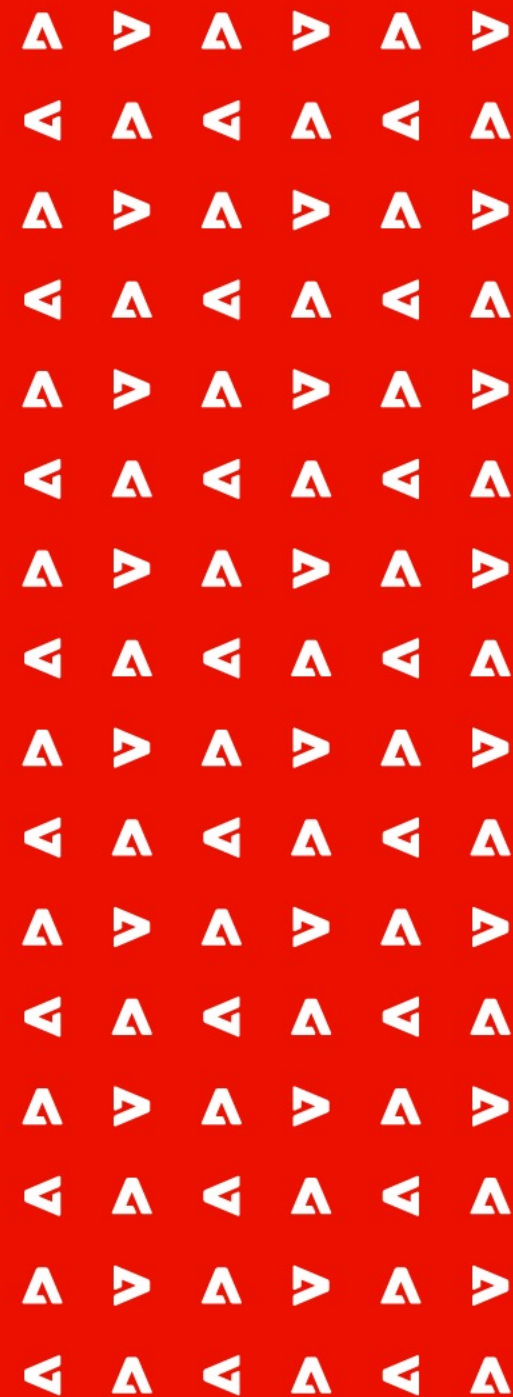




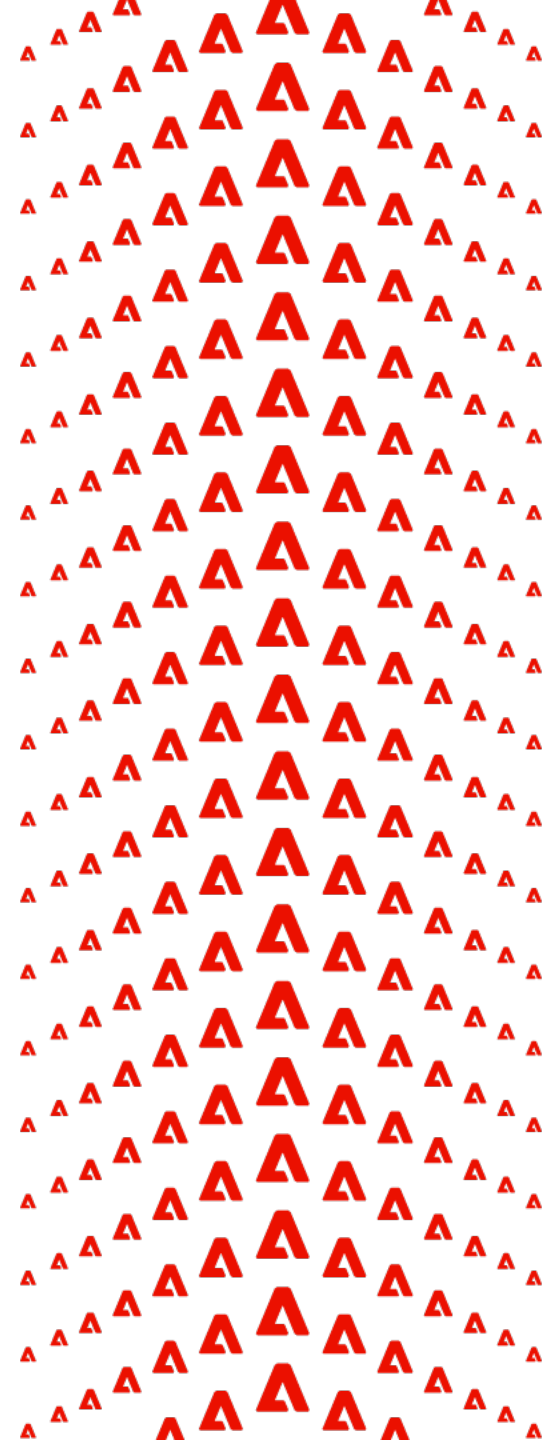
# System Admin Essentials: Understanding User Management

