

# Self-Paced Guide: Feature Overview

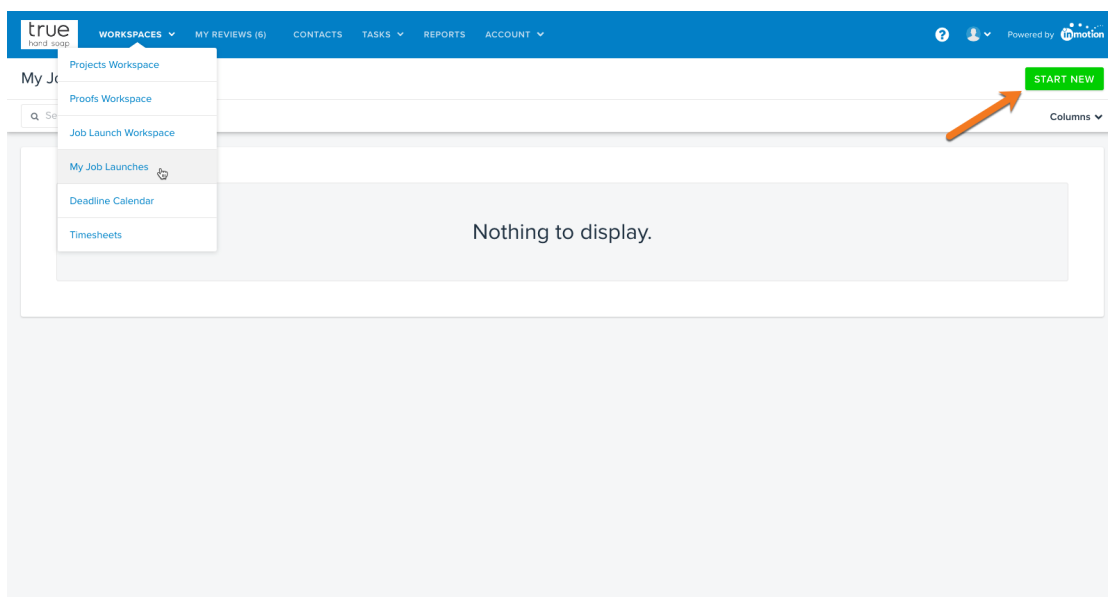
Published on 06/08/2017

Complete the following tasks to experience the basic features of the three major aspects of inMotion.

