

Fast Track Efficiency: Data Imports with Workfront Fusion

Adobe Workfront Customer Success & Professional Services | August 19, 2025



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.



Today's Agenda

Join us for a hands-on workshop hosted in partnership with Brian Haight, Principal Consultant, Adobe Professional Services, where we'll dive into the power of using .CSV files with Workfront Fusion. Whether you're looking to streamline data imports, automate exports, or build repeatable data workflows, this session will give you the practical tools to get started.

This session is designed to be interactive, so we encourage you to follow along in your own Workfront Fusion environment. Brian will walk through real-world use cases, show how to map and transform data from .CSV files, and share expert tips for building scalable automation solutions.

Start Time	11:30 a.m. PT/2:30 p.m. ET
2 minutes	Welcome & Introductions
15 minutes	Importing a CSV to Create Tasks
10 minutes	Importing a CSV to Create Custom Field Values
10 minutes	Exporting a CSV to a Workfront File
5 minutes	Demo: Use an intake queue to import a CSV file
10 minutes	Q&A
3 minutes	Wrap Up & Survey
End Time	12:30 p.m. PT/3:30 p.m. ET

Follow along as we go:

Download the following files to easily follow along in your Workfront Fusion instance for this workshop:

- File 1: [Task CSV](#)
- File 2: [Drop down CSV](#)
- File 3: [Fusion CSV Scenario Bundle](#)

All links should automatically download a CSV file (or zip file) with everything you need.



Introductions



Brian Haight

Principal Integration
Consultant, Adobe
Workfront & Fusion



Steve Teitelbaum

Professional Services
Consultant, Adobe
Workfront



Workfront Scale Customer Success Team, csatscale@adobe.com

Nichole Vargas, Leslie Spier, and Cynthia Boon

Available to all customers, you can find or contact us:

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

Example #1: Importing a CSV to Create Tasks

Purpose

1. Show how to create new records from a CSV file using Fusion
2. Use data from the CSV file to look up required information (job role ID)

Example #1: Importing a CSV to Create Tasks

1. Edit Excel or CSV file
2. Save as CSV file
 - Should open in a text editor as comma-separated values
 - Generally have a quotation text qualifier
3. Upload File to Workfront
4. Copy the Document ID from the URL
 - Add it to the Fusion scenario
5. Create or navigate to a project and copy the Project ID from the URL
 - Add it to the Fusion scenario
6. Run the Fusion scenario to add tasks

Example #2: Importing a CSV to create parameter values

Purpose

1. Show how to create form field values
2. Utilize custom API calls to search for and create uncommon records

Example #2: Importing a CSV to create parameter values

1. Edit Excel or CSV file
2. Save as CSV file
 - Should open in a text editor as comma-separated values
 - Generally have a quotation text qualifier
3. Upload File to Workfront
4. Copy the Document ID from the URL
 - Add it to the Fusion scenario
5. Create or navigate to a project and copy the Project ID from the URL
 - Add it to the Fusion scenario
6. Create or locate the dropdown form field
 - Get the ID from the "Fields" area by adding "ID" to the view. Add the ID to the Fusion scenario.
7. Run the Fusion scenario to add Parameter IDs

Example #3: Exporting a CSV to a Workfront file

Purpose

1. Start with a Workfront search to gather data from Workfront
2. Look up additional information with an additional search
3. Use a data structure for CSV columns
4. Export search-based data to a CSV file and upload it to Workfront

Example #3: Exporting a CSV to a Workfront file

1. Create or navigate to a project and copy the Project ID from the URL
 - Add the ID to the Set Scenario Variables module
2. Create or navigate to a Portfolio and copy the Portfolio ID from the URL
 - Add the ID to the Set Scenario Variables module
3. Add the CSV file name to the Set Scenario Variables module
4. Run the scenario to export the project

Demo: Using a request queue to import an emailed CSV file

Purpose

1. How can a request queue be utilized to import a regularly emailed CSV file?

How it works

1. Create a request queue
2. Enable Request Intake via Email
 - `csv_import_bh@intake1.my.workfront.com`
3. Set up a Fusion scenario to process incoming requests
 - New issue for the queue project ID
4. Get the incoming document attachment and process CSV records

