System Admin Essentials: Leveraging the Group Admin

May 11, 2022

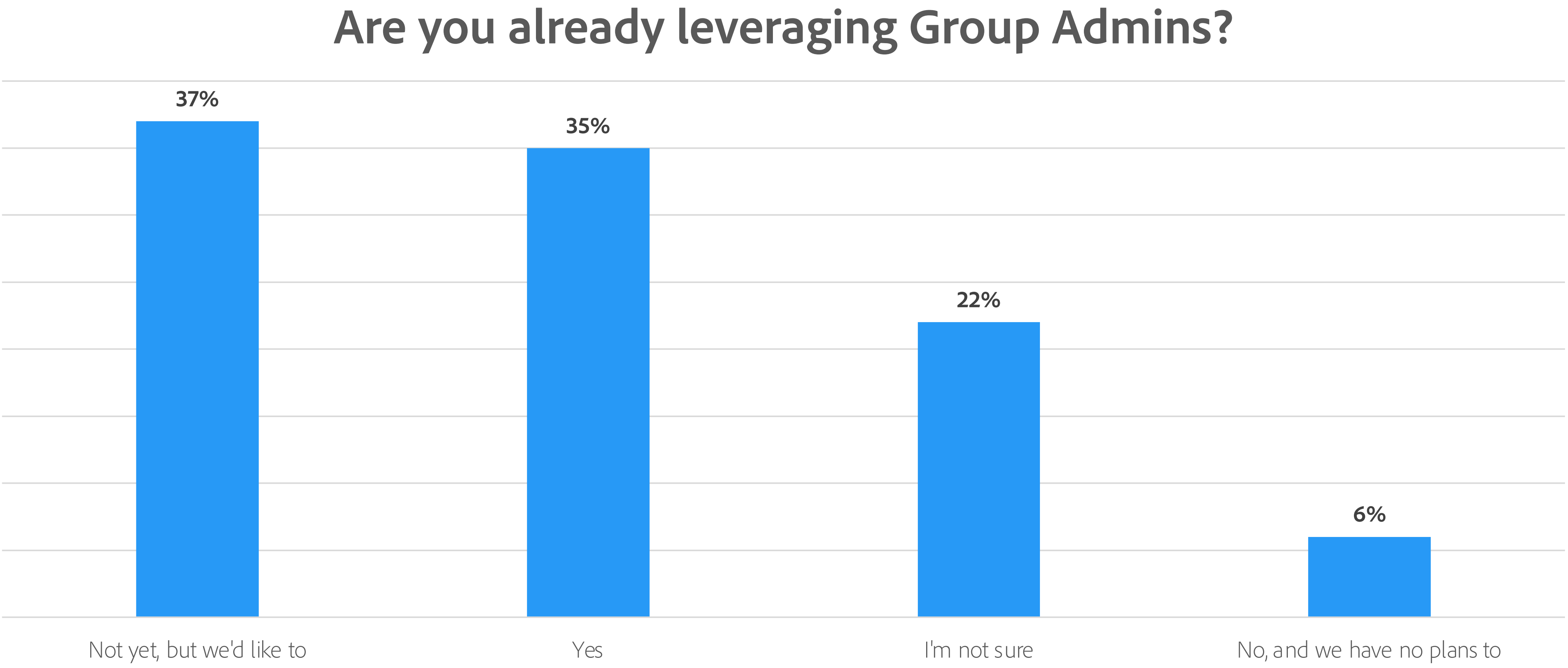
Agenda (Pacific)

Time	Topic
8:00 a.m.	Welcome and agenda
8:05 a.m.	**Leveraging the Group Admin** *Cynthia Boon, Customer Success Manager, Adobe Workfront*
8:25 a.m.	**Group Admin Spotlight: Mayo Clinic** *Kathy McLaughlin & Brittney Timm, Operations Specialists and Workfront Group Administrators, Mayo Clinic Alix School of Medicine*
8:45 a.m.	Presenter Q&A
8:55 a.m.	Wrap-up and next steps

Leveraging the Group Admins

- How to determine when it's time to add group administration
- Common roles and responsibilities
- Best practices for defining standard practices across groups
- Examples of what to document and how to communicate changes
- How Group Admins can be an advocate and champion for their teams

We asked…



Are you already leveraging Group Admins?
37%
35%
22%
6%
Not yet, but we'd like to
Yes
I'm not sure
No, and we have no plans to

What is Group Administration?