February 23, 2022



# Agenda (Pacific)

Time	Topic
8:00 a.m.	Welcome and agenda
8:05 a.m.	<b>Understanding User Management</b> <ul style="list-style-type: none"><li>• <i>Organizational units</i></li><li>• <i>Licensing and access levels</i></li><li>• <i>Object hierarchy and sharing permissions</i></li><li>• <i>Groups vs. Teams</i></li></ul>
8:45 a.m.	Presenter Q&A
8:55 a.m.	Wrap-up and next steps



# Presenters



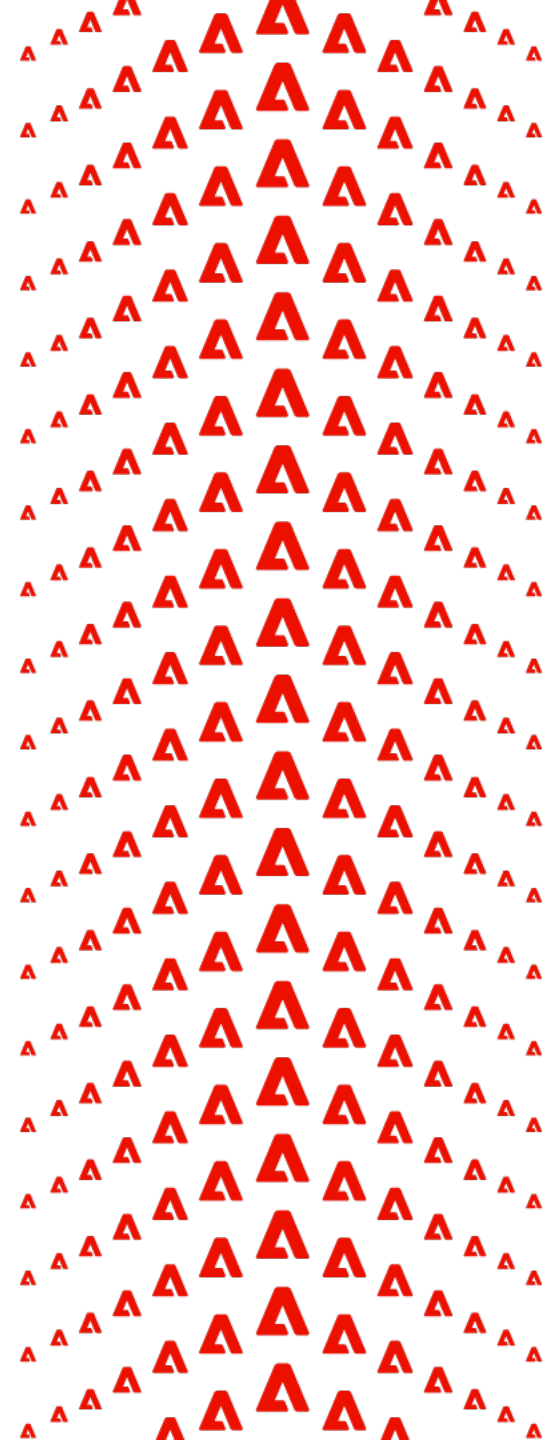
**Mary Ann Erickson, CSM, SA**

Customer Success Manager  
Adobe Workfront



