart button – it's the same thing)*.





1 Details
2 Build chart
3 Filter
4 Drilldown columns settings
5 Drilldown group settings

Chart | Build chart



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

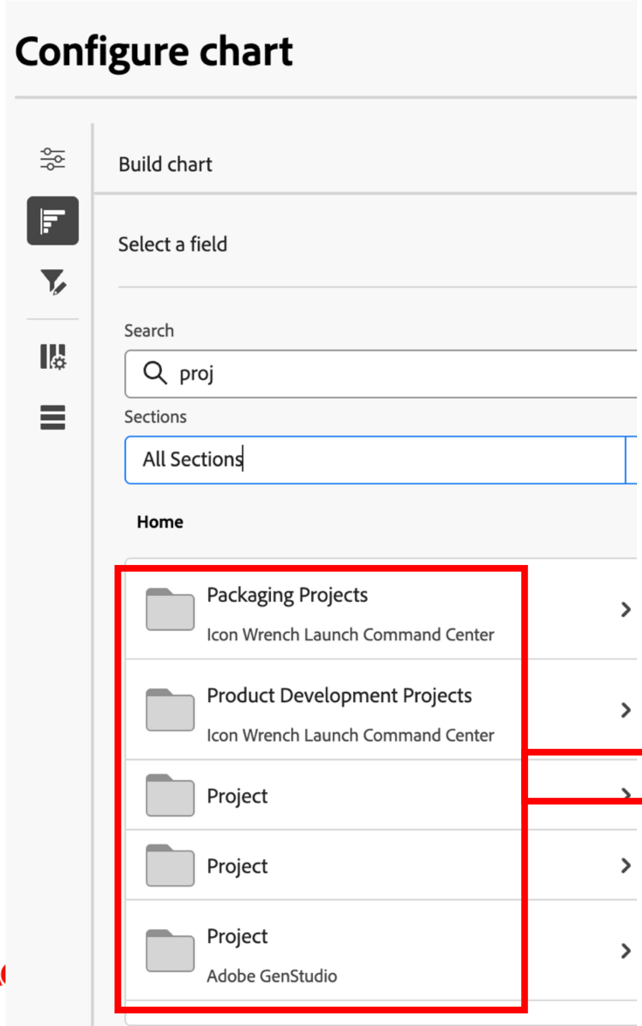
Next, click Update field on your first axis (for the column chart, it’s the left (Y) axis).

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.

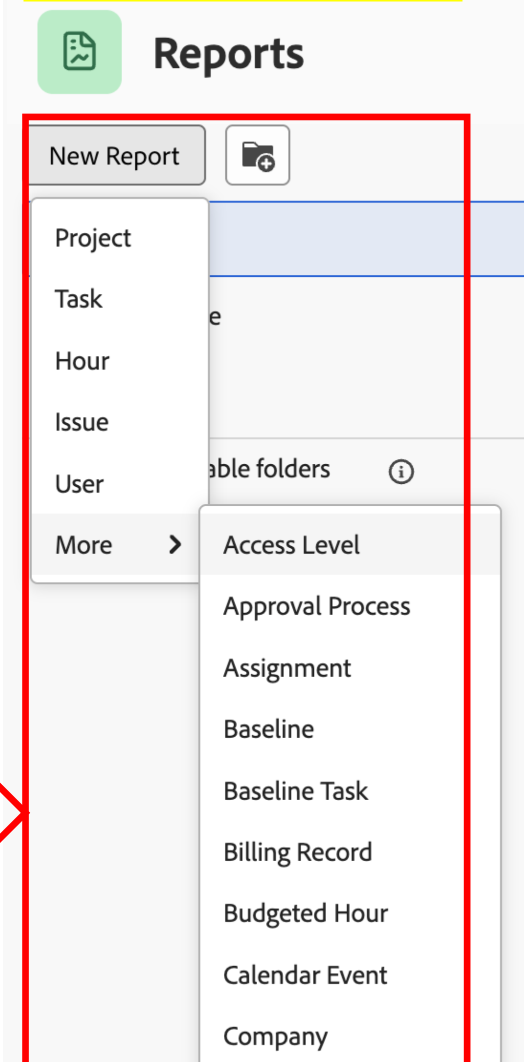
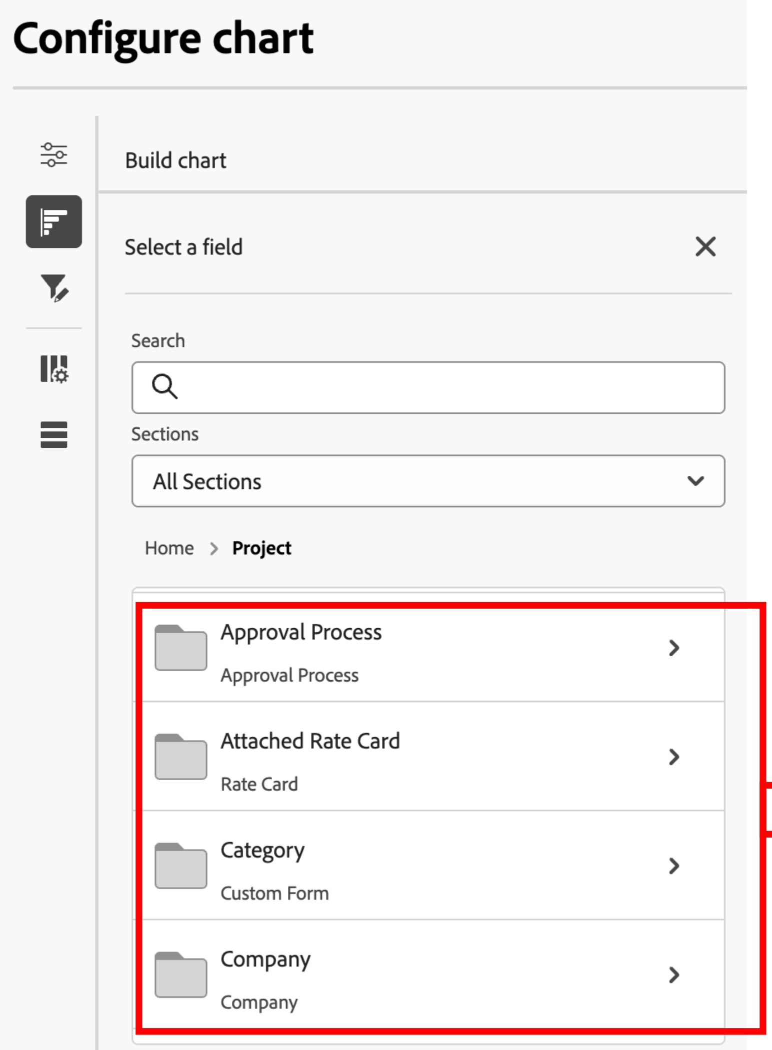


Chart | Build chart

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.



How it looks in Classic.

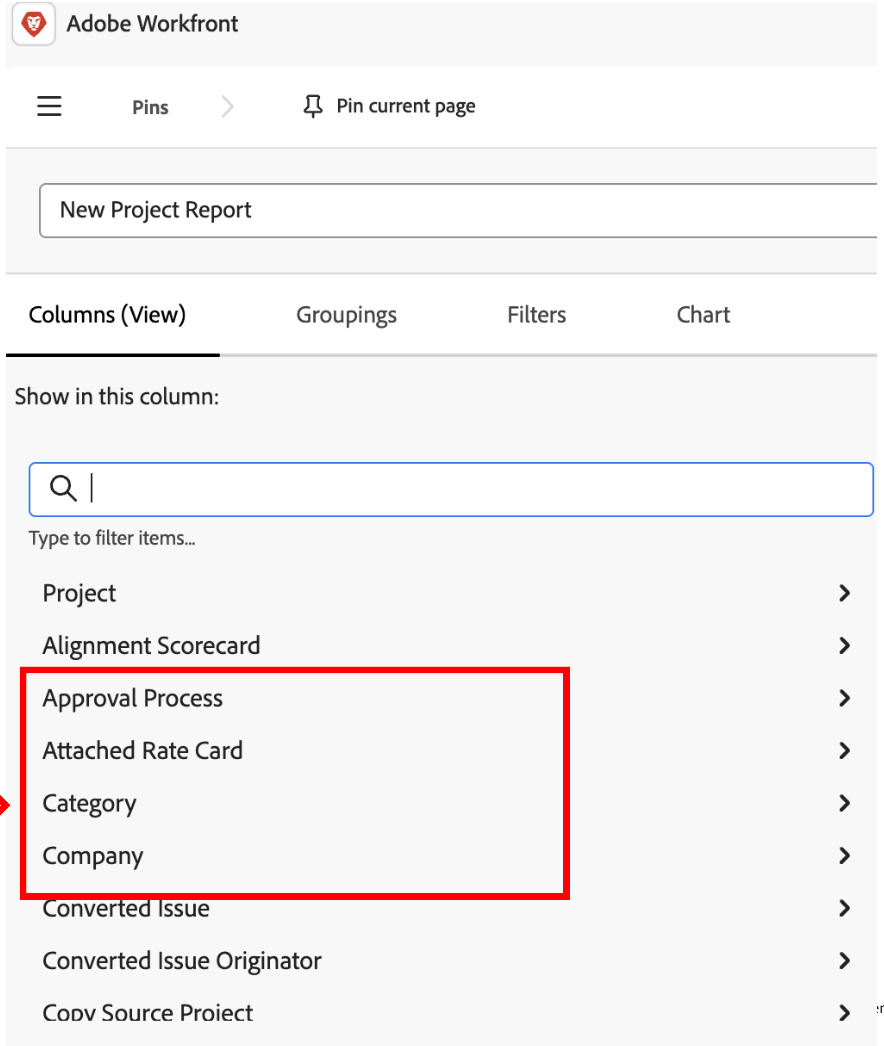
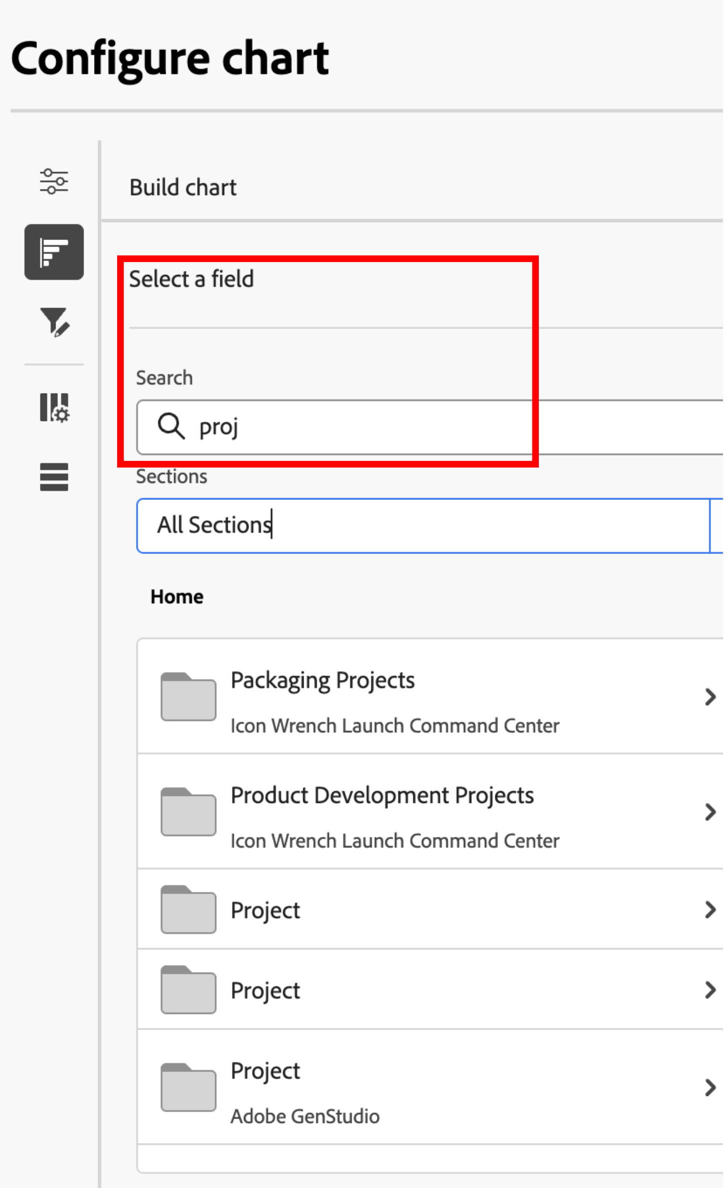


Chart | Build chart



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

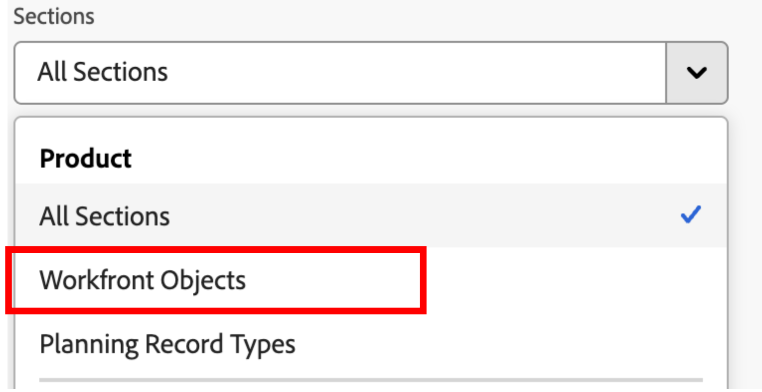
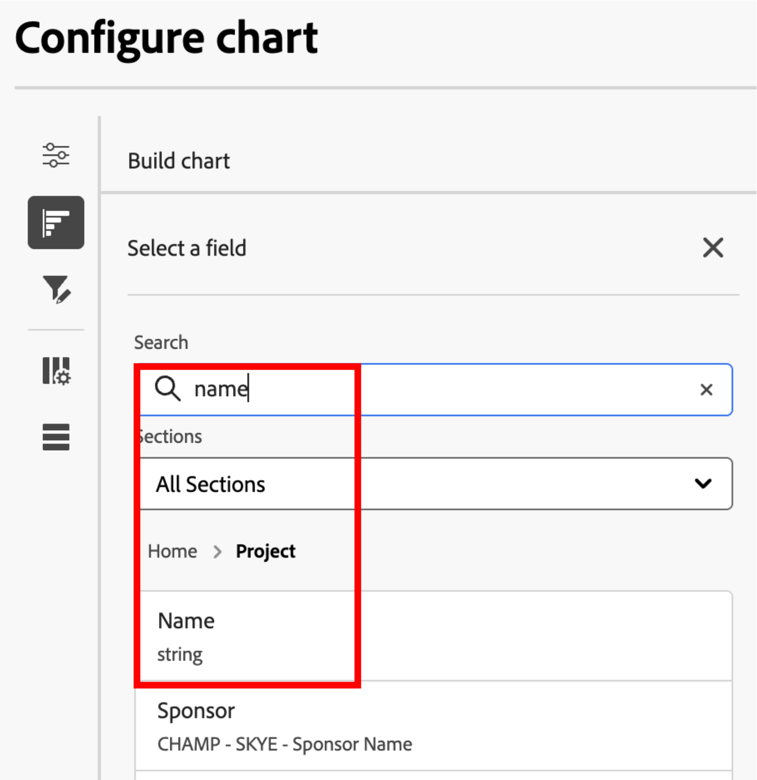


Chart | Build chart

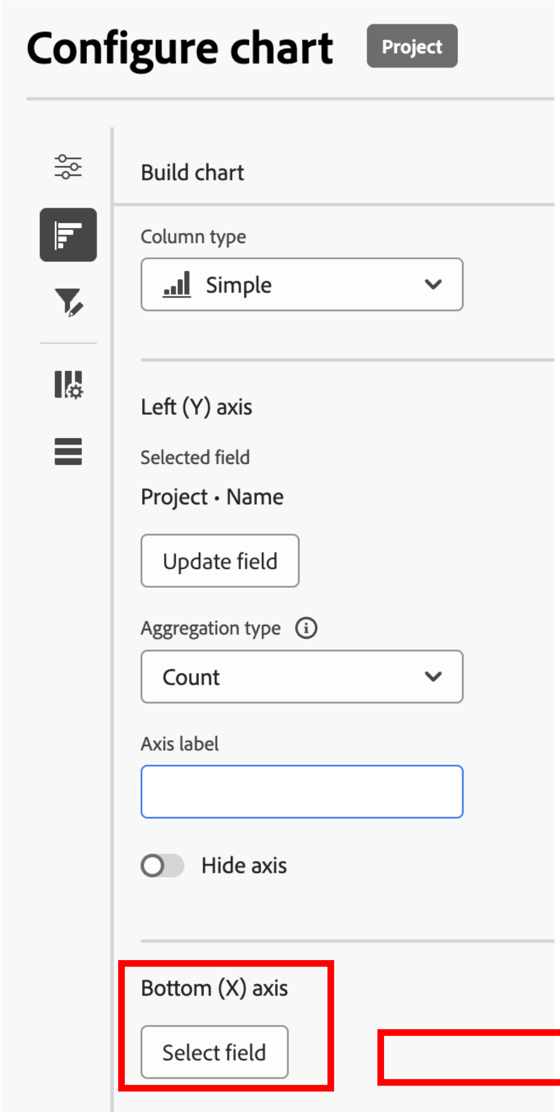


B. Next, picking your field: Think in terms of the kind of count you want (All fields have Count Distinct and Count; date fields additionally have Min & Max; and number fields have all of the above, plus Avg & Sum).

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!

