Marketo Engage to Adobe Console Migration

A Complete Guide

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# Upcoming Changes to Marketo Engage

Marketo Engage will be moving toward an SSO process based on Adobe profiles. Subscription and user management will move from within the Marketo application to the Adobe Admin Console.

- **System Admins will manage subscriptions on Adobe Admin Console**. See all your Adobe products in one console.
- **Product Admins will manage users and their access on Adobe Admin Console**. Add and remove users for all your Adobe subscriptions.
- **Users will sign in with Adobe Identity**. Adobe will migrate existing users to the Adobe Admin Console. Users will sign in to their Marketo subscriptions using their new Adobe Identity - either an Adobe ID or Adobe Federated ID (SSO).
- **There is no change to how you manage all other functionality within the Marketo Engage**, including management of features, user roles, workspaces, functionality, and behavior.
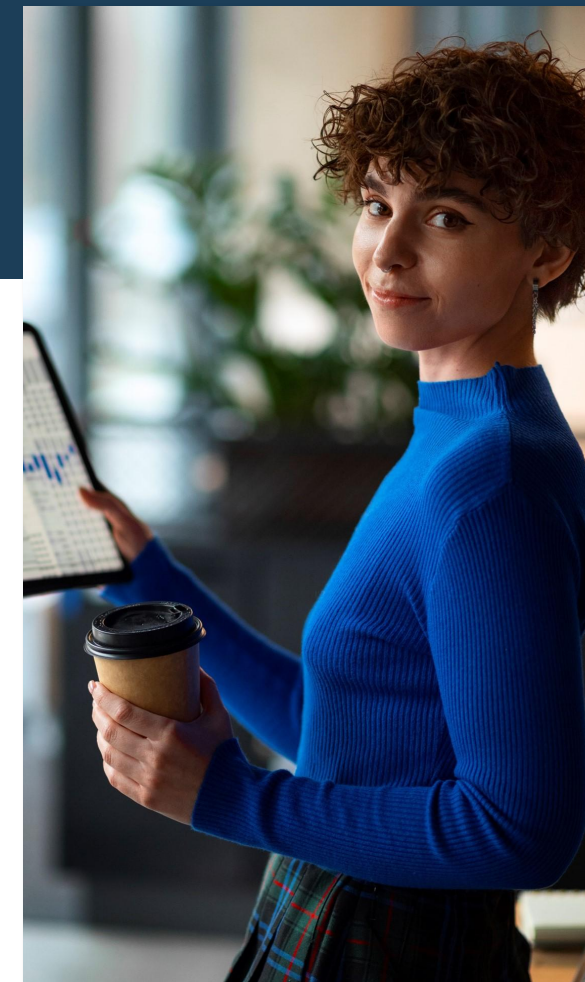
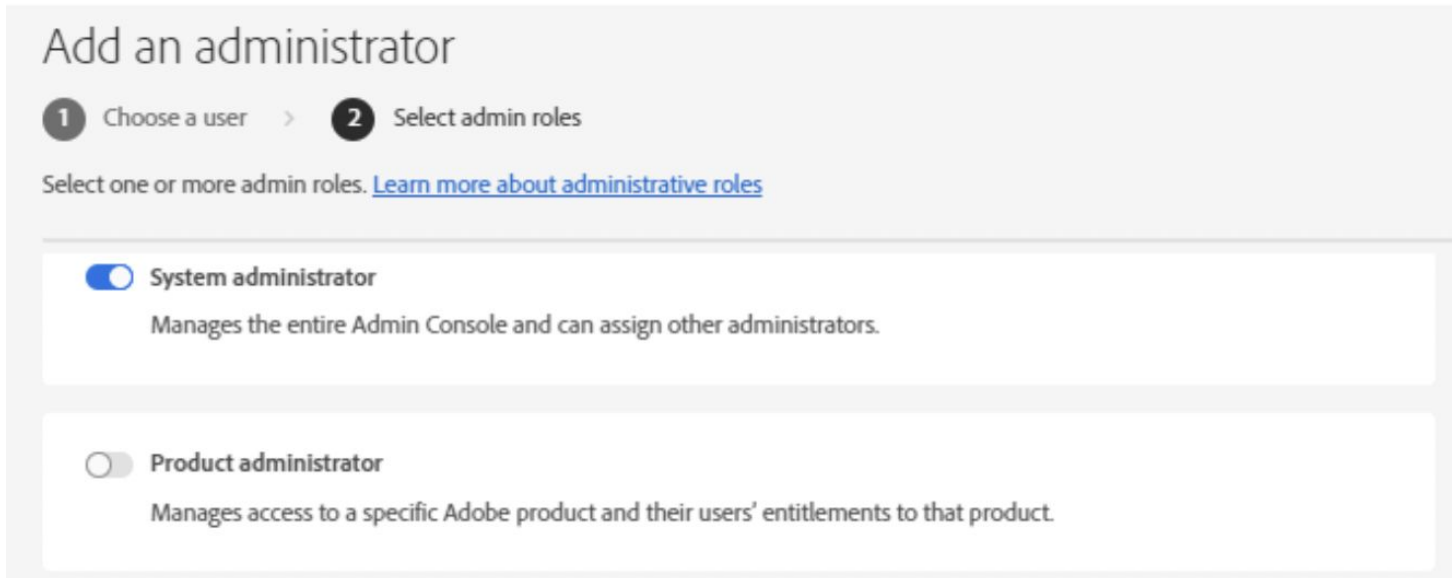# System Admin Roles

