# Workfront + Frame.io native integration

Test scenario / step-by-step walk through

# Workfront + Frame.io - Beta Program

- Only available to customers participating in the Workfront + Frame.io beta program

- The following walk through reflects the changes that were introduced with our mid-May release. If any of these aren't available or you have trouble accessing the experience, please contact Product Managment at ossmann@adobe.com.

- Not yet part of the Workfront + Frame.io beta? Reach out to ossmann@adobe.com

# May Release - Improvements

- Your creative users can now be flagged as "Frame.io enabled" which will automatically grant them access to the connected Frame.io project when assigned to the Workfront project.

- Your Workfront projects are automatically synced to Frame.io

- Frame.io project name gets updated when Workfront project name changes

- Easily track the approval status of any file directly from the document list

# Demo Personas
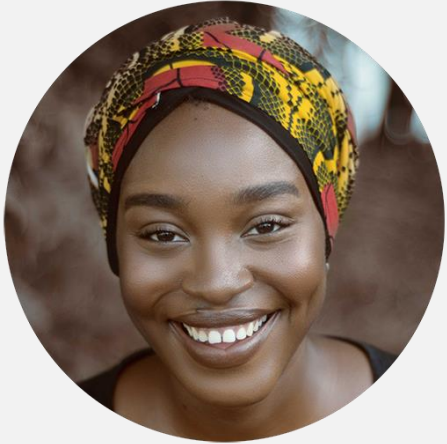
## User Manager

- **Responsible for managing user licenses and permissions**
- Product Owner, Workfront Administrator, Resource Manager

## Project Coordinator

- Serves as a **go-between for stakeholders and project teams**
- Tracks progress (or roadblocks)
- Project Manager, Program Manager, Producer, Traffic Manager, Account Manager, Design Manager, etc

## Professional Creative

- An individual contributor assigned to the project who **works within a content creation** profession (creative or not)
- UX Designer, Creative Designer, Content Strategist, Production Designer, etc

## Stakeholder

- Ensures that the delivered content is following the guidelines
- **Decision makers** operating in a low-touch, high-volume env.
- Procurement, Art Director, Copywriter, Customer, Legal & Finance, etc

# User Manager

# Enable Frame.io users

1. As a user administrator inside of Workfront, navigate to the Users section and enable Frame.io for all your (creative) users who produce content inside of the Adobe creative tools and collaborate and send for review using Frame.io.
   - Select your users > click on edit icon > Enable "Frame.io user" checkbox within Access settings and select "Yes" > click on "Save Changes".
   - For testing purposes, we recommend to mark your own user as Frame.io enabled.

Coordinator

# Create a project connected with Frame.io

1. Create a project from any pre-configured project template with your preferred group assigned to the Project Group field. This group will automatically be connected to a new team inside of Frame.io.
   - Please note, changing the project group after the project creation, won't update the connected Frame.io project.
2. If your project does not contain any tasks yet, navigate to your task list and create your relevant tasks (e.g. Finalize creative brief, create banner, create video).
3. Assign (both frame-enabled and non-frame-enabled) users to your tasks. As an alternative, you could also share the project with them. For this example we ask you to assign yourself to one of the tasks.
   - We also support teams, so when a team is assigned to a project and / or tasks, the team members who are Frame.io enabled will be added to the connected project in Frame.io.

# Share creative materials with Frame.io

*Note: We'll soon be updating this experience to include a dedicated folder inside of the Workfront project to send instructions and materials (aka files) from Workfront directly to the creative users in Frame.io. Whenever a file is brought into the folder inside of Workfront it will automatically be sent to the corresponding project inside of Frame.io.*

1. Navigate to your project documents, and upload instructions or materials that you want to share with your creative users in Frame.io
2. After uploading the files, change the project status to "Current" which will trigger sending the files (only latest document version) to the connected Frame.io project.
   - Please note, the removal of the files in Workfront, won't remove the files from your Frame.io project. In case of new / updated documents, you can repeat the process by changing the project status back and forth. Please be aware, that it will send all files to Frame.io (existing and new file(s)). New document versions will be sent as separate files.