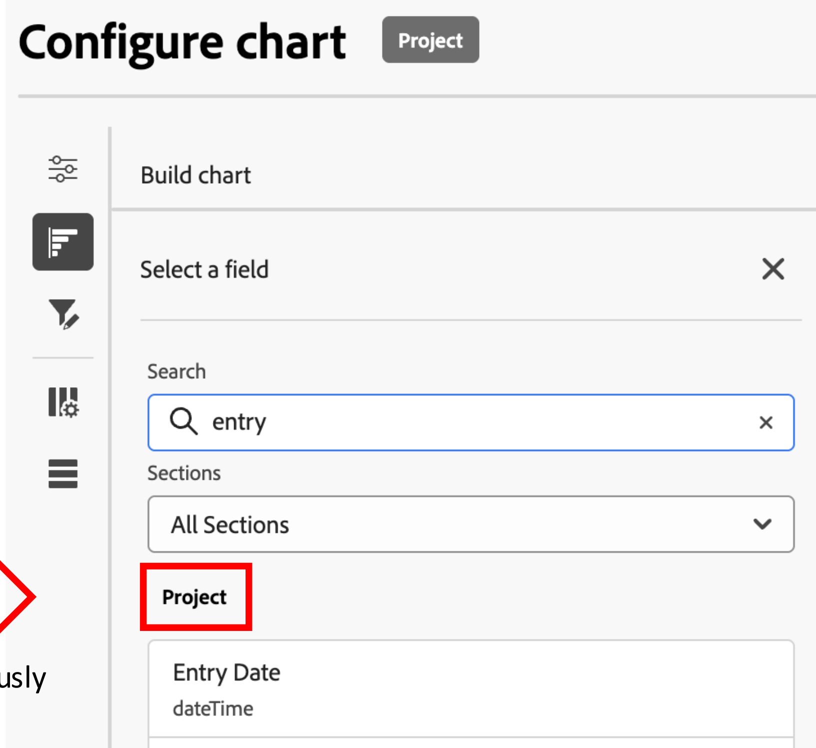
LIFE HACK: The fields you pick populate your drilldown (aka View) with a column, so for a straight count, pick a field you’d normally want to see (for us, this is the project name).

Chart | Build chart



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.

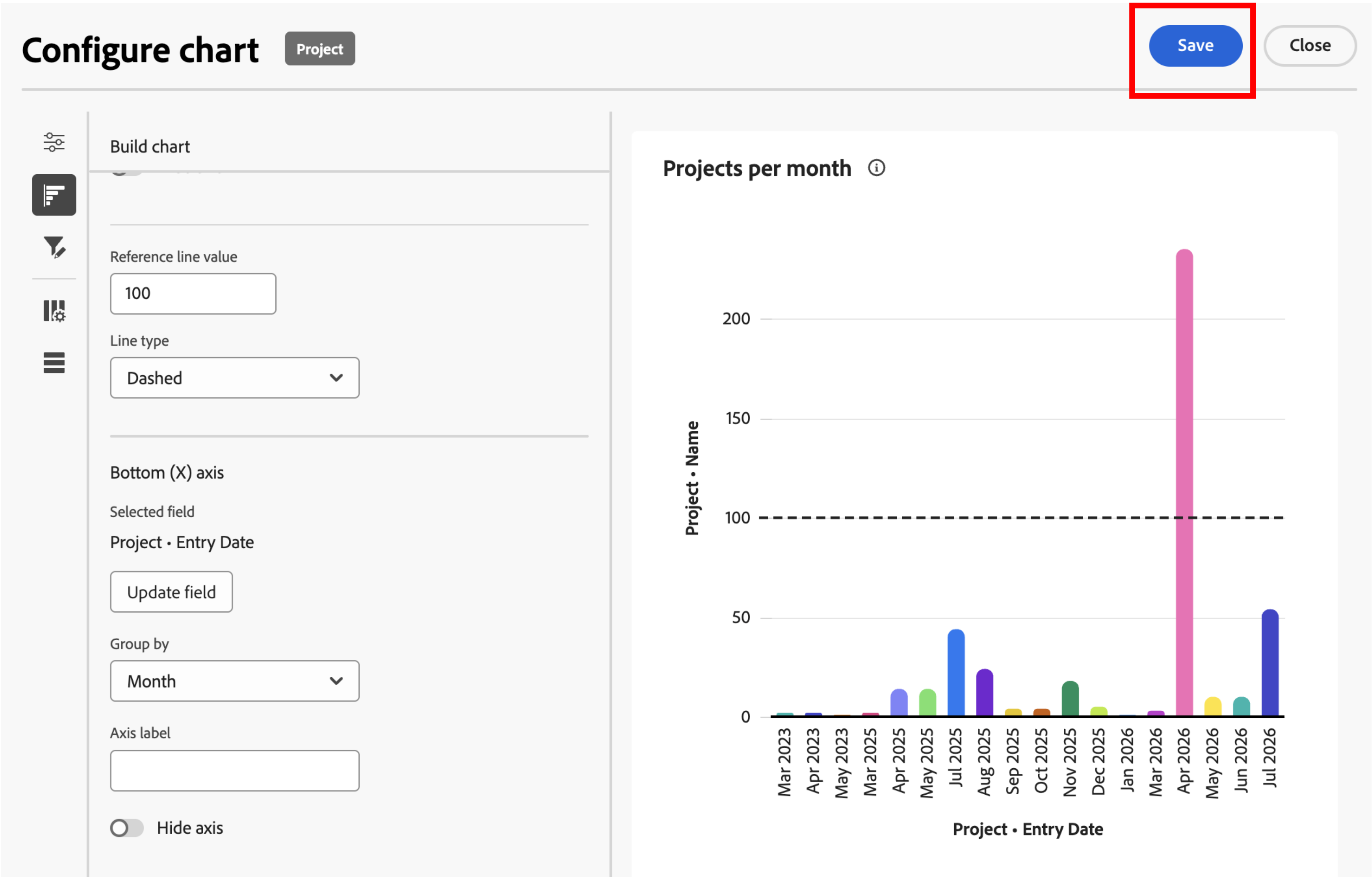


Note that unlike Y, this axis field came in with an object preselected. You previously selected Project, so this is why Project automatically comes up. No need to go "backwards" – anything Project is connected, to shows up at the bottom of this list.

Adobe

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.



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

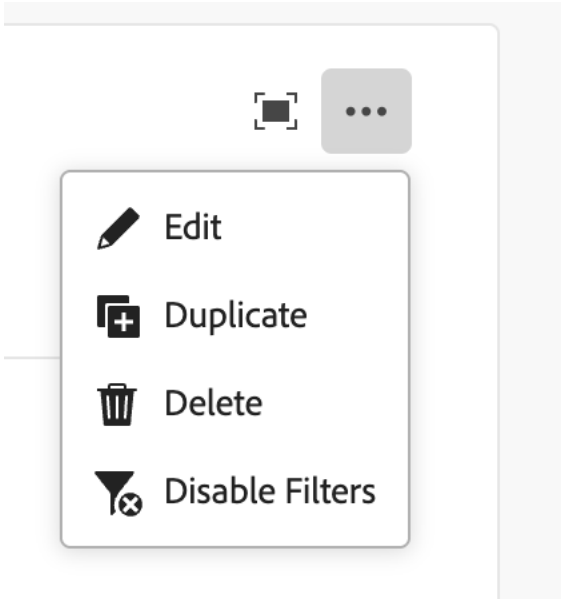


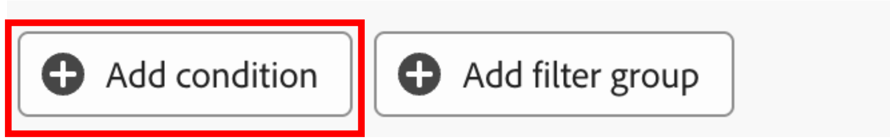
Chart | Filter

Click on the filter icon, then Edit filter.

3

Adobe

Chart | Filter | Condition



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

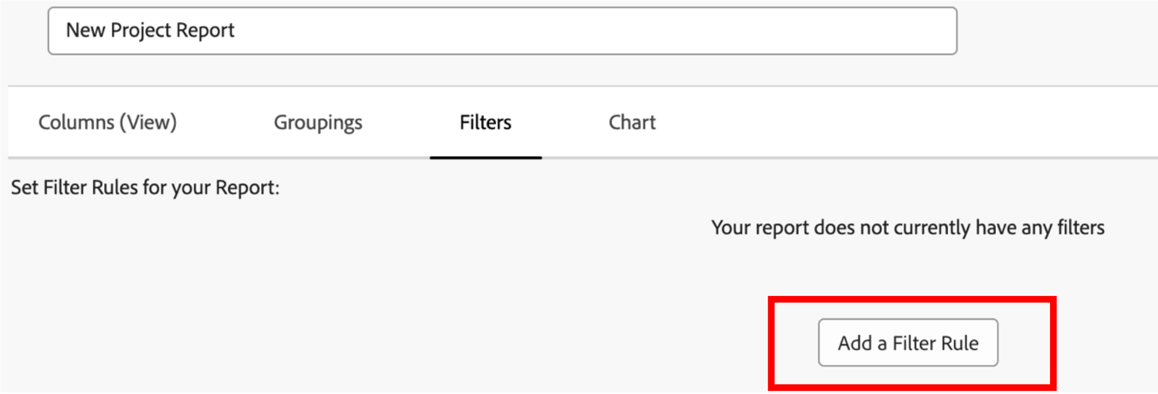
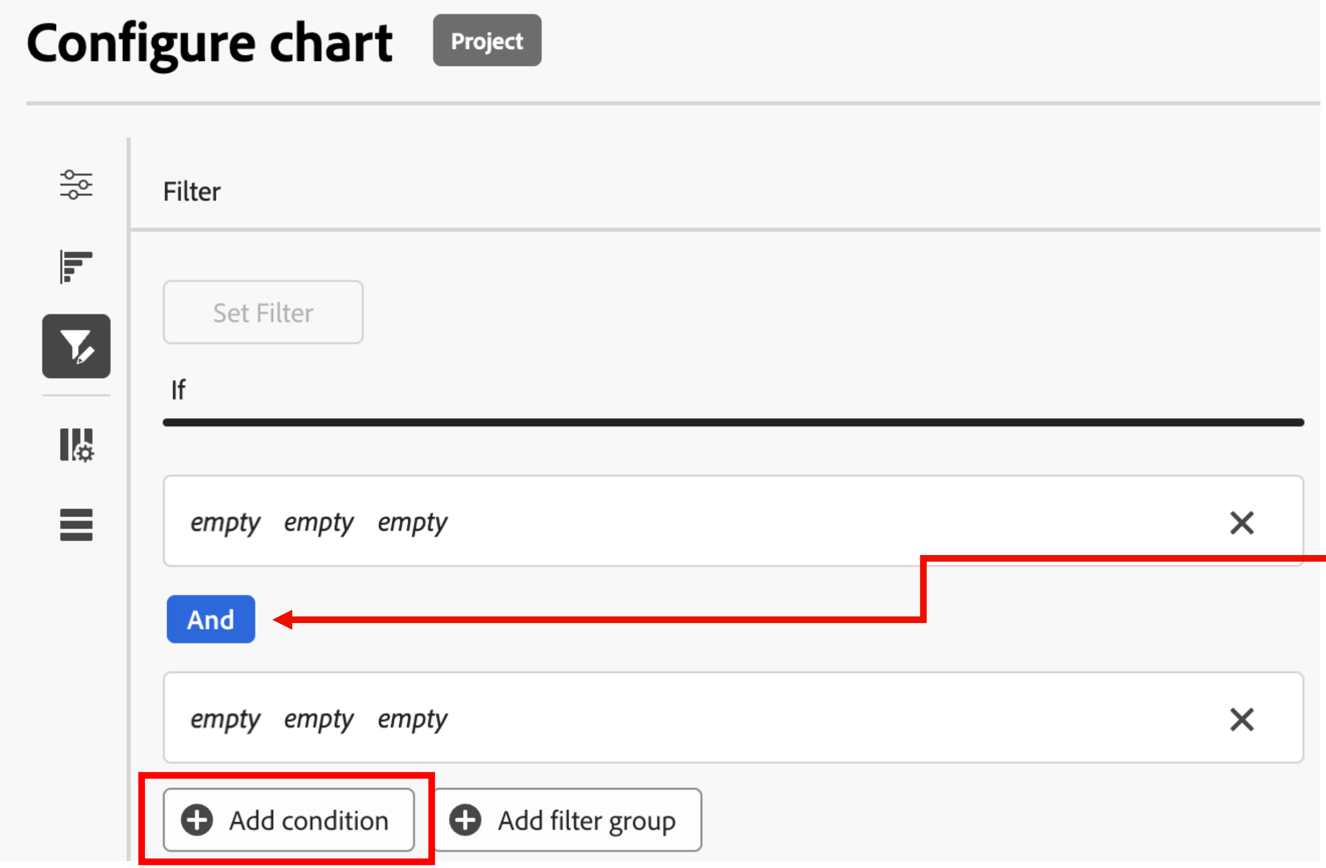


Chart | Filter | Condition

In Canvas, you would +Add condition.



In a Classic report, you would "Add another filter rule".

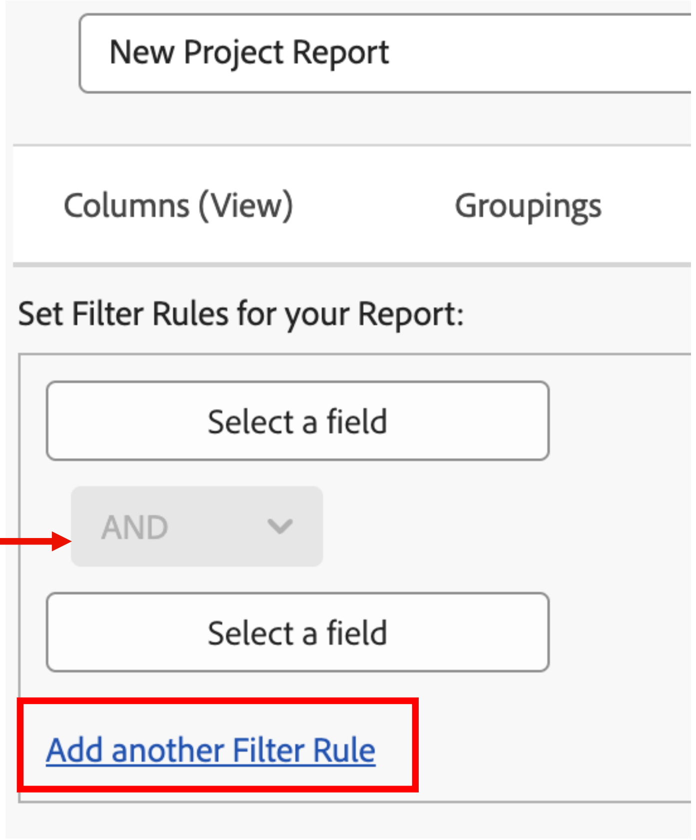
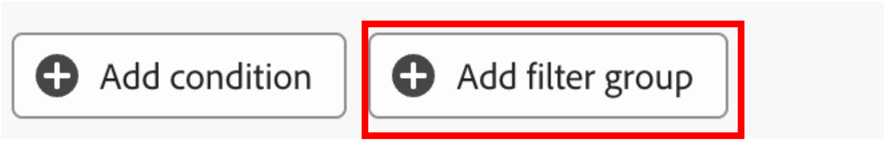
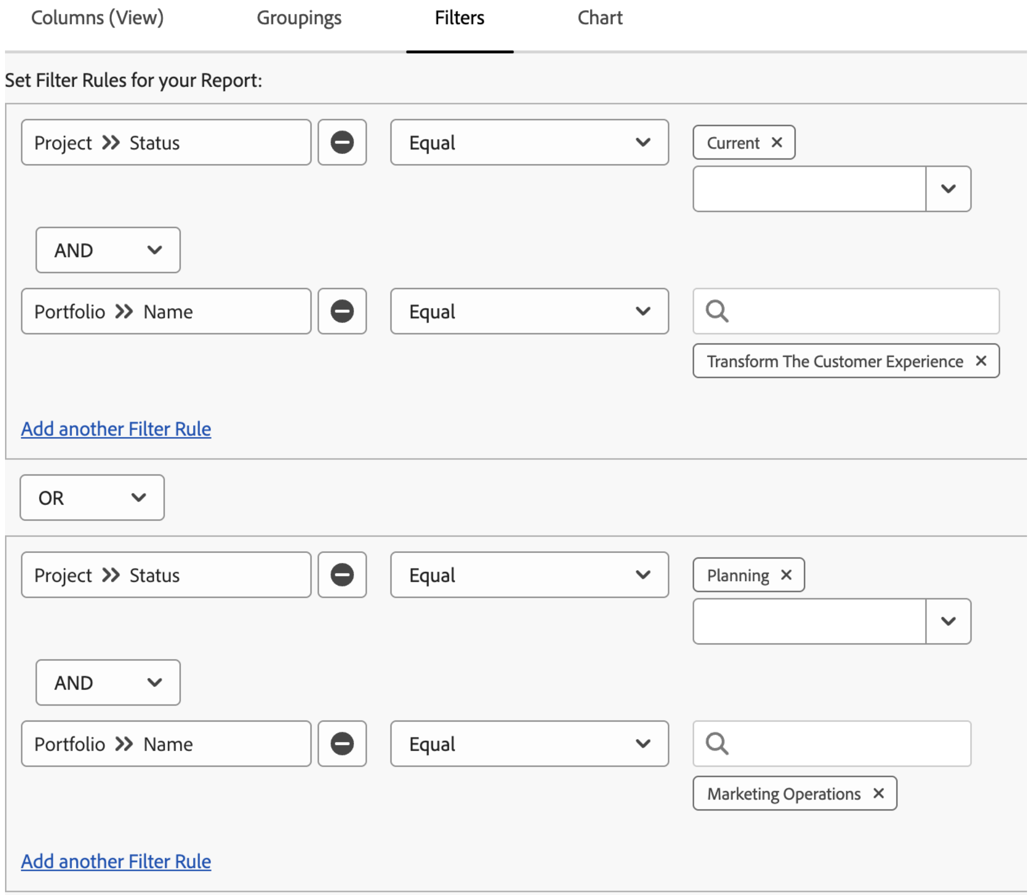


Chart | Filter | Filter group



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.



How it looks in Canvas.

