

# Managing Proof Access with User Groups

Published on 06/03/2017

### What are User Groups?

User Groups allow you to restrict access to proofs. Once you create a user group and assign it to a proof accordingly, only the members of the applied user group can view that proof in the Proofs Workspace. This feature is helpful when you have multiple departments in the same account (e.g. Digital, Print, Web) and you don't want one group's work cluttering the workspace for other users.

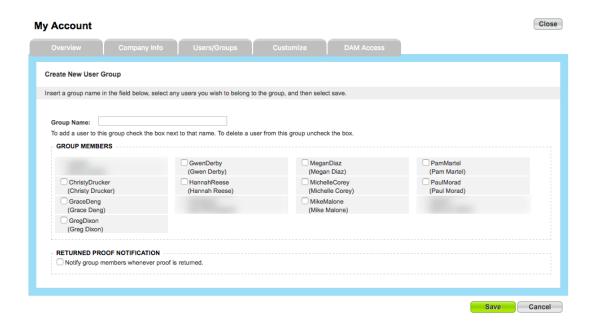
- Before you create user groups, Admin and Staff users are able to viewall proofs
  on the account.
- Once you create a user group, staff users will be unable to view any
  proofs unless assigned to the applied user group. Administrators can always
  view all proofs.
- 3. inMotion automatically creates a user group, 'No User Group,' which contains any user that is not assigned to a user group. You can apply this option to proofs as well.
- 4. A recommended best practice is to also create a group, 'All Users,' so that if necessary you can still give proof access to your entire team. Note: Remember to add any new users to this group upon user creation.

# Creating a New User Group

- Navigate to Account > Account Settings > Users/Groups, and click 'New Group.'
- 2. Enter a name for the user group.
- 3. Select the users that you want to assign to each group by clicking the check box next to their name.



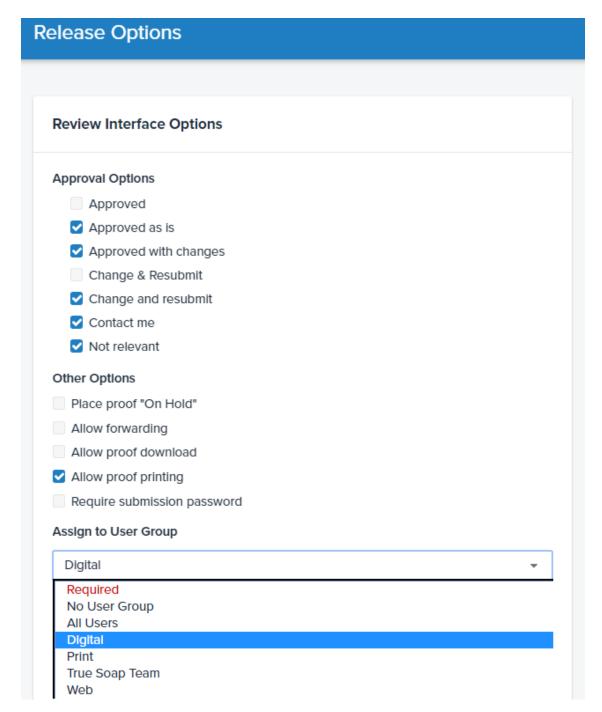
- 4. (*Optional*) Check the box to notify all group members whenever a proof is returned to this group.
- 5. Click 'Save.'



# Assigning a User Group During Proof Upload

- 1. Follow the steps to upload a new proof for review.
- On the 'Release Options' page, click on the 'Assign to User Group' dropdown menu.
- 3. Choose the applicable user group. *Note:* 'No User Group' will give proof access to any user that is not a member of any group.





## Assigning a User Group to an Existing Proof

- 1. Navigate to the **Proof Info** page.
- 2. Click 'Edit' in the top right of the 'Proof Details' section.
- Click the 'User Filter Group' dropdown menu and select the applicable group. If you leave the blank option selected, this will apply the 'No User Group' option mentioned above.



#### Proof Info - Spring Campaign

