**Lytho Workflow Team Training Agenda & Guide**

**Instructions:** Congratulations – if you’re reading this, that means you are SO close to launching Lytho Workflow with your team! Customize this agenda, guide, and the complementary presentation slides to best suit the needs of your team’s processes. You know your teams best – these are sources of inspiration and guidance for you to use as the Lytho Workflow champion in your organization! We’ll be here cheering you on!

**TEAM TRAINING AGENDA:**

1. Introduction to Lytho Workflow
2. Platform Overview & Navigation
3. Requests
4. Project Management
5. Review Process
6. Additional Features
7. Action Items

**DETAILED TRAINING GUIDE**

1. Introduction to Lytho Workflow
   1. Introduce yourself and your role with the launch of Lytho Workflow
   2. Cover the high level purpose of the Lytho Workflow training, including:
      1. Reasons that your company chose this platform & problems being solved
      2. Expectations for trainees following the training (e.g. Begin test projects, practice with real projects, etc.)
   3. Accepting your invitation
      1. Invitationfrom your Admin/Welcome Email
      2. Create Your Account
      3. Bookmark your team’s unique Lytho URL
   4. Update your personal settings
      1. Your Profile, Your Password, and Your Availability
      2. Your Notifications
      3. Your Integrations
2. Platform overview & Navigation
   1. People hierarchy in Lytho Workflow
      1. People: Team Members vs. Stakeholders
      2. Briefly discuss Roles and how your Permissions are tied to them
   2. Work hierarchy in Lytho Workflow
      1. Purpose of Dashboard
      2. Hierarchy of Work: Work, Projects, Campaigns, and their relationship to each other
      3. My Work vs. All Work
      4. Work details / Examples
         1. Project details / Examples
         2. Campaign details / Examples
         3. Task & Proof details / Examples
3. Requests
   1. Reiterate Team Members vs. Stakeholder Roles
      1. Introduce Team Member log-in
      2. Introduce Stakeholder log-in
   2. Make a request (STAKEHOLDER)
      1. Open Stakeholder log-in
      2. Discuss icons in the Stakeholder’s view
         1. Requests
         2. Reviews
         3. Reports
      3. Click ‘Add Request’ and fill out a Request Form
         1. Add an Attachment
         2. Submit Request and Discuss Requester’s Request View
      4. Discuss Request Status Bar, Acceptor(s), and Collaboration features
   3. Accept a request (TEAM MEMBER)
      1. Open Team Member log-in
      2. Highlight Dashboard with Incoming Request showing
      3. Click ‘My Requests’ and access the Submitted Request
      4. Scroll to review Request answers and Accept Request
      5. Explain that users have the ability to decline and converse with Stakeholders
      6. Explain the ways to accept a Request: Task, Proof, Project, Campaign
      7. Give an example of reasons to accept a Task and a Proof
      8. Choose Project icon and explain Project Name option, Project Template dropdown, and Link to Campaign option
      9. Choose a Project Template for this Request and click ‘Accept Request’
4. Project Management (TEAM MEMBER)
   1. Project view options
      1. Continue to use Team Member log-in
      2. Discuss Project tab view: Highlight how the project template that was uploaded with the request
      3. Highlight additional tab views: Calendar and Schedule
      4. Discuss purpose of Calendar view and discuss Gantt view and Automatic date calculations (if customer is using these features)
      5. Discuss Schedule view and purpose (if customer is using this feature)
      6. Discuss purpose of Request view: Highlight the request form answers and attachment that’s present from the demo’d request
   2. Project details / project sidebar (TEAM MEMBER)
      1. Return to Project View
      2. Discuss Project Statuses and customer’s expectations for which ones to use when
      3. Discuss Project Details
      4. Ability to add Members, esp. any coming mapped in from project template
      5. Start Date/Due Date
      6. Tags, esp. those that came in from Request Form demo
      7. Custom Fields, esp. those that came in from Request Form demo
      8. Discuss ability to add project files
      9. Discuss comments area and examples of using comments in a live project
   3. Managing project work (TEAM MEMBER)
      1. Highlight Groups, Tasks, and Proofs that were inherited by the Project Template
      2. Discuss ability to add new Tasks, Proofs, and Groups
      3. Discuss ability to use Blockers
      4. Highlight ability to reorder items in the work list
      5. Click open a Work item and highlight Dates, Files, and Time Entry (if applicable)
   4. Monitoring Work from a Requester’s View (TEAM MEMBER & STAKEHOLDER)
