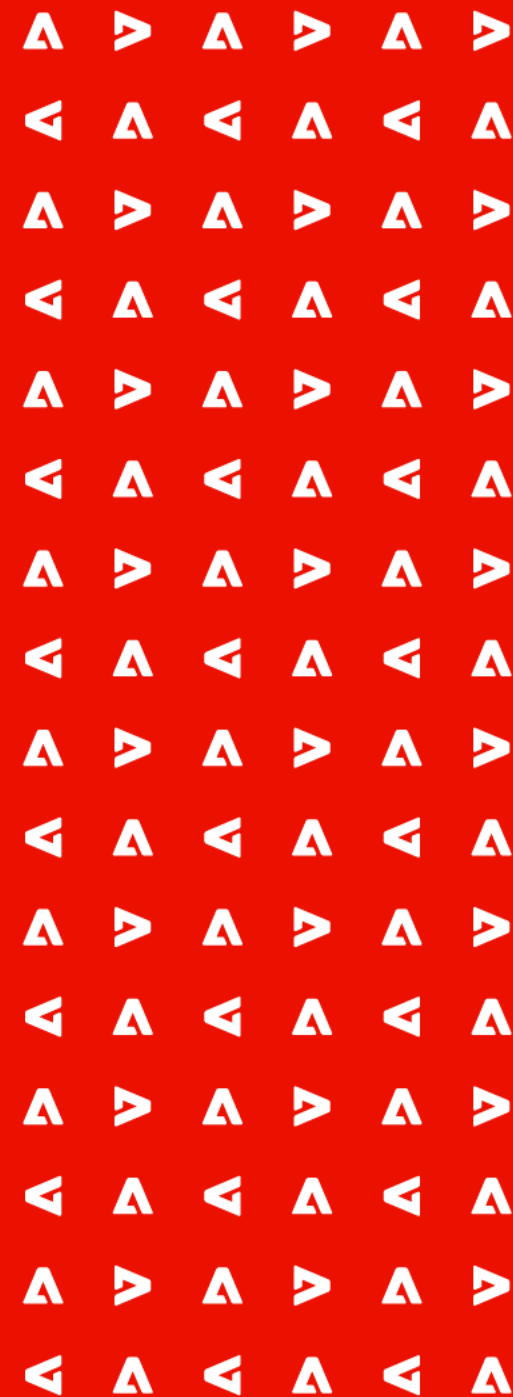






Learn From Your Peers Webinar | Adobe Workfront

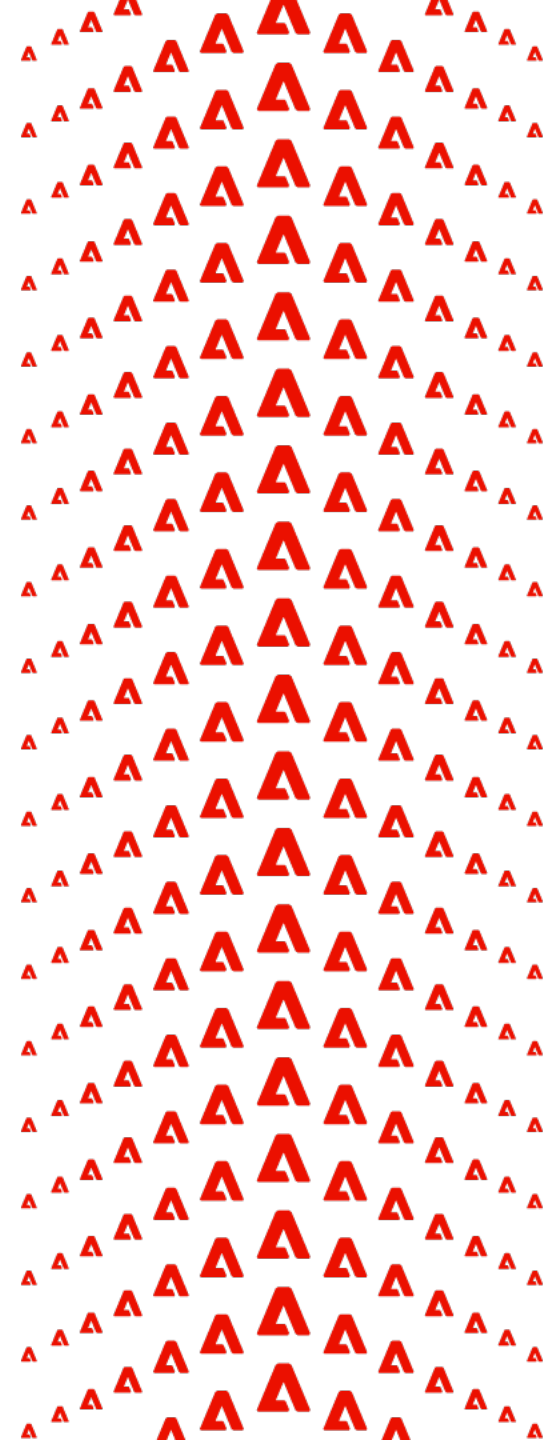
# Staffing Your System Admin Practice

April 25, 2024



# Agenda

Time (PST)	Topic
8:00 a.m.	Welcome and agenda
8:05 a.m.	Staffing Your System Admin Practice
	<div data-bbox="494 551 792 848"></div> <div data-bbox="473 863 851 1029"><p><b>Lou Ann Kleiman</b> Workfront Product Owner, Content Technology Dell Technologies</p></div> <div data-bbox="945 551 1243 848"></div> <div data-bbox="932 863 1322 1025"><p><b>Tyler Holt</b> Senior Customer Success Architect, Field Engineering Adobe</p></div>
8:45 a.m.	Ask the Experts! Audience Q&A
8:55 a.m.	Wrap-up and next steps



# About Lou Ann

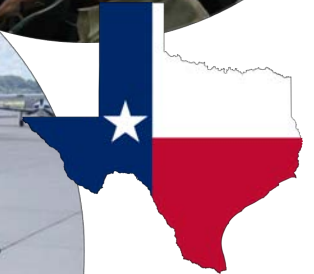
## Lou Ann Kleiman

Workfront Product Owner  
Dell Technologies

- Joined Dell in January 2022
- Governance Lead for enterprise Workfront implementation;  
Partner with IT, Change Management and other MarTech owners
- 10 years of Workfront implementation experience
- 20 years + of marketing project management with focus on process reengineering and operational improvements
- Enjoy spending time with family, watching football and playing competitive tennis

Connect with me:

[Lou Ann Kleiman | LinkedIn](#)



# How we use Workfront at Dell Technologies

Dell is among the world's leading technology companies helping to transform people's lives with extraordinary capabilities. From hybrid cloud solutions to high-performance computing.

2 Years into Implementation Start

3,000 Workfront users/ 1,850 Paid and growing!

## Integrations:

Service Now

AEM DAM

Allocadia

DIA (internal tool)

Frame.io (WIP)

## Native Integrations:

Teams, Outlook, SharePoint, Box, Creative Suites

## Fusion Scenarios:

(40+) active

## E2E Marketing Content Asset Management

- Campaign leads
- Internal Creative Agency
- Internal Global Studios
- External Creative Agencies
- Localization teams
- Claiming & Compliance
  - Forecast planning
  - Project & Resource management
  - Time Tracking
  - Reviews & Approvals
- (ESG) Environmental, social, and governance
- Non-Marketing Content
- MarTech Governance