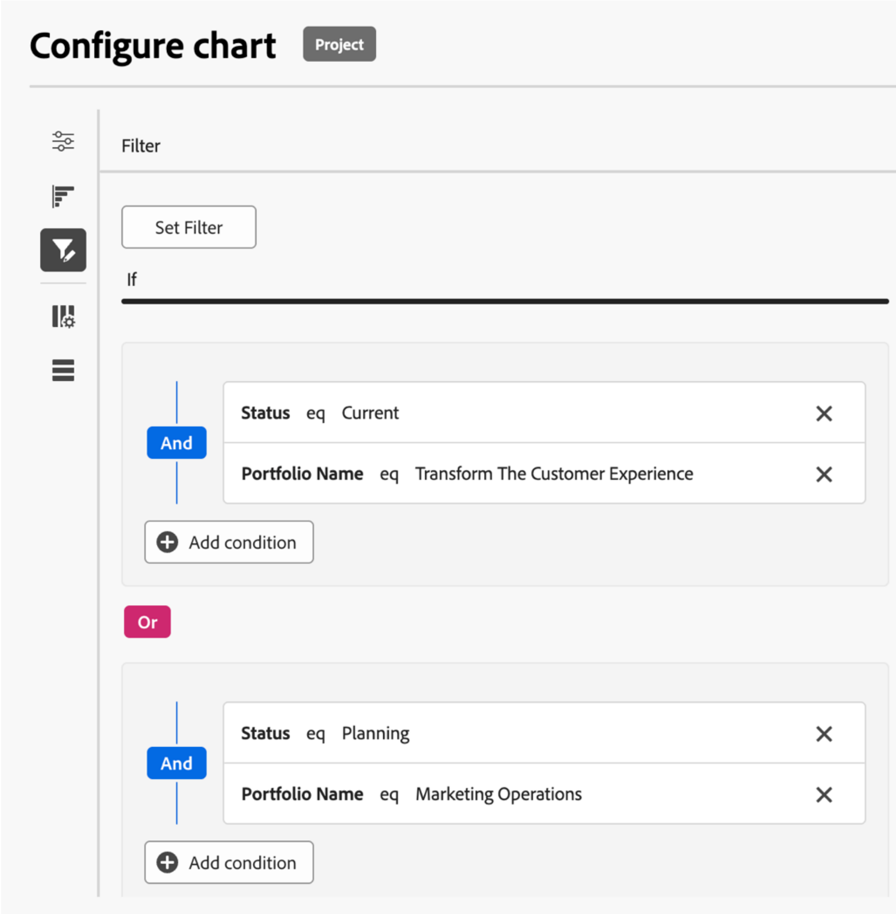


Chart | Filter | Filter group

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:

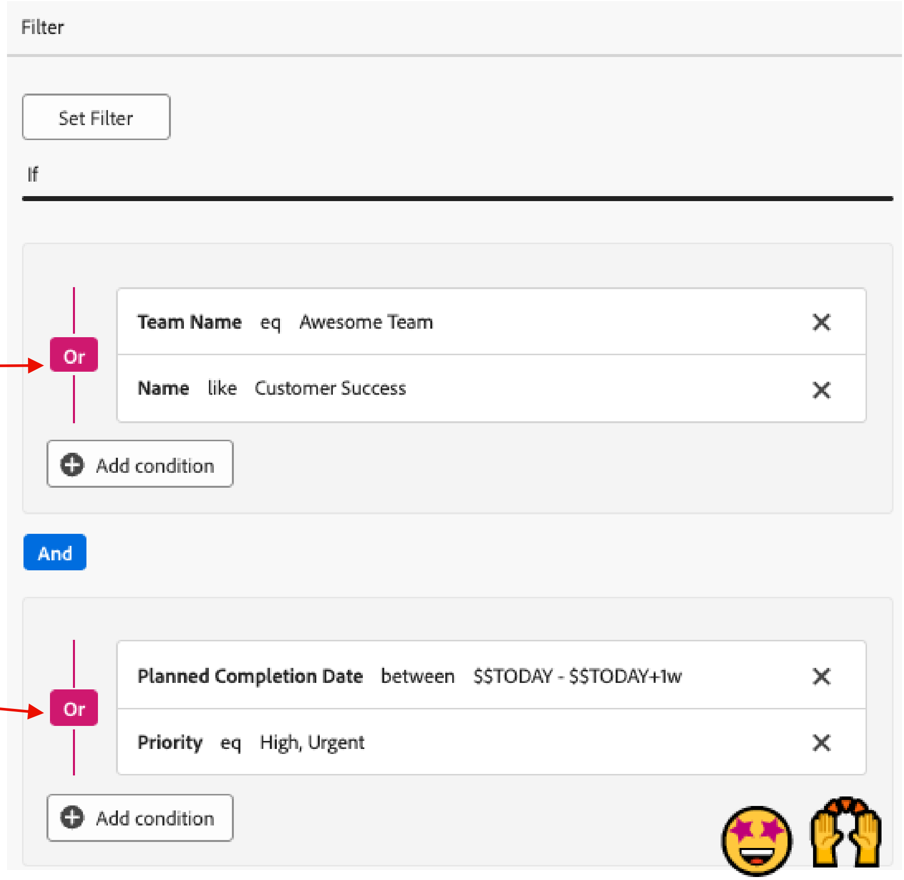
1. Assigned to Awesome Team
2. OR task named Customer Success

AND either

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

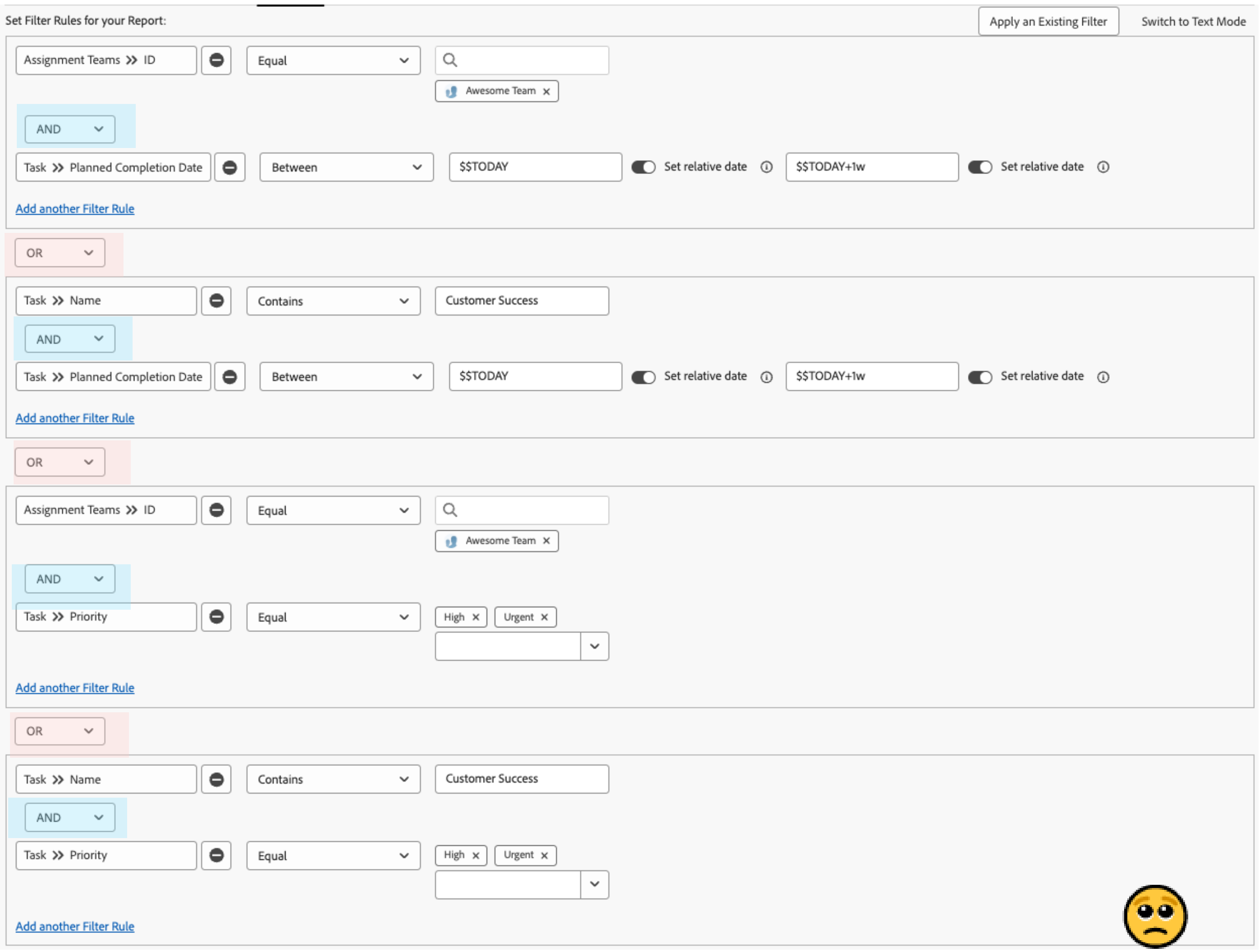
Sample Task name	Assigned to	Due date	Priority
Random Task Name 1	Awesome Team	12/1/26	High
Customer Success	John Smith	9/1/26	Low
Customer Success	Awesome Team	11/1/26	High
~~Random Task Name 3~~	~~Mary Smith~~	~~9/1/26~~	~~High~~
Customer Success	Awesome Team	9/1/26	Low

In Canvas, it looks like this



Adobe

Chart | Filter | Filter group



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,

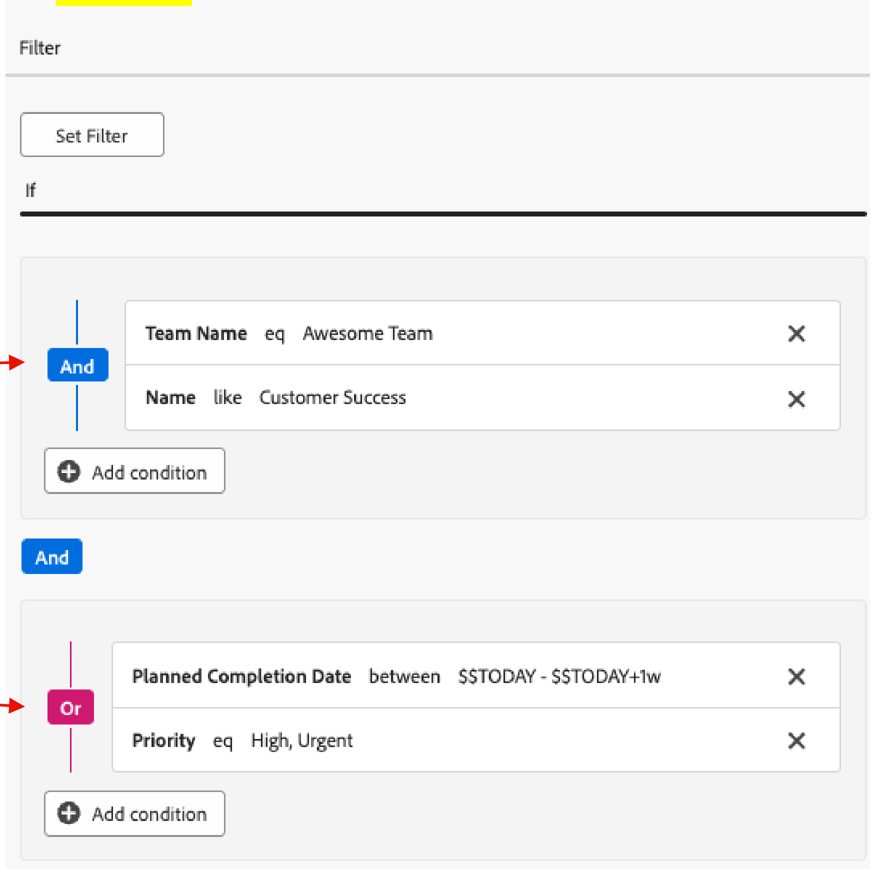
OR

2 AND 4

Adobe

Chart | Filter | Filter group

In Canvas, it looks like this



One more filter group “OR” example:

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

Tasks either:

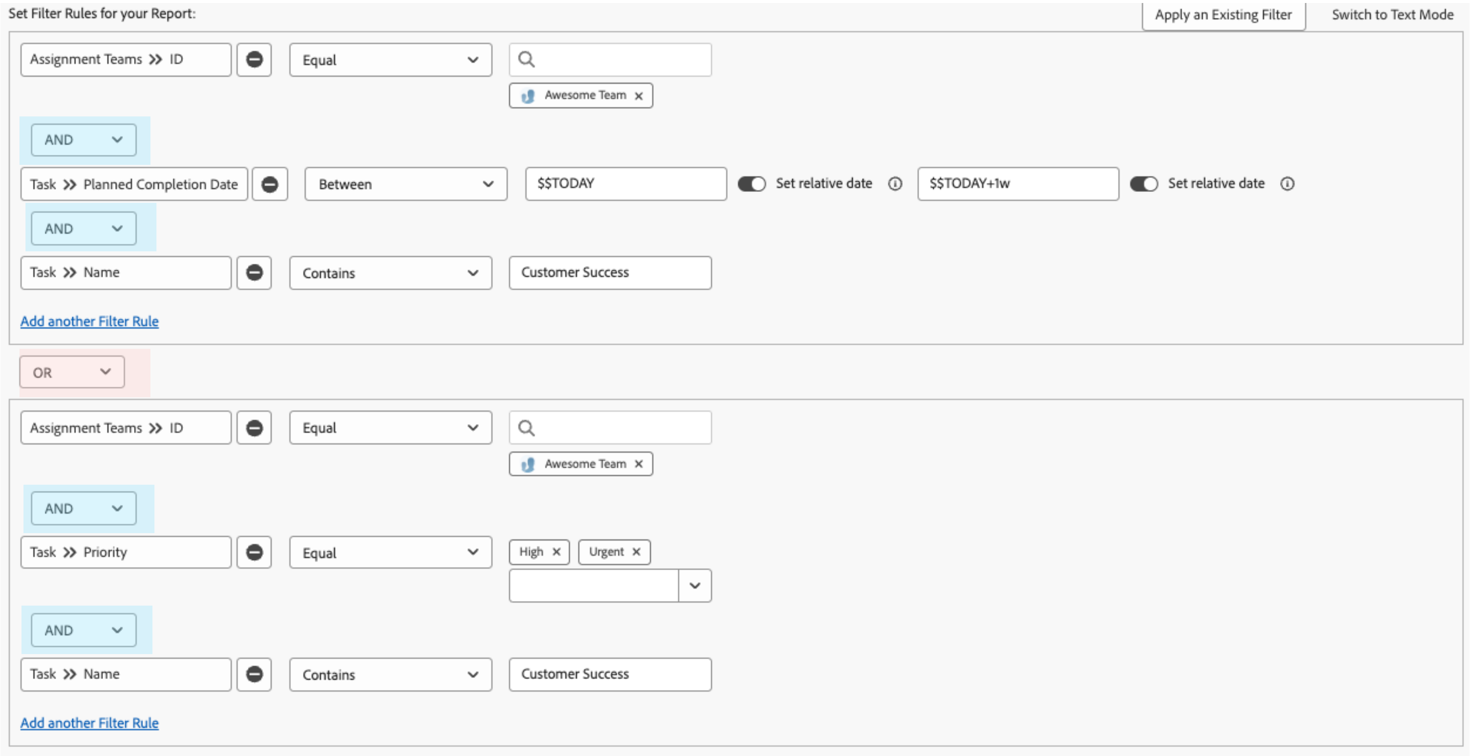
1. Assigned to Awesome Team
2. AND task named Customer Success

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

Chart | Filter | Filter group



In Classic, it looks like this:

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

1 AND 2 AND 3,

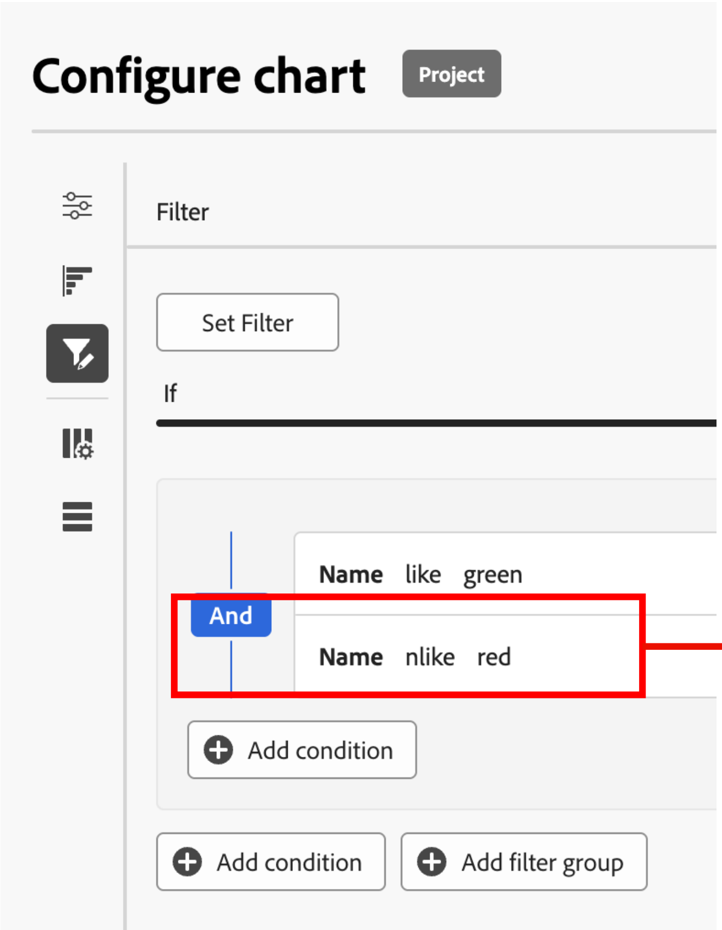
OR

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:

Adobe

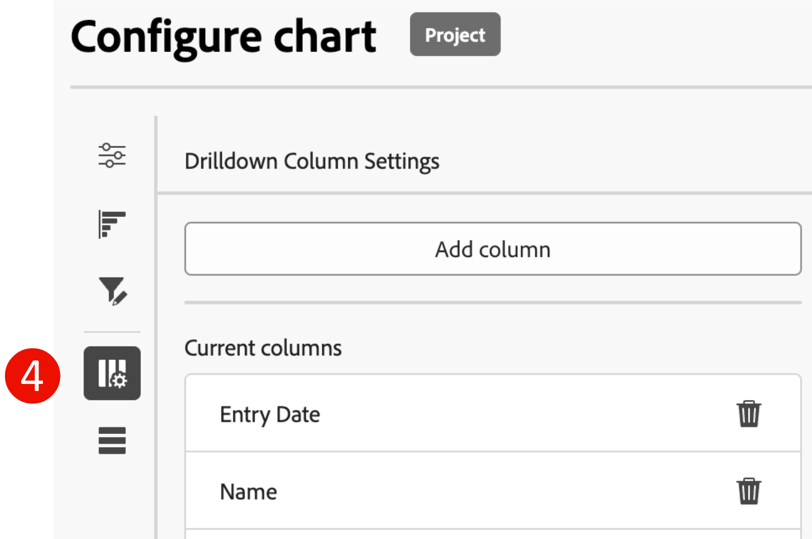
Chart | Filter

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



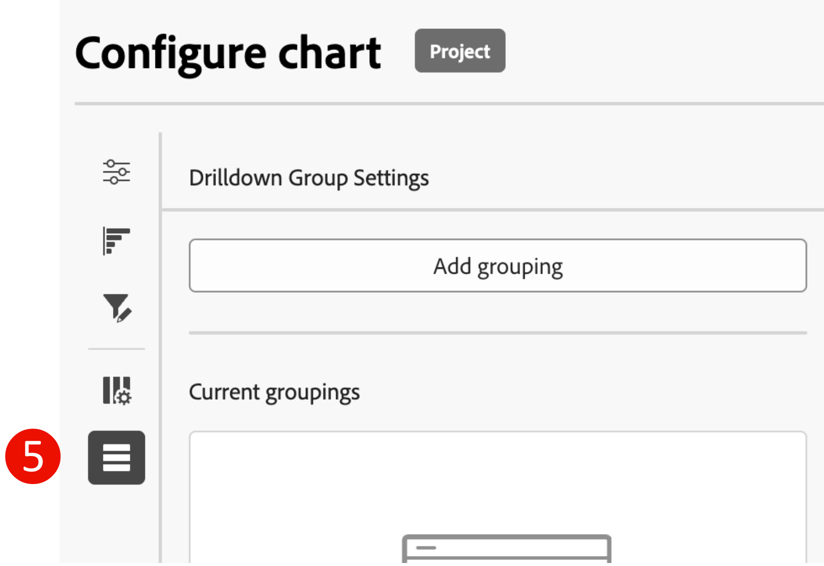
"Drilldown columns" are the collection of rows and columns that appear when you click on a bar in your chart. You can already see that because we selected entry date and name as our axes, we pre-populated 2 columns. Similar to picking an axis or a filter condition, after the initial axis is chosen, other 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

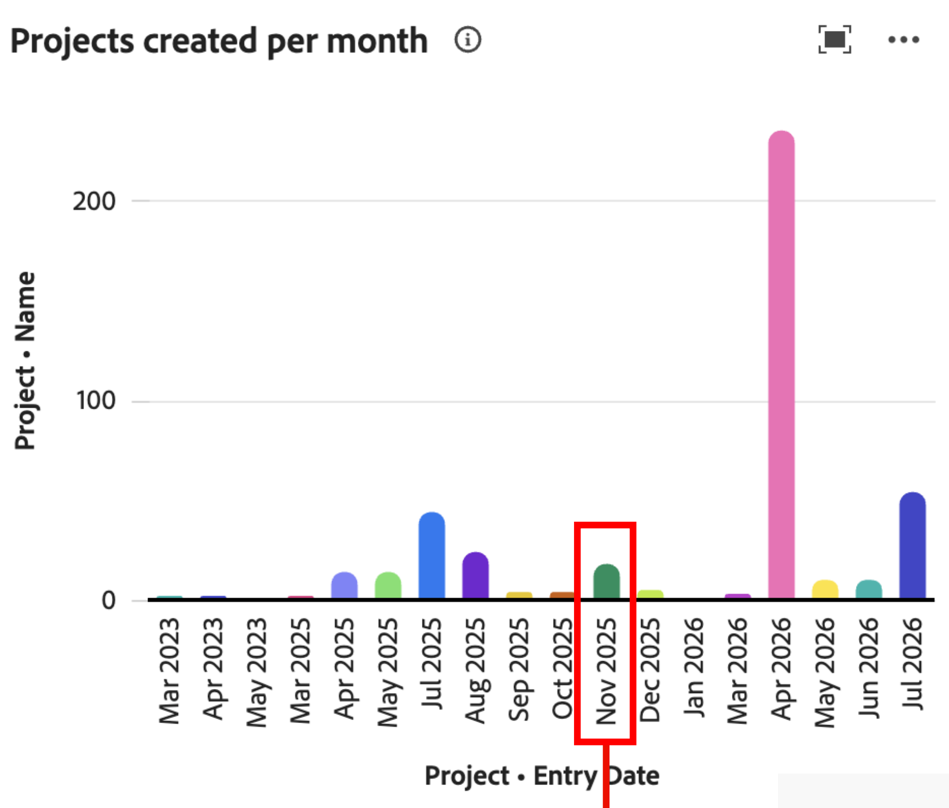


Drilldown groups are the additional groupings that appear after you click on an individual bar in your chart (in your table view).

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)



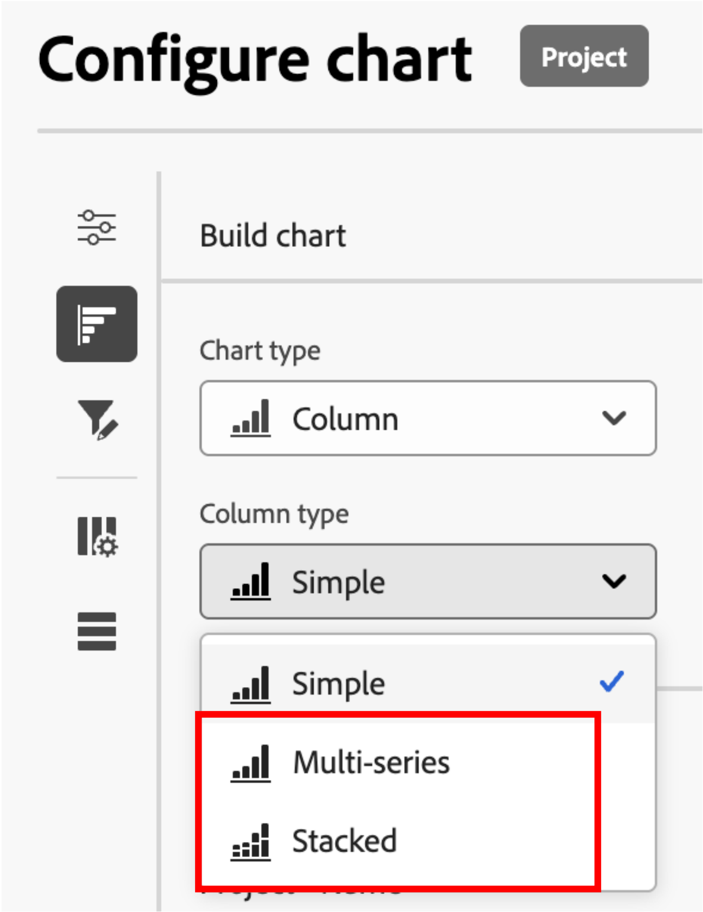
Name	Entry Date	Owner Name	Status
Chris Thygersen's Tasks	11/5/25	Chris Thygersen	Current

Adobe

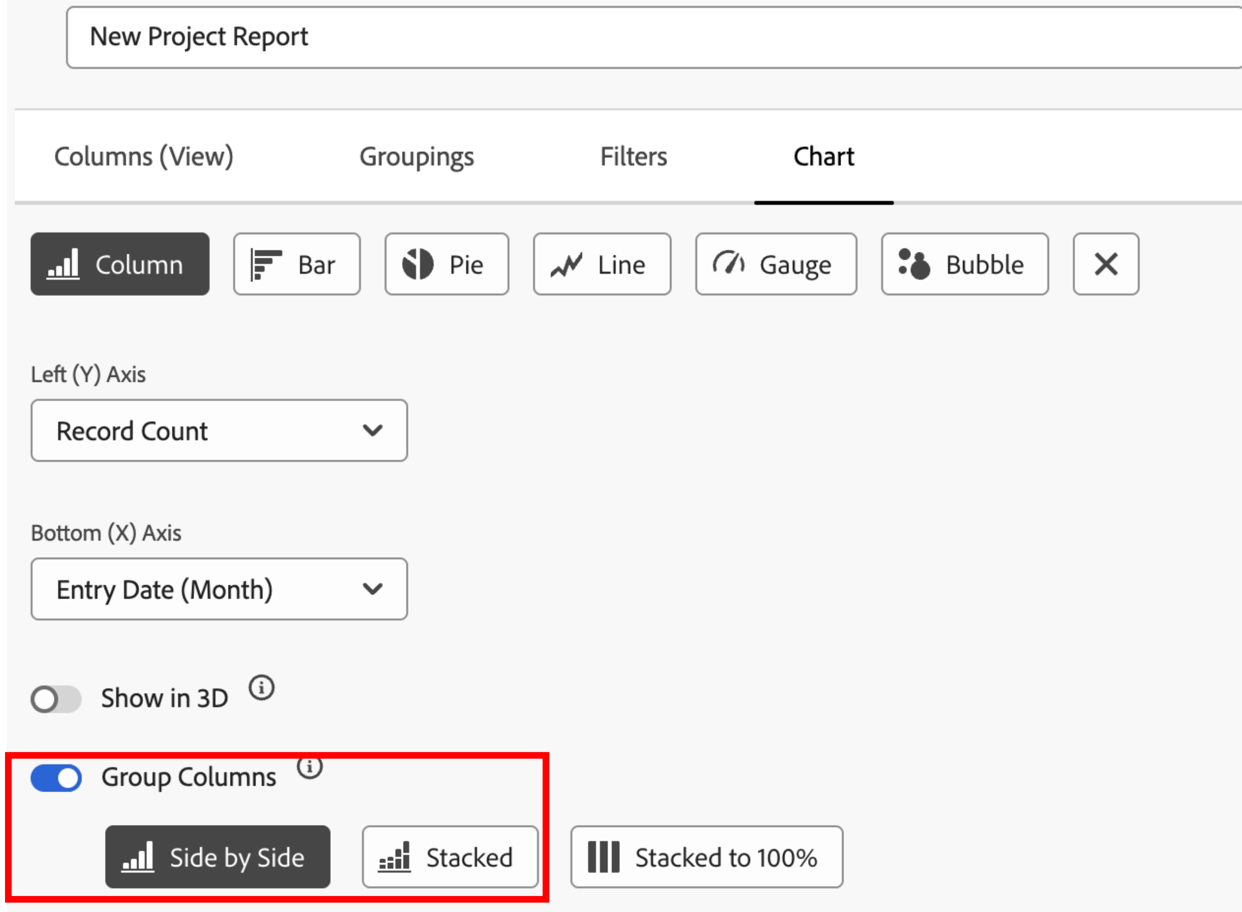
Intro to charts (additional options)

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.



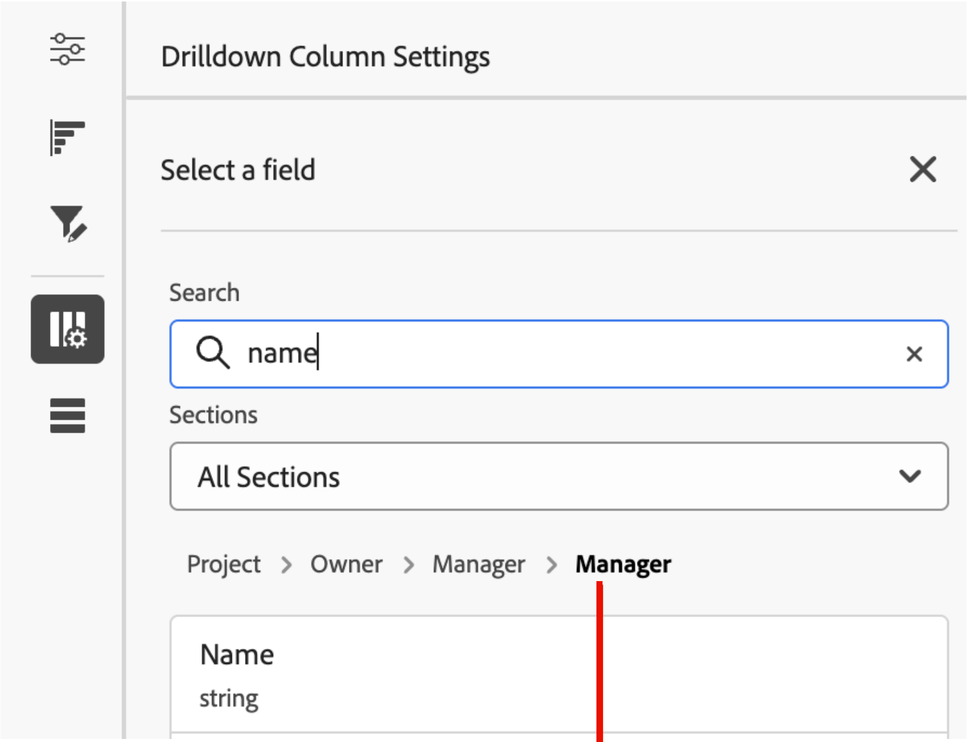
How it looks in Classic.

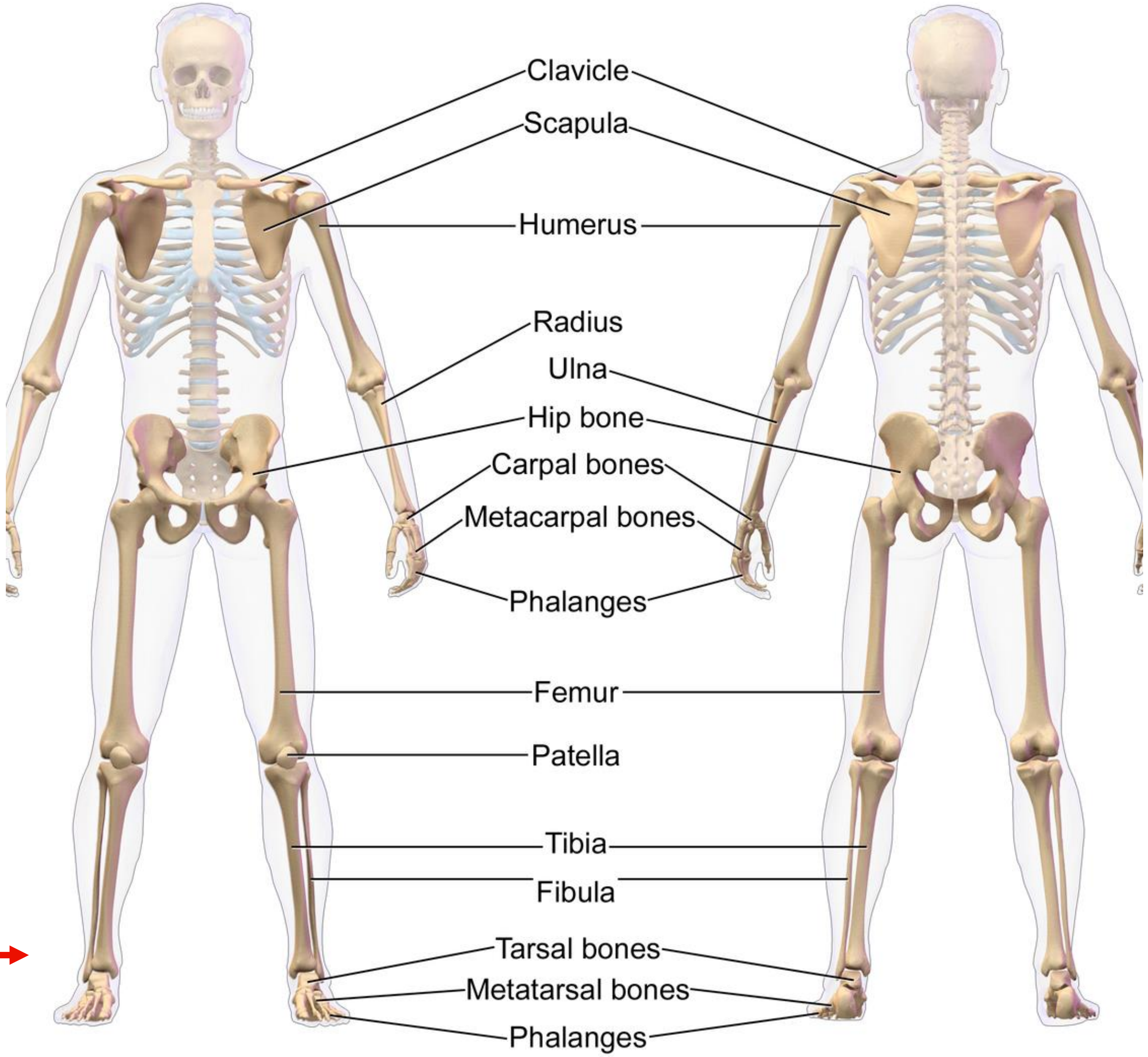


Knowledge add-on: references

Object traversal / Object references

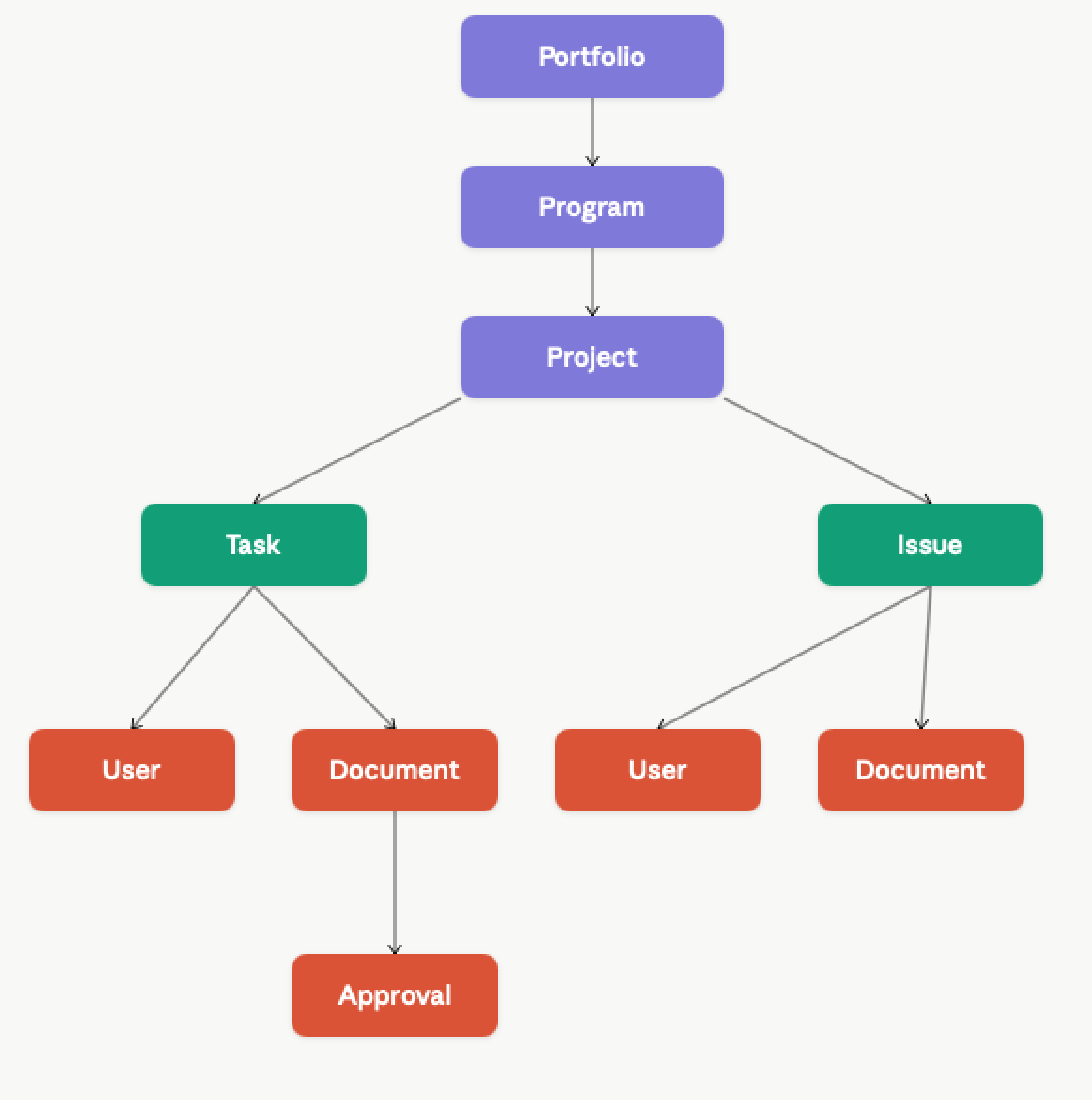
The object you pick in a Workfront report is connected to other things in Workfront.





