

Understand built-in project filters activities

Activity: Create a project filter

You want to see all the active projects you own, where “active” means the project status equates with Planning or Current. In the Projects area, create a project filter named “Active Projects I Own.”

Answer

Your filter should look like this:

The screenshot shows the 'Set Filter Rules for your Report' interface. At the top, there is a filter name input field containing 'Active Projects I Own'. Below this, the instruction 'Only show me Projects in which the...' is displayed. The main configuration area contains two filter rules. The first rule is 'Project >> Owner ID' with the operator 'Equal' and the value '\$\$USER.ID'. The second rule is 'Project >> Status Equates With' with the operator 'Equal' and the values 'Current' and 'Planning'. An 'AND' button is positioned between the two rules. At the bottom, there is a link to '+ Add another Filter Rule'.

Active Projects I Own

Set Filter Rules for your Report
Only show me Projects in which the...

Project >> Owner ID Equal \$\$USER.ID

AND

Project >> Status Equates With Equal Current Planning

+ Add another Filter Rule

You can include additional filter rules, such as looking for projects in a certain program or portfolio. When you do that, Workfront recommends you rename the filter to something appropriately descriptive, like “Active Projects I Own in the Marketing Portfolio.”