Enterprise Controls

A structured approach to group hierarchy allows you to create, manage, and organize all your departments in one instance of Workfront, while remaining flexible enough for those teams to customize and manage the unique way they work, from branding to project preferences.

Focus on Departmental Needs

Everyone in the company can share a single instance but departments can be administered separately, controlling their own settings, templates, workflows, and users at the group level.

Team Approach

Appointing group administrators who can perform some administrative functions for their own groups in Workfront helps balance the load when it comes to updating and maintaining the system.

The Role of the System Admin

Full control requires full responsibility

Group Admin allows Sys Admins time to focus

Is Group Admin functionality good for everyone?

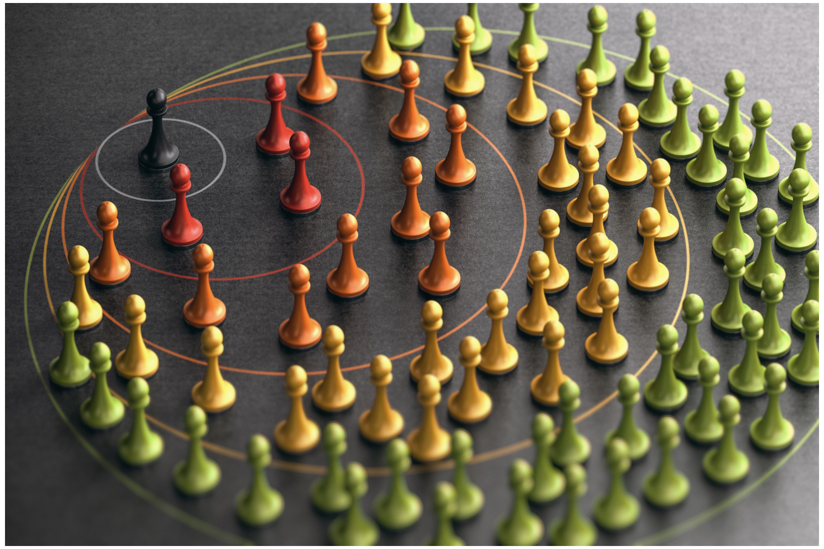
Strong Start

Is your organization just starting with Workfront? Perfect opportunity to “build it so they will come.”

Optimization

Been a customer for years and have some “leftovers” from implementation? Perfect opportunity to find your friends and get organized.

