

Mastering Business Rules & Validation Logic in Adobe Workfront

Adobe Workfront Customer Success & Content Supply Chain | May 7, 2026



This session is being recorded.

Keep an eye out for a follow-up email after the event (from csatscale@adobe.com) with a summary and links to the recording, slide deck, and more.

Introductions



Tina Craig

Principal Business
Consultant, Content Supply
Chain



Jade Walter

Senior Business Consultant,
Content Supply Chain



Nichole Vargas

Workfront Scale Customer
Success Team



Leslie Spier

Workfront Scale Customer
Success Team



Cynthia Boon

Workfront Scale Customer
Success Team

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- During our free virtual events. View the calendar of [Events](#) on Experience League.
- On Experience League. Tag us on the [Community](#)
- On LinkedIn

Agenda

This interactive workshop is designed for Workfront administrators and advanced users who want to harness the full power of business rules and validation logic to ensure data integrity, streamline workflows, and enforce organizational policies. Attendees will learn how to create, configure, and test Business Rules that automate validations and prevent unwanted changes across Workfront objects. The session will also cover advanced Validation Logic for custom forms, including conditional requirements and error messaging, with practical examples and live, hands-on exercises.

Topic

What is Validation Logic?

Validation Logic: Step-by-Step

Validation Logic Use Cases

Additional Advanced Logic

What Are Business Rules?

Business Rules: Step-by-Step

Business Rules Use Cases

Tips, Best Practices, and Troubleshooting

Q&A

Resources

Validation Logic is used on custom fields and prevents users and API calls from **submitting or updating custom forms.**

Business Rules are configured in setup and prevent users and/or API calls from **creating, deleting, or editing objects.**

What is Validation Logic?

Validation Logic is used to check that information entered into Workfront meets specific criteria before allowing users to save or submit forms, thus reducing errors and standardizing data collection.

- **Purpose:** Validation logic ensures that users provide accurate, complete, and consistent data by blocking form submission or updates when certain conditions are not met.
- **How They Work:** Administrators build validation expressions using IF-statement formulas to define when a field or form should trigger an error message. When the validation fails, users see a clear message and are prevented from saving until the issue is resolved.
- **Administration:** Validation is managed within the custom form designer in Workfront and should always be tested in a sandbox environment before being enabled in production. Validation logic is not supported in the form designer preview mode.
- **Scope:** Validation logic can be applied to various field types in custom forms, such as single-line text, dropdowns, checkboxes, dates, and more.

Validation Logic: Step-by-Step

If the field with the logic applied meets the defined validation conditions when a user fills out the custom form, the field is highlighted and the error message is displayed.

IF(Defined Condition, “Error message”)

You can apply validation logic to the following field types: single line text, paragraph, single-select dropdown, multi-select dropdown, external lookup, typeahead, date, checkbox group, and radio buttons.

TC - Advanced Logic Examples

Editing

Please review and correct the highlighted fields

No Special Characters

(\$%^(\$&%

Please remove special characters.

10 Character Limit

hjadfigrulkjetlgnsljslfkgj

10 character limit exceeded

Date must be in the future

May 5, 2026

Date cannot be in the past

Start Date

May 8, 2026

End Date cannot be before Start Date

Choose no more than 2 options

Please only choose up to 2 options

All

Choice 1

Choice 2

Choice 3

Choice 4

Choice 5

Choose at least 2 options

Please choose at least 2 options

All

Choice 1

Choice 2

Choice 3

Choice 4

Choice 5

Validation Logic: Use Cases

Character limit exceeded:

```
IF(LEN({DE:Field X})>200,"200 character limit exceeded")
```

Earliest possible date is X (based on entry date once submitted):

```
IF(!ISBLANK({entryDate})&&!ISBLANK({DE:Date})&&{DE:Date}<ADDDAYS({entryDate},13),CONCAT("Please allow two weeks from date of request entry. The soonest possible date is ",ADDDAYS({entryDate},15),  
IF(ISBLANK({entryDate})&&!ISBLANK({DE:Date})&&{DE:Date}<ADDDAYS($TODAY,13),CONCAT("Please allow two weeks turnaround time. The soonest possible date is ",ADDDAYS($TODAY,15)  
))
```

