



workfront

Proofing with Workfront and Adobe

Upload a proof and kick off a proofing workflow without leaving your Adobe application with the Workfront for Adobe Creative Cloud integration.

[MORE INFORMATION](#)

TARGETED LEARNING GUIDE

Get started.

Open the extension.

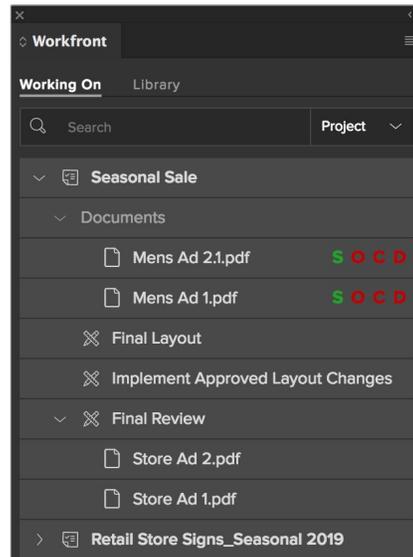
Find Workfront under the Window menu, then Extensions.

Enter domain.

Enter your organization's Workfront domain. Click Next.

Finish logging in.

Type in your Workfront username and password, then click the Log In button.



Your assignments.

The Workfront panel displays your Workfront task and issue assignments, organized by project name.

Click the expand arrow next to the project name to see the tasks and issues you're assigned. Then expand the assignment to see attached documents and proofs.

Considerations

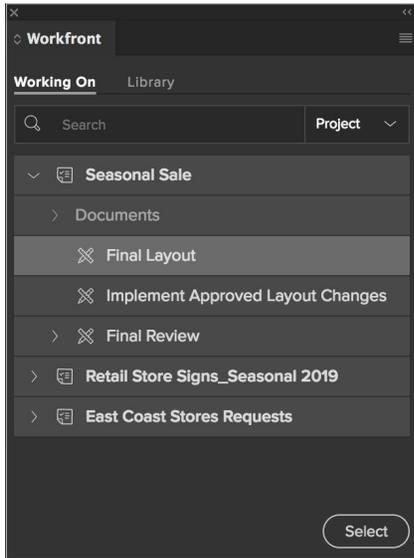
The Workfront for Adobe Creative Cloud extension works with InDesign, Photoshop, and Illustrator.

Before you get started, make sure:

1. You've installed the Workfront for Adobe Creative Cloud extension. You'll need to restart your Adobe application after the installation.
2. You have a Workfront access level that allows you to upload documents or proofs.
3. You have Workfront permissions to upload documents or proofs to the work assignment you select.
4. Proofing workflow templates have been created in Workfront. This is generally done by your system administrator.

Once everything is in place, you're ready to get started.

Start the upload.

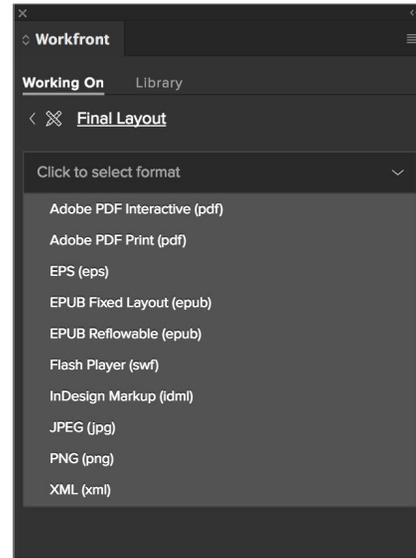


Select the item.

Search for the name of a specific assignment.

Find the assignment you want to upload a document or proof to and click on it.

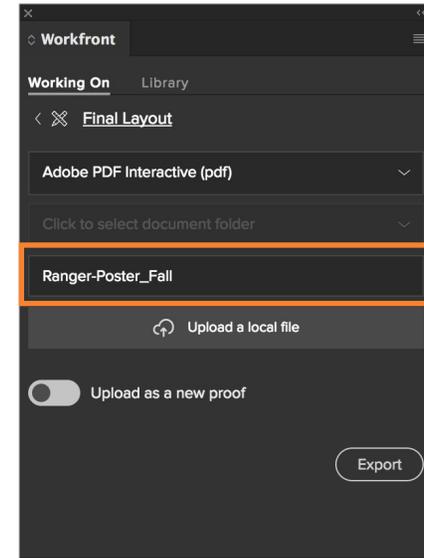
Then click the Select button.