in Adobe Admin Console
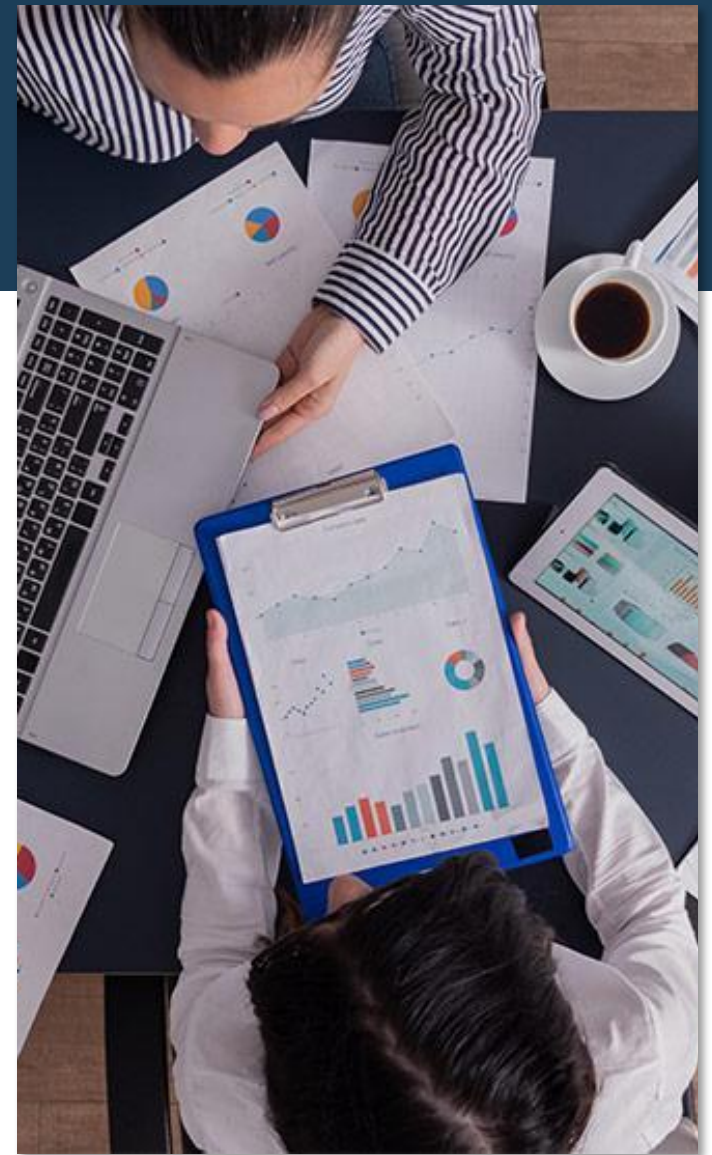
Adobe Admin Console: System Admins

System Admin Setup:

Once Marketo Engage is migrated to Adobe Admin Console, you will be prompted to invite a System Admin. System Admins can create Product Admin users who will manage the platform within Adobe Admin Console.

- Once logged in, click on Add Admin
- Enter the user's email address and details
- Check the System Administrator tab

Add an administrator

1 Choose a user > 2 Select admin roles

Select one or more admin roles. Learn more about administrative roles

System administrator

Manages the entire Admin Console and can assign other administrators.

Product administrator

Manages access to a specific Adobe product and their users' entitlements to that product.

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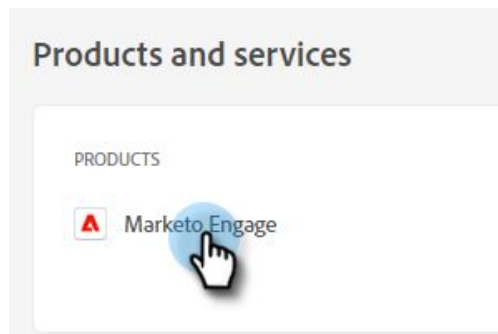
Product Admin Roles

in Adobe Admin Console

Adobe Admin Console: Product Admins

Product Admin Setup:

In Adobe Admin Console, we need to set up a **Marketo Engage Product Admin** as the first step in the process. Once the Product Admin is set up, Users are then assigned within the Admin Console.