Expansion

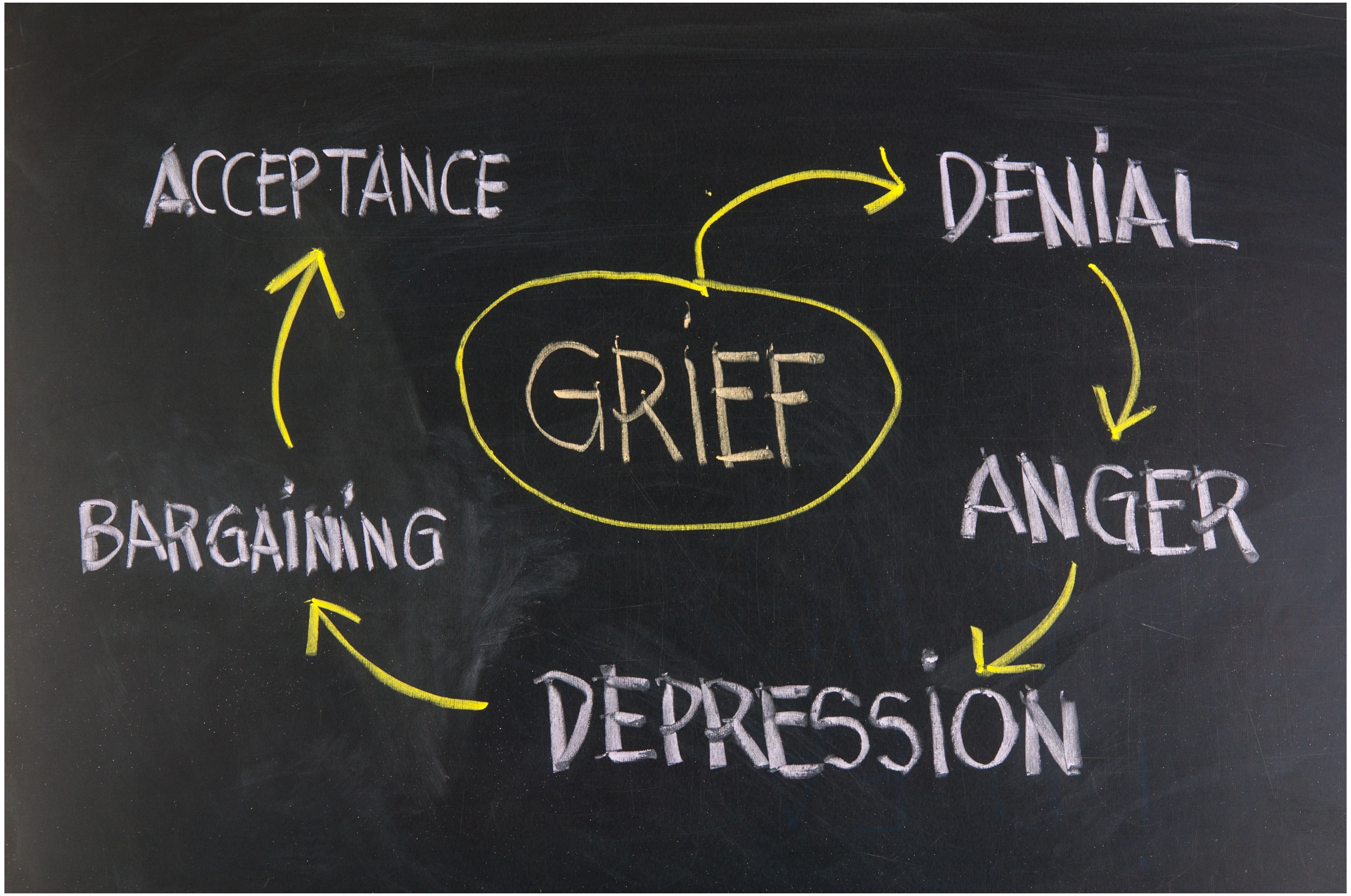


Already organized but looking to expand? Perfect opportunity to show other departments what is possible.

Establishing Trust

The Struggle is Real

- How do you share control?
- How does it feel to lose access if you're going from a Sys Admin to a Group Admin?
- What is the best way to build a collaborative team?



The Benefits…

Leaning into the Group Admin approach provides strength and support to help navigate the rough seas:

- Adoption Support
- System Training
- Consistency & Visibility
- Department & System Experts
- New Feature Functionality Testing

Strength in Partnerships

Look for skills that will support your vision:

- Seeks opportunities to collaborate
- Communicates clearly and often
- Enjoys experimenting with systems
- Values team accomplishments
- Welcomes mistakes as learning opportunities
- Demonstrates an appetite for change

The Challenge

What are the Rules of Engagement

- Finding the right team
- Mapping it out
- Assigning the names
- Communicating often
- Testing together

The Paperwork

Why document?