Choose file type.

Choose the file type from the drop-down menu. The file types in the list are supported by both the Adobe application and Workfront's proofing functionality.

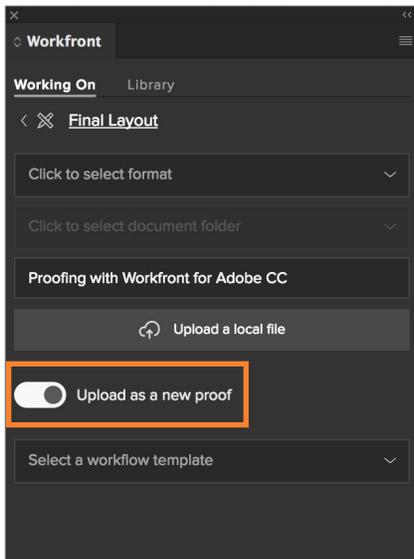
If you're using document folders in Workfront, select one from the middle menu.



Rename.

The Adobe file name fills in automatically, but you can change it. This is what everyone sees in Workfront.

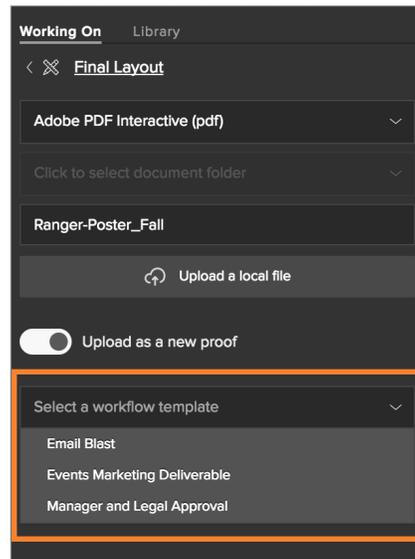
Select a workflow.



Toggle proof on.

Slide the Upload as a new proof button to the right.

This lets the extension know you want to upload the file as a proof, rather than a document.



Select workflow.

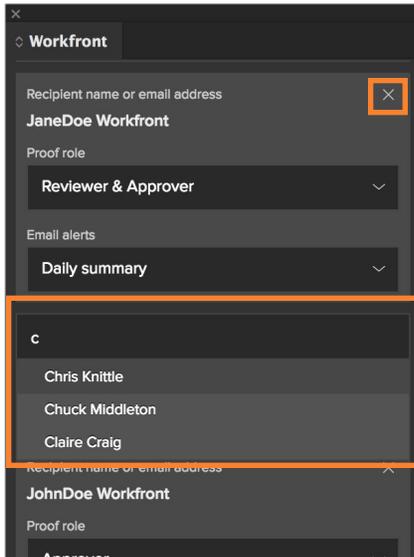
Then select a proofing workflow template from the menu.

These templates are created by your Workfront system administrator. You cannot upload proofs using the Workfront extension unless your Workfront system contains proofing workflow templates.

Learn more

- For a list of file formats that can be exported from each Adobe application, see the [Supported exported file formats](#) section of the [Use Workfront for Adobe Creative Cloud](#) article.
- Learn to install the Workfront for Adobe Creative Cloud extension with an [online article](#) or a [downloadable guide](#).
- Basic functionality of the Workfront for Adobe Creative Cloud extension is covered in the Use Workfront for Adobe Creative Cloud [video](#) on our [Integrations](#) webpage or through an [article](#) on the Workfront Experience website. There's also a [guide](#) you can download.
- Learn more about using proofing with the Workfront for Adobe Creative Cloud extension [online](#) or by watching a video on the [Integrations](#) webpage.

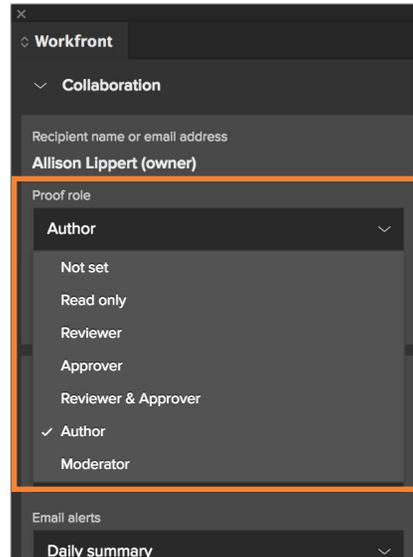
Review proof recipients.



Add/delete recipients.