Object traversal / Object references

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

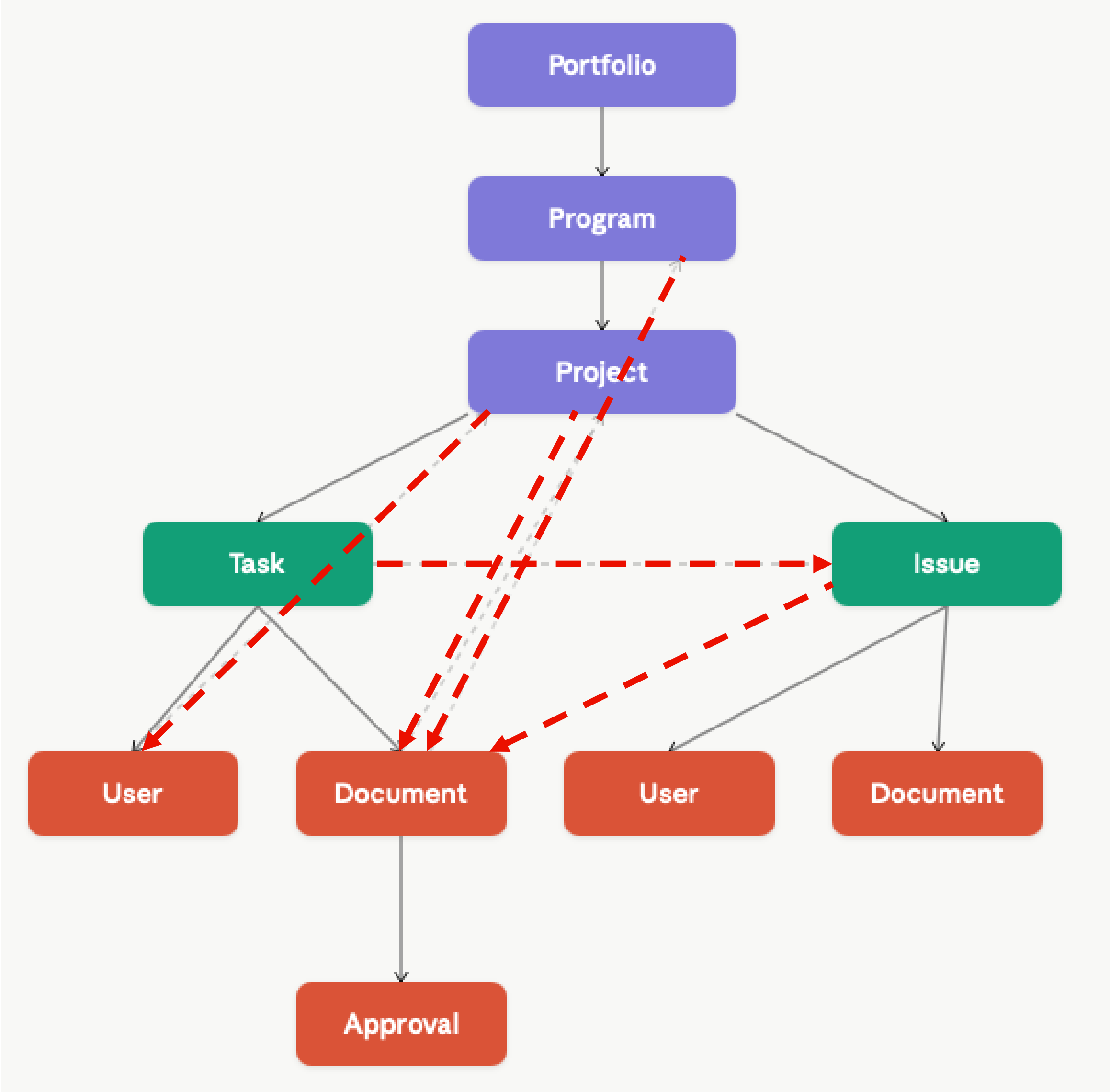


Adobe

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



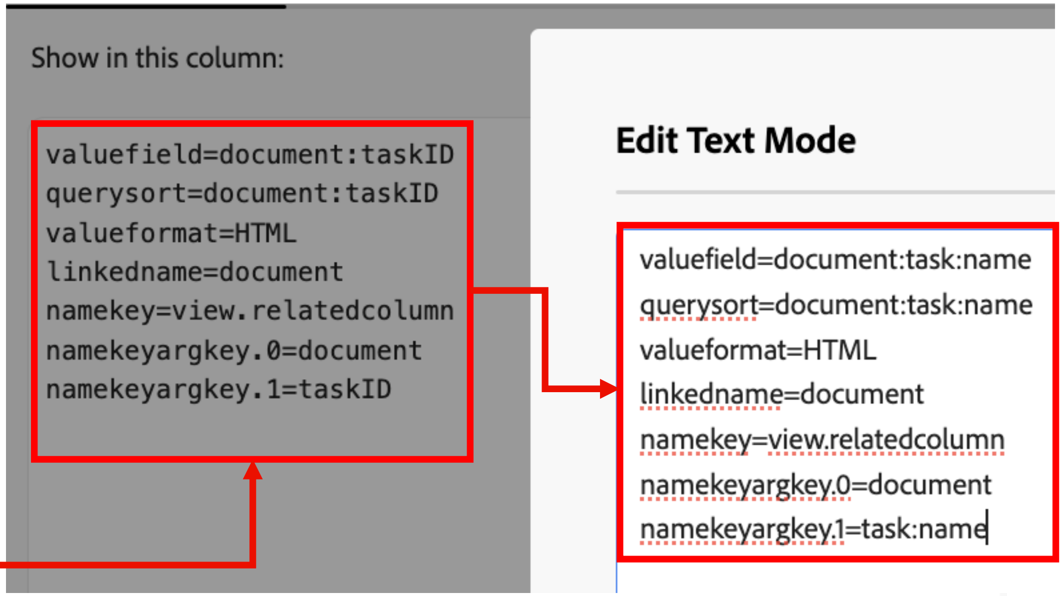
Adobe

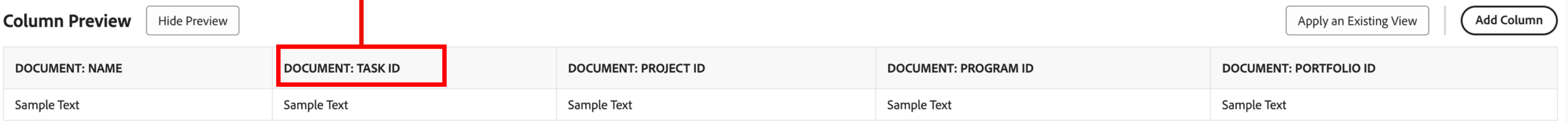
Object traversal / Object references

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.





Adobe

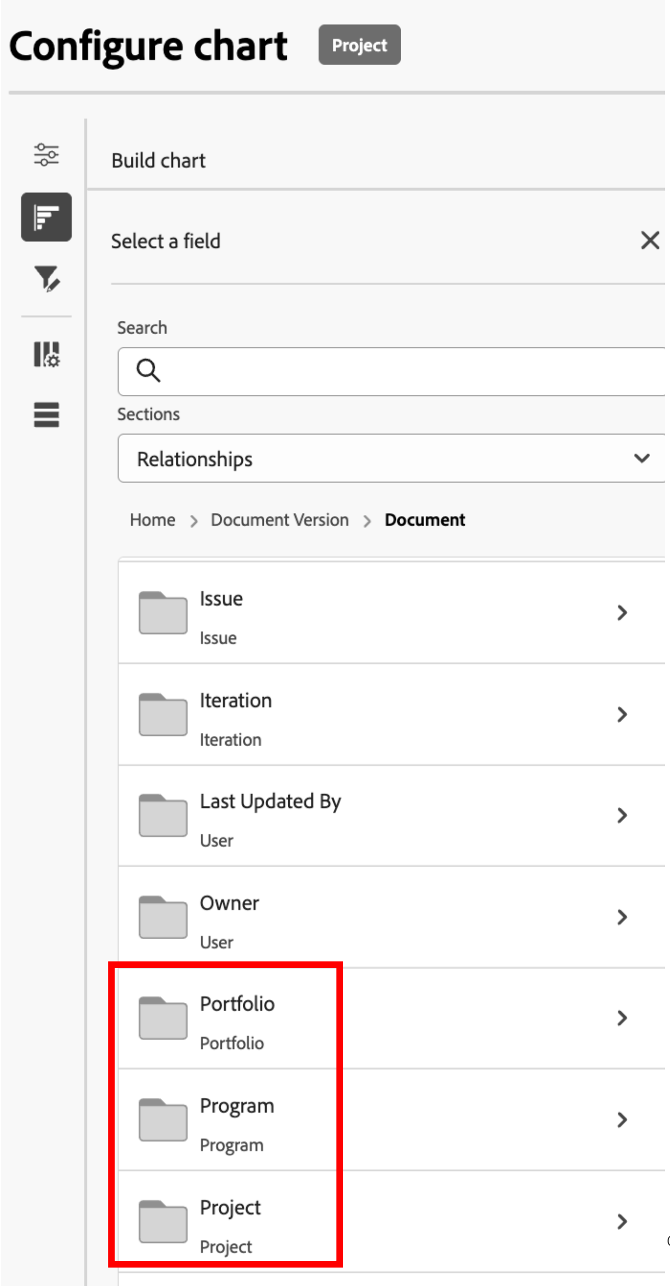
Object traversal / Object references

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.



Adobe

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

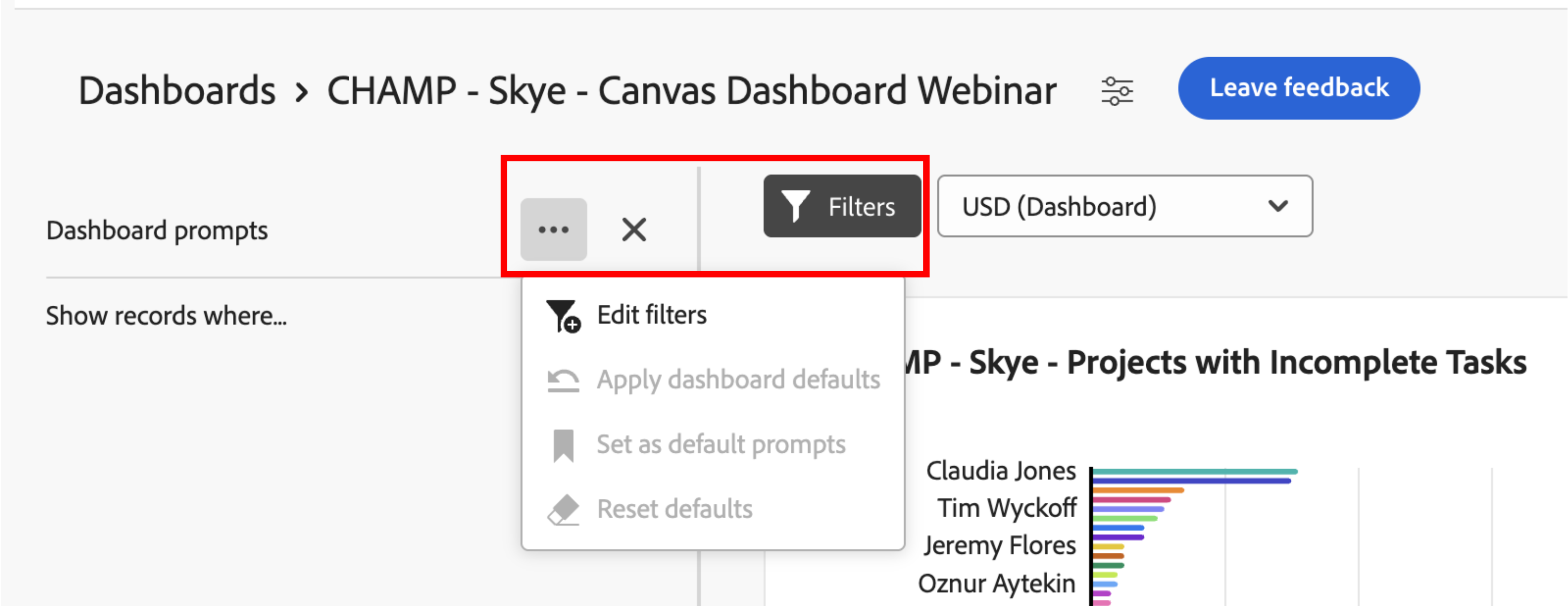
- Can be used as a workaround for some small, multi-select fields.

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

Apples	Bananas	Oranges
7	6	4
This is a count of all the apples	These are all the bananas we have	This is the orange colored fruit

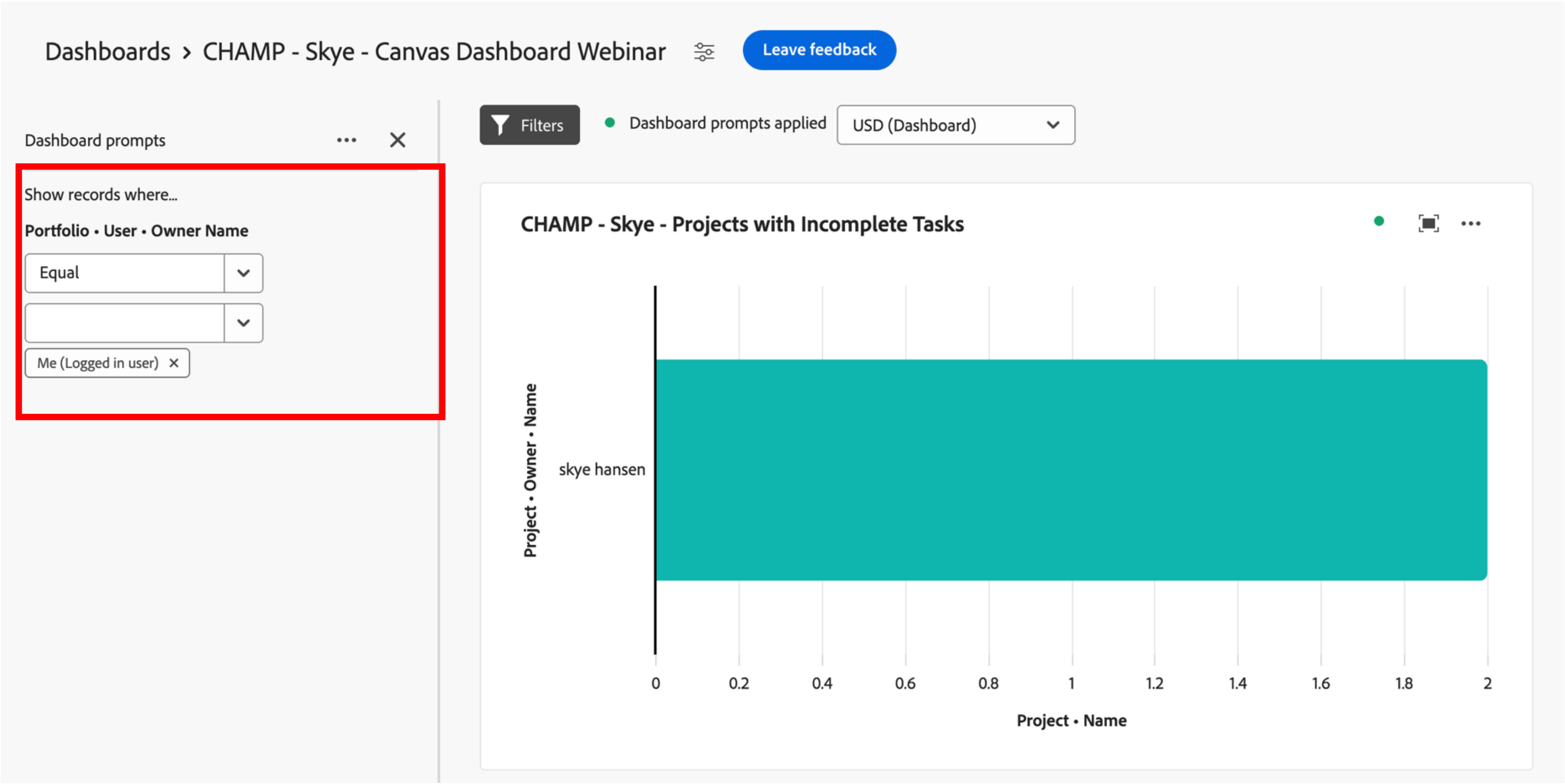
Adobe

Dashboard filters and prompts



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



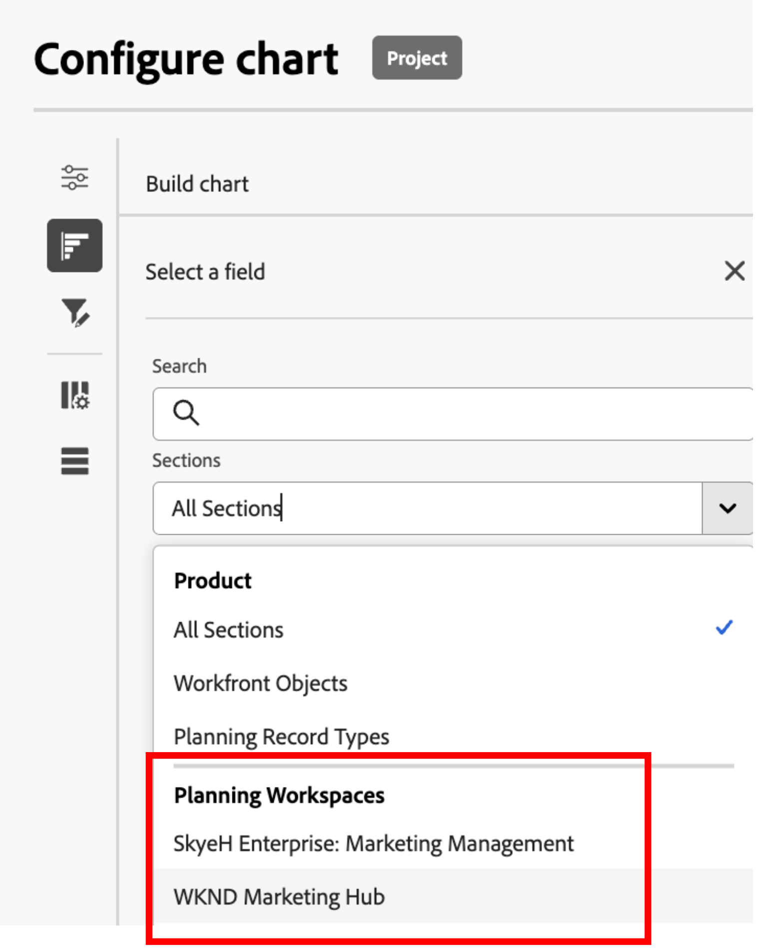
You can use the same dashboard for both a look at the whole system, as well as filter all reports to show your own personal focus.