Q&A

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

Workfront Fusion Resources

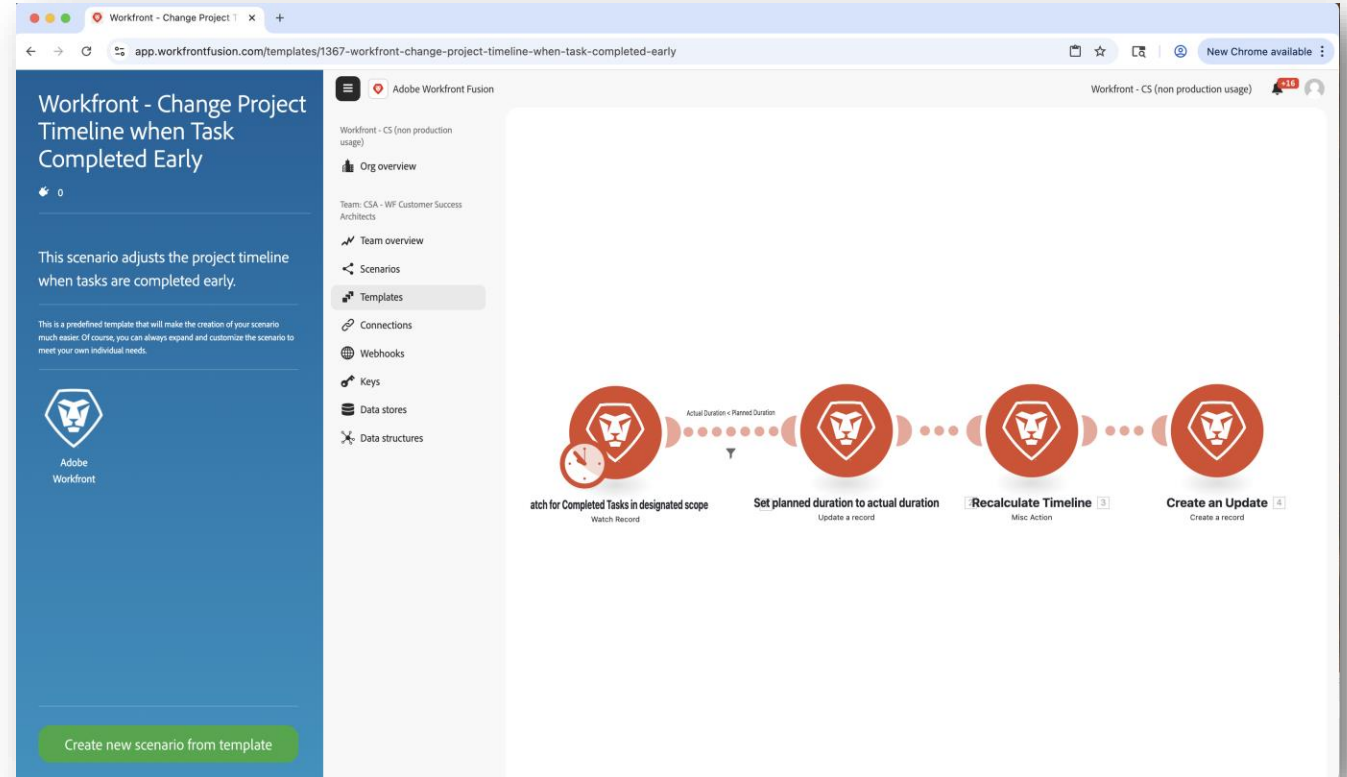
Experience League, Community, and more



NEW! Fusion Template – Change Project Timeline when Task Completed Early

This template is designed to support organizations that follow a more flexible, “plan-as-you-go” approach rather than strict PMI-based methodology for Project Management.

- If your team struggles to maintain momentum because project timelines don’t adjust dynamically, this solution is for you. Often, when tasks are completed ahead of schedule, it makes sense to accelerate the overall timeline — but manually updating dates can be tedious.
- This Fusion template automates that process. When a task is completed early, all dependent (successor) tasks are automatically rescheduled to start sooner, helping your team move faster and stay agile.



Looking for more info on Fusion Templates?

- [List of Available Fusion Templates](#)
- [View, Edit, or Delete Fusion Templates](#)
- [Fusion Template FAQs](#)

Workfront Fusion Resources

Experience League Documentation

- [Workfront Fusion](#)
- [Get Started with Workfront Fusion](#)
- [Fusion Basics](#)
- [Connections in Workfront Fusion](#)
- Tutorials, [Workfront Fusion training overview](#)
 - [Core Concepts](#)
 - [Initial Scenario Design Walkthrough](#)
 - [Mapping Panel and Formula Editor](#)
- Fusion Templates and Short Videos
 - [List of Available Fusion Templates](#)
 - [Adobe Workfront Fusion video overviews](#)

Adobe Digital Learning Services (\$)

- Sign up for the 3-day, instructor-led course, [Manage Connections and Workflows in Adobe Workfront Fusion](#)
 - Focuses on the role of Adobe Workfront system administrator or API workflow creator
 - Designed for individuals who will be creating scenarios using Workfront Fusion to automate workflows within Adobe Workfront or with external software.
 - Sessions cover such topics as Workfront Fusion basics, modules, apps, workflow creation, and error handling so you can connect Workfront to other business-critical applications.
 - Note: Your organization must purchase Workfront Fusion prior to you attending this course.