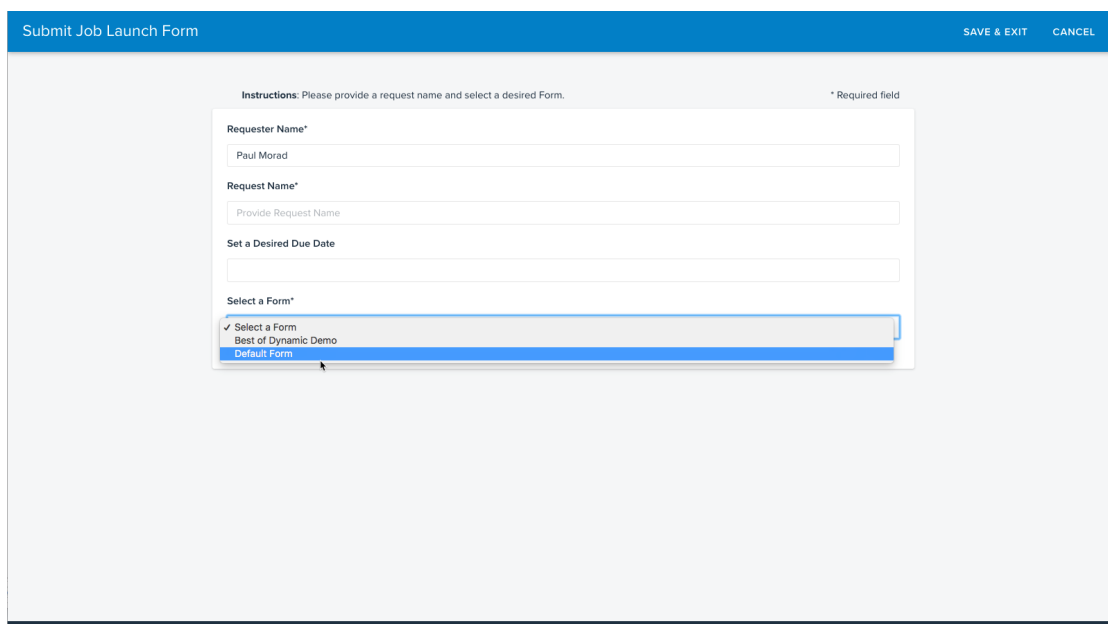
## Job Launch

### Submit a Job Launch Request Form

1. Hover over **Workspaces** and click **My Job Launches**.

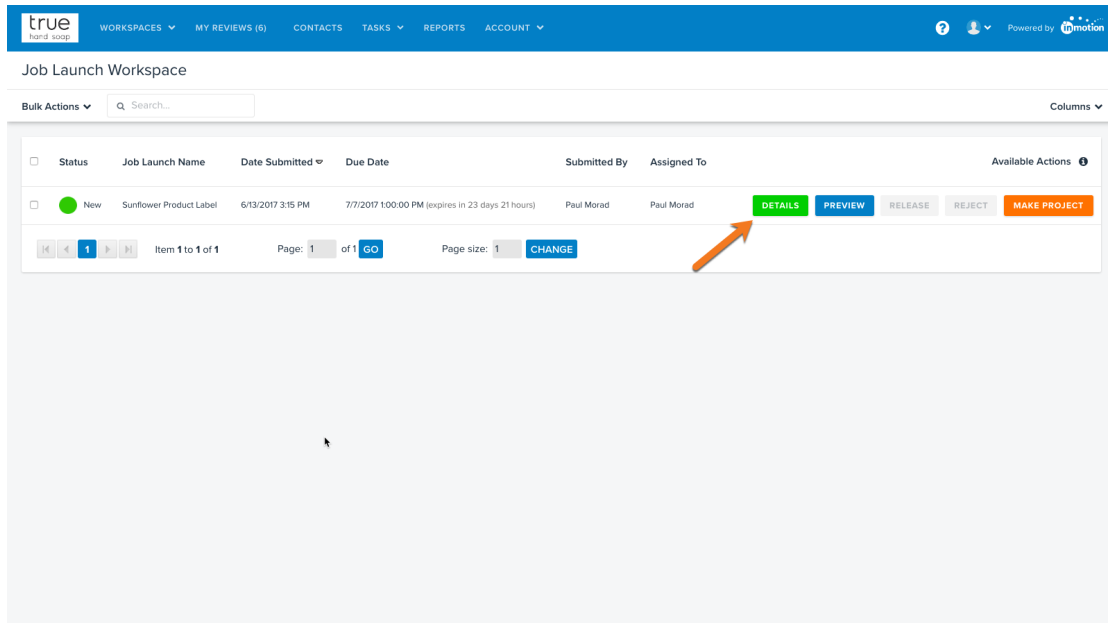


2. Click **START NEW** to select the Default form and submit your test request.

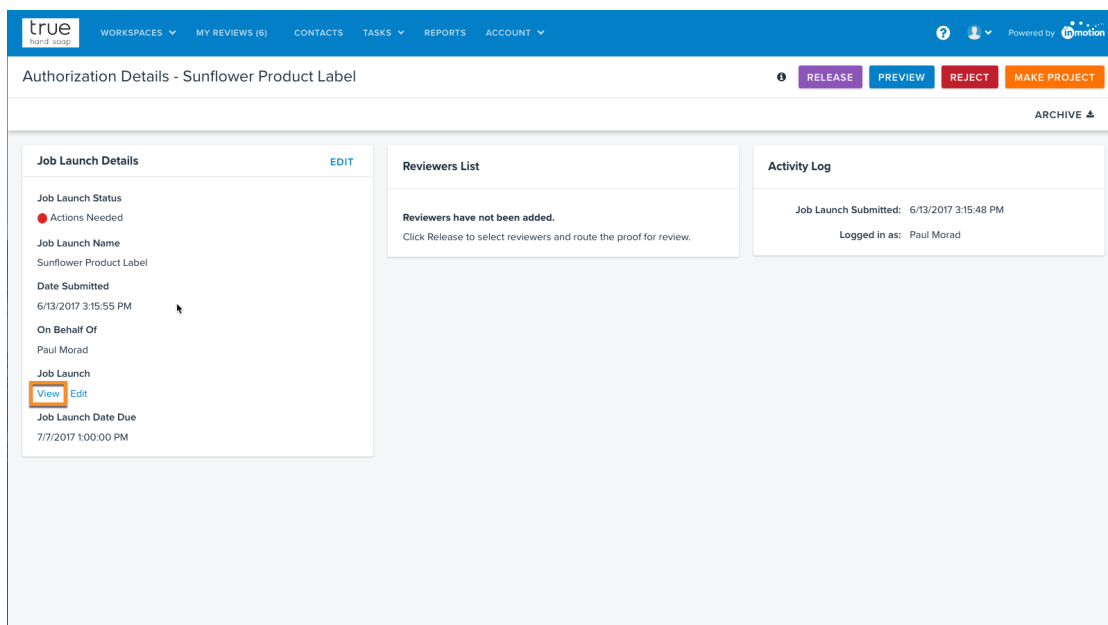
A screenshot of the 'Submit Job Launch Form' form. The form has a blue header bar with the title 'Submit Job Launch Form' and two buttons: 'SAVE & EXIT' and 'CANCEL'. Below the header, there is a section titled 'Instructions: Please provide a request name and select a desired Form.' with a '\* Required field' note. The form contains four fields: 'Requester