**Heather Kulbacki**

Marketing Systems Specialist  
Thermo Fisher Scientific



# User Management - Overview



# How We Use Workfront

## PROJECT MANAGEMENT

- Scheduling
- Communication & Collaboration
- Task Management

## PERFORMANCE MEASUREMENT

- KPI Tracking
- Strategic Alignment Scores
- Data Integrity

## PORTFOLIO MANAGEMENT

- Project Vetting & Prioritization
- Campaign Planning
- Demand Planning



## RESOURCE MANAGEMENT

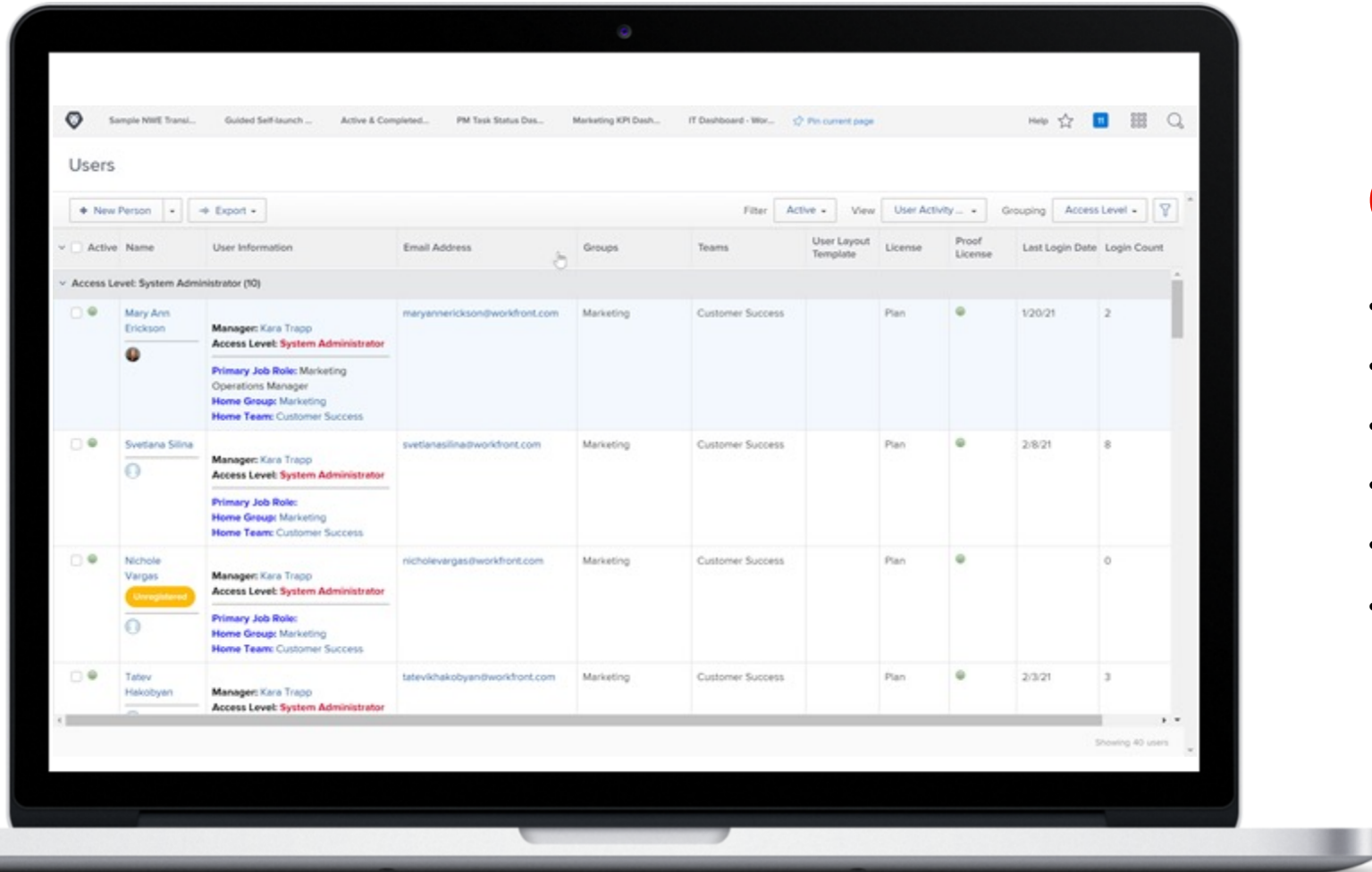
- Yearly Capacity Planning
- Budget Allocation
- Workload Management