Only allow users with a specific role to enter data in the field.

```
IF({DE:OpEx Budget}>10000&&{DE:Budget Approver}.{roleID}!='82eca5203c804b60bd2f0313592f25ce',  
"Approver must be a Program Director to approve budgets greater than $10,000.")
```

Validation Logic: Use Cases

No special characters

IF(CONTAINS("~",{DE:No Special Characters}) || CONTAINS("'",{DE:No Special Characters}) || CONTAINS("!",{DE:No Special Characters}) || CONTAINS("@",{DE:No
Special Characters}) || CONTAINS("#",{DE:No Special Characters}) || CONTAINS("\$",{DE:No Special Characters}) || CONTAINS("%",{DE:No Special Characters}) ||
CONTAINS("^",{DE:No Special Characters}) || CONTAINS("&",{DE:No Special Characters}) || CONTAINS("*",{DE:No Special Characters}) || CONTAINS("({DE:No Special
Characters}) || CONTAINS(")",{DE:No Special Characters}) || CONTAINS("+",{DE:No Special Characters}) || CONTAINS("=",{DE:No Special Characters}) ||
CONTAINS("{",{DE:No Special Characters}) || CONTAINS("}",{DE:No Special Characters}) || CONTAINS("[",{DE:No Special Characters}) || CONTAINS("]",{DE:No Special
Characters}) || CONTAINS("|",{DE:No Special Characters}) || CONTAINS("\\",{DE:No Special Characters}) || CONTAINS(":",{DE:No Special Characters}) ||
CONTAINS(";",{DE:No Special Characters}) || CONTAINS('',{DE:No Special Characters}) || CONTAINS("<",{DE:No Special Characters}) || CONTAINS(",",{DE:No Special
Characters}) || CONTAINS(">",{DE:No Special Characters}) || CONTAINS("?",{DE:No Special Characters}) || CONTAINS("/",{DE:No Special Characters}) ||
CONTAINS(".",{DE:No Special Characters}), "Please remove special characters.")

****this is based on your custom field called "No Special Characters"**

Additional Advanced Logic

Only available on
Workflow Ultimate Package

Logic Type	Description
 Advanced Display	You can use advanced display logic to control the visibility of custom form sections based on user roles and the visibility of a field based on another field's status.
 Default Value	Default value logic allows you to configure default values for custom form fields, using formulas. The default value is displayed when the defined conditions are met. A default value can be a static value or a dynamic value that references other fields within the object. Although the default value can reference other fields, it will not change as other fields on the form change. NOTE: A default value is applied only once to a custom field, when the custom form is attached to the object. If the default value formula is dependent on the value of another field, then the value in the other field must already exist when the custom form is attached.
 Formatting	Formatting logic highlights a field value when it meets the defined conditions. The applied formatting will work on multiple fields at once. You can add up to five formatting rules per field. The color options are \$\$POSITIVE (green), \$\$INFORMATIVE (blue), \$\$NEGATIVE (red), \$\$NOTICE (orange), and the other formatting options are \$\$BOLD, \$\$ITALIC, \$\$UNDERLINE. Only one color option is allowed, along with up to three other formatting options. If no color option is specified, the system's default color is applied.
 Editability	Editability logic determines whether a custom form field can be edited or whether it is read-only. This logic is built using formulas, and when the field meets the defined conditions, it can be set as editable or read-only.

What are Business Rules?

Business Rules are a powerful feature that allows administrators to enforce organizational policies, ensure process compliance, and improve data quality within the platform by preventing users from creating, editing, or deleting objects in Workfront when certain conditions are met.