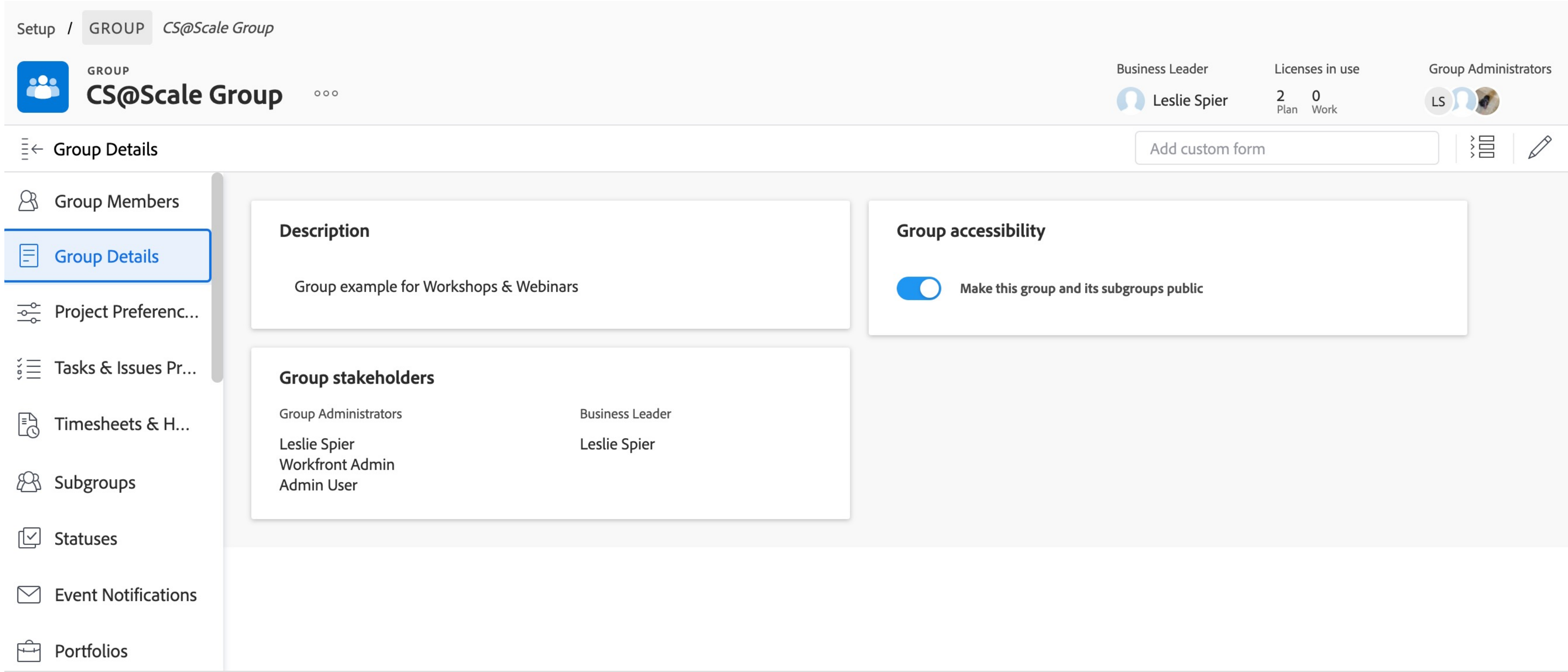
- Set expectations
- Ensure consistency
- Track great ideas
- Just in case…

Adobe

Group Admin Functionality

The steps *can* be straightforward – consider the following steps:

1. Map out your groups
2. Find your Group Admins
3. Determine their roles
4. Identify shared tasks
5. Obtain buy-in
6. Create your Access Level
7. Start assignments
8. Manage memberships, objects, tools, and preferences



Note! For every step include space for testing and communication, adjusting as needed.

Key Takeaways

Teamwork makes the dream work

Many hands make light work. Engaging others that are passionate about Workfront can absolutely benefit you and your teams.

Measure twice – cut once

Work with your Group Admins to determine roles and tasks, then map out your next steps. Your roadmap will help guide you through the Group Admin steps.

Documentation is fun

Take the time to communicate your vision and expectations. Your new Group Admin team can help with documenting department specific processes, naming conventions, and even their favorite features of Workfront.