Name\*' with the value 'Paul Morad', 'Request Name\*' with the placeholder 'Provide Request Name', 'Set a Desired Due Date' with an empty date field, and 'Select a Form\*' with a dropdown menu. The dropdown menu is open, showing three options: 'Select a Form' (checked), 'Best of Dynamic Demo', and 'Default Form' (highlighted with a mouse cursor).

# Manage Job Launch Requests

1. Hover over **Workspaces** and click **Job Launch Workspace** and click the **DETAILS** button next to your request.



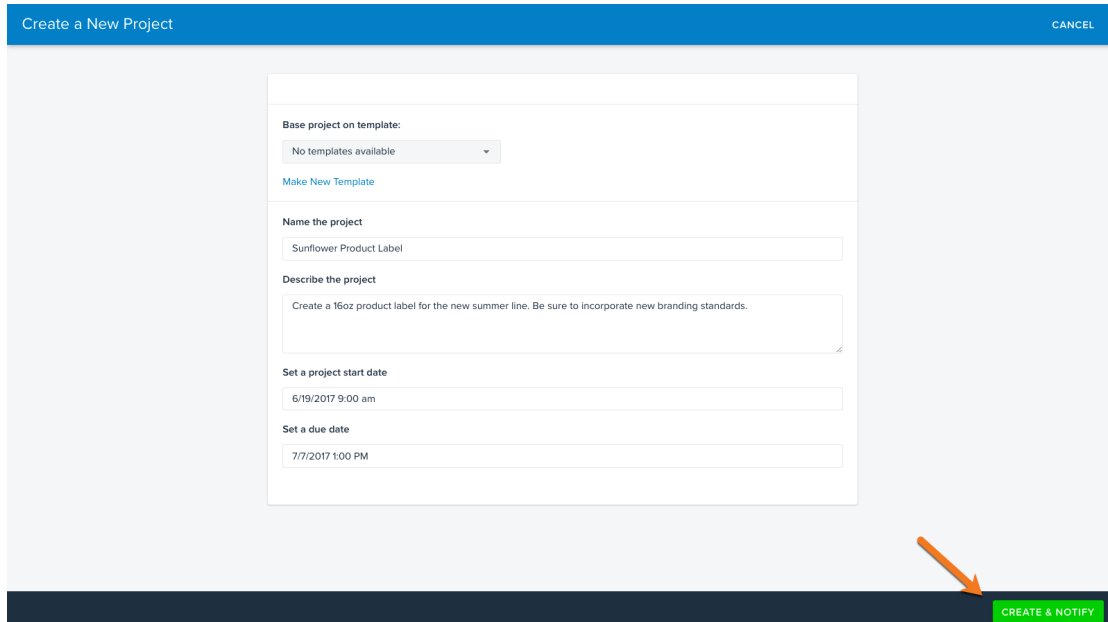
2. Open the request by clicking **View** in the 'Job Launch Details' section. From here you can download a PDF copy of the request.