      1. Begin to check off tasks in the project and change the Project Status
      2. Highlight how the Requester will be made aware of this progress (only if Requester Insights are enabled)
      3. Open Stakeholder log-in: Show the requester’s dashboard and how it’s updated with the project progress and status applied
      4. Return to Team Member log-in: Continue to check off work items until you access a Proof line item
5. Review Process
   1. Creating a Proof (TEAM MEMBER)
      1. Open a Proof
      2. Review the Proof features
         1. Especially highlight assigning Members (for notifications also), Custom Instructions, and difference between Due Date and Review Deadline
      3. Enter some text with some Custom Instructions
      4. Click ‘Add Assets’ and discuss options for Files, Webpage, and Email
      5. Add Review Assets
      6. Click ‘Add Route’ and ‘Choose Route Template’ to highlight any recommended templates
      7. Exit the ‘Choose Route Template’ area and select ‘Create New Route’
      8. Select the Stakeholder user that you’re using for the training example and ‘Add to Review’
      9. Add ‘Review Deadline’
      10. ‘Send Proof for Review’ and highlight how the Proof is now in a locked ‘In Review’ status
      11. Click ‘Review Options’ and discuss the ‘Automatic Review Reminder’ settings
      12. Under Review Route: Highlight how the Stakeholder appears below in ‘Waiting’ status
      13. ‘Open Review’ and pre-annotate the Proof with a comment
   2. Reviewing a Proof (STAKEHOLDER)
      1. Open Stakeholder log-in
      2. Highlight the Notification bell that contains the invite to the new Review. Also mention how the Stakeholder should receive an email with an invite to access it.
      3. Go to Reviews under To Do and click open the created Proof (from above)
      4. Highlight annotation icons and their purposes
      5. Make some annotations and add comments
      6. Discuss Collaboration options: Click open the chat bubble and @mention a User
      7. Also click the tab for ‘Everyone Else’ and the ability to @mention others not in the route (only if this feature is enabled)
      8. Highlight Share Review icon on top and ability to both @mention and ‘Require approval status’ from an additional person (only if this feature is enabled)
      9. Discuss Approval Statuses and Choose ‘Approved with Changes’ and ‘Submit Review’
   3. Versioning a proof and closing the project (TEAM MEMBER)
      1. Open Team Member log-in
      2. Access Proof from this demo review process and show Returned status next to Reviewer’s name
      3. If time allows, click ‘Add Review Version’ and repeat Workflow steps above for a 2nd version
      4. In Project View: check off Proof work item as completed
      5. Change Project Status to ‘Completed’
      6. Follow prompts to add final Deliverable
   4. Completed request from the requester’s view (STAKEHOLDER)
      1. Open Stakeholder log-in
      2. Go to demo Request in the Requests area under ‘Completed’ category
      3. Open the completed Request
      4. Highlight the Deliverables area where deliverables are uploaded and available into the future
      5. Highlight the Request ‘Share’ feature (if this feature is enabled)
   5. Suggested Additional Training (if necessary)
      1. Templates
         1. Project Templates (most likely to be selected)
         2. Route Templates (most likely to be selected)
         3. Forms
      2. Recommended work views
         1. Custom Table Views & Filters
         2. Custom Kanban Views & Filters
         3. Calendar Views & Filters
6. Additional Features
   1. Reports
      1. My Reports
      2. Recommended reports to create (if applicable)
      3. Report sharing
      4. Expectations of what reports might be shared with them
   2. inMotion Review App for iOS & Android
   3. inMotion Extension for Adobe Creative Cloud
7. Action Items Customize this list for the actions you want your team to complete after training!
   1. [Accept invitation](https://support.lytho.com/support/solutions/articles/151000189743-customize-your-personal-settings)
   2. [Build the following](https://support.lytho.com/support/solutions/articles/151000189865-custom-views) [custom views](https://guide-ignite.inmotionnow.com/help/custom-views):
      1. List your suggested custom views!
   3. [Create and send a practice](https://support.lytho.com/support/solutions/articles/151000189847-creating-a-proof) [proof](https://guide-ignite.inmotionnow.com/help/creating-a-proof)
   4. [Download the Adobe CC app](https://support.lytho.com/support/solutions/articles/151000189938-installing-the-lytho-workflow-extension-for-adobe-creative-cloud)
   5. [Download the iOS/Android app](https://support.lytho.com/support/solutions/articles/151000189885-lytho-review-app-for-ios-and-android)