- **How They Work:** Each rule is based on a condition (IF statement). If the condition is met, an error message is displayed and the action is blocked. The system permits **one business rule per object per trigger**. For example, one edit trigger rule is allowed for issues. However, you can include multiple rules in a formula with nested IF statements.
- **Administration:** Rules are managed from the Setup area in Workfront and should always be tested in a sandbox environment before being enabled in production. The syntax for the properties and other functions in a business rule is the same as the syntax for a calculated field in a custom form.
- **Priority:** Business Rules can prevent even a system administrator from violating organizational policies and are still dependent on user permissions and access to objects.

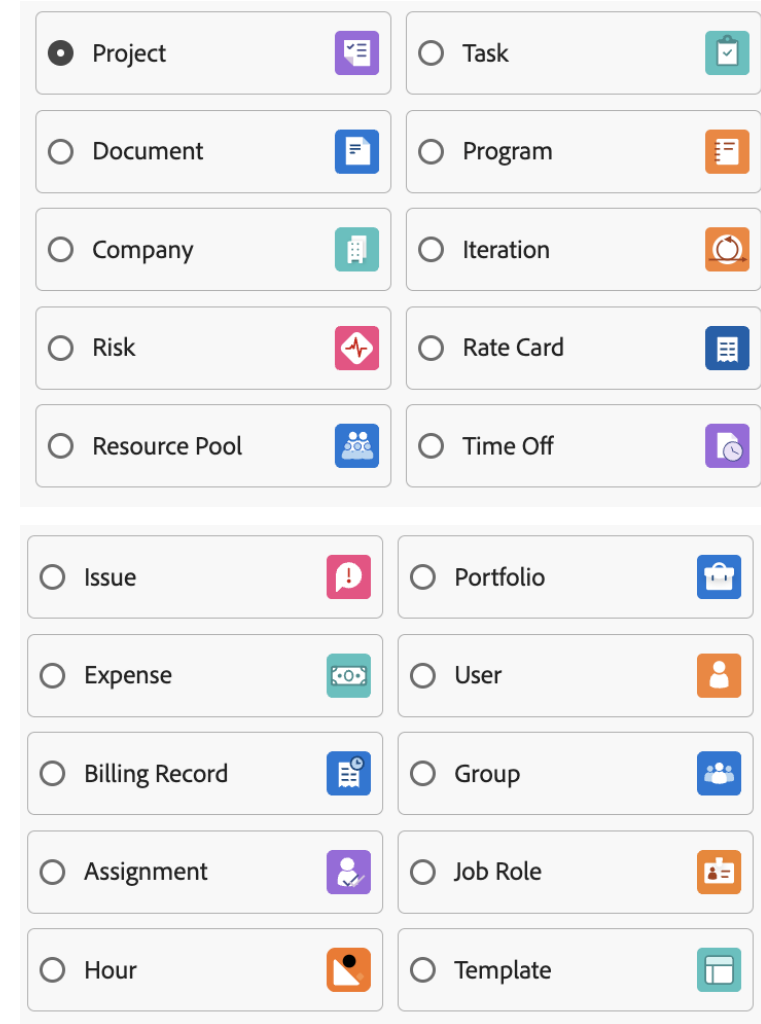
Only available on
Workflow Ultimate Package

Business Rules: Step-by-Step

The format of a business rule validation is “**IF the defined condition is met, then the user is prevented from the action on the object, and an error message is displayed.**”

IF(Defined Condition, “Error message”)

- **\$\$BEFORE_STATE** and **\$\$AFTER_STATE** wildcards are used in expressions to access the object’s field values before and after any edits.
- **\$\$ISAPI** – Allows you to enforce the rule only for objects being created, edited, or deleted through Fusion (or using the API)
- **!\$\$ISAPI** – Allows you to enforce the rule only for users in the user interface. Fusion can bypass the rule.