Click the X in the upper-right corner to remove someone from the workflow.

Scroll to the bottom of a stage section to add proof recipients. Enter the names of people with Workfront proofing access. Outside stakeholders can be added by entering their email address.

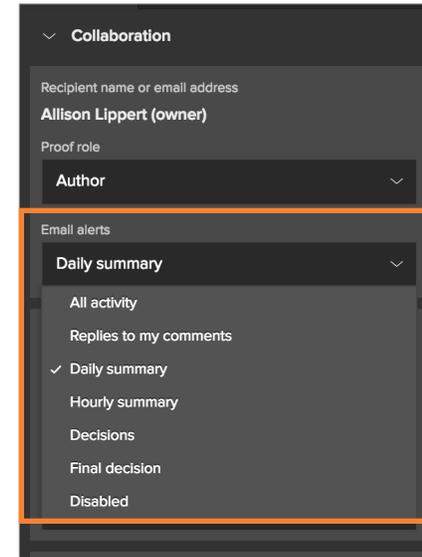


Select role.

A proof role fills in by default, but it can be changed by selecting an option from the drop-down menu.

Roles control what the user is able to do with the proof.

Learn more about [proof roles](#) in Workfront's knowledge base. There's also a chart explaining each role in the [Review Proofs](#) guide.



Set alerts.

Emails can be sent when activity (comments, approvals, etc.) happen on a proof.

Select the email frequency from the alerts drop-down menu.

For more detail about each alert, see the chart in the [Review Proofs](#) guide.

Modify proof workflow.

Legal

Recipient name or email address
JohnDoe Workfront

Proof role
Approver

Email alerts
Daily summary

Type a contact name or email address

Email notification

Notify recipients about this proof

Add custom message

Cancel Create proof

Notify recipients.

Check the Notify recipients about this proof box, so each person in the workflow receives an email notifying them of the proof.

Otherwise, no one will be alerted the proof is available.

Type a contact name or email address

Email notification

Notify recipients about this proof

Add custom message

Quick turnaround

This one is late! Please review ASAP

Cancel Create proof

Add message.

Workfront sends a standard proof request message.

You can customize the subject line and content of the message by clicking the Add custom message box, then entering your own text.

Type a contact name or email address

Email notification

Notify recipients about this proof

Add custom message

Quick turnaround

This one is late! Please review ASAP

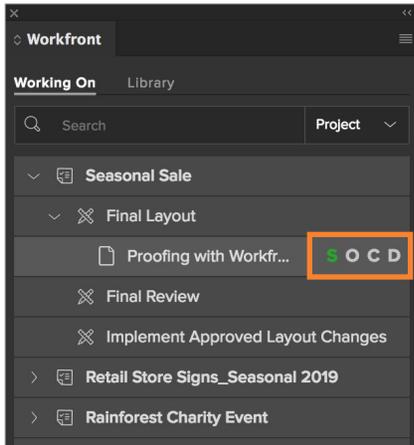
Cancel Create proof

Finish upload.

Finally, click the Create proof button.

Click through the Adobe export options to complete the export and upload the proof to Workfront.

Track proof progress.

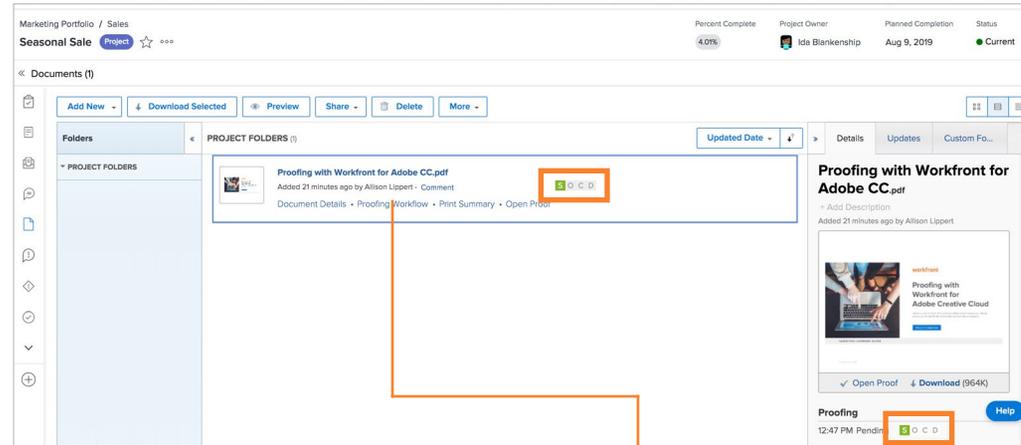


Watch the icons.