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

Adobe

PLANNING (locating workspaces)



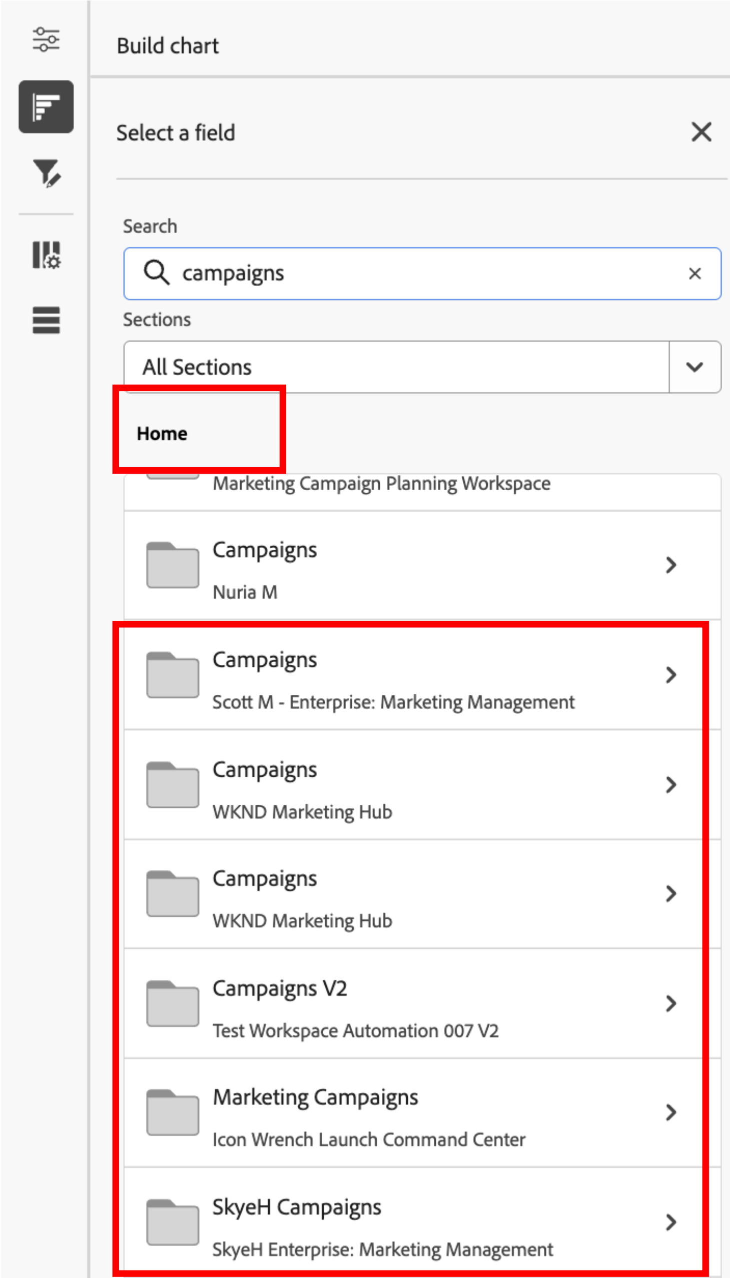
Planning records and their connected objects are available to report on in Canvas Dashboards. You can show Planning objects in several ways:

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:

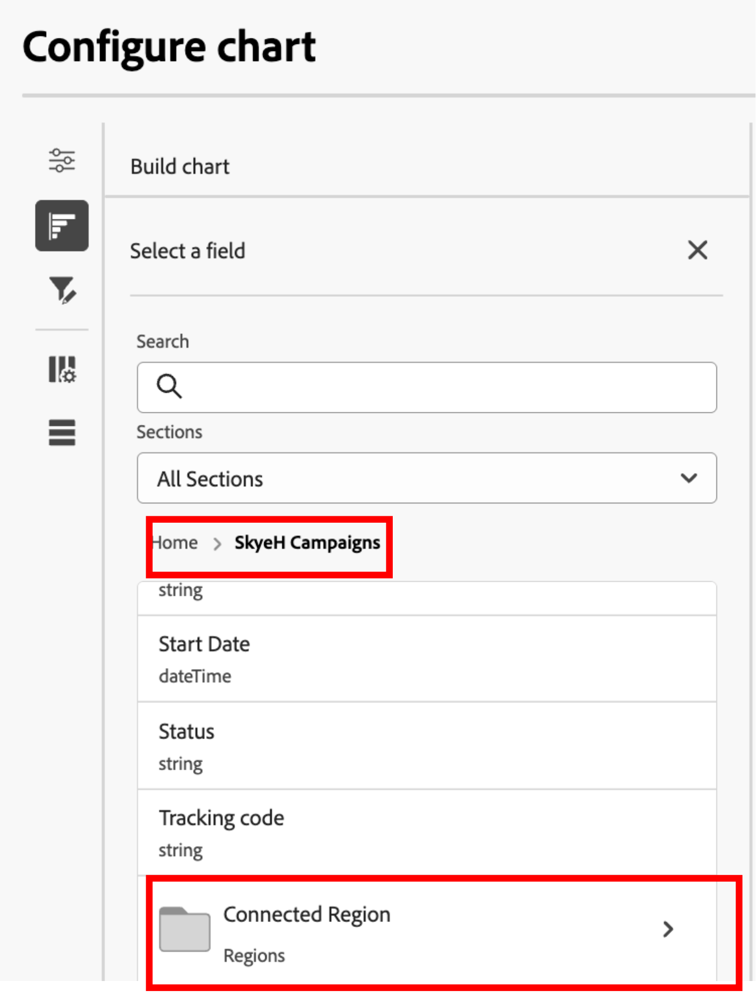
- Visibility of workspaces – if you can see it in Planning, you can see it in Canvas. *(Note: the Workspace names showing up in the Sections dropdown are those Workspaces shared with the user who is building a Canvas report)*
- Planning Connection fields (Connected Records) such as Project connections 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.

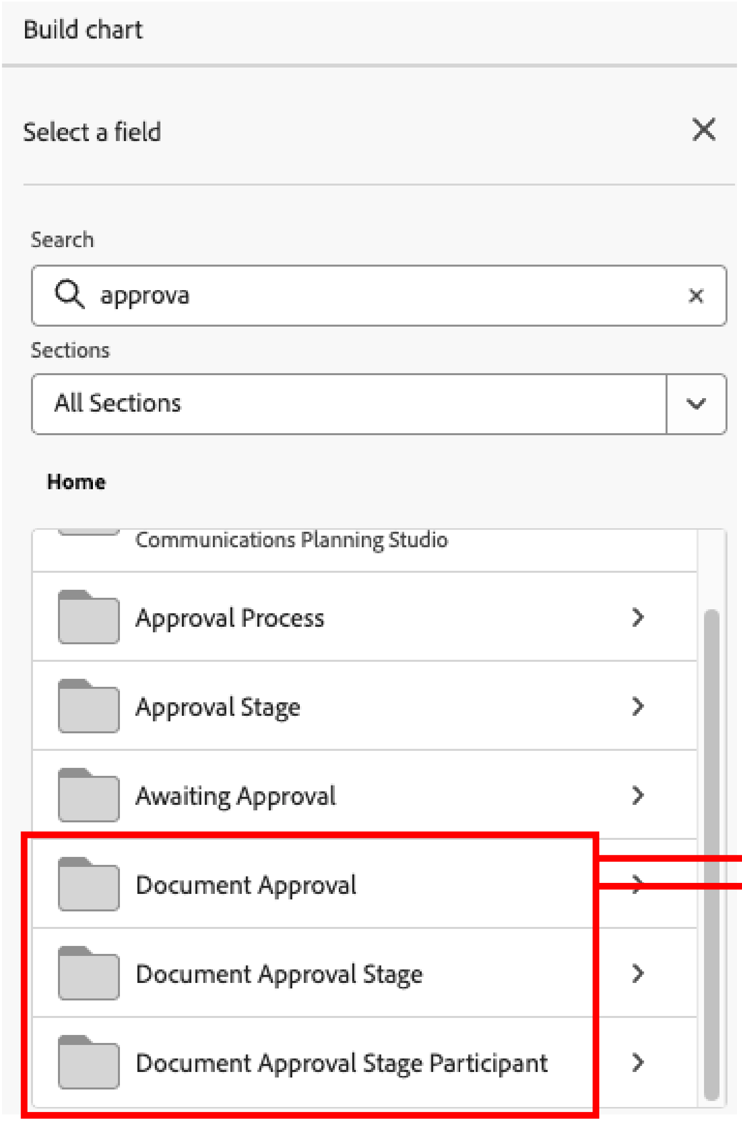
PLANNING (locating connected objects)



- 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.

Adobe

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

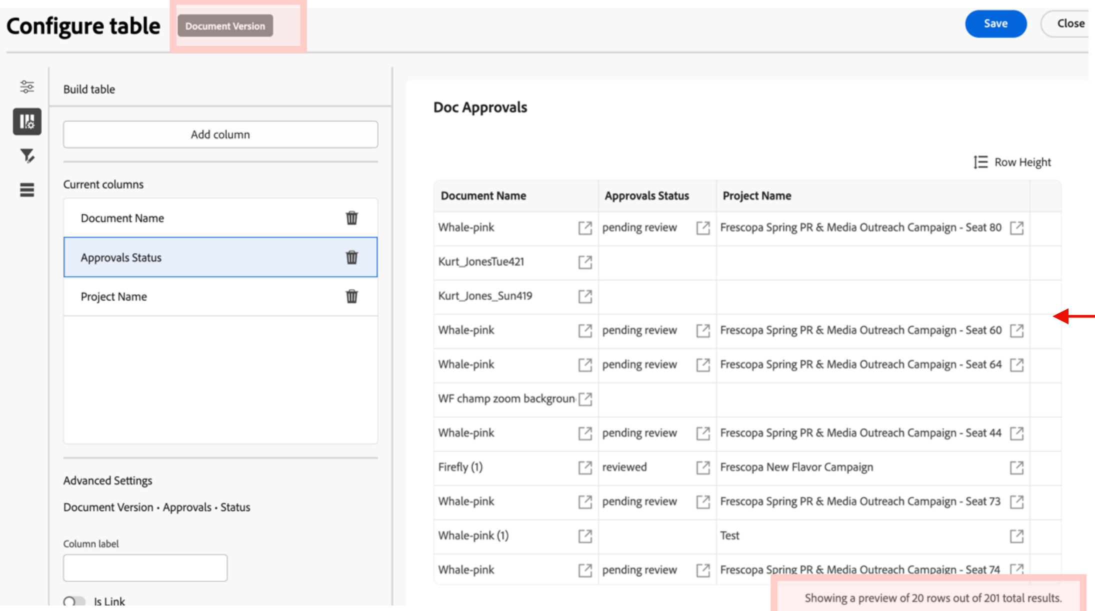
Task → Stage

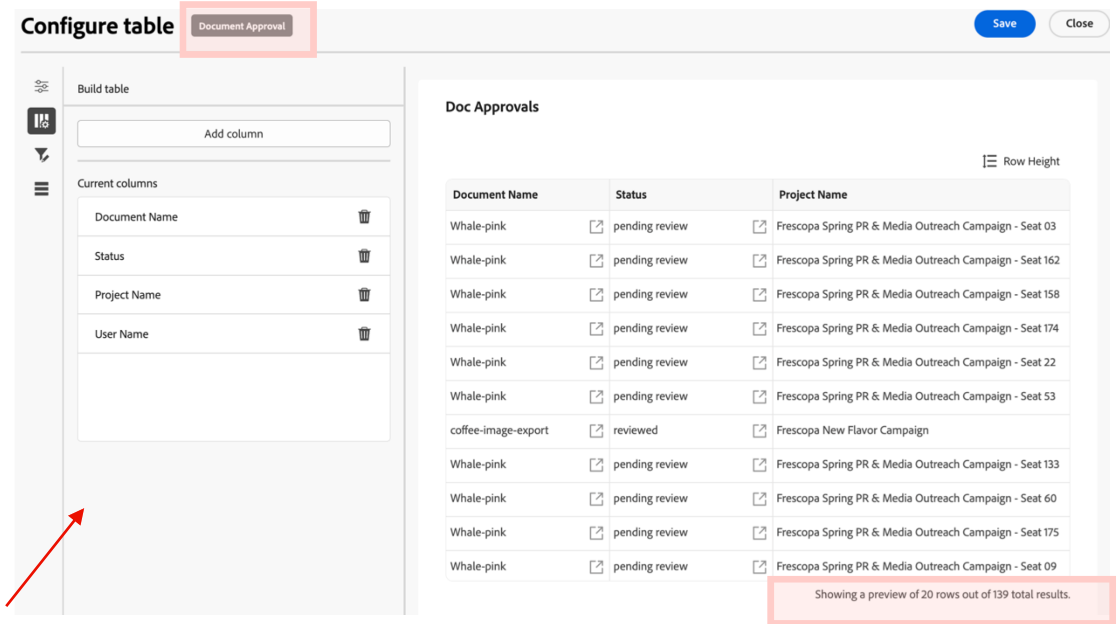
Assignment → Reviewer/approver decision

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



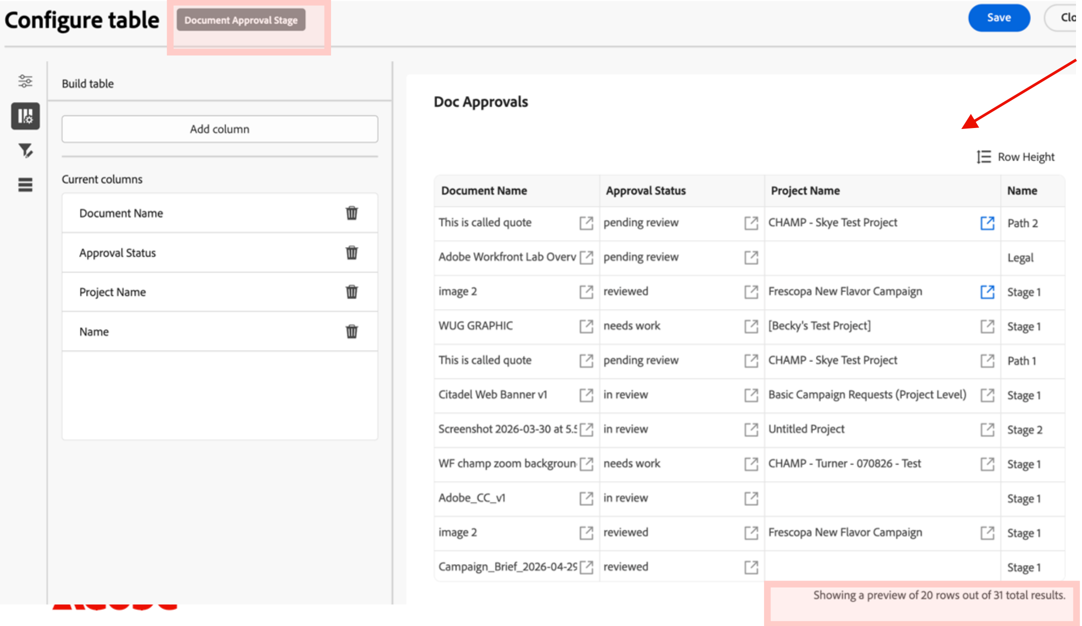


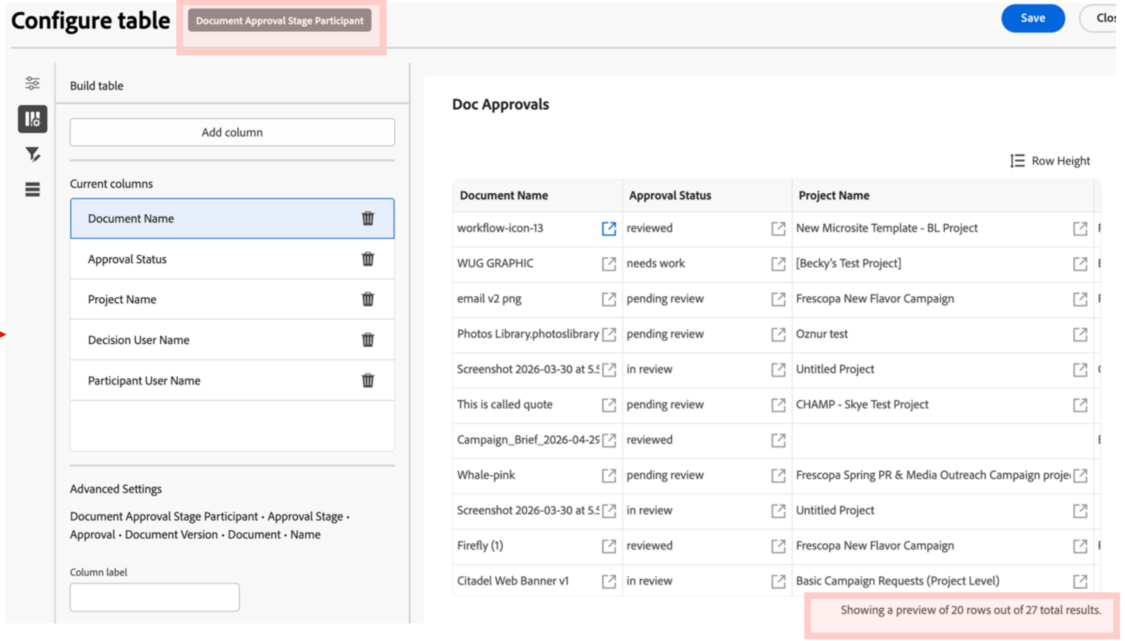
201 document versions

139 document approvals

31 approval stages

27 participants





In the lab & on the roadmap

Want to give feedback on this feature?