MAYO CLINIC EDUCATION GROUP ADMINISTRATORS

Kathy McLaughlin
Operations Specialist – Mayo Clinic - MN

Brittney Timm
Operations Specialist – Mayo Clinic - ARZ

Workfront Group Administration Webinar
5/11/2022

MEET THE GROUP ADMINS

A BIT ABOUT US

Kathy McLaughlin, MEd

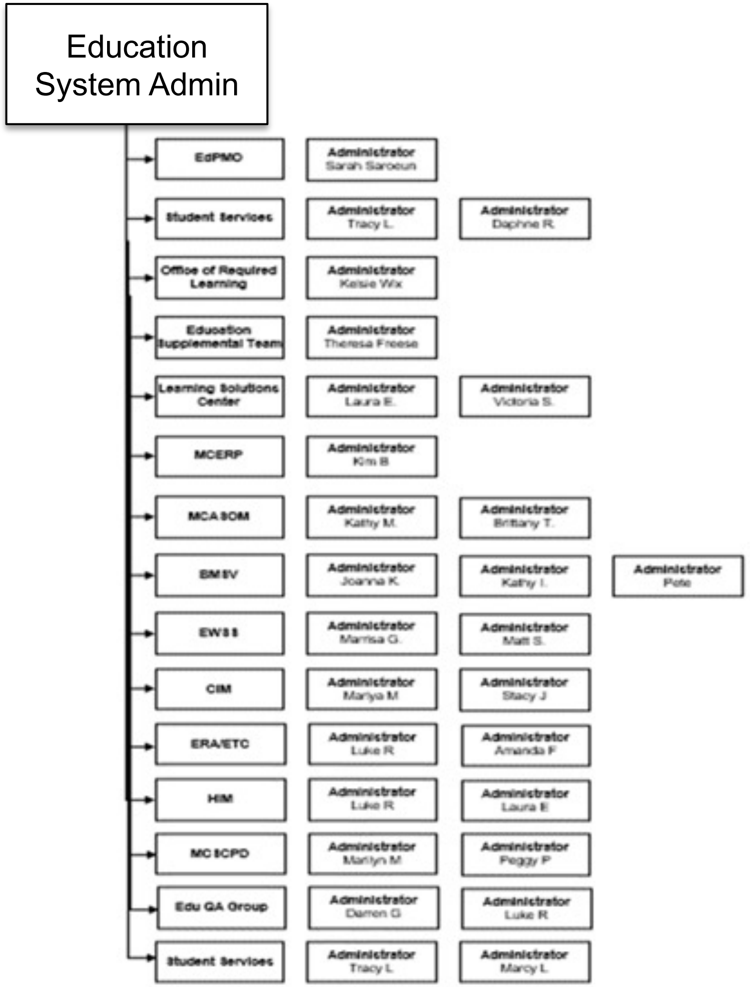
- Operations Specialist within the Mayo Clinic Alix School of Medicine – Minnesota campus
- WF Group Admin – August 2019
- Spends most weekends exploring the local county and state parks

Brittney Timm, MS

- Operations Specialist within the Mayo Clinic Alix School of Medicine – Arizona campus
- WF Group Admin – August 2019
- Loves spending time taking macro and close-up photos

IMPLEMENTATION TO OPERATIONS

OUR WORKFRONT STRUCTURE



Education

- One System Admin
- Group Admins in each Department
- Number of Group Admins dependent on department structure
- Typically, a primary and backup group admin

MEDICAL SCHOOL STRUCTURE

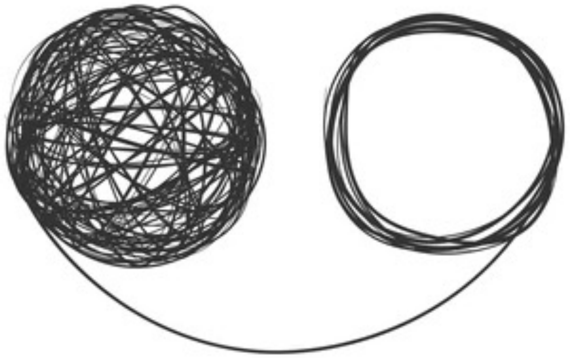
HOW WE ARE ORGANIZED

- Three campuses
  - Arizona
  - Florida
  - Minnesota
- Consist of 5 teams
  - Admissions
  - Academic Affairs
  - Student Affairs
  - Faculty Affairs
  - Administration
- Group Admins
  - Arizona
  - Florida
  - Minnesota

