Understanding User Roles and Contacts

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Users

Users are typically part of the creative team, and are responsible for the creation and management of a company's creative assets. They require a unique login to inMotion. User Types are assigned to team members based on their role and responsibilities within the team. Users typically fall under four different categories:

Admin

Manages the inMotion account and has unrestricted access to the complete inMotion Application.

Example: Project Managers, Traffic Coordinators, Creative Directors, and Marketing Managers

Key Permissions of the Admin User:

- Create and manage Users and Groups
- Create, edit, and manage all Contacts regardless of ownership
- Set and customize default account settings
- Create/edit all projects, set schedules, and assign team members
- Manage Project and Proof templates
- Assign Job Launch Manager functionality
- Assign access to Proof Templates for Vendor User Type
- Create custom reports
- Manage archived content

Staff

Has access to the Project, Proof, and Contact sections of the inMotion application.

Example: Designers, Copy Writers, Videographers

Key Permissions of the Staff User:

- Upload, manage, and archive Proofs within their assigned User Group.
- Create, view, and edit Contacts and Review Teams within their assigned Contact Group.
- Manage their username, password, name, and email address.
- Enable Job Launch Submitter and Routing Manager functionality of owned Contacts.
- Create and edit Projects, assign Team Members, assign and complete Tasks.
- Act as Job Launch Manager.
- Access all Workflows and Review Teams.
- Create, copy, and edit Workflows and Review Teams.
- Create, edit, and be a team member of projects.

CSR

Has viewing rights with limited actions available.
Example: Product Development, Business Analysts, Sales, Executive Assistants

Key Permissions of the CSR User:

- View Proof Status and Details within their assigned User Group.
- Renotify Reviewers for Pending Proofs within their assigned User Group.
- View and edit Project Status and Details in Projects they are assigned to.
- View assigned Tasks and mark complete.

Vendor

An external user who uploads content for review.
Example: Freelance and Contract Designers

Key Permissions of the Vendor User:

- Post content to a pre-defined Proof Release Template.
- View change requests and feedback on content they uploaded.

Contacts

Contacts are typically clients or stakeholders in a project, that only require the ability to request work and/or review assets. Depending on their assigned permissions, they may require a unique login.

Contacts

Any person who requests and/or reviews content only.

Example: Client, Account Manager, Internal Stakeholder

Key Permissions of a Contact:

- Submit Requests using permissioned Job Launch forms
- Review and approve assets

Users vs. Contacts

	Users			
	Admin	Staff	Vendor	Contacts
Paid License	✓	✓	✓	
Unlimited Seats*				✓
Review Content	✓	✓	✓	✓
Feedback Manager	✓	✓	✓	✓
Post Content for Review	✓	✓	✓	
Job Launch Submission	✓	✓		✓
Job Launch Management	✓	✓		
Project Management	✓	✓		
Time Tracking	✓	✓		
Access to Reporting	✓	✓		
Archive Proofs/Projects	✓	✓		
Delete Proofs/Projects	✓	✓		
Update Account Settings	✓			
Add/Edit Users	✓			
Add/Edit Contacts	✓	✓		
Routing Manager				✓

**For Business and Enterprise customers only.*