

Tutorial 04. Insert Only Fields

Sometimes you might want certain values to be stored into Workfront only at the time an object is being created, but never change the value if the object already exists.

When might I use this?

An example of this could be a more sophisticated organization that uses Excel Updater to provide an automated integration of business data from another system into Workfront – we refer to this as “Scheduled Excel Updater”. In this example, the organization queries their financial system for all projects that the accountants happen to have on record, and automatically creates an Excel spreadsheet export of the project details, such as project names, accounting codes, budgeted amounts, actual amounts, departmental owners, and planned start date. The organization generates this spreadsheet twice a day, and twice a day the most recent data is pushed into Workfront using Excel Updater.

Whenever a new project is created in the financial system, the organization wants a corresponding project to also be automatically created in Workfront, and populated with the details listed above. Details of new and previously created projects are all exported together from the financial system, into a shared Excel spreadsheet.

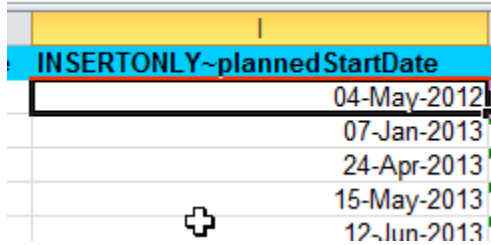
Assume there is a column in the spreadsheet named “plannedStartDate” which is set to a particular date. Any rows in the spreadsheet that have not yet been added to Workfront will be inserted, and their planned start date will be set to these values. This is all fine until a project manager updates Workfront to indicate a more realistic planned start date (from a business view, instead of from an accounting view). However, the next time the twice-daily load from the financial system is run, it will attempt to change the planned start date back to whatever date the accounting system indicated.

The organization doesn’t want subsequent runs of Excel Updater to flip the planned start date back to the original accounting system date – the planned start date should be controlled by Workfront, and going forward Workfront becomes the system of record. The accounting system “primes” the value, but Workfront “owns” it from that point forward.

This is where Insert Only fields are valuable.

The syntax

Columns that should have their cell values pushed to Workfront only during creation of the corresponding objects need to have an “INSERTONLY~” prefix in the column heading.



The image shows a screenshot of an Excel spreadsheet. The first row has a yellow header cell. The second row has a blue header cell with the text "INSERTONLY~plannedStartDate". Below this, there are five rows of dates: "04-May-2012", "07-Jan-2013", "24-Apr-2013", "15-May-2013", and "12-Jun-2013". A mouse cursor is visible over the date "15-May-2013".

	INSERTONLY~plannedStartDate
	04-May-2012
	07-Jan-2013
	24-Apr-2013
	15-May-2013
	12-Jun-2013