Business Rules: Use Cases

Prevent users from accidentally deleting request queues:

```
IF({status}='QUE',"Cannot delete a project with status of Request Queue",  
  
IF({programID}='6659f9ca008730efbda781325344daf7',"Cannot delete a project in the Request Queues program",  
  
IF({queueDef}.{isPublic})!='0',"Cannot delete a request queue project"  
  
)))
```

Prevent users (but not Fusion) from editing requests that have been converted to projects:

```
IF(!$$$ISAPI && !ISBLANK({resolveProjectID}),"You cannot modify requests that have been converted into projects. Please navigate to the converted project to make any updates.")
```

Prevent users from submitting a request without a document attached:

```
IF({projectID}="6508c04a0013f0d78fb935a9bbf23896" && {hasDocuments}=false,"You must attach a file in the Documents section before submitting your request.")
```

Tips, Best Practices, and Troubleshooting

- **Always test in a sandbox or preview environment prior to production**
- Include in the validation that it should only run if the field is not blank or does not equal zero, or it will display an error when the form is opened.
- Validation DOES work when in-line editing in a report and when bulk editing objects.
- If a field is used on multiple forms, and those forms are used on the same objects, then the validation logic must match - similar to calculated fields.
- You can use object references. For example, fields or selections that can only be made by the Project Owner can utilize {owner}.{name} in both the logic and the error message.
- You can build in an override option by adding a field to the form with validation applied that only certain users can select the override.
- With validation logic on typeahead fields, you can validate against the typeahead object's data. Example: {DE:Typeahead User}.{role}
- Validation logic cannot be tested in Custom Form Preview. You must add the form to an actual object and test it live.
- You may only apply one business rule per trigger per object type. It is recommended that each organization keep a living document of their business rules, broken out by trigger and object type, to maintain governance.
- The error message does not currently display in the same fashion on every page in Workfront.
- Business Rules will apply to everything under the selected object, so use your IF statement to filter objects down.
- Access level/sharing rules take precedent (aka, if a user can't edit a project, business rules that may allow for project editing will not apply)
- When multiple business rules are applied to an object, all rules are followed but in no certain order
- Business Rules will apply to system admins. Use `$$USER.{accessLevelID}!="sysadmin ID"` if you want system admins to bypass a rule
- Leverage the Business Rule's description to indicate which groups are using that rule and provide a quick summary of the rule's intent
- Business Rules will apply to the API. Use `!$$ISAPI` to allow Fusion to take the action you are preventing end users to take.

Q&A

Raise your hand to come off mute or post your question in the chat pod!

Resources

- [Add validation logic to custom forms](#)
- [Configure Advanced Display Logic](#)
- [Create and edit business rules](#)

Calculated Expressions Tutorials & Resources

- [API Explorer](#)
- [Overview of calculated data expressions](#)
- [Things to know about calculated field expressions](#)
- [Learn the data expression structure](#)
- [“IF” statements overview](#)
- [Create an IF text expression](#)
- [Use the ISBLANK and CONTAINS expressions](#)
- [Wildcard filter variables overview](#)
- [Condition operators in calculated custom fields](#)

Webinar Feedback

Please complete [this short survey](#) to share feedback on today's webinar. Responses are anonymous, so transparency and honesty are appreciated!



Workfront Updates

The Workfront Wire



We are SO excited to introduce [The Workfront Wire](#), a new monthly newsletter now available on the Experience League Community published by your Customer Success team!

- Self-serve resource and go-to-source for all things Workfront (pinned every month to the top of the feed)
- News, updates, and upcoming events
- We heard you – you missed the Workfront Customer Newsletter!
- All personas can take advantage – System Admins, Group Admins, Power Users, etc.
- Ask questions and request topic(s) for future newsletters

This was designed for YOU, so let us know what else you want or need to make it more valuable!