## Workfront Team:

SVP Executive Sponsor

(1) Business Team Manager

(1) Business Product Owner

(1) Business Program Manager

(3) Change Management Support

(3) System Admins

(6) Product Managers

(5) Implementation Leads

(1) IT Product Owner

(7) WF Fusion Developers

(20) Group Admins

Adobe Enterprise Training  
for all Dell employees



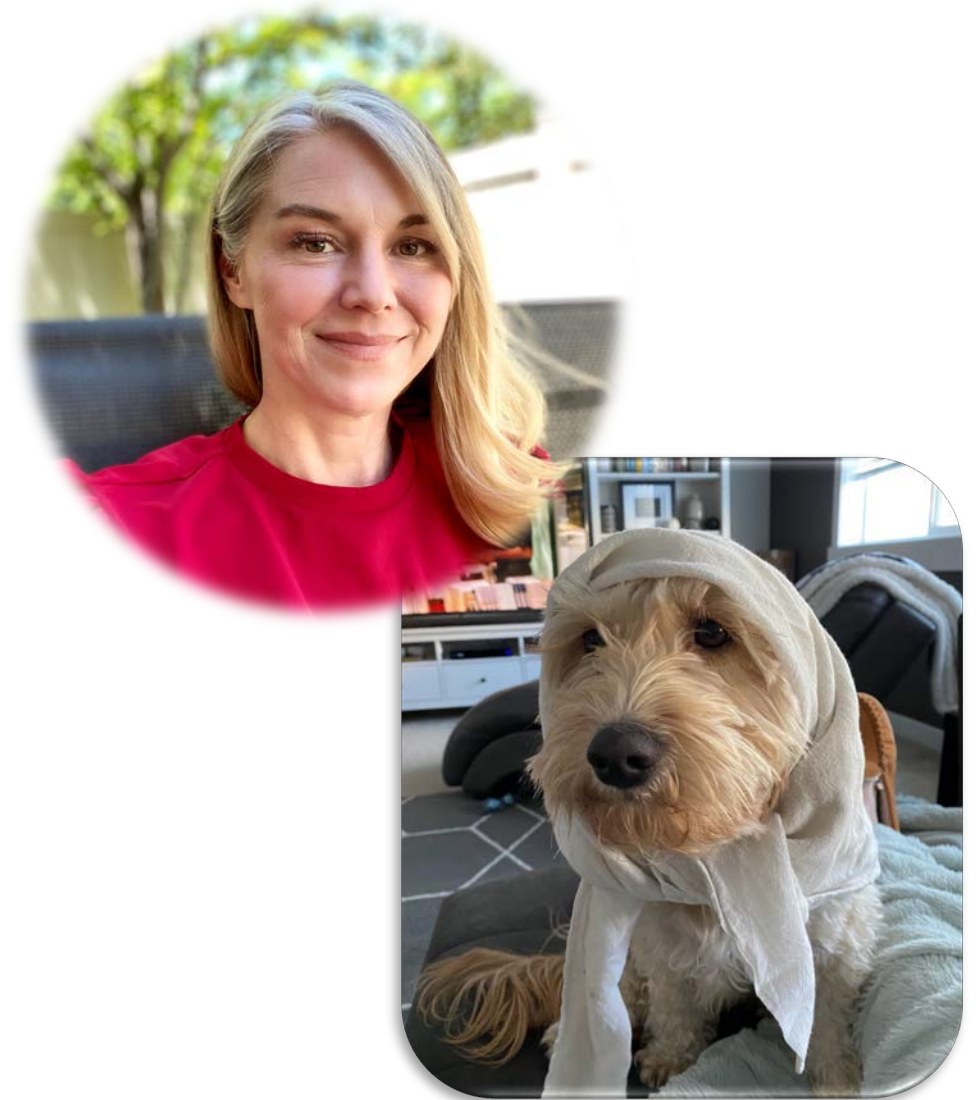
# About Tyler

## Tyler Holt

Senior Customer Success Architect  
Adobe Workfront Ultimate Success

- Workfronteer for life
- User/System Admin for 10+ years (5 as a customer, 7+ as a WF consultant)
- This is Beesly, my mini Golden Doodle – bonus points if you know where the name is from
- Utahan since birth, New Yorker at heart
- A biographical bibliophile
- Passionate but mediocre golfer

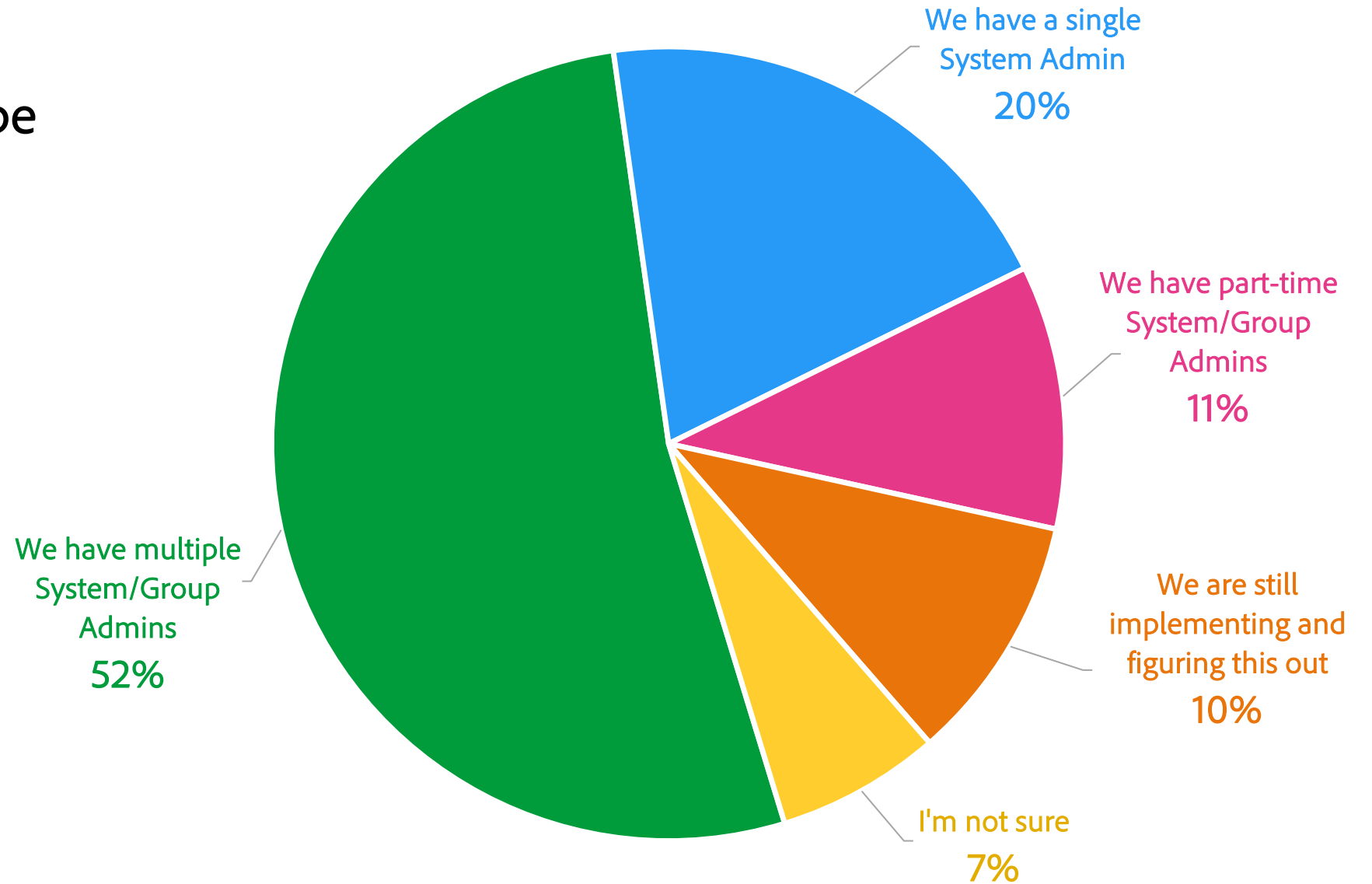
Connect with me: [LinkedIn](#) | [Experience League](#)





## We asked...

How would you describe the Workfront System Admin staffing setup at your organization?





# A staffing guide for your System and Group Admins

Staffing your admin practice is a **multi-faceted conversation** to be had at every phase of your organization's maturity.

Having **too many system admins** puts an organization's setup and data at risk, while **not having enough** administrative support for all users can hinder adoption and overburden a single administrator.

You will have to find the right **balance**.





# Discussion questions

In today's presentation, we'll review some of the critical questions to be asked while making the important decisions around current and future scalability and growth best practices.

- How many System Admins are appropriate?
- What differentiates System and Group Admins?
- When is it time to introduce Group Admins?
- What is the difference in access levels between the two Admin types?
- What are some of the high-risk areas where System Admins and Group Admins should always collaborate and govern closely together?

# What is a Workfront System Administrator?

## Roles & Responsibilities

- *Execute initial setup* of Adobe Workfront objects and use cases
- Understand how *organizational workflows and processes* are alike and dissimilar to allow for both optimization and autonomy
- Serve as the *system guru*, the most knowledgeable Workfront company resource driving change and adoption
- **Stay up to date** on all Workfront training, product releases and use case-based/skillset-building webinars -- invite group admins and SMEs to attend and **knowledge share** with end users
- *Apply key learnings* in Workfront, building, testing and validating new use cases, features and functionalities
- Serve as the *enablement expert* and escalation point for all group admins
- Primary point of contact with Workfront Support
- Responsible for or assisting with Workfront *integrations and automations*

## High-level Strategy

- Configure Workfront from day one or day 1,000 to be **scalable organizationally** to minimize risk, increase efficiency, improve effectiveness of the system and attain maximum value and ROI
- Ability to **advocate for Workfront** to both executive stakeholders and end users to continuously evolve work management initiatives and strategy throughout the organization
- **Communicate "The Why"** – identifying the value of Workfront for the business and for each user
- **Be the system guardian:** differentiate between full native functionality and customization needs; guide what factors drive overall standardization, risk mitigation, and process autonomy
- Strategically evolve the platform to drive continuous improvement and tangible business value at a digestible pace

**NOTE:** this is the only role with full control/permissions in an Adobe Workfront instance. It is suggested an instance have two system administrators, maximum three.

# What is a Workfront Group Administrator?

## Roles & Responsibilities

- *Meet and maintain all training/attestation requirements* prior to receiving group admin access
- Execute and maintain configuration in Adobe Workfront *for specific organizational group(s)/user base*
- **Manage group-specific needs**, i.e., users, templates, custom forms, approvals, statuses, job roles, companies, etc.
- Meet as a group administrator with their group's process owners and subject-matter experts to *gather feedback, process and configuration needs, pain points and insights*
- Meet with the organization's Group Admin Team to **share user feedback, requests, ideas for innovation, pain points, etc.** *Is this info beneficial to other groups*, i.e., an integration with another tool or process optimization; or *remedied by lessons learned and steps taken by another team*

## High-level Strategy

- Serve as the *key contact, configuration expert and adoption champion* for the group/team they're responsible
- Be able to *act as a liaison* between their group and the system administrator(s) to drive positive change
- Have the Workfront knowledge to *know which changes are risk free and which may put system configuration and/or user experience at risk*
- **Communicate any system-wide messaging** regarding releases, policy/process changes, required training, etc., from the oversight team to their group(s)

**NOTE:** Group administrator(s) will have the widest range of permissions within the group(s) they manage, however, they may vary based on the system administrator's discretion.

