

Managing Proof Access with User Groups

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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.

1. Before you create user groups, Admin and Staff users are able to view **all proofs** on the account.
2. 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

1. 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.'**

My Account Close

Overview Company Info Users/Groups Customize DAM Access

Create New User Group

Insert a group name in the field below, select any users you wish to belong to the group, and then select save.

Group Name:

To add a user to this group check the box next to that name. To delete a user from this group uncheck the box.

GROUP MEMBERS

<input type="checkbox"/> ChristyDrucker (Christy Drucker)	<input type="checkbox"/> GwenDerby (Gwen Derby)	<input type="checkbox"/> MeganDiaz (Megan Diaz)	<input type="checkbox"/> PamMartel (Pam Martel)
<input type="checkbox"/> GraceDeng (Grace Deng)	<input type="checkbox"/> HannahReese (Hannah Reese)	<input type="checkbox"/> MichelleCorey (Michelle Corey)	<input type="checkbox"/> PaulMorad (Paul Morad)
<input type="checkbox"/> GregDixon (Greg Dixon)		<input type="checkbox"/> MikeMalone (Mike Malone)	

RETURNED PROOF NOTIFICATION

☐ Notify group members whenever proof is returned.

Save Cancel

Assigning a User Group During Proof Upload

1. Follow the steps to upload a new proof for review.
2. 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.*

Release Options

Review Interface Options

Approval Options

- ☐ Approved
- ☒ Approved as is
- ☒ Approved with changes
- ☐ Change & Resubmit
- ☒ Change and resubmit
- ☒ Contact me
- ☒ Not relevant

Other Options

- ☐ Place proof "On Hold"
- ☐ Allow forwarding
- ☐ Allow proof download
- ☒ Allow proof printing
- ☐ Require submission password

Assign to User Group

Digital

Required

No User Group

All Users

Digital

Print

True Soap Team

Web

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.
3. 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

Proof DetailsSAVE

Proof Status

In Review

Proof Assets

 [DOWNLOAD](#) 

Proof Name

Spring Campaign

Project Name:

Access Code
d649bb

Deadline

Owner

Jane Rodriguez

User Group

All Users

Digital

Print

True Soap Team

Web