The screenshot shows a community post titled "The Workfront Wire, May 2026 - Your Go-To Source for News, Updates & Events". It is pinned and has 1 reply and 0 views. The author is NicholeVargas, an Adobe Employee, who posted it 42 minutes ago. The post features a red banner with the Adobe logo and the text "May 2026 | Adobe Customer Success The Workfront Wire". The main text welcomes users to the first edition of the newsletter, describes it as a monthly roundup of news, updates, and events, and lists four key announcements from Adobe Summit: Workflow Optimization Agent, AI Collaborators, Advanced Enterprise Operations, and Unified Review & Approval. It also promotes the Adobe Workfront Champion program and provides a link to apply.

The Workfront Wire, May 2026 - Your Go-To Source for News, Updates & Events

Translate All 1 reply · 0 views

NicholeVargas
Adobe Employee · 42 minutes ago

Adobe

May 2026 | Adobe Customer Success
The Workfront Wire

Welcome to the VERY FIRST edition of the Workfront Wire!

This is your new monthly roundup built just for Workfront customers. Think of this as your one-stop-shop for the latest news, updates, events, and everything happening across the Workfront world. Each month, we'll bring you what's new, what's next, and what you should know to get the most out of Workfront, without having to dig for it. Let's get into it, and we'll see you again next month for the next edition of the Wire.

Adobe Summit: 4 Key Workfront Announcements You Should Know

Last week at Adobe Summit, Workfront announced FOUR key updates focused on AI-driven workflow execution, enterprise operations, and more connected planning and review experiences:

- [Workflow Optimization Agent](#): AI that turns ideas and documents into structured plans, automates updates, speeds approvals, and delivers cross-system insights in Workfront.
- [AI Collaborators](#): Invokes an existing agent to execute work, leveraging instructions and context, and operates as a permissioned user in Workfront. The first (of many) AI Collaborators, the Content Reviewer, checks content against brand guidelines to speed and improve reviews.
- [Advanced Enterprise Operations](#): New capabilities for financial, resource, and governance management with real-time profitability insights and stronger enterprise controls.
- [Unified Review & Approval](#): brings together Workfront and Frame.io into a single, connected experience to centralize feedback, sync assets and versions, and accelerate approvals with real-time visibility across tools.

Apply to become an Adobe Workfront Champion!

The Adobe Champion Program is a prestigious opportunity for top users of Adobe solutions, including Workfront, to share their expertise, influence product innovation, and connect with a global community of leaders. For Workfront practitioners, it's a chance to showcase how you're driving smarter planning, collaboration, and execution across your organization while helping shape the future of Workfront.

Applications are open now through June 5, 2026. Don't miss your chance to get involved. [Apply today!](#)

Applications are OPEN: Adobe Workfront Champion Program

The Adobe Champion Program is a prestigious opportunity for top users of Adobe solutions, including Workfront, to share their expertise, influence product innovation, and connect with a global community of leaders. As an Adobe Champion, you'll enjoy a wealth of benefits, including:

- **Knowledge sharing and networking**
- **Direct collaboration with Adobe:** Influence product roadmaps, participate in betas, and help develop product-specific certification exams.
- **Exclusive opportunities:** Gain speaking, content creation, thought leadership, and personal branding opportunities at marquee events
- **Recognition:** Receive custom creative assets and banners to showcase your status as an Adobe Champion
- **Exclusive swag:** Stand out with unique Adobe Champion swag items
- **Adobe Champion Forum:** Invitation to the exclusive 2-day forum hosted at Adobe HQ, for networking with fellow Champions and product leaders