# How many people do we need as we expand?

## Key Considerations

- **Two system admins** per instance, possibly adding a third for international coverage
- How large are the groups? How many people will be relying on each group admin for administrative support?
- One group admin can support several small groups; while multiple group admins may be needed to support one large group with high demand and a lot of process complexity

## Complexity Scale

- Number of users reliant upon group admin support
- Number of and maturity of the groups' processes – a typical group starts small and expands in complexity over time, requiring continual, up-skilling of admin support
- Amount of autonomy system admins have provided for configuration, process ownership, troubleshooting and change management

## Risk Mitigation

The more users, processes and data, the greater the complexity resulting in the need for additional administrative support (a second admin or additional group admins). This increases the need for upfront communication and continuous enablement

Best Practice  
Guidance

Stakeholder Awareness  
& Escalation Process

Process Standards  
& User Enablement

Data & System  
Security Measures

# Governance

Business Continuity  
Assurance

Continuous Process  
Improvement

Defense Against  
Data Loss & Business  
Downtime

Risk Assessment  
& Mitigation



# Comparison of System and Group Admin Rights

## System Admin Only

- Access Levels
- System Settings
- Group Admins
- Audit Logs
- Licenses
- Kick-Starts
- Integrations

## Group Admin – if enabled\*

- Projects Preferences
- Task/Issue settings
- Group Statuses
- Approvals
- Reminder Notifications
- Log In As
- Reporting
- Custom Forms\*
- Task Templates
- Layout Templates
- Milestone Paths\*
- Timesheets\*
- Manage Teams
- Manage Users\*
- Manage Roles\*
- Profile Notifications
- Schedules

# Governance Team

Provide approval and oversight of policies created to support work across organizational groups and Dell's overarching Workfront mission. Create a forum where groups communicate and share their Adobe Workfront goals and activities - coordinating Change Management as needed.

## System Admins

Execute on any instance-level setup and requests, i.e., access levels, integration support, etc.

Preview and communicate all new releases

Manage support tickets and advocate for new functionality priorities

Ensure other group admins are fully trained

## Group Admins

Execute work for a specific Workfront group based on permissions allowed at group level

Manage all needs related to the group's users, templates, custom forms, approvals, statuses, job roles, companies

Share feedback on best practices; efficiencies gained/KPIs, product/feature feedback and lessons learned

## Power Users/SMEs

Provide requirements and/or input to Group/System Admins to accurately configure objects within Adobe Workfront

Participate in training and onboarding of new users

Share feedback on best practices; efficiencies gained/KPIs, product/feature feedback and lessons learned

# Making the distinction | Self assessment

- Now that you've seen the distinctions between System and Group Administrators, are there any opportunities for System Admins to become Group Admins?
- Are you seeing the opportunity to distribute more of your effort to new Group Administrators?





## Don't let System Administration staff turnover be a five-alarm fire.

Having well-trained, highly engaged Group Admins:

- Provides a safety net when primary system admins advance onward
- Brings career growth for all
- Strengthens the entire Workfront ecosystem



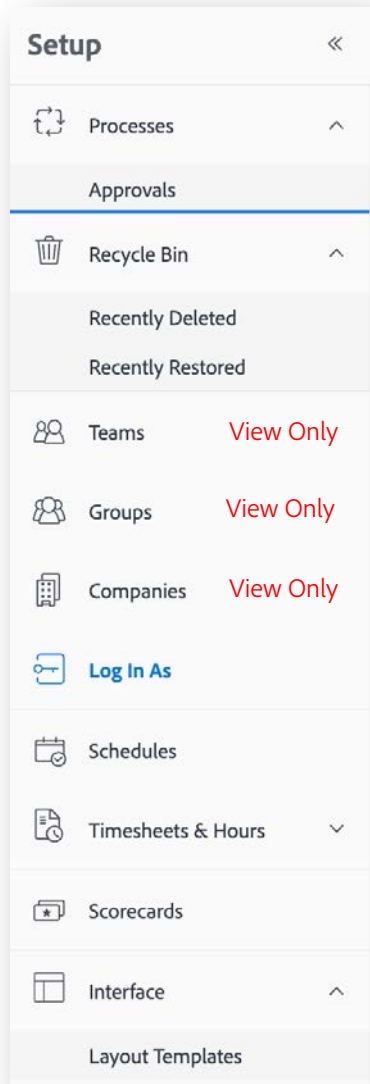
**Pro Tip:** Taking over as System Admin for an existing Workfront instance? Don't start from scratch!  
[Download the Inherited Instance Checklist.](#)



# Access levels for Group Administrators



# Base Group Admin Access



Group-Specific

Log In As...people in your group

Group-Specific: Must specify

System Wide

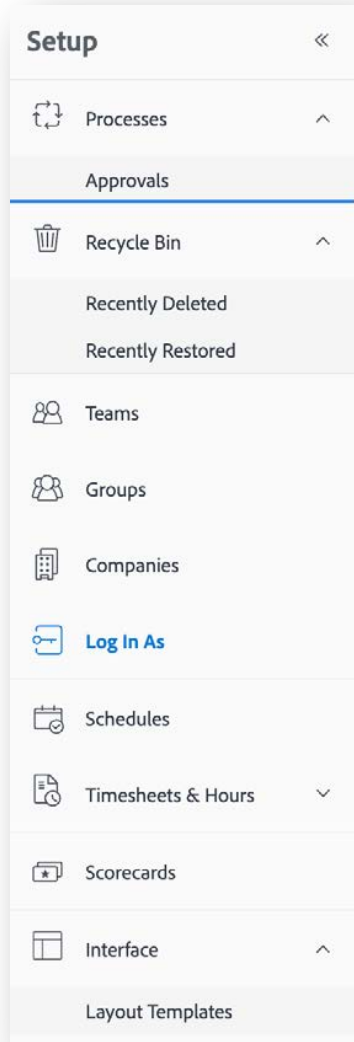
Group-Specific

This is what a group admin can access by default in Setup with *no additional Access Level permissions or unlocked System Settings*.

Group Admin access is an **accumulative process**.

The System Administrator can give as little or as much access as they wish, as the Group Administrator's skills and knowledge develop.

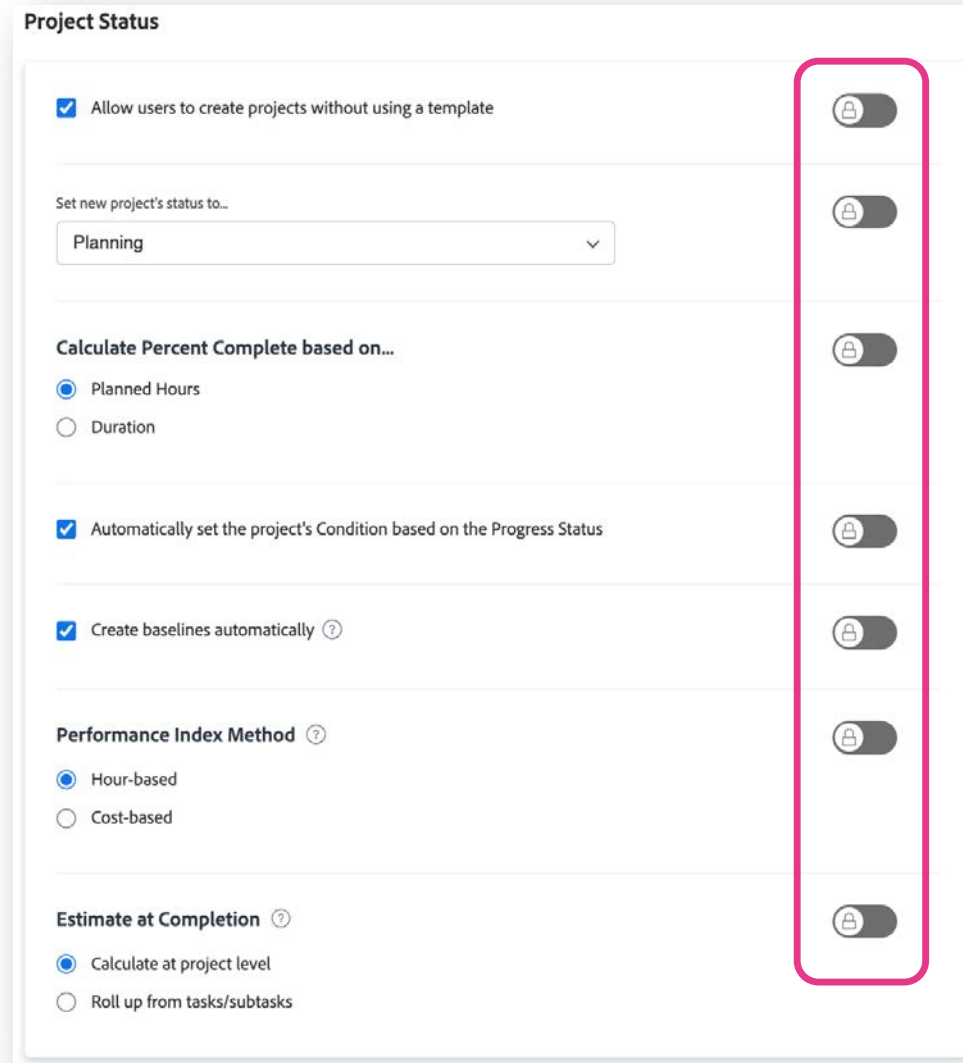
# Base Group Admin Access



Group Admin default access



Sample system setup without group admin permissions



NOTE: Any and all System Settings toggles must be set to **unlocked** by System Admin for Group Admins to change these settings.

