Configuring Workfront with Adobe Experience Manager

As a system administrator, you can integrate Workfront with Adobe Experience Manager (AEM) Assets and provide your organization with a comprehensive content management solution for the creation, sharing, and maintenance of assets within your workflow.

- Understanding Workfront for AEM Assets
- Prerequisites for Installing the AEM Assets Connector
- Installing the Workfront for AEM Assets Connector Package
- Configuring AEM Assets to Integrate with Workfront
- Configuring Workfront to Integrate with AEM Assets
- Setting Up Workfront Users in AEM Assets

Understanding Workfront for AEM Assets

The Workfront for AEM Assets connector allows your organization to do the following:

- Collaborate and manage creative content by linking AEM assets and folders to projects, tasks, issues, and requests in Workfront.

  For more information about configuring documentation integrations with third-party applications, see "Configuring Document Integrations."

- Integrate with the AEM Digital Asset Management (DAM) repository, allowing you to use Workfront to manage and share digital assets stored in the DAM.

  For more information about linking documents and asset folders, see the "Linking Individual Documents" section in "Linking Documents from External Applications."

- Combine and apply metadata from both applications to an asset.

- View an all-inclusive communication stream for an asset. Updates and comments made to an asset either in Workfront or AEM Assets are synchronized to the other application, establishing a comprehensive history of communications made to the asset.

  For more information about making comments in Workfront, see "Adding Updates and Comments to a Document."

Prerequisites for Installing the AEM Assets Connector

Before you can install the Workfront Connector for AEM Assets, ensure that the following prerequisites are met:

- AEM Assets installed and configured, version 6.0 or later
For information about installing AEM Assets, see the Adobe Experience Manager documentation.

- AEM Touch-Optimized User Interface activated

### Installing the Workfront for AEM Assets Connector Package

To install the Workfront for AEM Assets connector, you must import the connector into AEM as a package using the CRX Package Manager.

1. On a workstation where you have already installed AEM, download the Workfront for AEM Assets Connector installation file.

   You can get the Workfront for AEM Assets connector from your Workfront representative.

2. Log in to AEM using an administrator account.

3. Click **Tools > Deployment > Packages**.

   The CRX Package Manager opens.

4. Click **Upload Package**.

5. In the Upload Package dialog box, browse for and select the Workfront Connector package, then click **OK**.

   The package displays in the CRX Package Manager.

6. Click **Install**.
7. On the Package dialog box, ignore the advanced settings and click **Install**.

8. (Optional) To confirm the connector successfully installed, ensure the following statement displays in the Activity Log:

   Package installed in <time>

9. Close the CRX Package Manager.

   The connector is installed and you can now configure AEM Assets to integrate with Workfront.

10. Continue with "Configuring AEM Assets to Integrate with Workfront."

### Configuring AEM Assets to Integrate with Workfront

After you install the connector, import the connector package to AEM and configure AEM to link with documents in Workfront.

For information on installing the connector, see "Installing the Workfront for AEM Assets Connector Package."

- Installing the Connector Package on AEM Assets Version 6.4 (Touch UI)
- Installing the Connector Package on AEM Assets Versions 6.3 or Older (Classic UI)
- Configuring the AEM Externalizer

### Installing the Connector Package on AEM Assets Version 6.4 (Touch UI)

1. Log in to AEM Assets as a system administrator.

2. Click **Tools > Cloud Services > Workfront Integration Configuration > Global-Workfront**.

3. (Conditional) If you have not yet done so, create a Workfront cloud configuration file.

   1. Click **Create** in the upper-right corner of the Global-Workfront page.
2. In the **Workfront URL** box, specify the URL for your Workfront instance.

   For example, https://<account>.my.workfront.com, where `<account>` is the account you use for integrations with AEM.

3. Click the **Base Folder** box, then in the drop-down menu select the path where documents that are linked to Workfront objects are stored.