3. Approve the request by clicking the **MAKE PROJECT** button in the top right of the Job Launch Workspace.
4. Enter any sample project details (description, start date, etc.)

5. Click **CREATE & NOTIFY** to create your project.

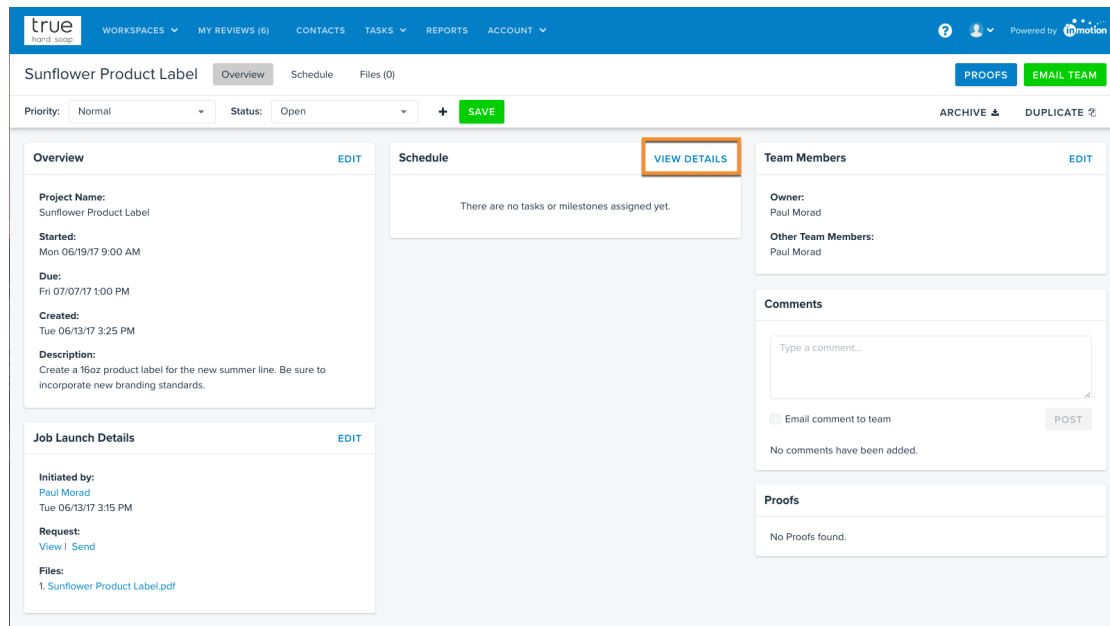
*Note: This notifies the Job Launch Submitter that the request was approved and the project is kicked off.*