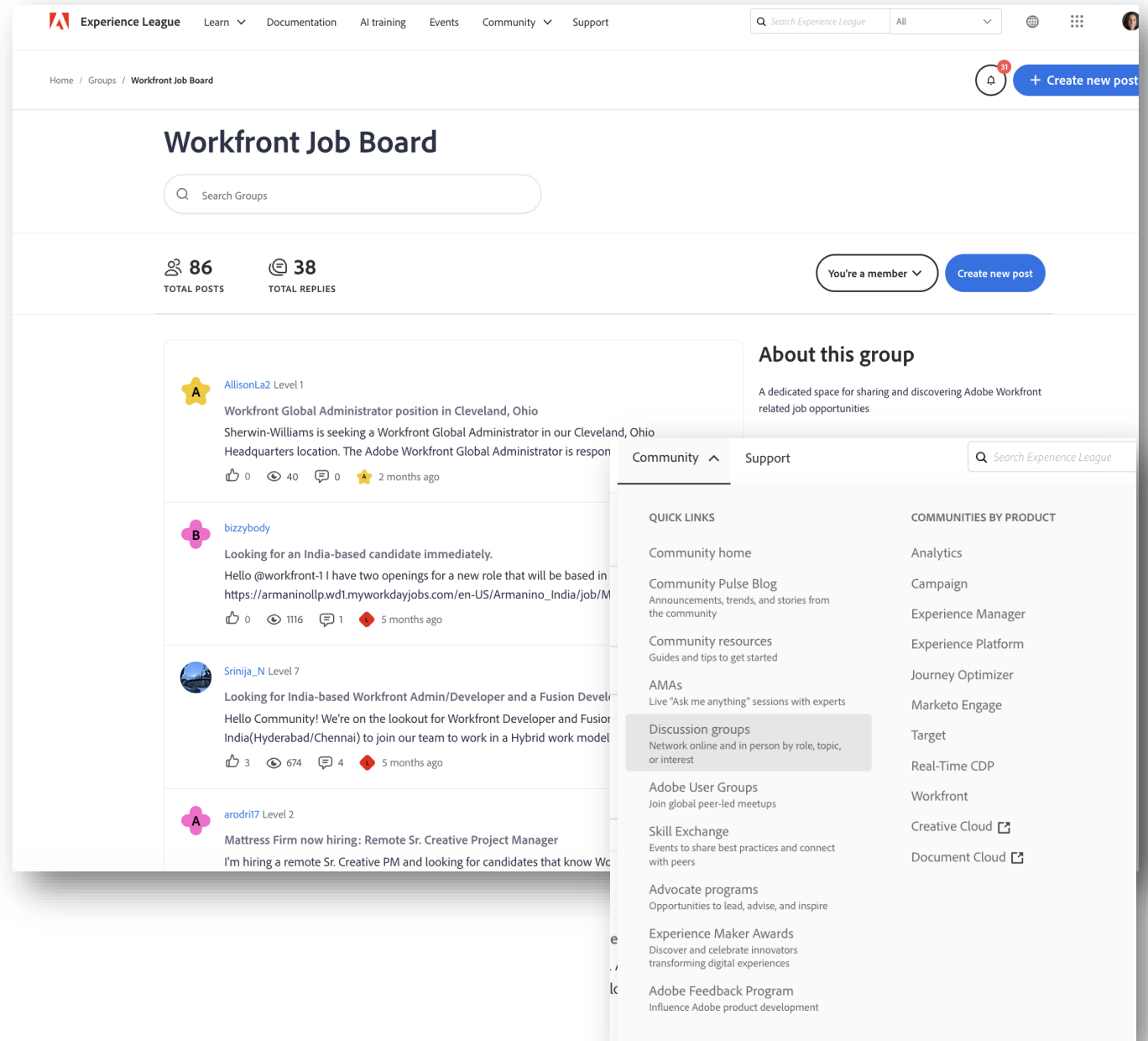


Applications are open now and will close June 5! Don't miss your chance to get involved. [Apply today!](#)

Workfront Job Board

Did you know that the Experience League Community forum has a dedicated Discussion Group where you can post [Workfront-related job openings](#)?

- Anyone can post!
- Find qualified candidates
- Help the broader Workfront Community find their next opportunity
- Increase visibility for open roles within a targeted, skilled audience
- Strengthen connections across customers, partners, and practitioners



FREE Events for Workfront System Administrators

All events are published to the [Events](#) page on Experience League or the [Workfront User Group Events](#) [WUG] homepage (login required). Check back often for updates and to register.