- When you get verified as a System Admin you will receive a welcome email to kick things off →
- Once you click *Get Started* you will be prompted to either create a new Adobe ID *or* be taken directly to the Adobe Admin Console
- Navigate to **Overview** and under **Product & Services** you will see **Marketo Engage** ↓

Products and services

PRODUCTS

A Marketo Engage

You now have administrator rights to manage Adobe software and services for your organization

In your role as System Admin you will have full administrator rights to manage Adobe software and services through the Adobe Admin Console for ███ ██.

To get started, sign in to Adobe Admin Console.

As part of the sign-in process, you may be asked to set up an Adobe profile if you do not have one already. If you have multiple profiles associated with your email address, choose "Join Team" (if prompted) and then select the profile associated with your new organization name ███ ██.

Get started

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Adobe Admin Console: Product Admins

<u>Product Admin Setup:</u>

- After clicking into **Marketo Engage** you should see the available subscriptions tied to the account. If more than one, click on the subscription that you want to manage and add users to *(you will have to repeat the process for each subscription)*
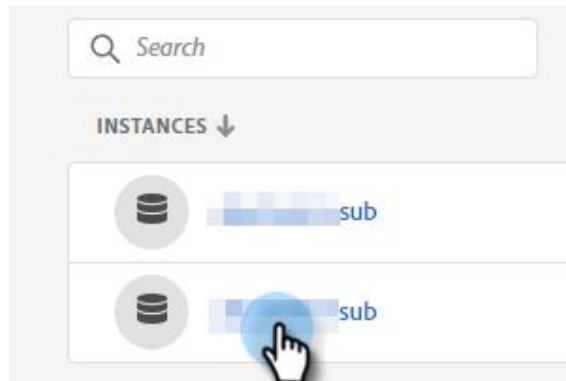

- *Product Profiles* have to be created for each subscription–click on **New Profile**

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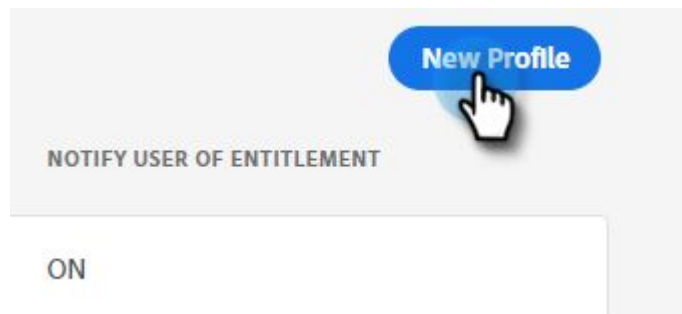
Adobe Admin Console: Product Admins

Product Admin Setup:

- After creating the **Product Profile** we then need to add **Product Admins.** The System Admin is for the entire Adobe Admin Console whereas Product Admins are specific to Marketo Engage.
- To add a **Product Admin**, go back into Admin Console, click on Marketo Engage, choose the subscription that the Product Profile was created for and click on **Admins**
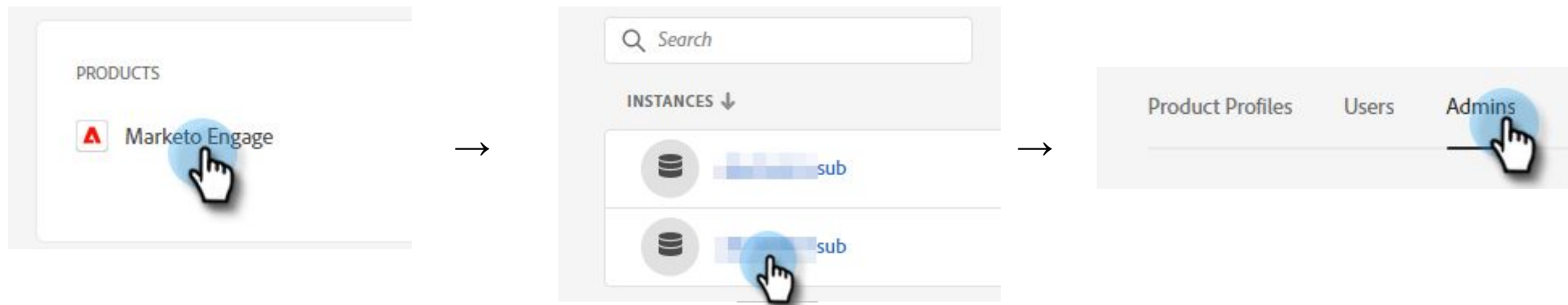
- Next you will click on **Add Admin** and type in the Email Addresses of all of the Product Admins you would like to add to Marketo Engage
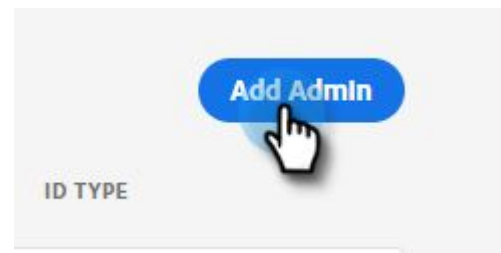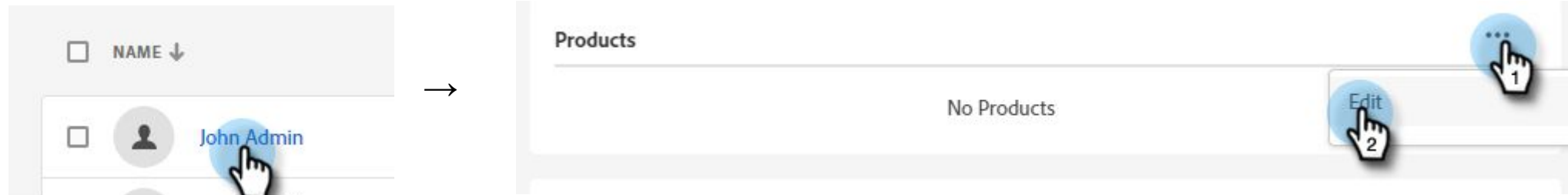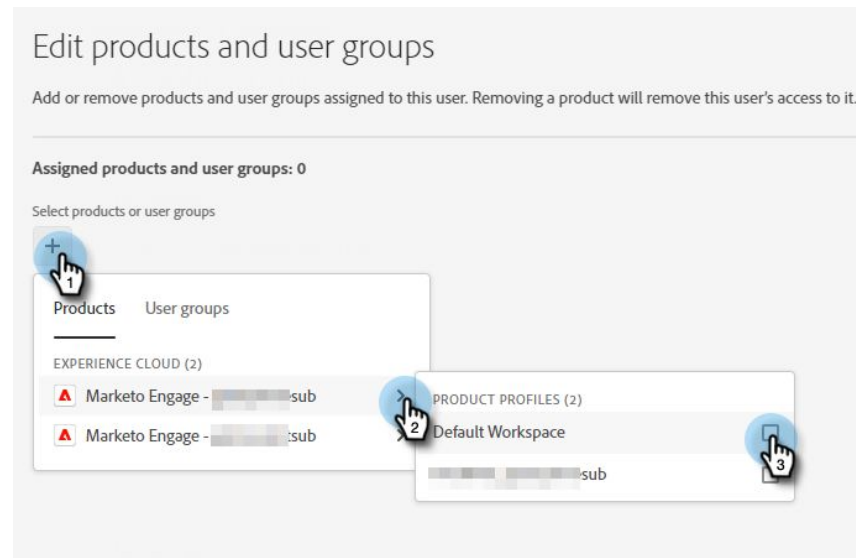
Adobe Admin Console: Product Admins

Product Admin Setup:

- Once the Product Admins have been added, their names will show up in the Console. Click on the name of the Product Admin you want to assign the Product Profile for Marketo Engage to by clicking Edit under the ellipsis in Products


- Then, choose the Subscription and the Product Profile which was set up at the beginning

  The user will then receive two emails. The first email notifies them they've been granted Product Admin rights to Marketo Engage. The second email invites them to sign in to Marketo Engage.

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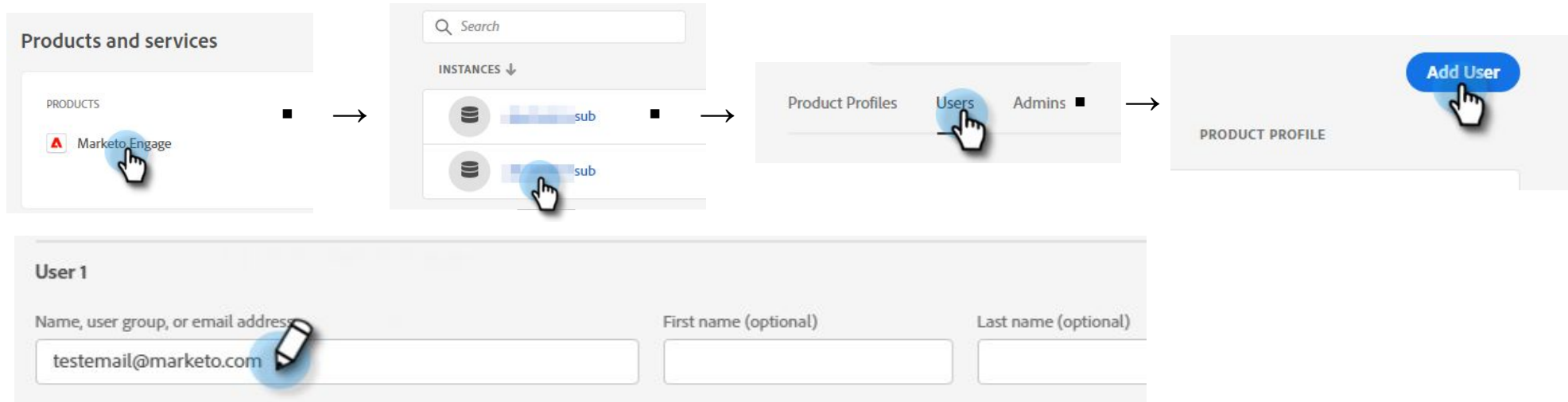
Product User Roles