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

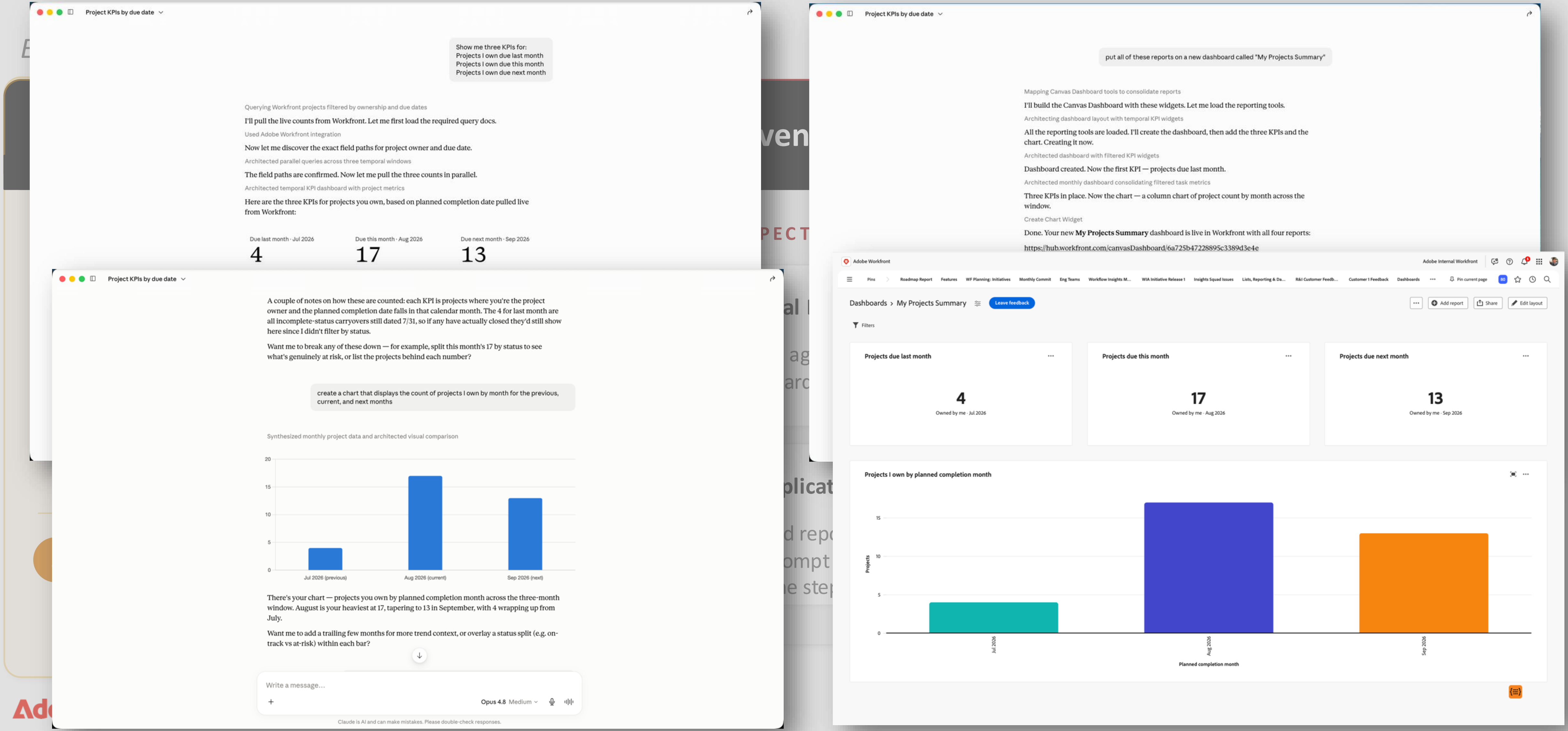
An agent can read a report's or an entire dashboard's definition and produce a plain-language summary or cross-report.

Adobe

REPORT CREATION VIA AI

Want to give feedback on this feature?

Introducing: Reporting AI Tools



NEW REPORT TYPE

Want to give feedback on this feature?

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.

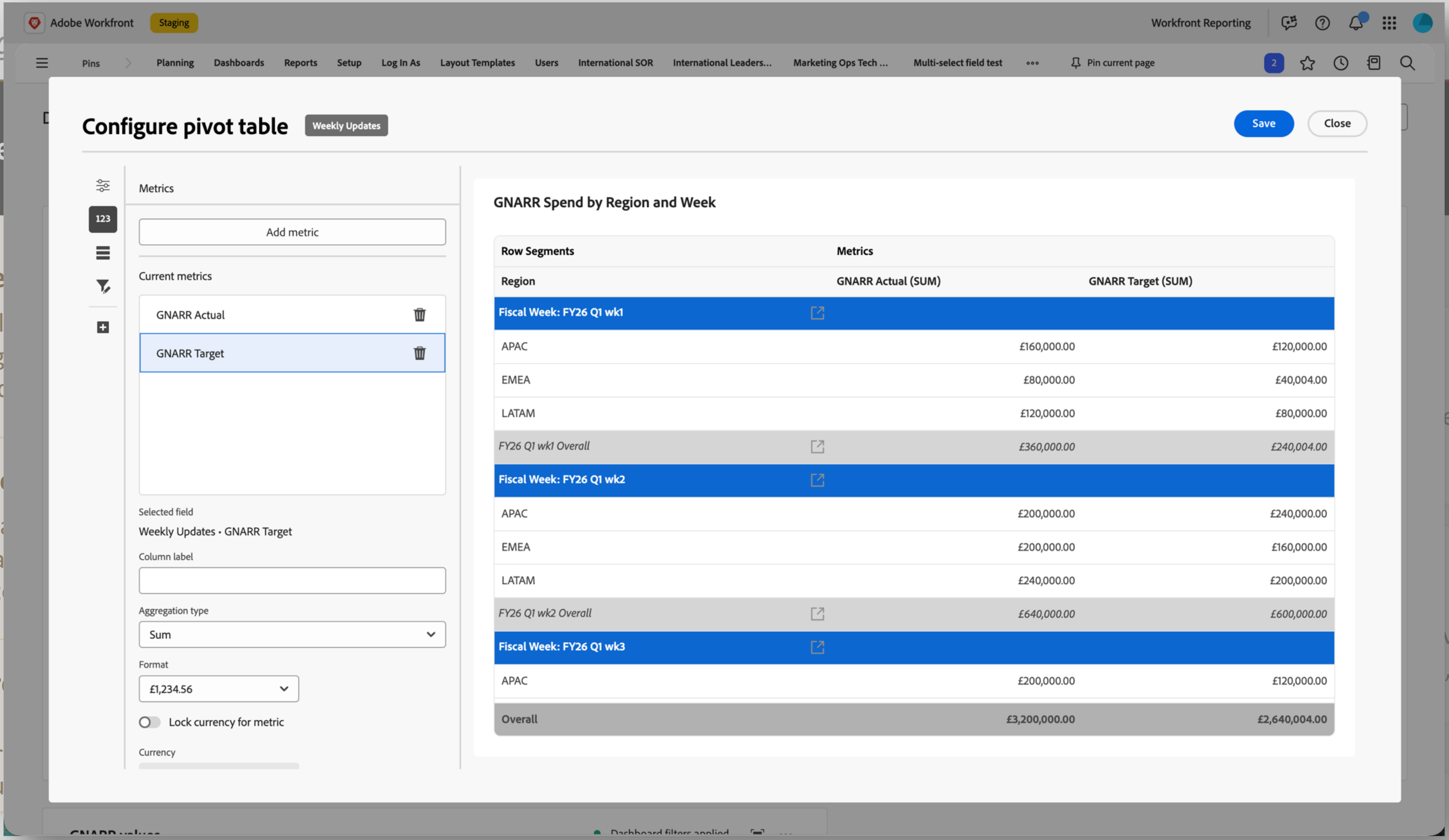
Adobe

NEW REPORT TYPE

Want to give feedback on this feature?

Introducing: Pivot Table Reports

The reporting



Current expe

1 **Collapse**
Define rol collapse g far more c

2 **Export t**
Run the s Functiona immediat

3 **Matrix r**
Not quite Customer the outpu

ender the the request

verything , and

Adobe

Want to give feedback on this feature?

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.

Adobe

Want to give feedback on this feature?

Introducing: Combination Charts

Two measure

Current expe

1 **Two cha**

Comparin like spend percentag building t

2 **Reconcil**

There's n series on have to b relationsh

3 **Exportin**

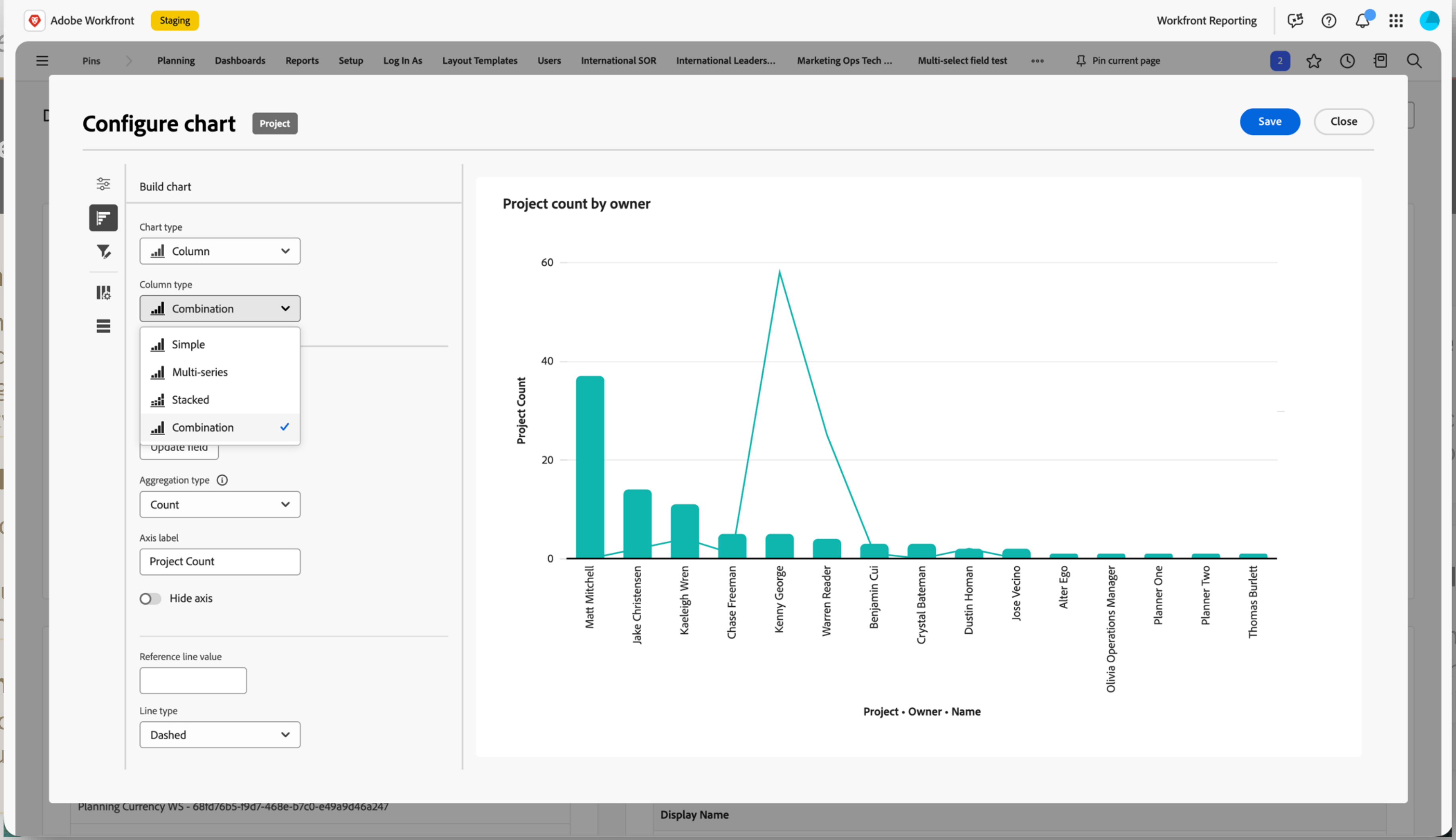
Analysts c tool to bu need.

ndent

h with its n type.

le by side

nversion annel, lder.



Want to give feedback on this feature?

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

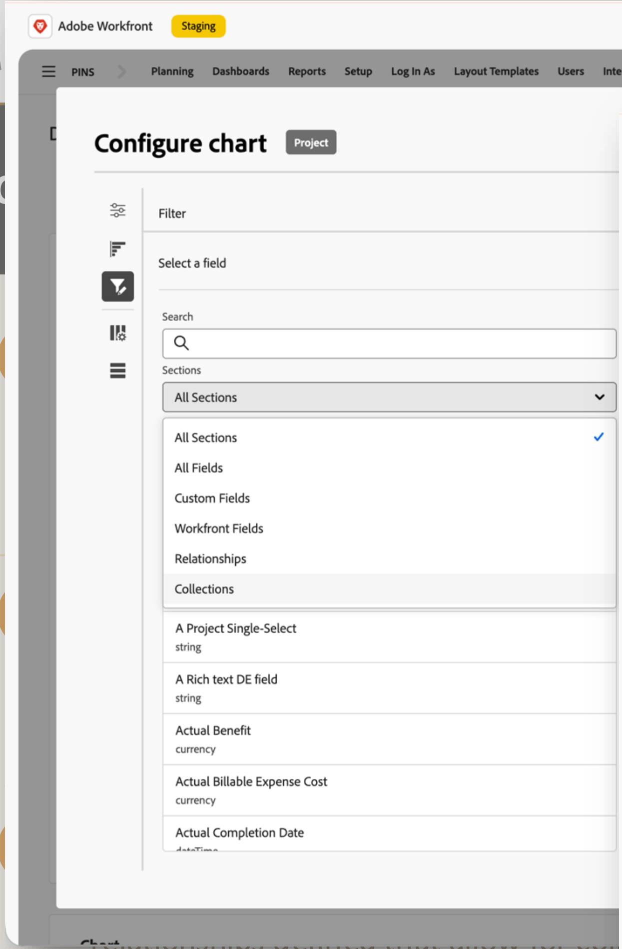
Traversal rules limit users to one level of nesting and one degree of separation with no loop-backs.

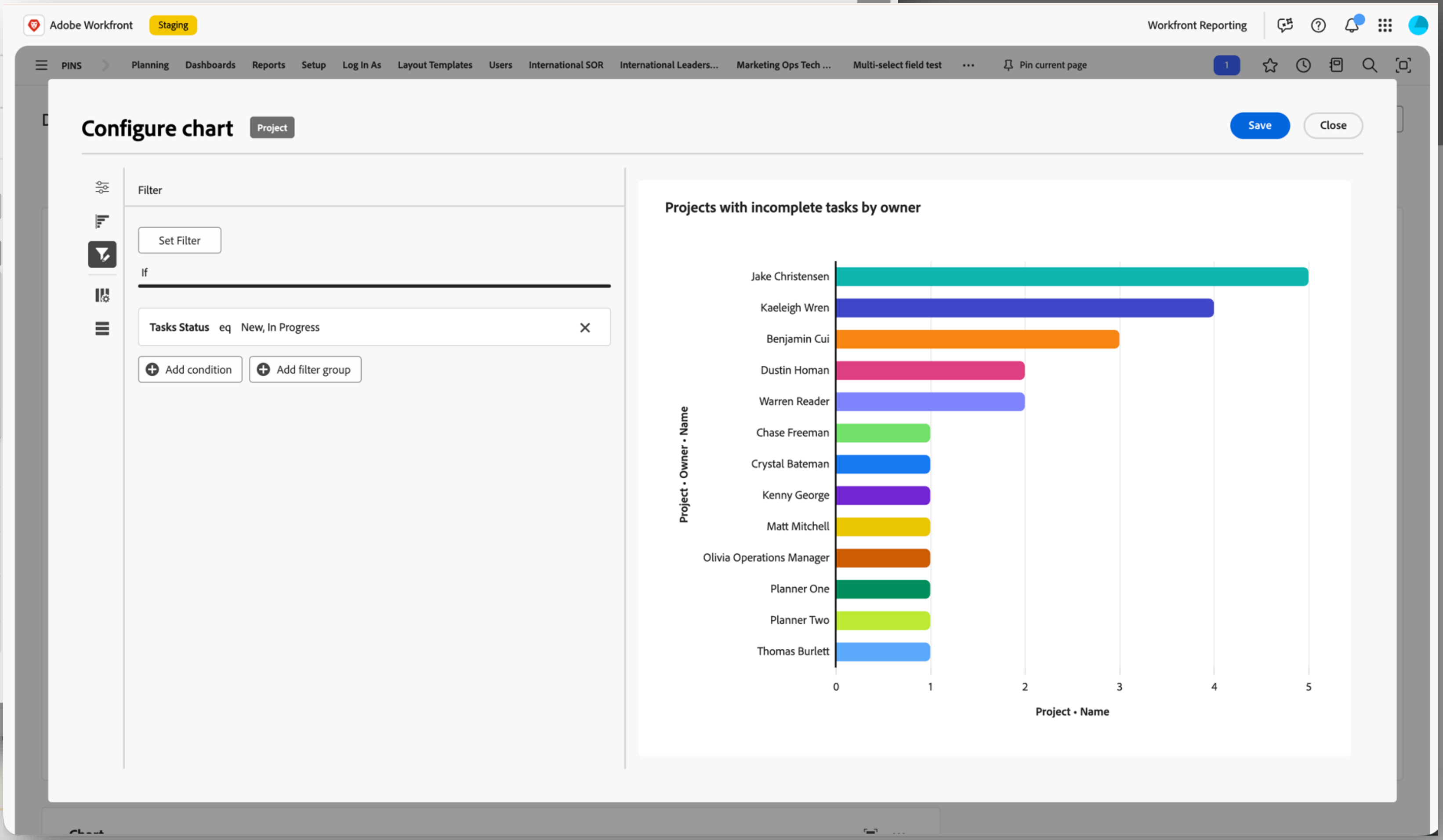
Independence from textmode

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

Want to give feedback on this feature?

