



Requester Insights

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What are Requester Insights?

Requester Insights enables an enhanced '**My Job Launches**' page that allows your requesters to see information about their requests like:

- **Project Name** - updates in real-time; what you call the project may be different from the original request name
- **Project Status** - updates in real-time; clients always know the status of their projects
- **Project Deadline** - updates in real-time; clients can see if a project deadline has been changed
- **Project Owner** - updates in real-time; clients can see who is managing their requested work
- **Review Action** - Adds an additional button in the '**Available Actions**' column that will take the requester to a filtered 'My Reviews' page for the applicable project.

Enabling Requester Insights

1. Navigate to **Account tab > Account Settings > Customize > Job Launch**
2. Check the box '**Allow Requester Insights.**'
3. Click '**Save.**'

Customizing Requester Insights Per Project

New Projects



On the '**Create a New Project**' page, you can check the boxes in the upper right corner to allow for the Requester Insights option you wish to share. Check all three boxes if you'd like to give your requester access to all the options, or a combination thereof. Now, after you approve the project, the requester will be able to view the project information on their own workspace without requiring updates from your team.

Note: This is only visible when you create a project from a request.

Existing Projects

From the Project Dashboard, click '**Edit**' under the Project Overview section.

A screenshot of a 'Project Overview' card. The card has a title 'Overview' in the top left and an 'EDIT' button in the top right, which is highlighted with an orange border. The card contains the following information: Project Name: Spring Campaign - Sunflower 7oz Label; Started: Mon 01/09/17 9:00 AM; Due: Fri 01/13/17 5:00 PM; Created: Fri 03/10/17 2:20 PM; Requester Insights: Enabled; Budget: Not Set; Specs: Not Set. A vertical scrollbar is on the right side of the card.

Overview **EDIT**

Project Name:
Spring Campaign - Sunflower 7oz Label

Started:
Mon 01/09/17 9:00 AM

Due:
Fri 01/13/17 5:00 PM

Created:
Fri 03/10/17 2:20 PM

Requester Insights:
Enabled

Budget:
Not Set

Specs:
Not Set

This will open the '**Make Changes to This Project**' page, where you can check the boxes in the upper right corner to allow for the Requester Insights option you wish to share.

Note: This is only visible when the project was created from a request.



Make Changes To This Project CANCEL

Project: Spring Campaign - Sunflower 7oz Label

Base project on template:

Share Details with Requester:
☒ Project Name & Project Owner
☒ Project Due Date
☒ Project Status

Name the project

Budget

Specs

Design Direction

Describe the project

Set a project start date

Set a due date

Assign Project Group

[BACK TO PROJECT DASHBOARD](#)

My Job Launches with Requester Insights

Here is an example of My Job Launches with Requester Insights enabled.

true hand soap WORKSPACES MY REVIEWS (5) CONTACTS TASKS REPORTS ACCOUNT ? ↓ Powered by inmotion

My Requests START NEW

Bulk Actions Columns ↓

<input type="checkbox"/>	Name	Status	Date Submitted	Submitted By	Form Name	Project Name	Project Owner	Project Status	Project Deadline	Available Actions
<input type="checkbox"/>	Summer Print Ad	Released To Project	5/8/2017 4:47 PM	Megan Diaz	Print Ad	Summer Print Ad	Grace Deng	In Progress	5/29/2017 5:00:00 PM	RECEIPT EDIT REVIEW DUPLICATE
<input type="checkbox"/>	Spring Campaign - Social Media Video Clip	Started	4/5/2017 10:18 AM	Megan Diaz	Video	N/A	N/A	N/A	N/A	RESUME EDIT REVIEW DUPLICATE
<input type="checkbox"/>	Spring Campaign - Product Giveaway	Being Reviewed	4/5/2017 11:11 AM	Megan Diaz	Default Form	N/A	N/A	N/A	N/A	RECEIPT EDIT REVIEW DUPLICATE