in Adobe Admin Console
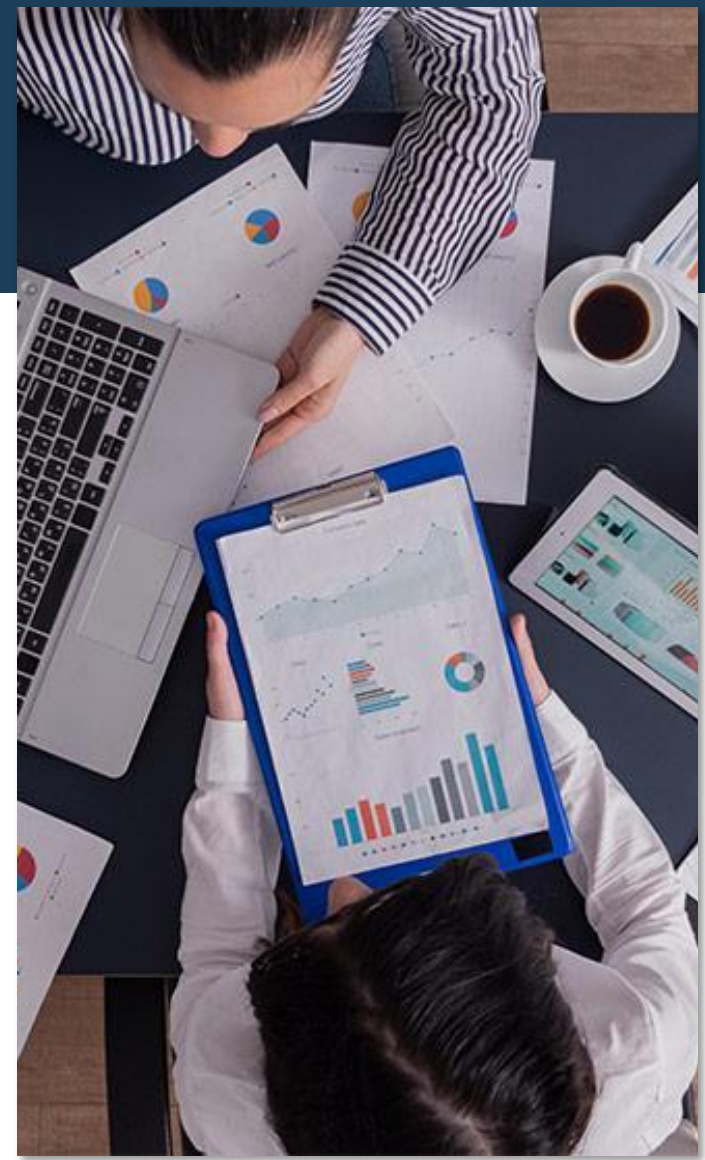
Adobe Admin Console: Product Admins

<u>Product User Setup:</u>

Once the Product Admin is set up for Marketo Engage, we will set up Product Users in a very similar way by using the Adobe Admin Console

- First you will want to log into Adobe Admin Console and navigate to **Overview** and under **Product & Services** you will see **Marketo Engage**
- After clicking into **Marketo Engage** you should see the available subscriptions tied to the account. If more than one, click on the subscription that you to add Users to
- Next, click on the **Users** tab and click on **Add User**
- You can then input the *Name* and *Email Address* for the User you would like to add

Adobe Admin Console: Product Admins

<u>Product User Setup:</u>

- Finally, choose the Product Profile (set up earlier during the Product Admin process) and assign it to the new User. Hit Save and your User has been set up!
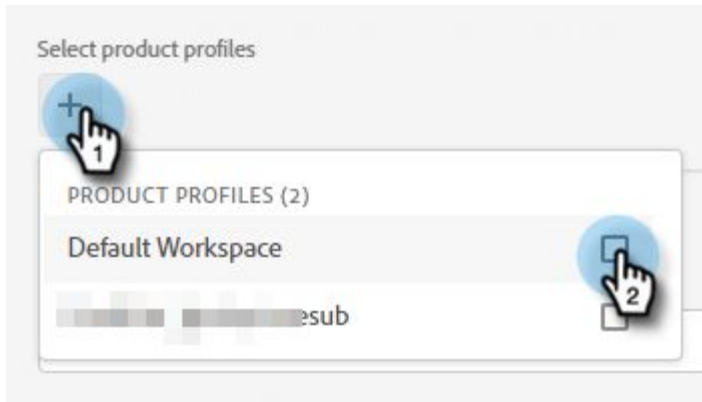
This process will need to be repeated for each User you are looking to add. Also, keep in mind the following:

1. Users are given the Standard User role within Marketo Engage. Any role adjustments happen within Marketo Engage.
2. If a User is not showing up, make sure that they are given a Product Profile–this is a requirement for access to Marketo Engage.
3. *To Remove a User, you must follow the same steps but instead, Remove the specific User and Product Profiles.*

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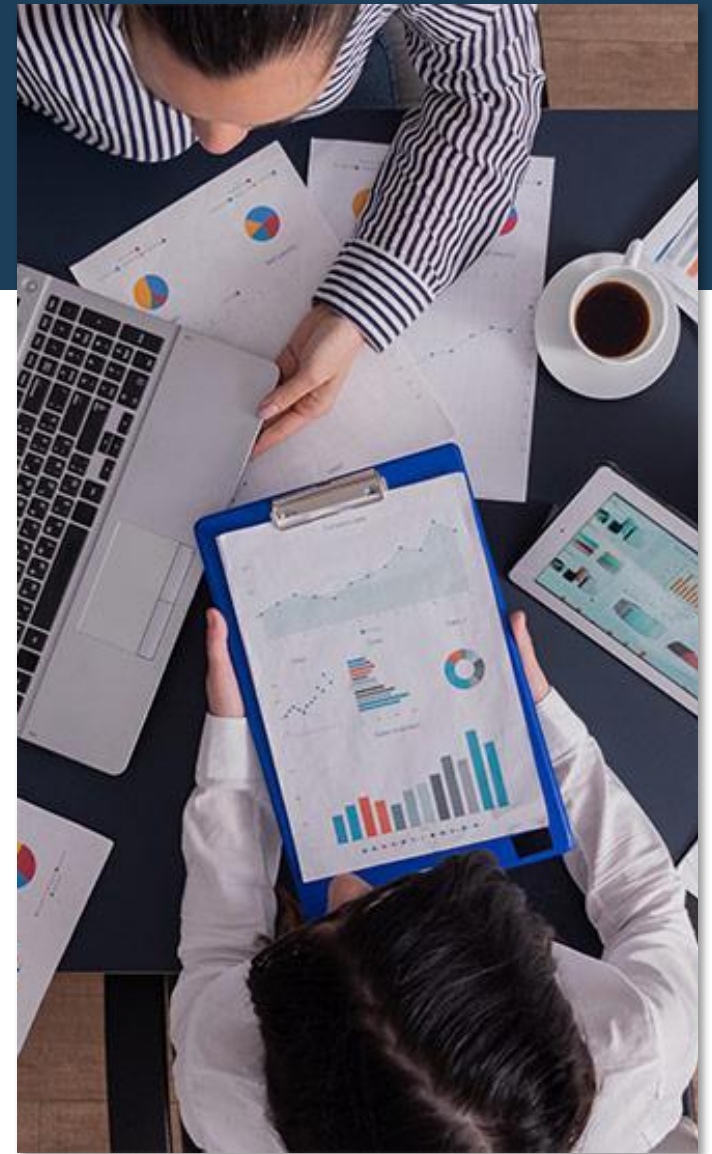# Adobe Admin Console: API User (Still Marketo Engage)

API User Setup:

For Launchpoint Integrations, creating an API User natively within Marketo Engage is still the method to follow. To do so, navigate to the Admin section of Marketo Engage, click on Users and choose 'Create API User'. After, follow the same process you typically would for adding an API User in Marketo Engage.

The window might close once you click the 'Create A New API User' button, but that is expected behavior and the user will be created.