IMPLEMENTATION TO OPERATIONS

OUR JOURNEY

- Our department was an early adopter
- Implementation = Get it Done
    - Learn Workfront
    - Decide where to begin
    - Who to involve from each team



Organized Chaos

OPERATIONS

NOW WHAT?

System Admin vs. Group Admin

- Who does what?
- How to keep the implementation moving?
- How to drive adoption?

OPERATIONS – SYSTEM ADMIN

SYSTEM ADMIN VS. GROUP ADMIN

System Admin	
Provide overall support, guidance, and workflow management	
Establish roles and responsibilities	
Establish best practices	
On-board departments/ new group admins	
Core team meetings	

 |

OPERATIONS – SYSTEM ADMIN

SYSTEM ADMIN VS. GROUP ADMIN

System Admin	Group Admin
Provide overall support, guidance, and workflow management	Provide overall support, guidance, and workflow management
Establish roles and responsibilities	Establish roles and responsibilities
Establish best practices	Establish best practices
On-board departments/ new group admins	On-board new users/partner with existing users
Core team meetings	Promote Workfront

EXAMPLES

ROLES AND RESPONSIBILITIES

Expectations of Roles

Keep the momentum going!

Workfront | MCASOM | Roles and Responsibilities

WF System Administrator (Education)
Workfront is utilized in Media Services and Education. Each area has a dedicated WF Systems Administrator that provides overall support, guidance, and workflow management to their respective departments. The WF Systems Administrators establish best practices for their respective departments, but each unit may further define best practice for their unit.

Group Administrators
Workfront recommends 2 – 3 group admins for each department. The Group Admin is front-line support for their department. Group Admins have the same responsibilities as the Ops Manager/Team Lead and Worker, plus the following.

- Stay informed of WF releases and changes
- Communicate updates to MCASOM
- Promote WF features and capabilities
- Create and maintain reports and dashboards
- Communicates MCASOM best practices
- Liaison between MCASOM and WF System Administrator
- Provide system oversight, such as monitoring template usage, custom form clean-up, etc.
- Add, change, or inactive WF members
- Attend Workfront team meetings as established by the WF System Administrator
- Update or maintain WF documentation for the MCASOM team
- Provide WF support to MCASOM

Ops Manager/Team Lead
The Operations Manager and, if applicable, Team Lead should determine who will be responsible for completing the work. They have the same responsibilities as a Worker, plus the following.

- Contact the MCAASOM Group Admins for support and/or assistance with Workfront
    - Groups Admins are the front-line support for MCASOM. They will work with the WF System Administrator if the issue cannot be resolved.
    - Group Admins are available for help with Workfront setups.

- Train their team members on best Workfront practices for their processes. Please see the Worker responsibilities for general responsibilities.

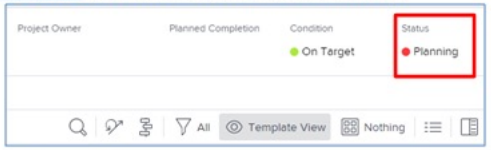
- Monitor WF projects to ensure they are completed on time and to assist with roadblocks.
    - These reports are sent weekly and can be used as a discussion points in 1:1s or team meetings.
        - The report, tasks due this week or overdue tasks sent to Marcia Andresen Reid, Operation Managers, and WF Group Admins. The report provides Operation Managers an overview by project tasks that are overdue.
        - The report, Active Project is sent to each team showing them current projects. The report includes project condition and % complete.
    - Team dashboards called MCASOM <team name> Team Current State combines the weekly reports and presents them visually

EXAMPLES
BEST PRACTICES

Guides and documents to help build

Workfront | Creating a Template | Best Practices

Creating a New Template
- Create a new project when starting a new template. The project functionality allows you to see if the Start On and Due By dates will calculate as expected, where the template functionality does not.
- Project status (upper right) defaults to Planning and should be left in planning while creating the template. This will prevent the project from displaying in reports or sending email notifications.