# Limited Group Admin Access

*Additional Admin Access Level Settings*

Setup | GROUP DX Workfront CS

GROUP DX Workfront CS

Unlocked system settings

Project Preferences

- Group Members
- Subgroup Members
- Group Details
- Project Preferences
- Tasks & Issues Prefe...
- Timesheets & Hours
- Subgroups
- Statuses
- Event Notifications
- Portfolios
- Programs
- Projects
- Templates
- Recently Deleted
- Recently Restored
- Approvals
- Show More
- Add a Dashboard

**Project Status**

- Allow users to create projects without using a template
- Set new project's status to...  
Planning
- Calculate Percent Complete based on...**
  - Planned Hours
  - Duration
- Automatically set the project's Condition based on the Progress Status
- Create baselines automatically

Save

**New Access Level**

Allow administrative access for...

- Approval processes
- Companies
- Custom forms
- Exchange rates
- Expenses
- Job roles
- Milestones in my group
- Reminder notifications
- Timesheets & hours

Set additional restrictions...

- Never give access to the whole project when assigned to a task or request
- Never inherit document access from projects, tasks, requests, etc...
- View only updates in which they have been included in the conversation
- Never allow users to delete comments
- View only companies & groups they belong to
- Never allow users to delete announcements

People in other companies should only view users from...

- Their Company
- The Primary Company (Citadel)

# Group Admin Page

Setup | GROUP IT

GROUP IT

Business Leader  
Tyler Holt

Licenses in use  
1 Plan 0 Work

Group Administrators  
TA Tyler Holt

Group Members

Group Members

Group Details

Project Preferences

Tasks & Issues Pref...

Timesheets & Hours

Subgroups

Statuses

Event Notifications

Portfolios

Programs

Projects

Templates

Recently Deleted

Recently Restored

Approvals

Companies

Teams

Schedules

+ Add members

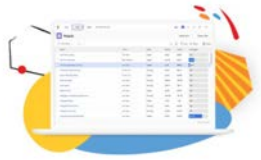
Active Nothing

Photo	Name	Email	Group Role
<input type="checkbox"/> TA	Tyler Holt		Group Administrator
<input type="checkbox"/> TI	Tiger Irons		Member
<input type="checkbox"/> PB	Pat Beesly		Member
<input type="checkbox"/> JH	Jim Halbert		Member
<input type="checkbox"/> DR	Dave Randall		Member
<input type="checkbox"/> MS	Mika Scott		Member

Showing 6 users

- To make group-specific changes, Group Administrators must click on their Group name under Setup which takes them to their Group Setup page.
- Most settings in the left navigation panel only apply to the group they selected from Setup.
- While all selections may appear, the System Admin must have granted them the proper permissions to make any changes.
- Some info may be view-only, group-specific.
- The Group Admin will only see what they have access to in the System Setup area and can't make system-wide changes unless otherwise specified, i.e., Unlocked Statuses, Priorities, Severities.

# Choose your path: how engaged will Group Admins be?



## Further understanding of managing work as a planner

1 hour, 6 minutes

[Expanding Planner Skills](#)

### What you'll learn:

1. How to create and use a project template.
2. How to create and use approval processes and milestones.
3. How to schedule projects and track progress.
4. How to handle unplanned work with issues, manage issue assignments and report on issues.
5. How to convert issues to other work items.



## Basic Reporting Elements

44 minutes

[Basic Reporting](#)

### What you'll learn:

1. Understand what filters, views, and groupings are and how they work.
2. How to create a basic custom filter.
3. How to create a basic custom view.
4. How to create a basic custom grouping.



## Get started with Workfront for system administrators

44 minutes

[Get Started - System Admins](#)

### What you'll learn:

1. How to add, edit, and manage users
2. How to select and establish the type of notifications users will get
3. How to customize the users experience to their needs



## Further your system settings knowledge for System Administrators

1 hour

[Expand Sys Admin Skills](#)

### What you'll learn:

1. How to organize users into teams, groups, and companies
2. How to create and gather unique information through custom forms
3. How to further enhance your users experience through layout templates and reminder notifications



**Pro Tip:** Browse more course options for Workfront on the [Learning page of Experience League](#)





# Do Not Delete Existing Objects in Workfront

Refer to [this link](#) to understand what objects are in Workfront

**Data can be lost if the objects listed below are deleted without System Admin guidance**

Submit a [Workfront Support Request](#) for assistance

Portfolios*	Programs*	Projects
Tasks	Issues	Dashboards
Reports	Groups	Teams*
Users*	Companies*	Documents
Plans	Goals	Project Templates*
Job Roles*		

 **Do Not Delete – Hide or Make Inactive**

\*This object type can be **deactivated**

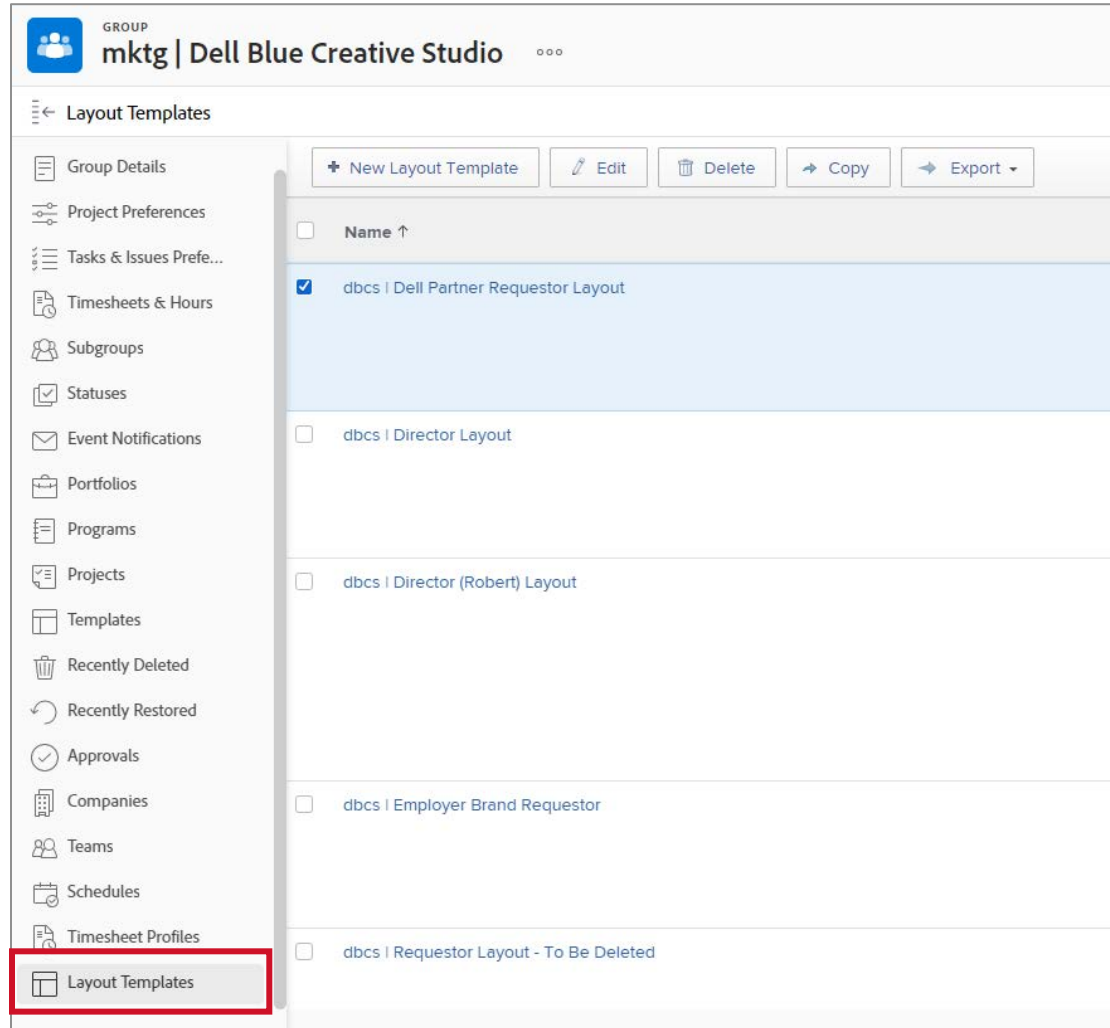
## NOTE

The only objects that can be restored (within 30 days) in Workfront are Projects, Tasks, Issues, Documents and Templates—all other deleted objects are permanently removed

# Can I Create / Edit Layout Templates?

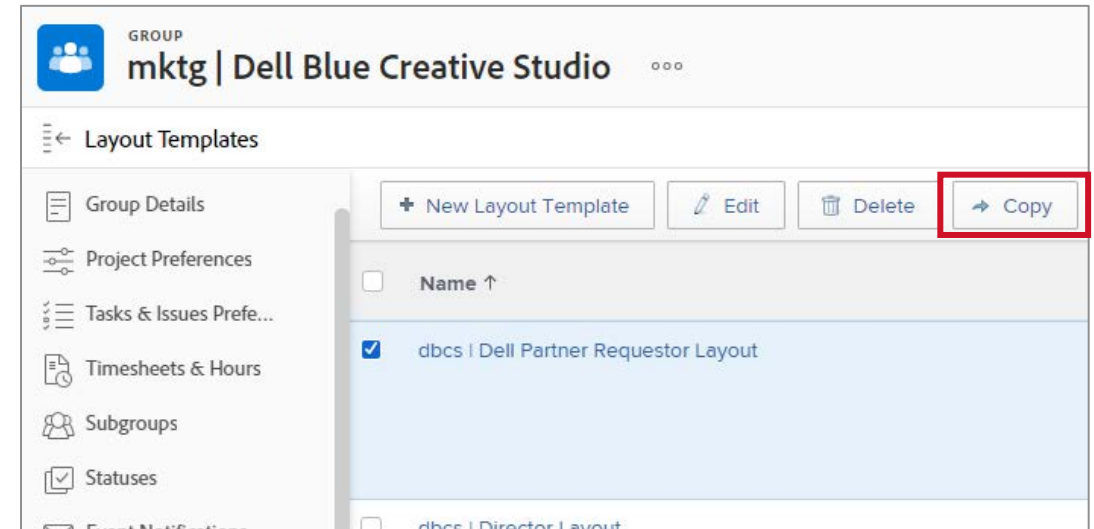


Group Admins **can create and edit layout templates**



**When creating a new layout template, it is a best practice to copy one for a similar role and then adjust accordingly**