## WORKFLOW APPLICATION

- Project Intake
- Routing & Proofing
- Asset Management

## FINANCIAL REPORTING

- Time Tracking
- Chargebacks
- Vendor Management



## Organizational Units

- Communicate your why
- Get input from multiple stakeholders
- Train users on more than where to click
- Capture data necessary for reporting
- Align to your organizational strategy
- Build with the end in mind

# Licensing & Access Levels



PLAN

Create



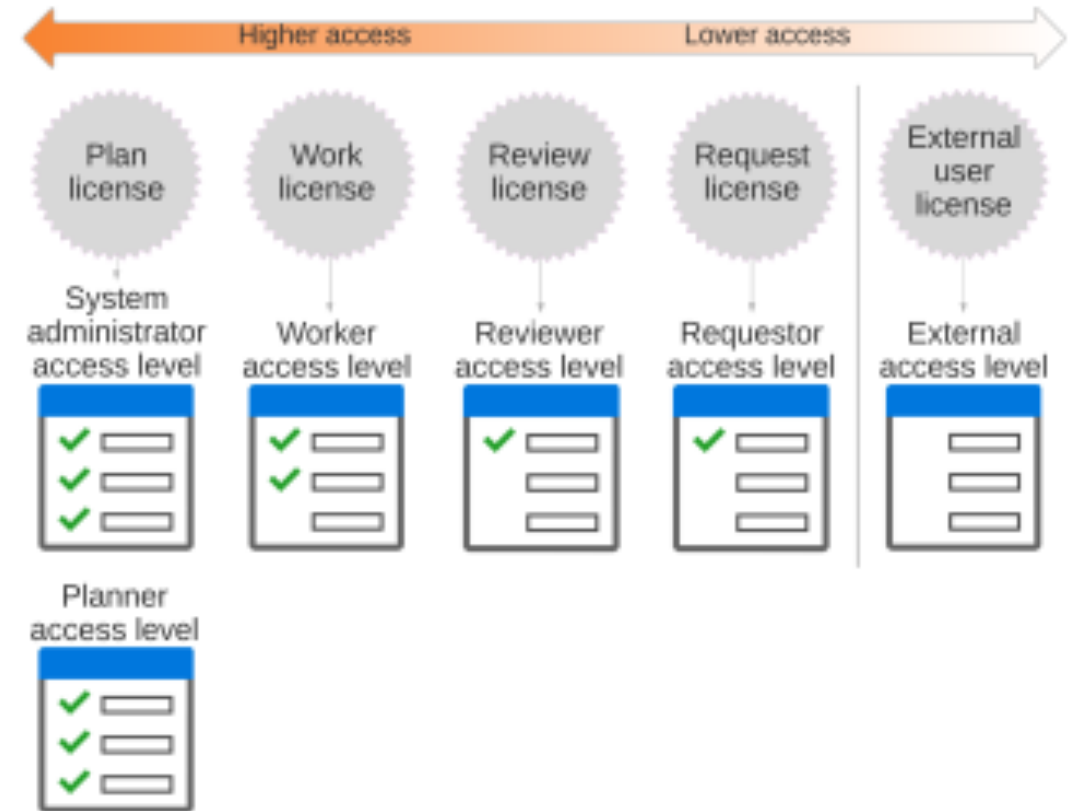
WORK

Update





REQUEST/  
REVIEW

Request/  
Communicate/  
Approve



# Example: Access Levels with Plan Licenses

 **Access Levels** 

+ New Access Level

↔ Export ▾

Filter

Plan License ▾

View

Standard ▾

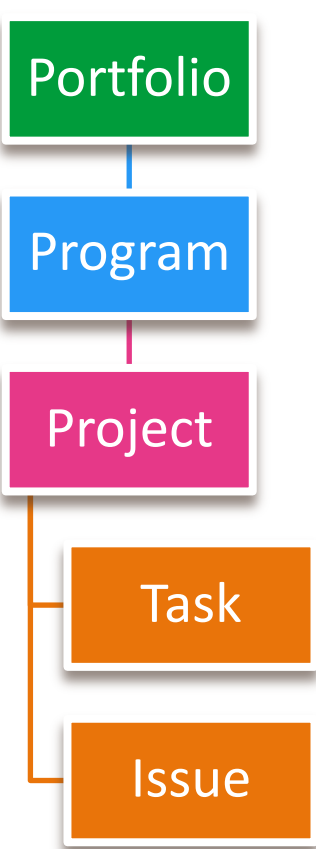
Grouping

Nothing ▾

<input type="checkbox"/>	Name	Description ↑	License
<input type="checkbox"/>	[EU] Planner	Can copy projects	Plan
<input type="checkbox"/>	NA Strategic Marketing Planning	Can copy projects	Plan
<input type="checkbox"/>	NA Functional Managers	Can't copy projects	Plan
<input type="checkbox"/>	NA Planner	Can't copy projects	Plan
<input type="checkbox"/>	EU NCP Planner	Can't copy projects	Plan
<input type="checkbox"/>	NA Worker Plus Financial	for workers who need access to edit Expenses someone else has created	Plan
<input type="checkbox"/>	System Administrator		Plan



# Object Hierarchy & Sharing Permissions



<b>VIEW</b>	<p>You can perform the following actions on the object:</p> <ul style="list-style-type: none"><li>• View the object</li><li>• Add documents to the object</li><li>• View Finance information on the object</li><li>• Share the object</li></ul>
<b>CONTRIBUTE</b>	<p>You can perform the following actions on the object:</p> <ul style="list-style-type: none"><li>• View it</li><li>• All the actions included with View</li><li>• Add Expenses to it</li><li>• Add Issues to it (if it is a task or project)</li><li>• Add Tasks to it (if it is a project)</li><li>• Edit Custom Forms on it</li><li>• Log hours on the object</li><li>• Make assignments in it</li></ul>