4. Click **Select** in the upper-right corner.

   You can link to any folder beneath the root `/content/dam/`.

   **NOTE** The `/content/dam/` root folder is automatically created and configured when you install the Workfront for AEM Assets connector.

5. In the **Workfront API Key** box, specify your Workfront API Key.

   For information on API keys, see "Managing API Keys for the Workfront System."

   To retrieve your Workfront API key:

   1. Open a browser tab, and log into your Workfront account as a system administrator.

   2. In the **Global Navigation Bar**, click **Setup**.

   3. Click **System > Customer Info**.

      If you have already generated an API key, your Workfront API Key displays under the Your User's API Key label.

   4. (Conditional) If you have not yet generated an API key, you need to generate one:

      1. In the **API Key Settings** section, ensure that the **After Creation**, API keys expire in option is set to None.
If you select an expiration period, the connector will stop working after the API Key expires. You will then need to re-generate an API Key and update your Workfront configuration.

2. Under the **Your User's API Key** label, click **Generate API Key**.

An API Key for Workfront generates and displays.

5. Copy the API Key to your clipboard.

6. Open the browser tab for AEM Connector and in the **Workfront API Key** box, paste the API Key you copied.

6. (Conditional) Click the **Advanced** tab in the upper-left corner of the Workfront Integration Configuration page, and select the following options if applicable:

   **Allow Collection Browsing**: Select this option if your organization allows Workfront users to link AEM Assets collections to Workfront objects.

   **User Federated ID**: Select this option if your organization is using Federated IDs or Single Sign-On (SSO) when logging into Workfront.

   **Ignore Email Domain**: Select this option if your AEM users do not use the domain name in their user ID.

   **Restrict Access**: Select this option to specify the appropriate Workfront IP addresses that need to be whitelisted. For more information about whitelisting, see the "Adding IP Addresses to the Whitelist" section in "Configuring Your Firewall."

7. Click the **Basic** tab in the upper-left corner of the Workfront Integration Configuration page, and then click **Connect**.

4. (Conditional) If you already created a Workfront cloud configuration file, select **Global-Workfront**, and then in the upper-left corner, click **Properties**.

5. Generate the AEM API Key by clicking **Generate Key**, then copy the AEM API key to your clipboard.

   You will need the AEM API Key later when you configure Workfront to integrate with AEM Assets. For more information, see "Configuring Workfront to Integrate with AEM Assets."

6. In the upper-right corner, click **Save**.

   The Global-Workfront window displays.
7. (Optional) Synchronize bi-directional communication between AEM and Workfront.

1. Click **Global-Workfront**.

2. In the upper-left corner of the window, click **Properties**.

   The Workfront Integration Configuration page displays.

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**Configuration Title**

*global-workfront*

**Workfront URL**

https://hoodoodigital.my.workfront.com

**Base Folder**

/content/dam/workfront

**Workfront API Key**

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AEM API Key should be copied to Workfront custom integration configuration.

**Re-Generate Key**

**AEM API Key:** ***************

**Enable Comment Sync**

To disable comment sync delete the event for 'NOTE' 'CREATE'.

Workfront Event Subscriptions:

Events that are registered to this AEM instance can be deleted, others are informational only.

**Show Details**
3. (Optional) To enable the synchronization of comments between AEM Assets and Workfront, click Enable Comment Sync.

4. (Optional) To turn off comment synchronization, click Disable Comment Sync.

Or

Delete the NOTE CREATE event subscription registered to your AEM instance.

For information on event subscriptions, see the "Deleting Event Subscriptions" section in the article "Event Subscriptions API."

8. Continue with "Configuring the AEM Extender."

Installing the Connector Package on AEM Assets Versions 6.3 or Older (Classic UI)

1. Log in to AEM Assets as a system administrator.

2. Click Tools > Deployment > Cloud Services.

3. Locate the Workfront Document Sync service, then click Show Configurations.

4. In the Available Configurations section, click default (workfront-dam integration configuration).

The AEM Default page displays. You need to first configure the Workfront Configuration settings.