This will ensure that toggles for what shows on projects, tasks, requests, etc. are enabled correctly



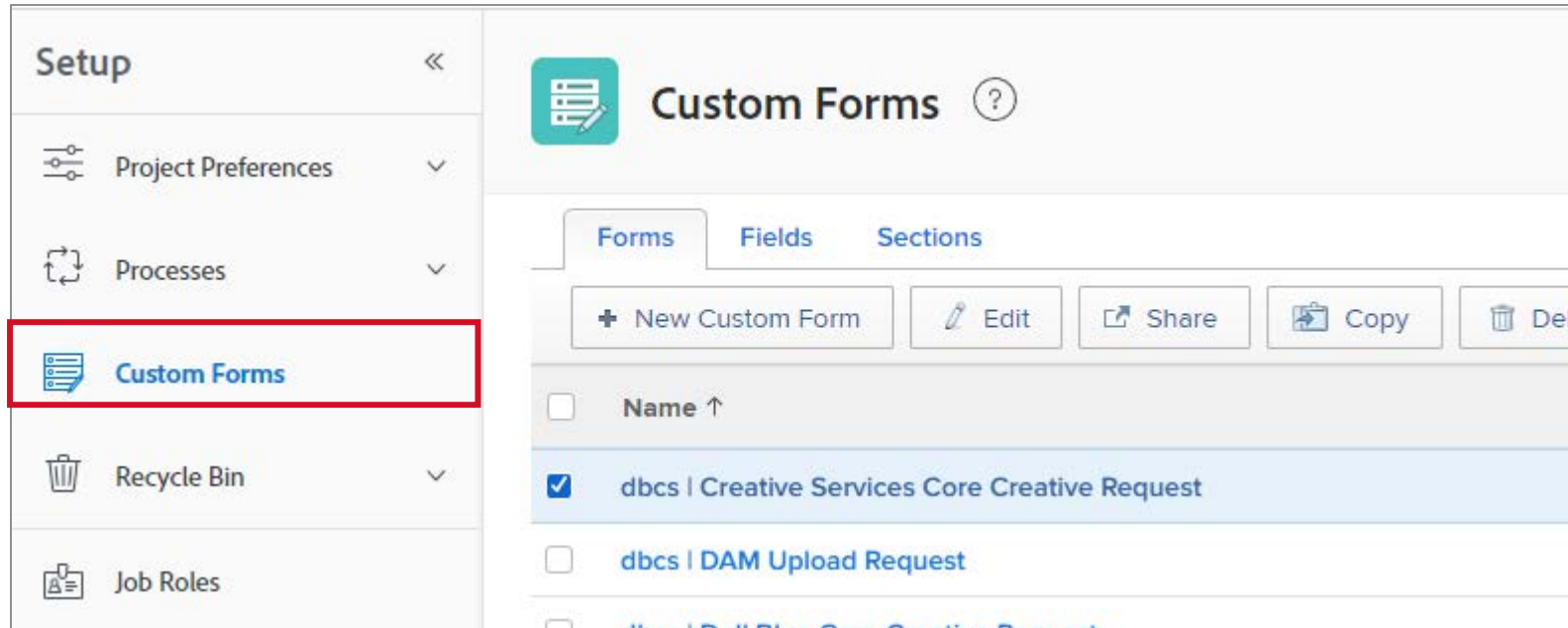


# Can I Create Custom Forms?

Group Admins **can create custom forms** but will need to submit a [Workfront Support Request](#) to setup a new intake process (if applicable)

**Best practice is to copy an existing custom form and then apply changes**

This ensures that needed fields are applied to the new form



**REFER TO CONFIGURATION DOCUMENT**

On your group's configuration document, refer to the **Calc Fields & Fusion Edits** tab to **understand if any reports need to be updated** with the addition of a new custom form

**NOTE**

Ensure name includes group's prefix & "|"

Ex: **"dbcs |"** for Dell Blue Creative Studio

 **Do Not Delete – Make Inactive**

# Can I Create Groups / Sub-Groups?



<input type="checkbox"/>	Name
<input type="checkbox"/>	mktg   Dell Marketing IT
<input type="checkbox"/>	mktg   Messaging
<input type="checkbox"/>	mktg   Legal
<input type="checkbox"/>	mktg   Vendor Funding
<input type="checkbox"/>	mktg   Translation
<input type="checkbox"/>	mktg   Change Management
<input type="checkbox"/>	mktg   Campaign B2B
<input type="checkbox"/>	mktg   Field Marketing B2B
<input type="checkbox"/>	mktg   Content Technology

## Group Admins should not create new Groups / Sub-Groups

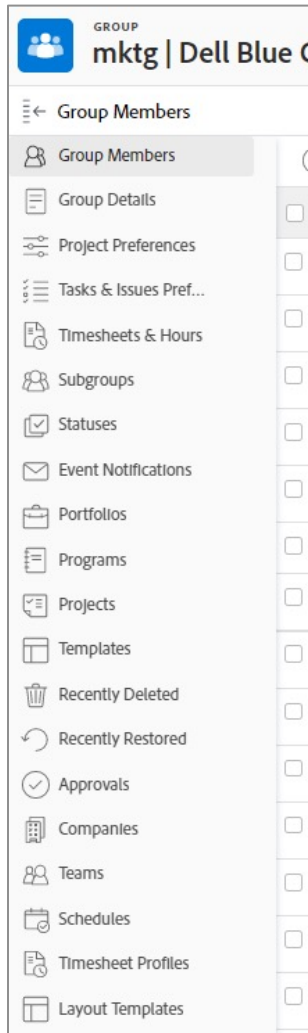
If a new group / sub-group is needed, please submit a [Workfront Support Request](#) for assistance

*Groups cannot be created by Group Admins because it can affect the greater system organization and data*

**Do Not Create New Group / Sub-Groups**

# What Group Settings Can I Change?

The table listed below shows the options Group Admins are allowed to change, along with changes that will require a [Workfront Support Request](#) be submitted for assistance



Group Setting	Yes	No	Why can't I change it?
Group Members	Yes	No	
Group Details	No	Yes	Configured settings are standardized and aligned with all groups created
Project Preferences	No	Yes	Majority of project preferences are configured at global system level and not changeable on group level
Tasks & Issues Preferences	No	Yes	Majority of task / issue preferences are configured at global system level and not changeable on group level
Timesheets & Hours	No	Yes	Best to consult the Workfront Team to ensure settings align with data that needs to be collected
Subgroups	No	Yes	Teams are used in lieu of sub-groups to manage users
Statuses	No	Yes	Adding / updating / removing statuses can accidentally change current and historic data
Event Notifications	Yes	No	
Portfolios	No	Yes	System setup is to only have 1-2 portfolios per group for organization; submit <a href="#">Workfront Request</a> for more
Programs	Yes	No	
Projects	Yes	No	
Templates	Yes	No	
Approvals	No	Yes	Consult the Workfront Team about integrating approvals / GAs may swap approvers on existing ones
Companies	No	Yes	Companies are configured on the global system level
Teams	Yes	No	
Schedules	Yes	No	
Timesheet Profiles	Yes	No	
Layout Templates	Yes	No	



# What Can I Do Under Setup?

The table listed below shows the options Group Admins are allowed to change in the Setup area

Group Setting	Yes	No	Why can't I change it?
Processes			Submit a <a href="#">Workfront Support Request</a> to utilize the Processes feature
Custom Forms			
Recycle Bin			
Job Roles			
Teams			Team changes should be done under <b>Group Settings</b>
Groups			Submit a <a href="#">Workfront Support Request</a> to create new Groups
Companies			Companies are created and updated by System Admins
Log In As			Group Admins can only log in as people in their group
Schedules			Schedule changes should be done under <b>Group Settings</b>
Timesheets & Hours			Submit a <a href="#">Workfront Support Request</a> to adjust Timesheet & Hours preferences
Email			Email notifications under Setup are global preferences, group preferences should be edited under <b>Group Settings</b>
Scorecards			Submit a <a href="#">Workfront Support Request</a> to utilize the Scorecards feature
Interface			Interface changes are made by System Admins
System			System changes are made by System Admins

# Maintenance and Measurement



# System Administration: Driving Value

## Value Realization | Core Value Dashboard

Maturity level: Managed

This blueprint contains a single dashboard with 21 reports to help you measure the Value of Workfront. These reports help you translate the benefits of Centralizing Work and Managing Work Processes into measurable values that you can track over time to drive better outcomes.

Version 1 | Published on 5/22/2023

Use cases:

Project Management Office

Blueprint Types:

Dashboard

Details

## Value Realization | Review and Approve Dashboard

Maturity level: Managed

This blueprint contains a single dashboard with 7 reports to help you realize the Value of Workfront. These reports help you translate the values of Reviewing & Approving work into measurable benefits that you can track over time to drive better outcomes.