<b>MANAGE</b>	<p>You can perform the following actions on the object:</p> <ul style="list-style-type: none"><li>• View it</li><li>• All the actions included with View and Contribute</li><li>• Delete it</li><li>• Manage Finance information on it</li></ul>
<b>MAKE THIS PUBLIC TO EXTERNAL USERS</b>	<p>Anyone without an Adobe Workfront account can view the object by clicking a link to it – not available for all objects</p>
<b>MAKE THIS VISIBLE SYSTEM-WIDE</b>	<p>The object may be found in searches and viewed by anyone with an Adobe Workfront account</p>

# Object Hierarchy & Sharing Permissions – Example Details

*You do not have to be a System Administrator to share permissions on objects to which you have access, but permissions on objects work within the access levels set by the System Administrator.*

*In other words, you have the ability to share or remove permissions to an object that you created or an object that was shared with you by another user.*

*When you are not the creator of an object, you must have SHARE access on the object that you want to share within your ACCESS LEVEL in addition to SHARE permissions on the object itself.*

- You may only share the same level or a lower level of your own permissions on the object.
- You cannot share an object with a permission level higher than the access level of the user. For example, if a user has VIEW access to Projects as their access level, you cannot give them Manage permissions on a project.
- A user with permissions to at least VIEW an object can then share that object with someone else
- You can share objects with active users, job roles, teams, groups or companies
- You may only share objects with up to 100 entities – it is recommended you share w/ the largest available option (teams, groups, etc.) to avoid running into this limitation
- You may also request permissions to an object from anyone that has SHARE permission to that object – this comes in handy if someone sends you a link to an item that you cannot retrieve due to permission limitations

