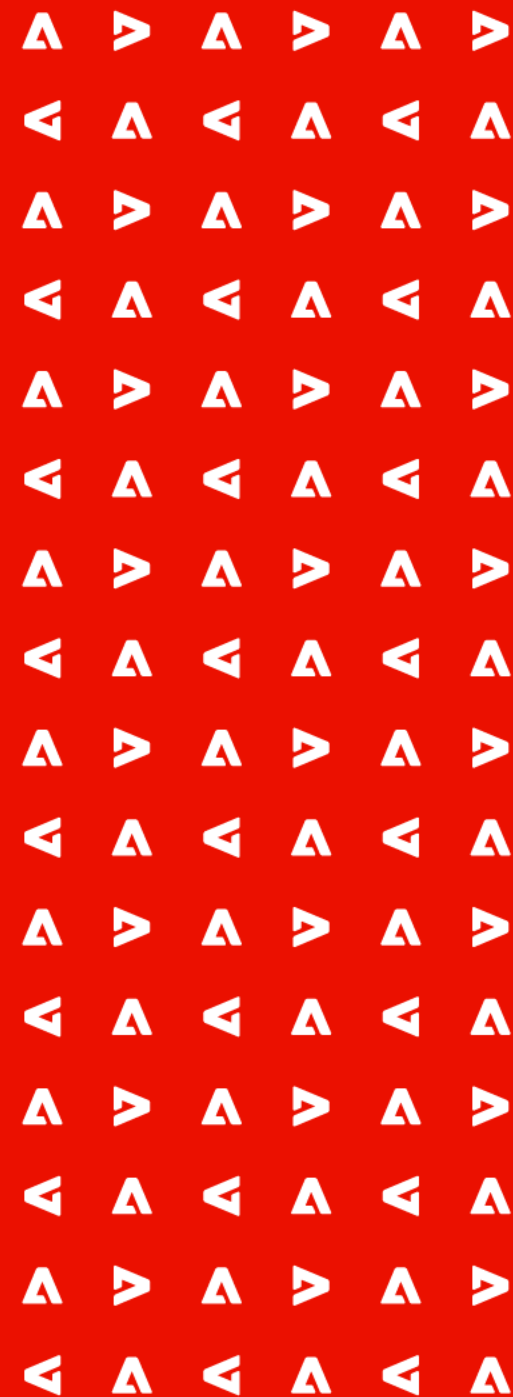




MVP Workfront + Frame.io native integration

Test scenario / step-by-step walk through



Demo Personas



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



Coordinator

Project coordinators can configure which Workfront projects are sent to Frame.io and have the assigned Creatives in Workfront added to the Frame.io project (1/2)

1. Create a project (from scratch or a template) with the „Frame.io alpha testing“ group assigned as the project group.
2. Go to your task list and create the tasks needed (e.g. Finalize creative brief, create banner, create video)
3. Mark the tasks that require creative work / work that needs to be done within Frame.io (e.g. create banner, create video) as “frame enabled”. To do that, either
 - A. go to the task details of your respective tasks: there you find a new custom form called „Frame.io Integration” and set it to “active”
 - OR B. add the field „this task’s integration status” to your task view and change the value to active in your task list.
 - Please note,
 - we are shortly going to support marking tasks as frame enabled in the new task modal
 - Only tasks can be marked as frame enabled; sub tasks are not supported
4. You should now see a gray Frame.io logo in the project header indicating that the project is in pending status and the connection to Frame.io will be established once project status is turned to “Current”. Refresh the page in case you don’t see the logo
 - Please note, you need to mark at least one task as frame-enabled to fulfill the criteria for establishing a connection to Frame.io

Project coordinators can configure which Workfront projects are sent to Frame.io and have the assigned Creatives in Workfront added to the Frame.io project (2/2)

5. Now assign your Creatives (single users or teams) to the frame-enabled tasks. In case you want to test the whole end-to-end workflow, assign yourself to a frame-enabled task
 - Please note, this MVP experience is different to the alpha experience. We will no longer assign all project members to the Frame.io project, only users/teams assigned to frame-enabled tasks will be invited to the Frame.io project. Users/Teams can be added before initiating the connection to Frame.io as well as afterwards (when the project is in progress).
6. Don't forget to upload all documents that you want your Creatives to have available in the Frame.io project, e.g. creative briefs before setting the project status to Current. They can either be uploaded to your project documents or your frame-enabled tasks
 - Please note, only documents that got uploaded to the project before it gets connected to Frame.io will be pushed to Frame.io. Documents uploaded afterwards won't be pushed.
7. Now change the project status to "Current".
8. When refreshing the page, you should see the Frame.io logo in its real color indicating that the project got connected to Frame.io.
 - Please note, this experience will soon be improved so that no page refresh will be required to show the Frame.io logo



Creative

Within Frame.io, Creatives can send created assets to the Workfront project for formal review

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 assigned to frame-enabled Workfront tasks 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. The folders represent the frame-enabled tasks in Workfront. You as a Creative can choose to keep the suggested folder structure or adjust it to your needs
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 “Mark task complete” in the second drop down list
7. You should receive a success message informing you that the asset got added to Workfront and that the task status got updated



Coordinator

Project coordinators can assign the formal approval process to documents linked from Frame.io

Within Workfront,...

1. Check the frame-enabled task (e.g. "Create banner") and notice that it got marked complete and find the linked Frame.io assets in the documents section
2. 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 whole end-to-end workflow add yourself as an approver



Stakeholder

Stakeholders can conduct their 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 your review & approval. You can now click on the button in the notification email or access the asset from inside Workfront.

1. Within Workfront, view your approval requests in WF New Home or Document Details and access the asset by clicking on either the document title (available from January 2024) 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

Project coordinators can 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



Stakeholder

Within Frame.io, Creatives will be informed about the overall decision made on the connected Frame.io asset

Within your Frame.io project,

1. notice the overall approval decision made on the asset you've added to Workfront. (Refresh the page if needed)
2. Double click on the asset to view the asset and read through the comments
3. Apply the requested changes by adding the updated version to the version stack of the connected asset.
4. Change the task's status in case it got set back to "in Progress". Right click on the asset "Manage task".



Coordinator

Project coordinators can see the newly uploaded version of the asset and start another round of review & approval

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.