- The Project_TemplateSetup.xlsx worksheet contains the PlanningDocument tab – a guide that can be used to document tasks and the required information to create a project in Workfront, and Predecessors tab that provides an explanation of predecessors.

Naming Conv
- Names sh abbreviat searching
- End the n being cre

Task Fields
A task view, T template.

- **Task Nam**
- **Task Desc** step-by-s e.g., cann
- **UCM (als**

A	B	C	D	E	F
	Please make a copy of the workbook BEFORE making updates.	**The MCASOM WF Group Admins are always willing to partner with you to setup projects and templates**			
Task #	Task Name What is the name of the task? This is the action that needs to happen, e.g. schedule meeting, order materials, update files/website, follow-up on . . .	Description A brief description of the task. --UCM links are placed in UCM(URL) --Links to other documentation or files should be listed here. Optional, include what should be updated in the task and when it should be closed.	UCM (URL) If there is a procedure in the UCM, add the link to it here. Links to other documentation should be listed in Description	Assignments Who completes the task? If it's a specific person each time, use the name. If it could be different people, then indicate role, e.g. EAC, Admin, OMS, etc.	Task Constraint This works with predessors. If preferred, discuss with one of the MCASOM Group Admin on the type of constraint this might be. Typically ones used are: As Soon As Possible --- when another task is done, then this one can be started. Fixed Dates -- these are meeting dates that are not known until scheduled Start On --- a task has to start no sooner than a specific date Must Finish On -- a task has to be done by a specific date