Creative

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# Create content and collaborate with your peers in Frame.io

In your email client software of choice (e.g. Outlook)

1. Check for an invite email to the newly created Frame.io project.
2. Click the "Join project" button within the invitation email to join and open the Frame.io project in your browser.
   - All users/teams marked as "Frame.io enabled" assigned to the Workfront project will receive an invite and will be added to the Frame.io project as collaborators. Users with an existing team membership will retain their relevant permissions.

Within Frame.io:

3. Review the documents & materials that were uploaded to the Frame.io project, e.g. creative briefs.
   - *Note: we will soon be introducing a dedicated read-only folder that contains all the files that were sent from Workfront*
4. Produce your creative content within your Creative Cloud tool of choice and upload your created assets to the Workfront-connected Frame.io project.
5. With a team member license, you could now use the Frame.io native "Share for review" functionality to ask for feedback from your peers (peer-to-peer review / off the shoulder review).
6. Once your asset(s) is ready for formal review you can link them to the Workfront project. Right click on the asset(s) (up to 10 assets can be sent in bulk) > "Add to Workfront". You can choose to either add to the overall Workfront project documents or to a specific project task documents section. For this example, we ask you to select one of the project tasks and choose "Completed" in the "Change task status to.." drop down list
   - *Note: you won't be able to change the status of a task that contains sub tasks.*
7. You can confirm that the asset was linked to Workfront by noticing the little Workfront lion icon appear on the asset thumbnail.

Coordinator

# Initiate formal reviews and approvals in Workfront

Within Workfront

1. Confirm that the task selected in the previous step was marked as complete.

2. Navigate to the tasks' documents section to see the linked asset as indicated by the Frame.io purple icon.

3. In the approvals section in document's details or in the document summary panel in document list, assign approvers to your frame-linked asset. You can do this by either assigning a user, team or pre-configured approvals template (for more information on assigning reviews/approvers, see <u>Add additional approvers or reviewers to a document</u>). Optional: Set a deadline on your approval.

   o *Note: if you want to test the entire end-to-end workflow yourself then add your users as an approver.*

Stakeholder

# Conduct your review and approval within the Frame.io Viewer

All users assigned as approvers or reviewers to the frame-linked asset will receive a notification asking them to review & approve the asset. If you've assigned yourself as an approver, you can now click on the button in the notification email or access the asset from inside Workfront.

Access from inside Workfront:

1. Within Workfront, view your approval requests in Workfront Home or Document Details. You can view the asset by clicking on either the document title or "Open in Frame.io" link in document details.
2. Review the Frame connected document in the Frame.io Viewer:
   a. Leave a comment and add a drawing markup.
   b. Approvers are able to make a decision – in the right upper corner of the Frame.io Viewer you should see a button called "Review & approval". Pick one of the available options. In this example, please select. "Approved with changes".

Coordinator

# Check the approval status and comments from within Workfront

Within Workfront,

1. Navigate to the document list or document details where the linked assets is located and view the stakeholder's comments within the Updates section of the Frame.io connected document.

2. Navigate to the approvals section of the Frame.io connected document to see the decision(s) that were made. For this example, please ensure that all stakeholders made their individual decision to see the overall decision made on your asset.

Creative

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# Check the approval status and comments from within Frame.io and submit a new version

In your email client of choice (e.g. Outlook),

1. Find a Workfront email notification informing you of the approval decision on your asset.

2. Select the "View Project in Frame.io" button and notice the approval status on your asset (label on your asset).

3. Double click on the asset to view the asset and read through the comments.

4. Change the task's status of your asset back to "In progress" by right clicking on the asset > "Workfront" > "In Progress"

5. Apply the requested changes by adding the updated version to the version stack of the connected asset. (Drag & drop the new version over the existing version).

6. Change the task's status back to "Complete" by right clicking on the asset > "Workfront" > "Completed".

Coordinator

# Check the newly uploaded version of the asset and start another round of R&A

Within Workfront

1. Notice that a new version is available for the frame connected document.
2. Assign approvers/reviewers to the newly uploaded version and monitor the progress until it reaches sign-off.

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