5. Click Edit.
The Workfront Configuration page displays.
Replace this screen once the misspellings are corrected.

6. In the **Workfront URL** box, specify the URL for your Workfront instance.

   For example, https://<account>.my.workfront.com, where `<account>` is the account you use for integrations with AEM Assets. This is a required field.

7. In the **Base Folder** box, specify the path where documents that are linked to Workfront objects are stored. You can link to any folder beneath the root /content/dam/.

   **NOTE** The /content/dam/ root folder is automatically created and configured when you install the Workfront for AEM Assets connector.

   This is a required field.

8. In the **Workfront API Key** box, specify your Workfront API Key.

   For information on API keys, see "Managing API Keys for the Workfront System."

   To retrieve your Workfront API key:

   1. Open a browser tab, and log into your Workfront account as a system administrator.

   2. In the **Global Navigation Bar**, click **Setup**.

   3. Click **System > Customer Info**.
If you have already generated an API key, your Workfront API Key displays under the Your User's API Key label.

4. (Conditional) If you have not yet generated an API key, you need to generate one:

1. In the API Key Settings section, ensure that the After Creation, API keys expire in option is set to None.

   If you select an expiration period, the connector will stop working after the API Key expires. You will then need to re-generate an API Key and update your Workfront configuration.

2. Under the Your User's API Key label, click Generate API Key.

   An API Key for Workfront generates and displays.

5. Copy the API Key to your clipboard.

6. Open the browser tab for AEM and in the Workfront API Key box, paste the API Key you copied.

9. (Conditional) Select the following options, if applicable for your configuration:

   **User Federated ID:** Select this option if your organization is using Federated IDs or Single Sign-On (SSO) when logging into Workfront.

   **Ignore Email Domain:** Select this option if your AEM users do not use the domain name in their user ID.

   **Restrict Access:** Select this option to specify the appropriate Workfront IP addresses that need to be whitelisted. For more information about whitelisting, see the "Adding IP Addresses to the Whitelist" section in the article "Configuring Your Firewall."

10. Click OK.

    The Workfront Configuration page closes.

11. (Conditional) If no AEM API Key displays, click Generate Key to generate an API Key.
12. Copy the AEM API key to your clipboard.

You will need the AEM API Key later when you configure Workfront to integrate with AEM Assets. For more information, see "Configuring Workfront to Integrate with AEM Assets."

13. (Optional) To enable the synchronization of comments between AEM Assets and Workfront, click **Enable Comment Sync**.

14. (Optional) To turn off comment synchronization, click **Disable Comment Sync**.

Or

Delete the NOTE CREATE event subscription registered to your AEM instance.

For information on event subscriptions, see the "Deleting Event Subscriptions" section in the article "Event Subscriptions API."

15. Continue with "Configuring the AEM Externalizer."

**Configuring the AEM Externalizer**

The AEM Externalizer allows AEM to pass URLs in a format that can be used in Workfront. If not properly configured, Workfront cannot make calls to the AEM API, and the URLs linking AEM documents in Workfront will not work.

1. In AEM, click **Tools > Operations > Web Console**.

2. Click **OSGI**, then click **Configuration** in the drop-down menu.

3. In the configuration list, select **Day CQ Link Externalizer**.

   The Externalizer page displays.

4. In the **Domains** section, ensure the domain listed in the Author field is the domain name externally accessible to AEM users.
The domain name in the author field should match the domain listed in the URL line of your AEM instance.

5. (Conditional) If necessary, update the domain in the Author field.

6. Click Save.

AEM Assets is now configured to link documents with Workfront.

