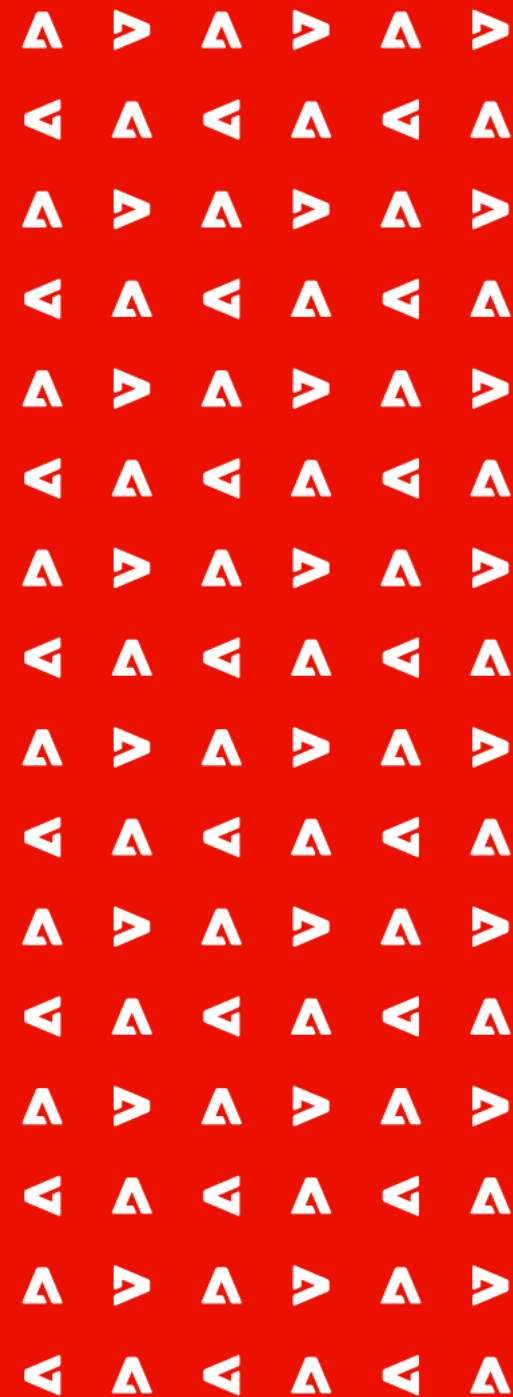




Workfront + Frame.io native integration – May 2024 Release

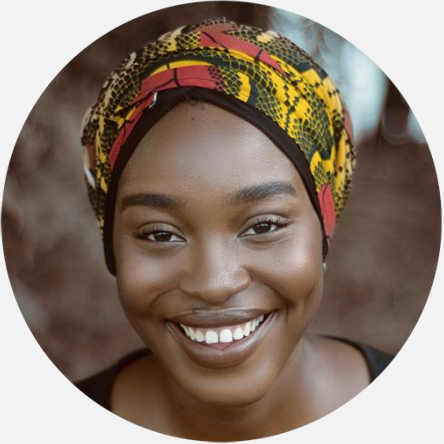
Test scenario / step-by-step walk through



Read Me

- The following walk through reflects the changes that were introduced with our release on xxxx. If any of these aren't available or you have trouble accessing the experience, please contact Product Managment at xxx.
- Not yet part of the Workfront + Frame.io beta? Reach out to xxx

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. In Workfront, go to your users section and enable Frame.io for all your users who regularly work in creative tools and upload assets for review and approval as Frame.io users.
 - 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 a template with your preferred group assigned as the project group. This group will automatically be connected to a new team (if not yet available) in Frame.io
 - Please note, changing the project group after the project creation, won't move the connected Frame.io project
2. In case your project doesn't contain any tasks yet, go to your task list and create the tasks needed (e.g. Finalize creative brief, create banner, create video)
3. Assign users (frame-enabled and non-frame-enabled) 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. (e.g. create banner)
 - We also do support teams, meaning that team members who are Frame.io enabled will be added to the connected Frame.io project

Share creative materials with Frame.io

Please note, that this experience is going to be improved soon. We're going to introduce a dedicated folder within your Workfront project that allows you to send instructions and materials from Workfront directly to the creative users in Frame.io independent of the project status.

1. Go 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 the 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 (already existing and new file). New document versions will be sent as separate files.



Creative

Create content and collaborate with your peers in Frame.io

In your email software (e.g. Outlook),...

1. Check your emails for an invite to the newly created Frame.io project
2. Click the “Join project” button within the invitation email to join the Frame.io project.
 - 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 a team membership will keep their existing permissions

Within Frame.io...

3. Review the documents that got uploaded to the Frame.io project, e.g. creative brief.
 - We’re soon going to introduce a dedicated read-only folder that contains all the files that got sent from Workfront
4. Start your content creation 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 is final 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 add to Workfront Project Documents or to a specific project task. For this example, we ask you to select a task (e.g. create banner) and select “Completed” in the “Change task status to..” drop down list
 - Please note that you won’t be able to change the status of a task that contains sub tasks.
7. You should see that the asset got linked to Workfront indicated by the little Workfront lion icon



Coordinator

Initiate formal reviews and approvals in Workfront

Within Workfront,...

1. Check the task that got selected by the Creative (e.g. “Create banner”) and notice that it got marked complete
2. Got to the task’s documents section to see the linked Frame.io asset indicated by the Frame.io 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 in-flight or based on an approval template (for more information on assigning reviews/approvers, see [Add additional approvers or reviewers to a document](#)). You can also set a deadline.
 - Please note, if you want to test the entire end-to-end workflow yourself, just add yourself 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 for their review & approval. 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 New Home or Document Details and access 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 can 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. (Refresh the page) and view the stakeholder's comments within the Updates section of the Frame.io connected document.
2. Go to the approvals section of the Frame.io connected document to see the made decision(s). For this example, please ensure that all stakeholders made their individual decision to see the overall decision made on your asset



Creative

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

In your email software (e.g. Outlook),...

1. Check your emails for a notification about updated Workfront approval decision on your asset
2. Click the “View Project in Frame.io” button and check 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.