Version 1 | Published on 6/12/2023

Use cases:

Project Management Office

Blueprint Types:

Dashboard

Details

## Value Realization | Deliver Client-facing Services Dashboard

Maturity level: Managed

This blueprint contains a single dashboard with 8 reports to help you realize the benefits of Workfront. These reports are designed to help you translate your client-facing services into measurable value that you can track over time to drive better outcomes.

Version 1 | Published on 12/11/2023

Use cases:

Marketing Agency (Studio) •  
Project Management Office •  
New Product Development •  
Marketing Operations • Finance •  
Information Technology • Marketing Technology •  
Marketing • Marketing Creative Services •  
Marketing Event Management •  
Human Resources • Professional Services •  
Marketing Risk And Compliance

Blueprint Types:

Dashboard

Details



LANDING PAGE

# Blueprints



Filter by type

- Dashboard
- Organizational Structure
- Project Template
- Report

# Clean-up and maintenance resources

## System Administrator Maintenance Dashboard

Maturity level: Managed

This blueprint contains a single dashboard to assist system administrators in maintaining and cleaning up the system periodically from miscellaneous clutter that might build up over time.

Version 1 | Published on 10/5/2022

Use cases:

Project Management Office • New Product Development • Finance • Information Technology • Marketing • Human Resources • Professional Services

Blueprint Types:

Dashboard

Details

## Workfront Usage Dashboard

Maturity level: Managed

This blueprint contains a single dashboard with 11 reports to assist system administrators and governance teams understand whether their configuration is being used as expected.

Version 1 | Published on 10/5/2022

Use cases:

Project Management Office • New Product Development • Finance • Information Technology • Marketing • Human Resources • Professional Services

Blueprint Types:

Setup Feature • Dashboard

Details



# System Admin Schedule

Cadence of roles and responsibilities for System Admins

Create a project with these recurring task reminders

System Admin Maintenance Schedule								
Category	Description	Daily	Weekly	Monthly	Quarterly	Upon request (ticket required)	Last Updated (for Quarterly and Monthly only)	Access Links
User Set-Up	<b>Internal User Setup</b> Approve New Users Requests in ServiceNow and complete setup	X						<a href="#">Internal User Set Up Playbook</a>
	<b>External User Setup</b> Approve External New Users Requests in the 'admin   Workfront Support Dashboard' and complete setup					X		<a href="#">External User Set Up Playbook</a>
	<b>Internal/External Teams tag</b> Make sure users are tagged with admin   Internal or admin   External in the <b>Other Teams</b> field within the Edit Panel of the user							
	<b>New Team Onboarding</b> Update the <b>User Onboarding Status</b> tab in this file so the team has visibility on the who still needs to request access from a new team use case			X				<a href="#">User Onboarding Status</a>
	<b>External Group Deactivations</b> Dell users, that have been created in Workfront with only their Dell email because they were added to a proof review. They need to submit their access through ServiceNow so they are fully set up in WF using SSD				X		<i>Email sent on 04/11</i>	<a href="#">External Users Bucket</a>
	<b>Team/Outlook Add-Ons Set Up</b> New Users may need guidance when trying to install a Teams or Outlook Add On from Workfront. Sort ServiceNow report for monthly add-on requests and send email with slide 10 instructions to confirm the set up.				X		<i>No one has requested additional access as of 02/02</i>	<a href="#">Teams/Outlook Workfront Add-Ons</a>
<b>Support Tickets</b>	<b>Workfront Support Tickets</b> Assign tickets to System Admins, Product Managers or IT as applicable. Review and follow up on status to maintain SLAs. The direct Support line is...	X						<a href="#">admin   Workfront Support</a>
System Maintenance	<b>Reassignment of Deactivated Users</b> When users are deactivated by the SSD system, any projects, issues or task assignments that need reassignment will show on these reports. Make sure you go to the Proofing side and delete their accounts to avoid duplicates on the proofing side.		X					<a href="#">Deactivation Dashboard</a>
	<b>Master Access Level Updates</b> Product managers need to review any needed changes with the Governance Lead and then submit a ticket for the Access Update to the system admins. System Admins will make updates in the system and to the Master Access Level document.						X	<a href="#">Master Access Level Document</a>
	<b>User Maintenance</b> Review dashboard to determine if users have been inactive for three months or more, and should be changed to a reviewer access level. Use the email template provided to notify the users of the license downgrade. Also, check the country codes in users to ensure uniformity.					X	<i>(sent on 11/07/2023) To be completed 02/04/2024 - Adobe Consulting Hours</i>	<a href="#">admin   USER Dashboard Maintenance (workfront.com)</a>
	<b>admin   Project, Templates, Reports, Custom Form, Dashboard Maintenance</b> Review dashboard to determine what projects can be deleted or close. May have old test or demo projects still open or projects may have all task completed, but still in an open status. Reports & Dashboards that are copies or that are not being used can be deleted.					X	<i>(sent on 11/07/2023) To be completed 02/04/2024 - Adobe Consulting Hours</i>	<a href="#">admin   Project, Templates, Reports, Custom Form, Dashboard Maintenance (workfront.com)</a>
	<b>admin   Project/Task/Issues Audit Dash - *Not using yet</b> Dashboard to be developed and used in the future...					X		<a href="#">admin   Project/Task/Issues Audit Dash - *Not using yet (workfront.com)</a>

# Workfront Team Projects

We create Workfront Team Projects for:

- New Implementations
- Integrations
- Alphas
- Initiatives (example: URN creation)
- System Admin Recurring (example: Maintenance tasks and New Releases)

The screenshot displays the 'admin | Workfront Implementation Dashboard'. At the top, it shows 'admin | WF Implementation - Project Summary - Current' with an 'Export' button and 'Details | Summary' tabs. Below this is a table with columns: Project Name, Baseline Name, Baseline Start (KickOff), Actual Start, Baseline Completion (RTB), Actual Completion, and Variance. The table lists three categories: 'WF Non-Use Case Projects (6)', 'wf | Compliance & Claiming (3)', and 'WF Use Case Projects (3)'. Below the table is a 'Project Milestone Gantt' section with 'Details' and 'Summary' tabs. The gantt chart shows a timeline from January to August 2024, divided into quarters. A project named 'loc | WF localization - Phase 1 delivery (7)' is highlighted, with a progress bar showing 100% completion in January. Other projects have progress bars for February (5.2%), May (6.2%), and August (0%).

This is a zoomed-in view of the project details for 'loc | WF localization - Phase 1 delivery (7)'. It shows a list of tasks with checkboxes:

- DISCOVERY
- DESIGN
- BUILD & TEST - Print / Brochure (Long/Short forms, whitepapers) / Retail
- BUILD & TEST - B2B Email, Broadcast, Video, OA and Social
- TRAINING
- GO LIVE



# Workfront Support Queues

Group Admins have their own Workfront Support queues visible only to their teams.

System Admins have a Workfront Support queue visible system wide.

DASHBOARD admin | Workfront Support Requests Dash Dashboard Actions | As of Apr 14, 2024 10:49 am Central D

Admin

admin | Workfront Support Tickets

Details Summary

[→] [v]

Report Default Report Default

<input type="checkbox"/> L2	L3	L4	Name	Date Submitted	Age	Last Update	Last Comment	User Type	Requestor	Email	Assigned To	Assignments	Status														
<ul style="list-style-type: none"> <li>&gt; Access, Org or Role Change (3)</li> <li>&gt; New User Set Up (3)</li> <li>&gt; Need an Update (1)                             <table border="1"> <tr> <td><input type="checkbox"/></td> <td>Global Marketing</td> <td>Brand, Creative &amp; Experiential</td> <td>Global Brand &amp; Dell Blue</td> <td>Help editing a report</td> <td>4/2/24</td> <td>12 Days</td> <td>4/11/24</td> <td>Hi Michelle - The meeting I normally have where we'd review and talk about these things was cancelled this week. We meet on Monday. I can let you know after that.</td> <td>Internal Dell Employee</td> <td>Angele Davidson</td> <td>Michelle Francis</td> <td>Michelle Francis</td> <td>Awaiting Feedback</td> </tr> </table> </li> <li>&gt; Report an Issue or Bug (1)</li> <li>&gt; Other (1)</li> </ul>														<input type="checkbox"/>	Global Marketing	Brand, Creative & Experiential	Global Brand & Dell Blue	Help editing a report	4/2/24	12 Days	4/11/24	Hi Michelle - The meeting I normally have where we'd review and talk about these things was cancelled this week. We meet on Monday. I can let you know after that.	Internal Dell Employee	Angele Davidson	Michelle Francis	Michelle Francis	Awaiting Feedback
<input type="checkbox"/>	Global Marketing	Brand, Creative & Experiential	Global Brand & Dell Blue	Help editing a report	4/2/24	12 Days	4/11/24	Hi Michelle - The meeting I normally have where we'd review and talk about these things was cancelled this week. We meet on Monday. I can let you know after that.	Internal Dell Employee	Angele Davidson	Michelle Francis	Michelle Francis	Awaiting Feedback														

admin | Workfront Support Tickets - Backlog

Details Summary

[→] [v]

<input type="checkbox"/> L2	L3	L4
<ul style="list-style-type: none"> <li>&gt; Global Marketing (10)                             <ul style="list-style-type: none"> <li>&gt; Brand, Creative &amp; Experiential (8)</li> <li>&gt; Corporate Affairs (2)</li> </ul> </li> </ul>		

admin | Workfront Support Tickets - Adobe Ticket Open

Details Summary

[→] [v] Report Default Report Default Report Default

<input type="checkbox"/> L2	L3	L4	Name	Entry Date	Requestor	Assignments	Status
No data to display.							