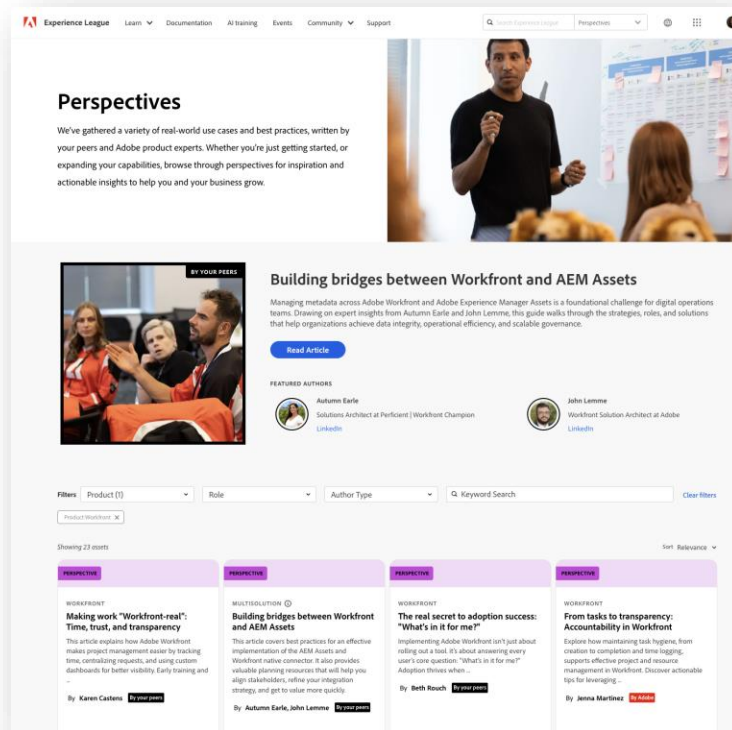
- May 12 at 9:00 a.m. PT – [Spill the Tea: Adobe Summit 2026 Afterparty](#) [WUG]
- May 13 at 8:00 a.m. PT– [Configuring Sustainable Workfront Adoption: From Architecture to Everyday Use](#)
- May 14 at 9:00 a.m. PT– [Unlock the Adobe Champion Advantage: Who It's For, What It Takes, and How to Apply](#)
- May 14 at 9:00 a.m. PT– [Reimagining Work with AI: What's Next for Workfront](#) [WUG]
- May 18 at 8:00 a.m. PT - [Driving Value: Introducing Advanced Enterprise Operations Capabilities in Workfront](#)
- May 21 at 9:00 a.m. PT - [Inside the Workfront Admin Role: 10 Lessons from My First Two Years](#)
- May 28 at 8:00 a.m. PT - [Workfront Planning Global Record Types Explained: When, Why, and How to Use Them](#)
- [In-Person] June 3 at 11:00 a.m. ET - [Atlanta: Workfront Lunch & Learn with Customer Success](#)

Have a topic you'd like to see added to the list? Send us an email at csatscale@adobe.com.

Perspectives: Peer-Driven Content



Did you know there is a dedicated section on Experience League for peer-driven content? It's call [Perspectives](#) (found under the dropdown, Learn). Since February 2026, there have been EIGHT – yes 8 – new real-world use cases and best practice recommendations published by your peers and Workfront Champs:



- [Resourcing at a glance: Instant insights dashboard](#)
- [From chaos to order: Shaw's Workfront PMO transformation](#)
- [Two admins. Two companies. One Workfront.](#)
- ["Help me help you": From support queue to adoption](#)
- [Growing through Workfront: Real admin lessons](#)
- [The real secret to adoption success: "What's in it for me?"](#)
- [Building bridges between Workfront and AEM Assets](#)
- [Making work "Workfront-real": Time, trust, and transparency](#)

Thank You!

Keep an eye out for a follow-up email from csatscale@adobe.com in the next few hours!

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