Track the overall progress of a proof through the proofing workflow with the progress icons.

- S = Sent
- O = Proof has been opened
- C = Comments have been made
- D = Decisions have been made

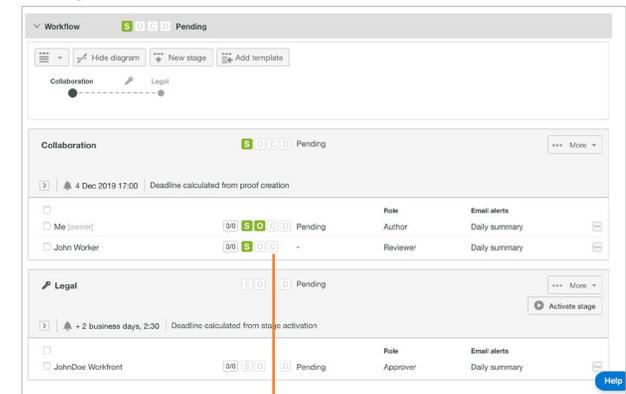
The icons remain white until they're completed, then they turn green. Red icons mean that step is late, having missed the proof deadline.



In Workfront.

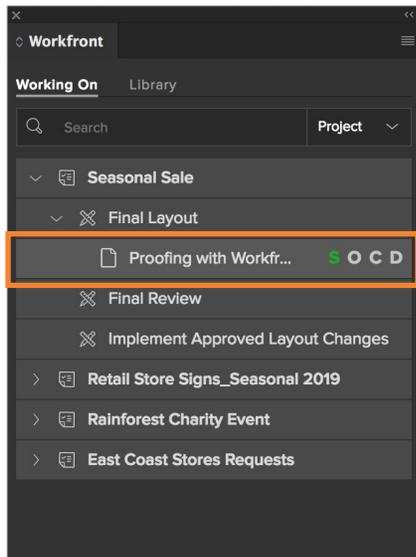
You can track the progress of a proof from the Documents page of the Workfront item (project, task, or issue) the proof was attached to.

The Documents list and Details panel show the overall progress of the proof. Click the Proofing Workflow link to see the entire workflow and what stage each recipient is at.



Learn more about the [proof progress icons](#) on the Workfront Experience website.

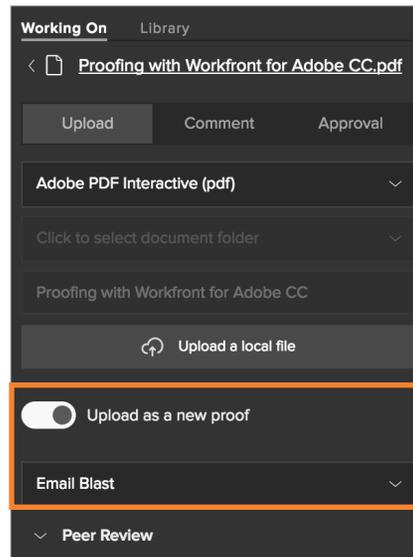
Upload new version.



Open the file.

Find the assignment with the attached proof. Click the arrow to expand the list and see all the attached proofs.

Click on the desired proof and click the Select button.

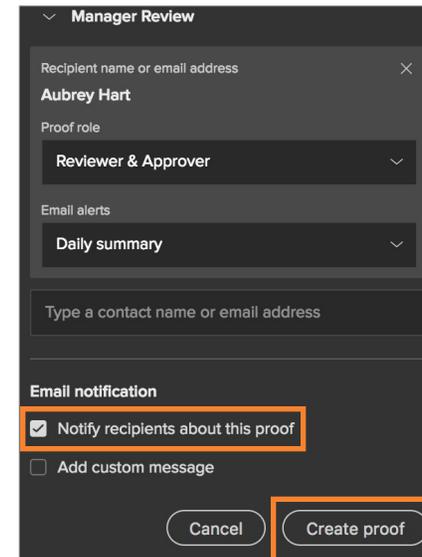


Upload tab.

Select the file type for the new version of the proof.

Toggle on the Upload as new proof button.

Choose a proofing template and make modifications.



Export and upload.

Click the Notify button and add a custom message, if desired.

Finally, click the Create proof button.

Click through the Adobe export options to complete the export and upload the new version of the proof to Workfront.

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