admin | Workfront Support Tickets - Adobe Enhancement Request

Details Summary

[→] [v] Report Default Report Default

<input type="checkbox"/> L2	L3	L4	Name	Entry Date	Requestor	Assignment
<ul style="list-style-type: none"> <li>&gt; Global Marketing (2)</li> </ul>						

admin | Workfront Support Requests by Support Type

Details Summary Chart

Export Hide Values

Support Type	Percentage
New User Set Up	51.89%
Report an Issue or Bug	22.36%
Other	6.74%
Need a Report or Dashboard Built	3.61%
Need an Update	6.43%
Demonstration	0.31%
Access, Org or Role Change	5.8%
No Value	1.57%
WTF / AFR DAM Integration	0.63%
Training	0.78%

admin | Workfront Support Requests by Business Unit

Details Summary Chart

Export Hide Values

Business Unit	Percentage
Other	56.94%
Vendor Funding	0.33%
No Value	12.78%
Dell Blue	16.09%
Dell Marketing IT	0.03%
Dell Marketing	7.1%
Digital Marketing	0.95%
Exponential Marketing	0.95%
Field Marketing CSO	0.47%
Field Marketing CSO	0.47%
Local	0.33%
Localization CSO	0.33%
Marketing Operations Scalable Solutions (MOSS)	0.19%
Messaging	0.19%
Content Technology	0.19%
Compliance & Campaign CSO	0.19%
AC Tech	0.19%

# Workfront Support Tickets

System Admins have a report to track the SLA (service level agreement)

We also calculate the average SLA by request type to determine if we need to adjust SLAs for the future.

Capture Status for submitted as Adobe support ticket or enhancement

The screenshot displays two reports from the Workfront Support system. The top report, 'Feedback SLA Report', shows a list of tickets with columns for Assigned To, Assignments, Support Type, Ref #, Name, Date Submitted, Actual Completion Date, Age, SLA Duration, and SLA Hit/Miss. The bottom report, 'Feedback SLA Average by Request Type', shows a summary of average durations for different request types.

Support Type	Ref #	Name	Date Submitted	Actual Completion Date	Average Duration
> Need General Support / Updates	(184)				6.75
> Request New Functionality (IT requirements)	(16)				18.76

## SLA Average Duration

- Entry date = Date Submitted
- Actual Completion Date
- Average Duration = Text Mode

aggregator.displayformat=HTML

aggregator.function=AVG

aggregator.valueexpression=ROUND(WORKMINUTESDIFF({entryDate},{actualCompletionDate})/480,2)

aggregator.valueformat=doubleAsDouble

displayname=Average Duration

textmode=true

valueexpression=CONCAT(ROUND(WORKMINUTESDIFF({entryDate},{actualCompletionDate})/480,2)," Days")

valueformat=HTML

# Workfront IT Support

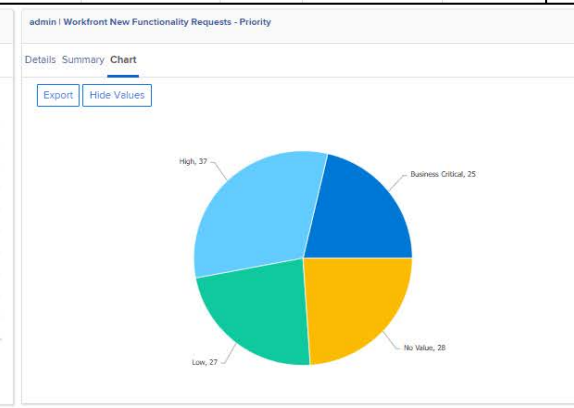
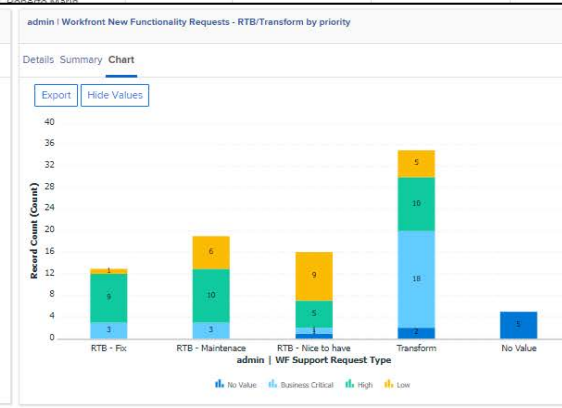
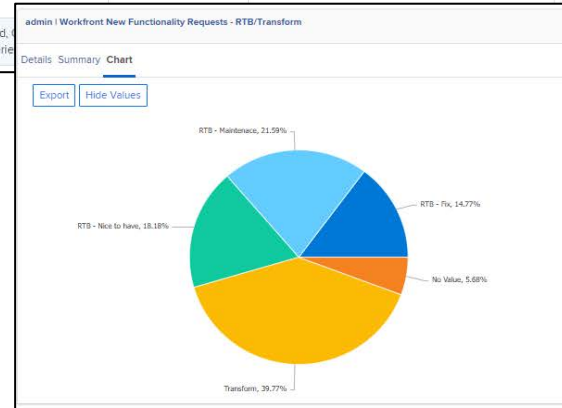
## IT Support Requests

- Issues on Implementation Projects
- Issues on Non-Implementation Projects (example: frame.io testing)
- WF Support Tickets assigned to IT rather than System Admins

DASHBOARD admin | IT Assignments Dashboard Actions As of Apr 14, 2024 11:15 am Central Daylight Time

admin | Workfront New Functionality Requests - Active

L2	L3	L4	Name	Assignments	Rank ↑	RTB/Transform	Recurring?	Priority ↑	LOE	Release Date	Story ID	Status
Global Marketing	Customer Data & Marketing Tools	Content & Workflow Technology	Modern Dell - Proof notification automation for Blog	Sreekanth Reddy Roberto Marin	1	Transform		Business Critical	Medium: 5-10 days	4/30/24	WOR-339	Opened Ticket with Adobe
Global Marketing	Dell Technologies Business Unit	Content & Workflow Technology	E2E - Adding Program tier and URN - Automation 1 - DB Pilot	Lou Ann Kleiman Sreekanth Reddy Roberto Marin	2	Transform	Quarterly	Business Critical	Xtra Large		WOR-340 and WOR-361	Under Development
Global Marketing	Customer Data & Marketing Tools	Content & Workflow Technology	New Org Dropdowns on "Request for Support"	Lou Ann Kleiman Victor Paulini Roberto Marin	2	RTB - Fix		High	Xtra Large		WOR-257	Under Development
Global Marketing	Dell Technologies Business Unit	Content & Workflow Technology	E2E - Convert request into project with program details and URN - Automation 2 - DB Pilot	Lou Ann Kleiman Sreekanth Reddy Roberto Marin	3	Transform	Quarterly	Business Critical	Xtra Large		WOR-382	Pending Development
Global Marketing	Dell Technologies Business Unit	Content & Workflow Technology	E2E - Create assets from project asset type and URN - Automation 3 - DB Pilot	Lou Ann Kleiman Sreekanth Reddy Roberto Marin	4	Transform	Quarterly	Business Critical	Xtra Large		WOR-361	Pending Development
Global Marketing	Customer Data & Marketing Tools	Digital Marketing	User notification update to Fusion Scenario that Updates Email Notifications	Olya Kollen Roberto Marin	7	RTB - Maintenance		High	Small: 14 days		WOR-377	Under Development
			RTB - Dell Blue - Intake form and template update	Lou Ann Kleiman Angèle Davidson Michelle Francis Roberto Marin	8	RTB - Maintenance		High				Need Requirements
			RTB - Update DBCS DAM upload Intake Form in Fusion	Roberto Marin	9	RTB - Maintenance		High	Large: 10-20 days		WOR-386	Pending Development
Global Marketing	Brand, Creative & Experiential	Global Brand & Dell Blue	RTB - Dell Blue - Limit Folder visibility	Lou Ann Kleiman Michelle Francis Roberto Marin	10	RTB - Nice to have		Low	Small: 14 days		WOR-384	Pending Development
Global Marketing	Brand, Creative & Experiential	Global Brand & Dell Blue	dbcs   Updated Proofing Workflows	Lou Ann Kleiman Laura Kuehl Michelle Francis Carol Ann Lee Roberto Marin	11	RTB - Maintenance		Low	Medium: 5-10 days		WOR-388	Pending Development



# Questions?



# Upcoming Events

## Product Release Webinars

- On-Demand: What's new in the 24.1 Release (Q1 2024)

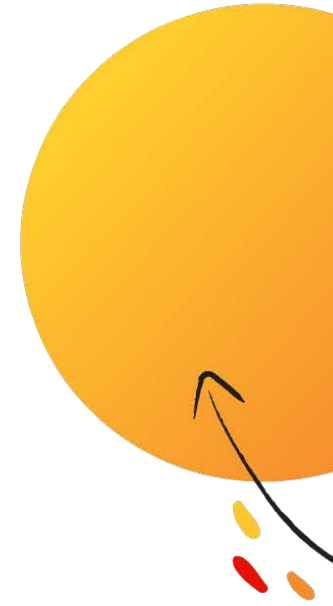
## Upcoming Webinars & Events

- Aug 15: Skill Exchange for Workfront (*Coming soon!*)

## "Ask the Expert" Office Hours + Small Group Workshops

- Apr 30: Ask the Expert: Fusion Operations
- May 9: Workfront Industry Circle: Higher Education
- May 10 Connect: Admin Chat for Marketing & Creative
- ★ May 16: Ask the Experts – Staffing Your Admin Practice Follow-up