Workfront User Group Updates

Workfront User Groups (WUGs) are your chance to connect locally with other admins!

Coming to an area near you:

- [Philadelphia](#): Virtual Meeting (8/20)
- [Utah](#): Virtual Meeting (8/26)
- [Colorado](#) [& surrounding areas]: Virtual Meeting (8/27)
- [Ohio](#): Virtual Meeting (8/28)
- [Skill Exchange After Party/ "Mega-WUG" \(9/10\)](#)
- [Boston](#): Virtual Meeting (9/15), Social Hour (9/17)

These groups have kicked off and will have more soon!

[Central](#) [MO, AR, IA, KS, NE, OK] | [DC/Maryland/Virginia](#) | [Michigan](#) | [New York City](#) | [Pittsburgh](#) | [So. California](#)

Have you signed up yet? Be sure to check the [Chapters page](#) for updates on new chapters in your area.

The screenshot displays two overlapping interface elements from the Adobe Workfront community. The top element is a post titled "The Adobe Workfront User Group – Ohio Chapter is now live!" by KierstenKollins, dated 7/18/25. Below the post is a promotional banner for the "WUG-CENTRAL Boost Your Workfront Adoption: Strategies & Best Practices" event, scheduled for August 12, 11:00 – 11:45 AM (CDT). The banner features a graphic of white paper airplanes flying upwards against a dark blue background. The bottom element is a detailed event page for the "Adobe Workfront User Group Philly Chapter Kickoff Event" on Wednesday, August 20th, from 12:00 to 12:45 PM EST. This page includes the event title, date, time, and a description: "Ready to be part of something great? Join us for the Philadelphia Workfront User Group (WUG) Kickoff on Wednesday, August 20th at 12PM! Whether you're a seasoned Workfront expert, a process-driven project manager, or a new adopter eager to learn, this is your chance to connect with others who share your enthusiasm for Workfront. We'll focus on introductions during this interactive kick-off call and brainstorm ideas for upcoming events." It also includes the text "Come with your questions, a learning mindset, and your passion for Workfront!" and a link to the event page.

Join the Skill Exchange Virtual Event in August!

EXPERIENCE MAKERS
THE SKILL EXCHANGE

Join us for ***Experience Makers The Skill Exchange***, a free virtual learning event. Learn tips, tricks and best practices from those who know it best - industry and Adobe experts.

With over 50 sessions across 6 different products, there's something for everyone!

EVENT DETAILS

Sessions run from 9:00 a.m. to 12:00 p.m. Pacific

- August 13:
 - Adobe Customer Journey Analytics
 - Adobe Experience Platform: Real-Time CDP + Adobe Journey Optimizer
- August 14: Adobe Analytics
- August 20:
 - Adobe Experience Manager
 - Adobe Marketo Engage
- **August 21: Adobe Workfront**



**See the full agenda
and register now!**

Link [HERE](#) to register

Start Time 9 a.m. PT/ 12 p.m. ET – Opening Keynote

LEARN TRACK

GROW TRACK

9:15-9:55 a.m. PT	Maximize Efficiency with AI: Mastering Workfront’s AI Tools	Maximize Your Workfront License – Pro Tips for User Management & Licensing
9:55-10:30 a.m. PT	Getting Started with Review and Approvals	Automate Workfront User Account Creation with Fusion
10:35-11:15 a.m. PT	Enabling Users on New Features: Agitation is Life	Elevate Workfront Reporting with Advanced Text Mode
11:15-11:55 a.m. PT	Preparing Your Workfront Organization for a Center of Excellence	Streamlining Creative Workflows with Workfront + AEM

End Time 11:55 a.m. PT/2:55 p.m. ET

[REGISTER NOW](#)

FREE Events for Workfront System Administrators

All events are published to the [Events](#) page on Experience League. Check back often for updates and to register.

- August 21 at 9:00 a.m. PT – [Experience Maker's The Skill Exchange](#) - Learn & Grow Tracks for Workfront
- August 25 at 6:00 a.m. PT – [Workfront Collective](#)
- August 28 at 8:00 a.m. PT – [Workfront Planning, Reimagined: SNHU's Creative Use Cases](#)
- September 5 at 9:00 a.m. PT – [Connect: Admin Chat for Marketing & Creative](#)
- September 9 at 8:00 a.m. PT – [Admin 101: Getting Workfront Data](#)

Past events you may have missed:

- [On-demand] [How Kohler Reimagined Creative Briefs in Workfront](#)
- [On-demand] [Power Templates: How IDEXX Reconfigured Project Templates for Global Success](#)

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

Feedback

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

Thank You!

Huge shoutout to Rick, Kiersten, and Nicole

Adobe