EXAMPLES

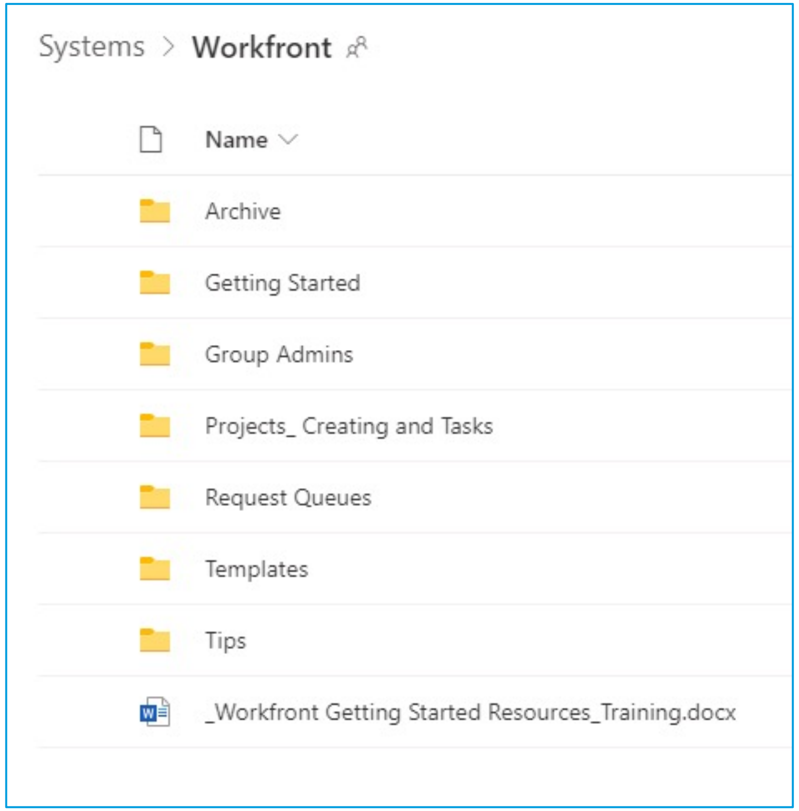
ON-BOARDING AND PARTNERING

Workfront Getting Started - Resources

Recommended – Basics These are recommended resources to understand the basics for getting started with Workfront. Mayo Clinic Workfront link: https://mcedu.my.workfront.com/ • Workfront uses Mayo's Single Sign-On (SSO) to connect. If accessing Workfront outside the Mayo network you will need to sign-in with your Mayo ID and password.	
Welcome to Workfront – 7 minutes	High level overview of Workfront 0:00 – 1:20 – **General information** 1:21 – 2:34 – **How to use Workfront Home**, which contains tasks assigned to you and personal tasks that you can create 2:35 - 4:44 - **Projects** – finding, opening/filtering, overview of screen Proofing is reviewed, but is currently not used within MCASOM 4:45 - 6:05 - **Resource Management** not current used within MCASOM 6:08 – 6:34 - **Leaders and Executives** how reports and dashboards can show high level overview 6:34 – 6:55 - **Conclusion**
What is a project?	View this 2-minute video for a high-level overview of what is a project, and how they are created for the medical school using Workfront.
Finding Your Work	
Find your work in Workfront Home in the new Workfront experience	This 2-minute Workfront video provides an overview of the Home screen. FYI, between 11 – 16 seconds it states to log into Workfront. We use single, sign-on that automatically logs you into Workfront. However, as the video says feel free to grab that morning beverage. Companion Workfront handout to video - Workfront Home Overview
Personal Tasks	Create your own electronic to-do list.
Tip_MyWorkSummary	How to use the My Work Summary dashboard for your open project and personal tasks, open requests, and projects you are on.
Tasks	
Task page overview Update work status	These Workfront user guides focus on tasks. The task page reviews fields found in a task. The update work status explains how to make an update (e.g., comment) on a task.
Working With Tasks – Updating, Closing, Reopening Tasks	This MCASOM developed resource lists the minimum updates needed for a task.
Tagging and Replying to Updates	This MCASOM developed resource explains how to use Workfront's tagging to notify another Workfront user of an update, and how to reply to the notification.
Searching – Make It Easier	
Pins+Favorites+Recents guide	Find the work you need when you need it. Pin projects to your Workfront banner or to your Favorites list. Learn how to use your Recent list to find the projects you opened.

Getting Started guide

SharePoint of learning resources



EXAMPLES

PROMOTING WORKFRONT

WORKFRONT PROJECT AND TASK STATUS

Workfront project and tasks status are used to identify the current stage of a project or task work. Most of these statuses are self-explanatory, e.g., current, in-process, etc. There are several project a task statues that we've defined specifically for MCASOM use.

Project Statuses	What happens in this status	When to use it
Dead	• No notifications are sent • Tasks do not appear in the work list • Project can be copied	Used when the project can't be finished due to roadblocks. If it should restart, a new project would need to be started. **Update** the **Project Summary** as to why the project was changed to Dead.
On Hold	• No notifications are sent • Tasks do not appear in the work list • Project can be copied	Project is paused and assumed it will be active again. **Update** the **Project Summary** as to why the project was changed to On Hold.
Task Status	**What happens in this status**	**When to use it**
N/A	Custom status created during implementation.	Used when the task in not applicable, e.g. task completed before the project/checklist was created or not necessary for this project/checklist.

More information about project and task statuses, including links to Workfront resources can be found Tip Workfront Project and Task Definitions.

- Weekly newsletter
- Acknowledge the change

DEAR SYSTEM ADMIN

WHAT A GROUP ADMIN WANTS YOU TO KNOW

- Trust
- Coach
- We are your partners

Questions?

Upcoming Events

System Admin Essentials Webinars

- June 8: Foundations of Operational Reporting
- *Coming soon!* July: Work Intake and Queue Management
- *Coming soon!* Aug: Leveraging Workfront Fusion

“Ask the Expert” Office Hours + Small Group Workshops

- May 17: Office Hours – Group Admin
- May 19: Workshop – Executive Sponsorship & Value Reporting
- May 24: Workshop – User Management

Register at one.workfront.com/events

Thank you!

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