 Register at <https://experienceleague.adobe.com/events>



**Thank you!**







# Appendix



## Document outcomes

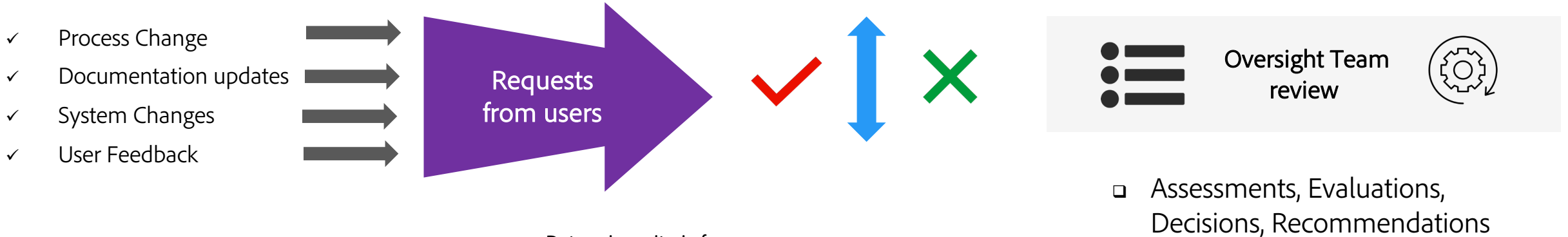
- Tie your Workfront change requests to your Workfront documented object policies, requests, and maintenance (examples shown next slides).
- Use Workfront to document configuration changes, especially those tracked through change control. If you use a CMDB consider making those changes as well.
- Document and communicate process and system changes, and policy statements (Recommend Email, Workfront Notifications, Slack/Teams Post and regular enablement updates)
- Record policy statements and key decisions in Workfront Governance Portfolio/Program, Workfront Process & Policies Project and on company document storage provider



# Request (Intake) Queue

Request Queues are a great product feature to leverage for having users submit feedback to the Oversight Team.

Gathering all the inquiries, suggestions, and requests into a similar format with as much information as possible collected from the requestor allows for a standard approach for reviewing and addressing items, as well as clear reporting and communication.



Determine criteria for:

- Changes that need to be documented - instant
- Changes that need group admin approval from group admin - instant
- Changes that need group admin approval from group admin – instant
- Changes that need oversight team approval - planned

<input type="checkbox"/> # ↑	▼ Task Name	Description	Owner	Initially Documente	Last Update Date	Approval Process
<input type="checkbox"/> 12	Project Approvals	Admins and groups admins should discuss the creation of approvals as a group, as these are shown system-wide	Tyler Holt-Admin	3/18/22	3/25/22	
<input type="checkbox"/> 13	Task Approvals	Admins and groups admins should discuss the creation of approvals as a group, as these are shown system-wide	Tyler Holt-Admin	3/18/22	3/25/22	
<input type="checkbox"/> 14	Issue Approvals	Admins and groups admins should discuss the creation of approvals as a group, as these are shown system-wide	Tyler Holt-Admin	3/18/22	3/25/22	
<input type="checkbox"/> 15	Milestone Paths	System and Group Admin Access Only - These are to be kept to a minimum, showing the key phases across the most common collections of project types - If a group admin does not have access to all system milestone paths, but feels there may already be one that applies to their use case, please consult with the system admin; however, do not make changes to this without consulting the milestone path group admin/owner	Raquel Green	3/18/22	3/25/22	
<input type="checkbox"/> 16	Custom Forms	The description field on all custom forms should have the following data: - Which groups it is shared with - The purpose of the form - If it is tied to integrations - The three-digit naming convention of the group at the end of the field name if it will not be used in custom forms universally	Raquel Green	3/18/22	3/25/22	
<input type="checkbox"/> 17	Custom Fields	The description field on all custom fields must have the following attributes: - If it is a organizationally reported field - If it is used in integrations - The group name that created the field - The purpose of the field - The three-digit naming convention of the group at the end of the field name if it will not be used in custom forms universally	Raquel Green	3/18/22	3/25/22	
<input type="checkbox"/> 18	Portfolios - Marketing	Portfolios represent...				
<input type="checkbox"/> 19	Programs - Marketing	Programs represent... business, internal,				
<input type="checkbox"/> 20	Projects - Marketing	Projects represent the various jobs that... i.e. multi-deliverable campaign, new business pitches per... company, all internal marketing projects, etc.				

Document policy and process in a Workfront project

## Maintenance Schedule Example

Defining a cleanup schedule is a necessary part of the on-going maintenance of your instance.

**Suggested approach:** Adobe Workfront Group Admins will be responsible for suggesting cleanup solutions. Group Admins should share the clean-up activity with the System Admin prior to acting on cleanup. Sample provided below.

**NOTE:** Please reach out to an object owner before you deactivate **any** object.

Objects	Q1	Q2	Q3	Q4
Custom Fields/Forms	X			
Portfolios			X	
Program		X		
Project Templates				X
Groups				
Request Queues				
Teams				
Roles				
Layout Templates				
Timesheet Profiles				
Training Materials				

Schedule using reminders in  
Workfront!





# Sample Admin Agenda

- Action items from previous meeting
- Purpose/Vision Alignment
- Updates from Previous Month
  - Review Decisions from Request Queue
  - Request for any new Decisions
  - Approve/decline open requests as a group
  - Significant Changes
- Discuss User Feedback and Requests
  - Adoption and Usage Challenges
  - Optimization Ideas and Requests
- Upcoming release Items
  - Release Review
  - End-user communication
  - Training methods (creation, communication, and delivery)
- Process Overview/Best Practices Highlight
- Support/Enhancement Need Review
- Items to highlight to Key Stakeholders
- Action Items

# Sample job description | Full-time System Administrator

## Sample Job Titles

- System Admin – Workfront
- Workfront Administrator
- Workfront Admin
- Workfront Systems – Admin
- Workfront Business Analyst (Can be used for Sys Admin or Group Admin)
- [Department] Operations Specialist/Analyst/Manager/Administrator
- [Department] Operations Systems Specialist / Analyst / Manager / Admin

## Job Summary

- [Role] leads the implementation, configuration, and enterprise adoption of Workfront platform, managing technology, workflows, and requirements, as well as supporting process improvements to meet the operational needs of the organization.
- [Role] is responsible for building, maintaining, and updating the Workfront configuration and preferences, including setup, portfolio, program, and group management, reporting oversight, custom forms, automation, user management and license allocation.
- Role drives roadmap for system expansion and optimization, creating and maintaining process documentation, as well as monitoring systems and workflow standards.
- [Optional for Automation, APIs, and Fusion] Direct the implementation of new functionality and lead enterprise software integration initiatives, defining requirements as well as testing and troubleshooting (Automation, APIs, and Fusion)



## Essential Functions/Key Responsibilities

- Configure Workfront platform to meet business requirements, driving user adoption and providing work management transparency through accurate and effective reports and dashboards
- Create, share, and update reports and dashboards as requested by leadership, partnering with business units on requirements
- Partner with cross-functional leadership for user management and budget for license allocation
- Collaborate with cross-functional stakeholders to understand current state, difficulties and demo Workfront solutions to meet those challenges
- Support day-to-day system needs and adjustments such as user management and experience, reports and dashboards, data integrity, audits, as well as user troubleshooting and support ticket tracking
- Create and deliver training content for cross-functional teams on system functionality, updated features, and new processes
- Create and lead enterprise Workfront Center of Excellence to support the governance and prioritization requirements for the organization
- Create and maintain documentation for processes, adoption, standardization, alignment, and enterprise roadmaps
- Regularly review intake processes and user feedback to ensure implementation is meeting expectations, making adjustments as needed to improve the user experience and metrics
- Create, share, and update reports and dashboards as requested by leadership, partnering with business units on requirements
- Lead troubleshooting efforts and track support ticket requests shared by users and department leadership
- Review and prepare for Workfront releases, implementing new functionality and communicating new features as needed
- Actively participate in Workfront Networking and Training events
- Perform any other job duties as required

# Sample Job Description | Workfront Group Administrator

## Sample Job Titles

- Workfront Business Analyst (Can be used for Sys Admin or Group Admin)
  - [Department] Operations Specialist/Analyst/Manager/Administrator
  - [Department] Project/Program Manager
- 

## Job Summary

- [Primary Job Summary]
- In addition, [Role] serve as the Group Admin system expert for department leading the team in the adoption and implementation of administration of the Workfront system and providing day-to-day support for team administrative and technical needs, as well as troubleshooting system issues and tracking support tickets.

## Essential Functions/Key Responsibilities

- [Primary Job Duties]
- Collaborate with internal stakeholders to understand current state, difficulties and provide solutions to meet needs.
- Collaborate with business partners to create process requirements for the Workfront System Admin
- Serve as Departmental Subject Matter Expert, communicating current process, requirements, objectives, and challenges
- Act as liaison between Workfront Sys Admin and department stakeholders to ensure Group configuration is meeting departmental objectives
- Partner with cross-functional team members to collect feedback for process efficiencies
- Coordinate with the Workfront Sys Admin to review processes, features, and identify opportunities for efficiencies and optimization
- Share reports and status updates as requested by departmental leadership
- Facilitate Workfront onboarding and features training to users within the business unit
- Drive cross-functional collaboration, troubleshooting questions and issues, collecting and communicating feedback
- Partner with Workfront Sys Admin on system optimization, audits, clean-up, data integrity as well as basic troubleshooting and support ticket escalation
- Create and document processes for adoption, standardization, and alignment