7. Continue with "Configuring Workfront to Integrate with AEM Assets."

Configuring Workfront to Integrate with AEM Assets

After you install the Workfront for AEM Assets Connector (as described in "Installing the Workfront for AEM Assets Connector Package") and configure AEM Assets (as described in "Configuring AEM Assets to Integrate with Workfront"), you need to configure Workfront to link documents between Workfront and AEM Assets.

1. Log in to Workfront as a system administrator.

   **NOTE** Workfront recommends creating a system administrator dedicated solely to your AEM integration. For more information about assigning the System Administrator access level to a user, see "Administrative Access."

2. Go to the Setup area in the Global Navigation Bar, click Setup.

3. Click Documents > Custom Integration.

4. Click Add Custom Integration.

5. In the Name box, specify the name of the custom integration.

   This is the name users see when using the integration within Workfront; for example, you could enter "AEM Assets" for the name.

6. In the Base API URL box, specify the URL for your AEM instance.

   The base API URL consists of the URL for your AEM instance followed by the path: /bin/webhooks/api/
7. In the **Authentication Type** drop-down menu, select **ApiKey**.

8. In the **API Key** box, paste the AEM API Key you copied when you configured AEM Assets.

9. Click **Save**.

10. (Optional) Ensure the integration is marked Active.

Workfront is now configured to work with AEM Assets.

In order to access assets in AEM, each Workfront user who needs to use the connector must be set up as a user in AEM. For information on creating users, see "Setting Up Users to Use the Connector."

### Setting Up Users to Use the Connector

In order for users to access the connector, they must have a user profile in AEM and belong to a Workfront group that has Access levels that include the Create and Delete permissions.

For more information about Workfront permissions, see "Creating or Modifying Access Levels."

- Setting Up Users in AEM Assets Version 6.4
- Setting Up Users in AEM Assets Versions 6.3 or Older

### Setting Up Users in AEM Assets Version 6.4

1. Log in to AEM Assets as a system administrator.
2. Click **Tools > Security > Users**.

3. (Conditional) If the user does not have a user profile in AEM, create an AEM user profile.
   1. Click **Create User**.
   2. Enter the user's personal information.
***Need to replace this screen with New User screen

The only required field is the ID field. The user's AEM ID must match their Workfront ID, which is the user's Workfront email address.

If you selected the Ignore Email Domain option when you configured AEM to integrate with Workfront, then the AEM ID will not match the Workfront email address.

4. (Conditional) If the user has an AEM profile, open the user's AEM profile.
   1. Click User.
      The User Management page displays.
   2. Click the user you want to add, then click Properties.
      The user's settings page displays.

5. Click the Groups tab.

6. Ensure the user belongs to at least one Workfront group that has Access levels that include the Create and Delete permissions.
   1. To add the user to an existing group, begin typing the group name in the Type Group Name box, then select the group when it appears in the drop-down menu.
      Or
      To select a group to which the user is a member, select a group in the Groups that this user is a member of section.

7. Click Save.

Setting Up Users in AEM Assets Versions 6.3 or Older

1. Log in to AEM Assets as a system administrator.
2. Click Tools > Security > Users.
3. (Conditional) If the user does not have a user profile in AEM, create an AEM user profile.
1. Click **Create User** in the upper-right corner of the User Management page.

2. Enter the user's personal information, then continue with Step 5.

The only required fields are the ID, Password, and Retype Password fields. The user's AEM ID must match their Workfront ID, which is the user's Workfront email address.
If you selected the Ignore Email Domain option when you configured AEM to integrate with Workfront, then the AEM ID will not match the Workfront email address.

4. (Conditional) If the user has an AEM profile, open the user's AEM profile.

The Edit Users Settings page displays.

5. (Conditional) If the user is not a member of a Workfront group, in the Add User to Groups section, begin typing the name of a Workfront group to which the user belongs, then select the group when it displays in the drop-down menu.

The user must belong to at least one Workfront group that has Access levels that include the Create and Delete permissions. For information about Workfront groups, see "Understanding Groups."

6. Click Save in the upper-right corner.