Introducing: Filtering on Collections





relationships to be used in filters.

Adobe

Want to give feedback on this feature?

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.

CANVAS REPORT CAPABILITY

Want to give feedback on this feature?

Introducing: Collections in Table views

From hidden

Current exp

1 Require

For class query syn configura

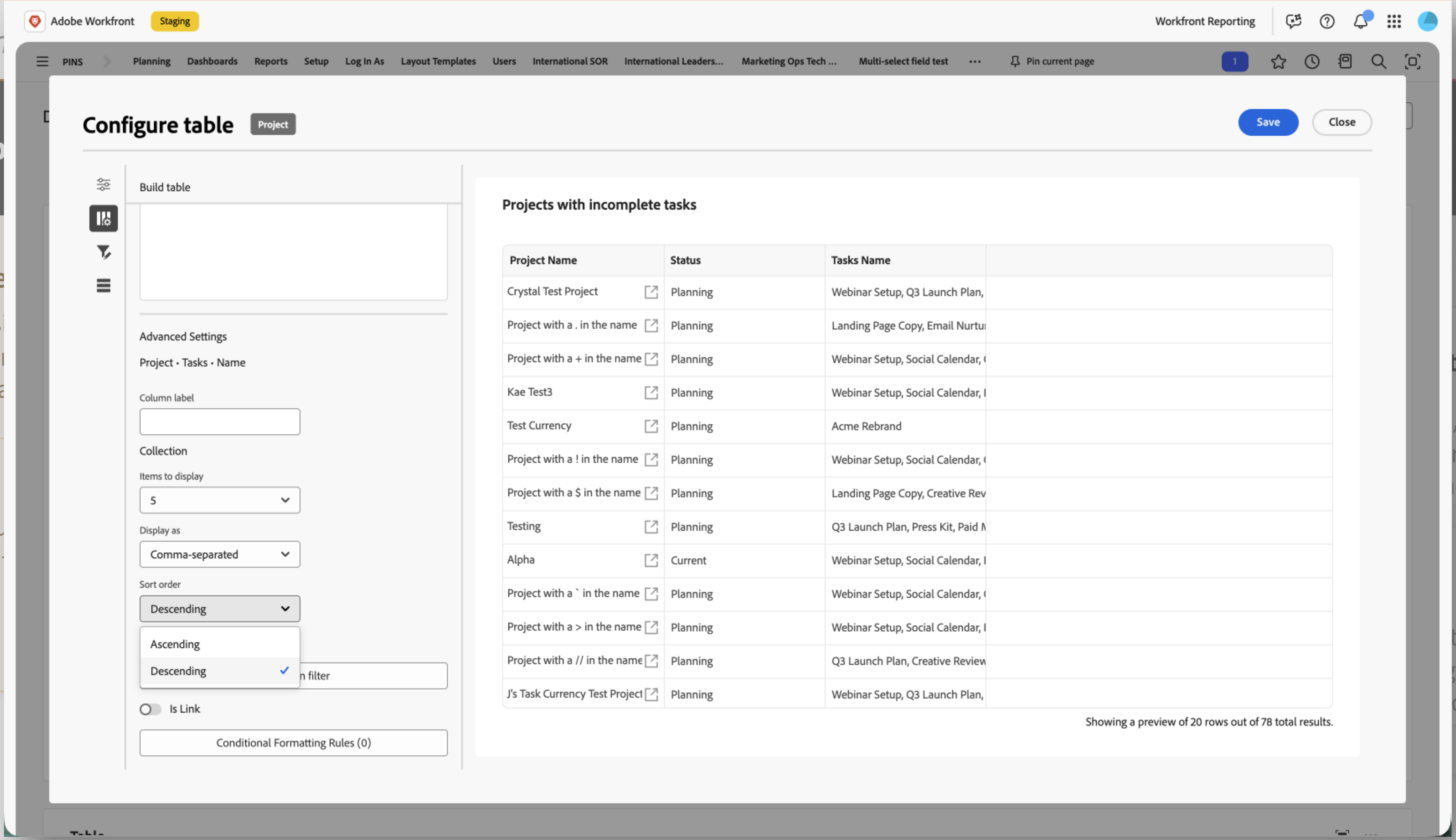
2 Canvas

When pu appears creating column.

ts

, 5, 10, or All rol over the deoff.

to the sub- the focus of ct.



Want to give feedback on this feature?

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.

Want to give feedback on this feature?

Introducing: Copy Dashboard

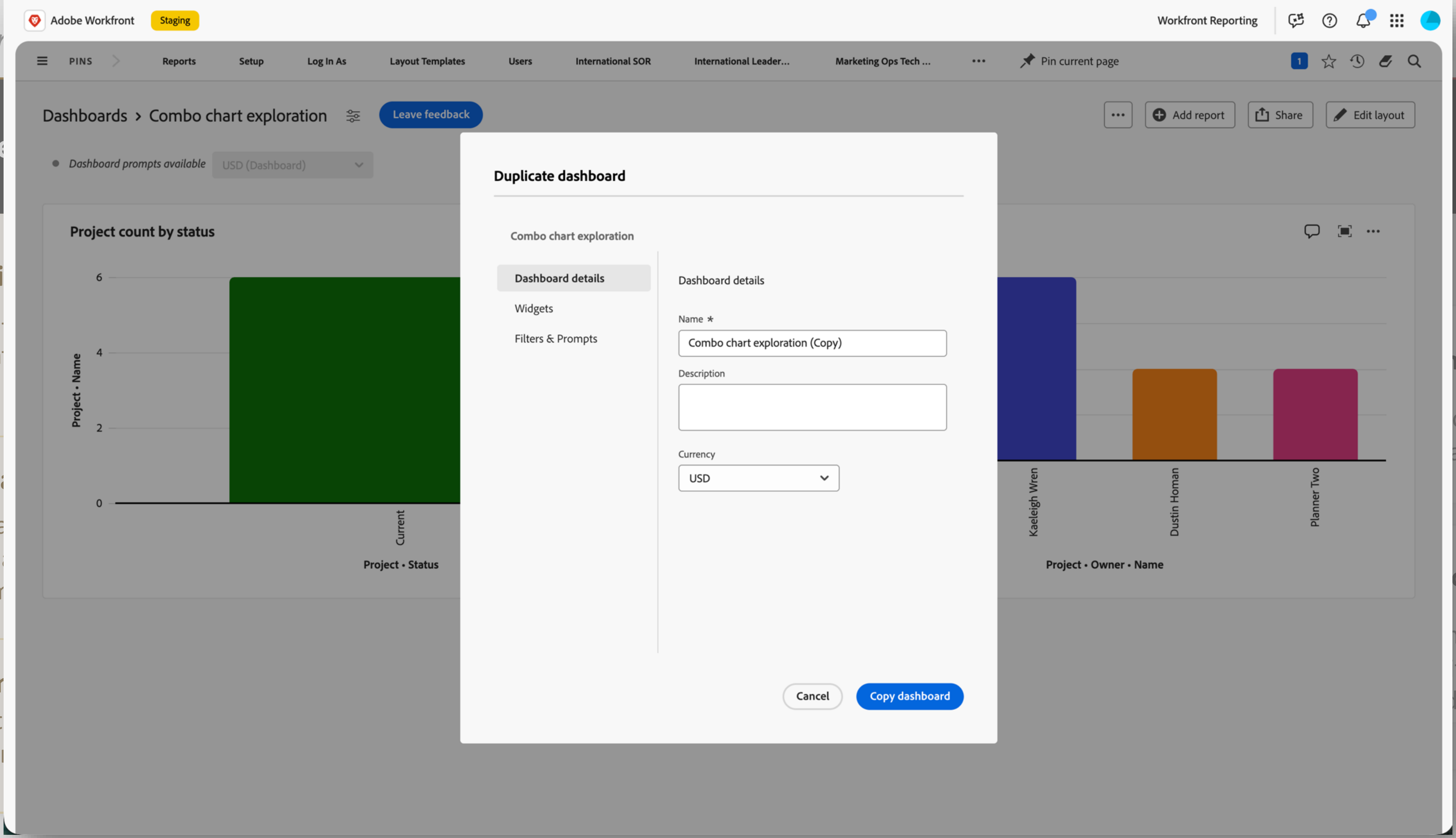
Spend less ti

Current expe

1. **Rebuildi**
   Audience-
   be recrea

2. **Over-sha**
   Without a
   a single d
   content m

3. **Reportir**
   Organizat
   spend sig
   duplicate



hat Copies

ource
and prompts

ork

med with
ts the same
ds.

Want to give feedback on this feature?

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.

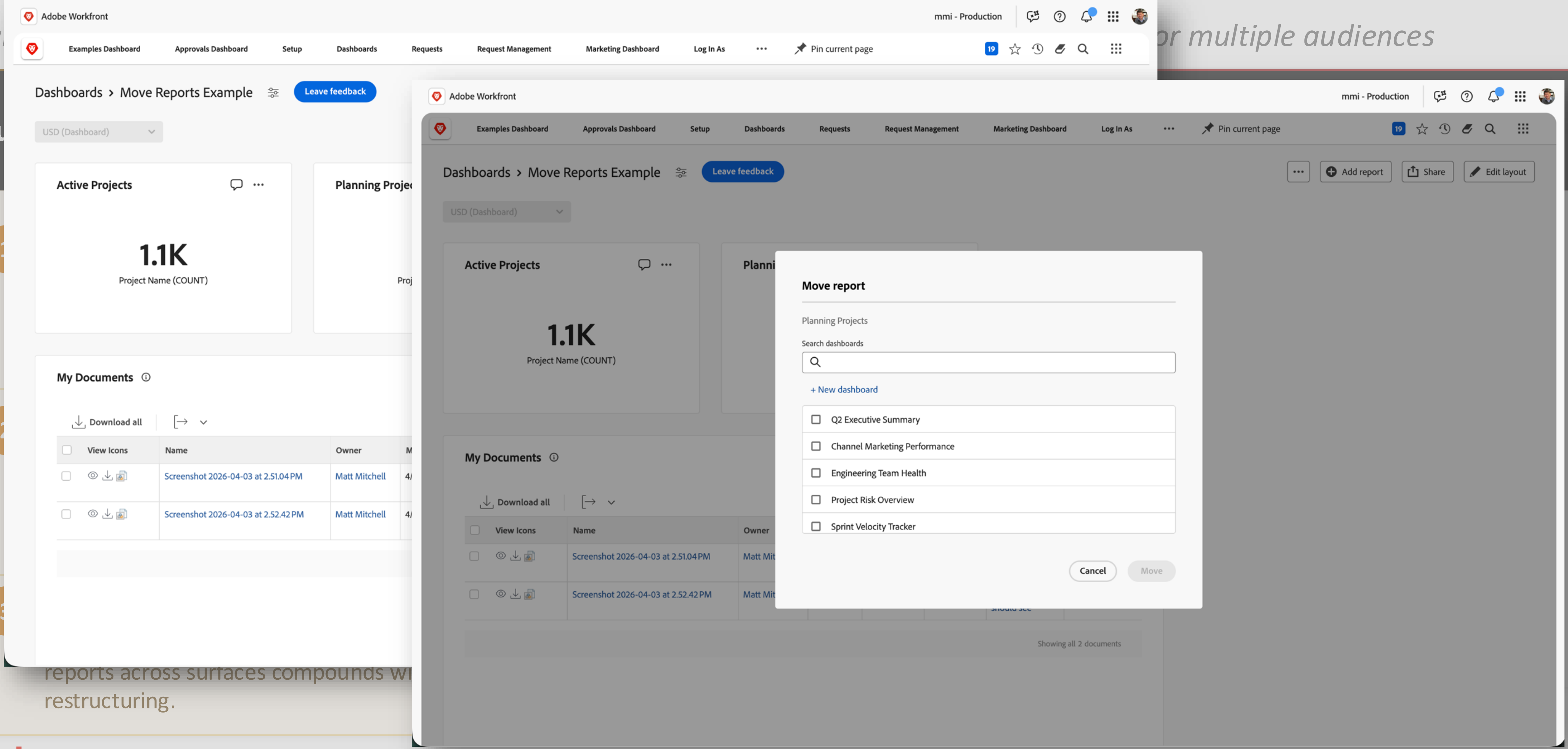
Adobe

Want to give feedback on this feature?

Introducing: Move Widget

Bu... ...or multiple audiences

Cu



reports across surfaces compounds w... restructuring.

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.

New objects with custom data are reportable

Expanding cu

Current expe

1 **Reportin**

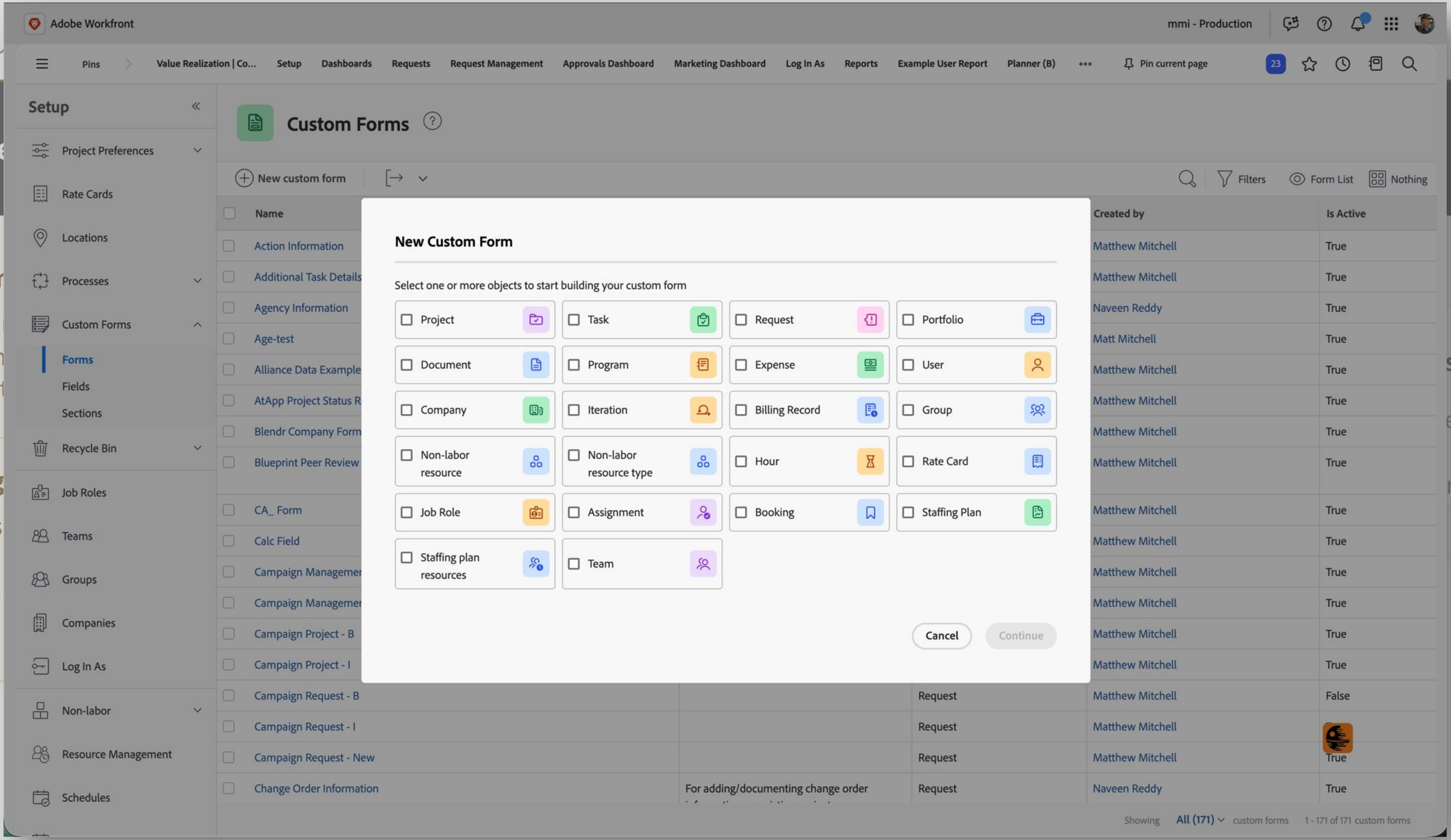
In classic
objects th
are report

2 **Filtering**

In Canvas
group, or
underlyin
supports.

s dataset

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.

Adobe

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 and join a chapter!

https://usergroups.adobe.com/

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

Thank you!

Adobe

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	✓	✗