# Groups vs. Teams

FUNCTIONALITY	GROUPS	TEAMS
A Planner can create		X
Only an Adobe Workfront administrator can create	X	
Share objects	X	X
Assign a task		X
Assign an issue		X
Associate with a project	X	
Designate as an Approver in an Approval Process		X
Notifications trigger for all members at one time		X
Tag in a comment		X
View in the People or Teams area		X
View Working On List		X
Filter users in the Resource Planner		X
Visibility of Milestone Paths for a Project or Template	X	
Visibility of Custom Forms	X	
Visibility of Schedules	X	
Assign Timesheet Profiles	X	X
Assign Layout Templates	X	X
Any user with a Plan license can assign it to another user		X
Customize Statuses	X	
Customize the Done button		X
Track licenses	X	

Questions?





## Upcoming “Admin Essentials” Webinars

- Mar 30 – What IS Governance in Workfront?
- Apr 27 – Designing an Ideal Workfront User Experience



Register at [one.workfront.com/events](https://one.workfront.com/events)

# Upcoming Events

## **Experience Makers Awards** ([adobeexperienceawards.com](https://adobeexperienceawards.com))

- Mar 1 – Submissions open (16 categories!)

## **Adobe Summit** ([summit.adobe.com](https://summit.adobe.com))

- March 15-17 – 12 Workfront sessions!

## **Experience Makers The Skill Exchange**

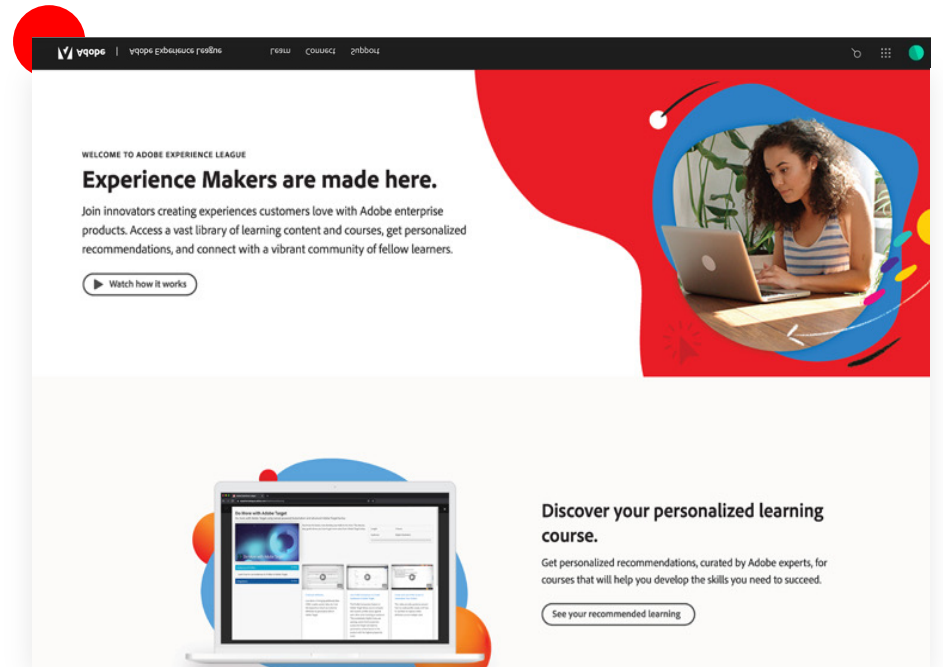
- April 13 – Free learning event. Save the date!

# Workfront One is moving to Adobe Experience League!

Get ready!

Soon all Adobe Workfront **documentation, community, support, training, and events** will be found on Adobe Experience League.

(Adobe Experience League is the equivalent of Workfront One!)



 [experienceleague.adobe.com](https://experienceleague.adobe.com)

Thank you!