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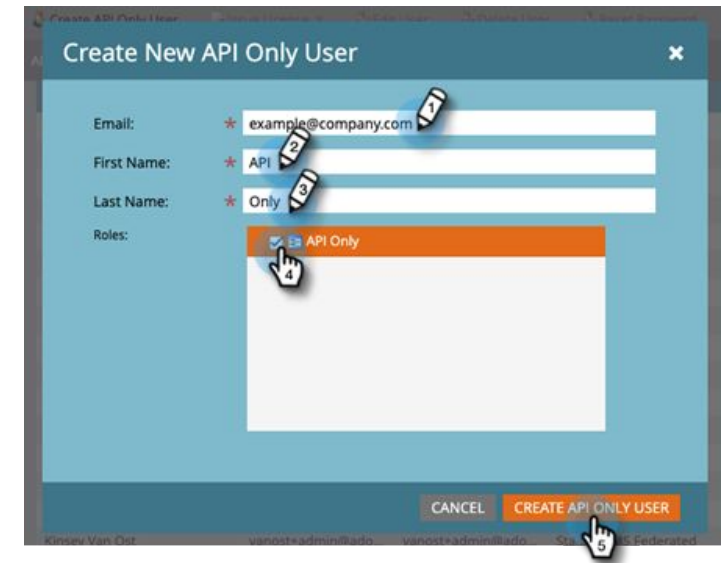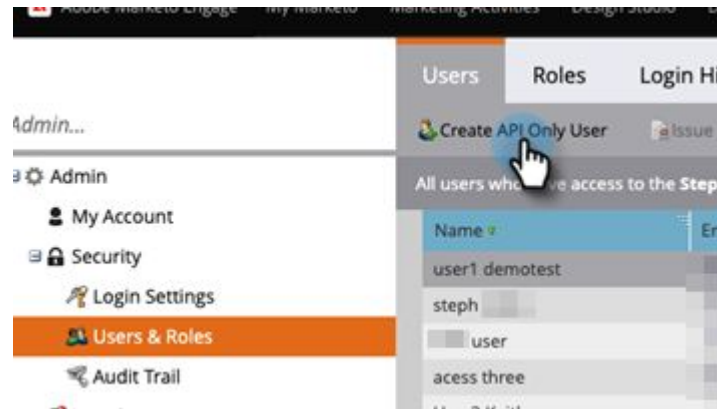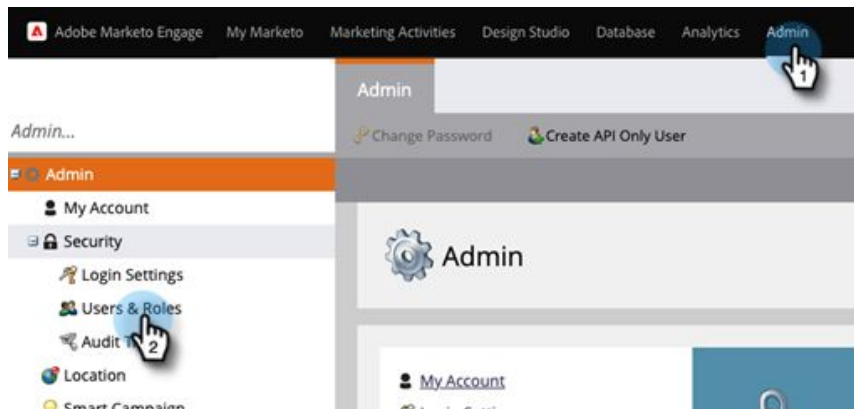
Access & User Management
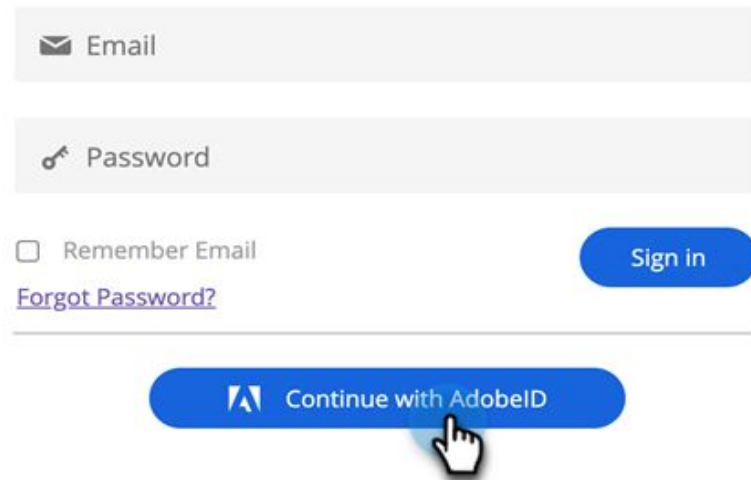
in Adobe Admin Console

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Adobe Admin Console: Product Admins

Once the Adobe ID has been set up with the correct Product Profile for the User, Users will need to click on **Continue with AdobeID** on the Marketo Engage login page to access the application. They will then be prompted to enter their AdobeID credentials. After their credentials are verified, they will be redirected to the Marketo Engage instance.
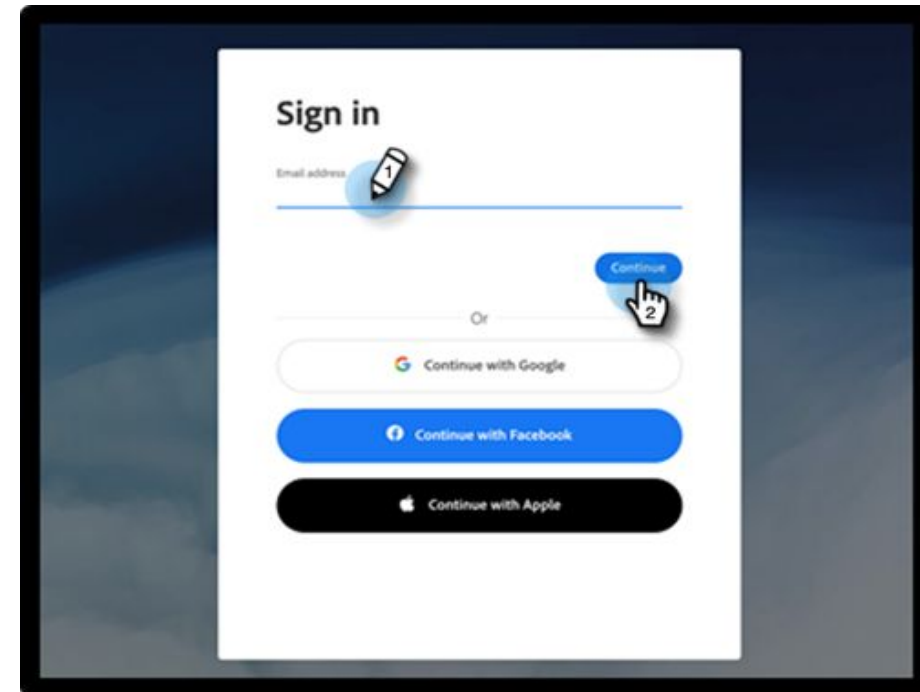
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Migration Day Preparation
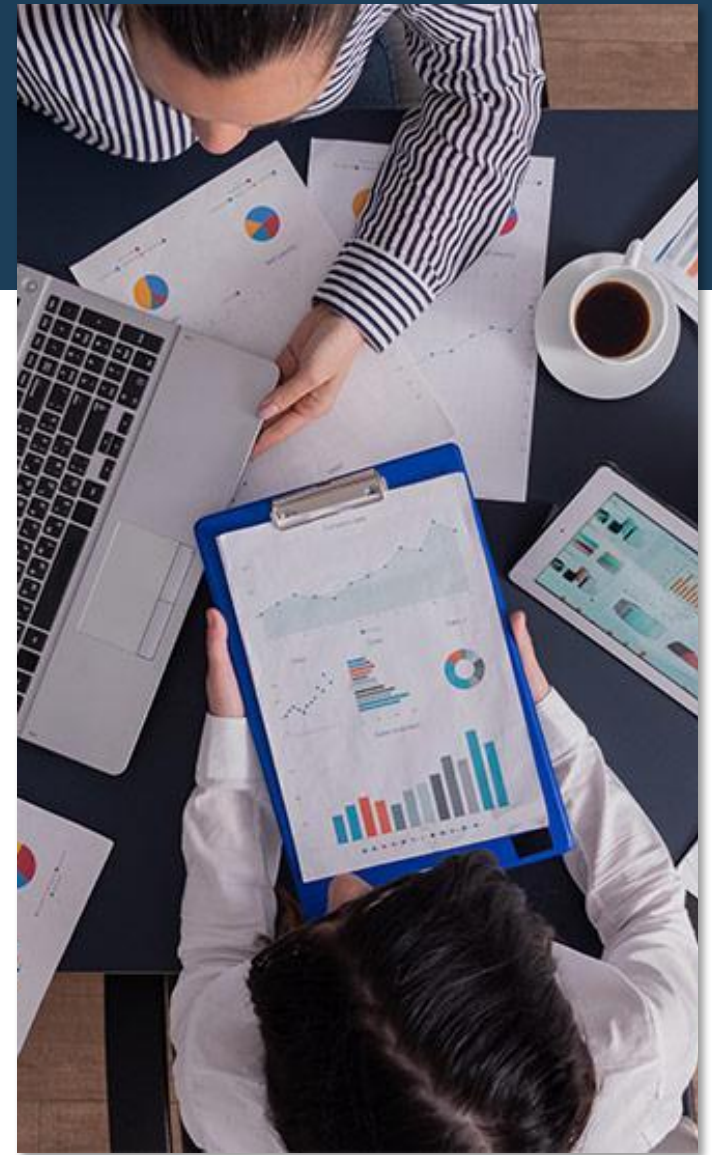
Preparing for Migration

<u>Subscription Migration</u>

System Admins will receive an email when subscription migration to Adobe Admin Console is complete. System Admins may need to complete some required steps before user migration starts to minimize impact to Marketo users:

- If your Marketo users currently log in with SSO, you'll be required to set up SSO on the Adobe Admin Console so your users can continue logging in with SSO. If your Marketo users do not currently utilize SSO, but you would like to set it up on Adobe Admin Console, you can do so at this point in the migration journey.
- If you already manage other Adobe products in your Adobe Admin Console, Adobe may seek your consent to automatically migrate users to your existing console. Click the "Get Started" button in the email to navigate to the consent page.

<u>Schedule User Migration</u>

After your System Admin completes the prerequisites outlined in the previous section, Adobe will automatically schedule your user migration 30 days ahead and communicate with Marketo Product Admins to manage the user migration.

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The **GNW Consulting Revenue Operations (RevOps) Framework** serves as a comprehensive tool for understanding how Marketing Operations (MOps) impacts an organization and the benefits it provides.

Download the Framework

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