## Project Management

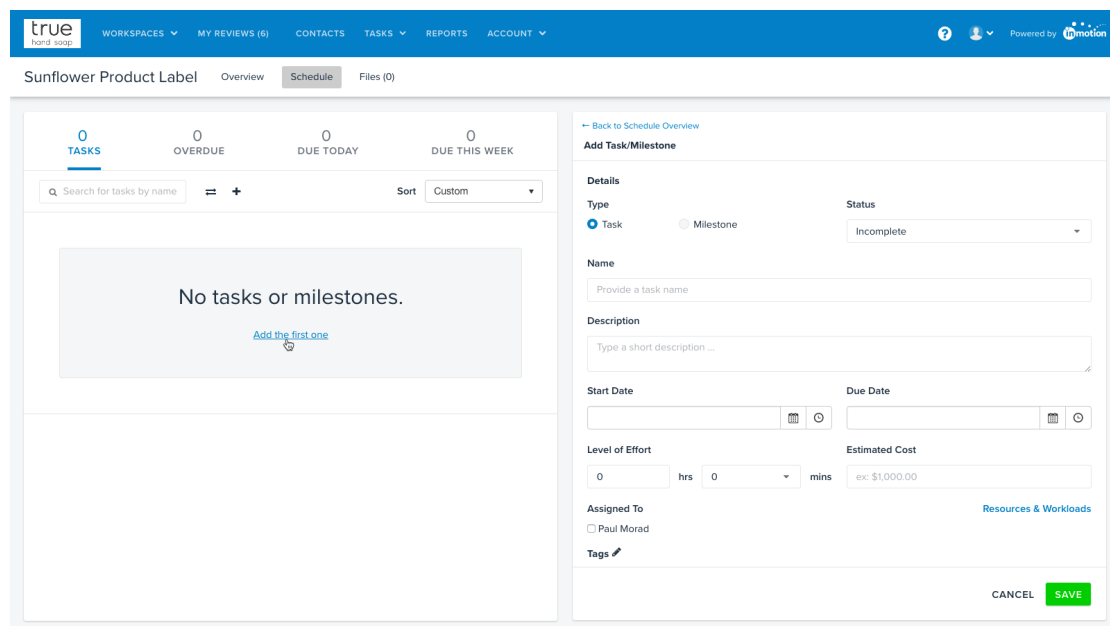
### Manage Projects

1. After creating the project from the request, you should now see the project info on the **Project Dashboard**.
2. Click **VIEW DETAILS** in the '**Schedule**' column to create sample tasks and milestones and assign them to team members on the project.



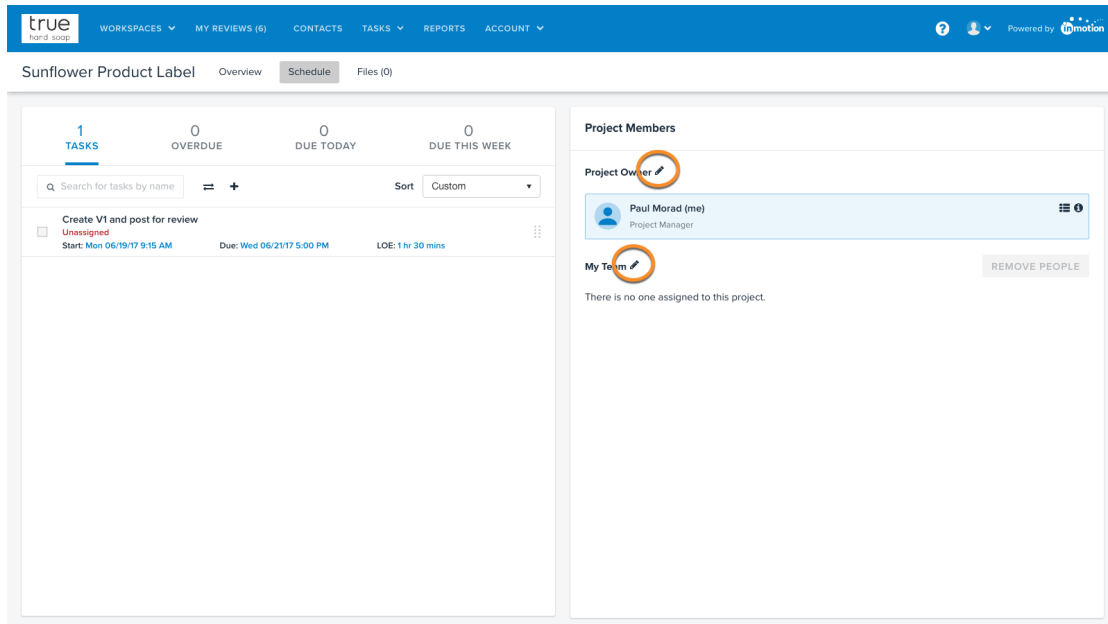
3. Click the link to 'Add the first one' to begin [task creation](#)

(<http://guide.inmotionnow.com/help/add-tasks>) .



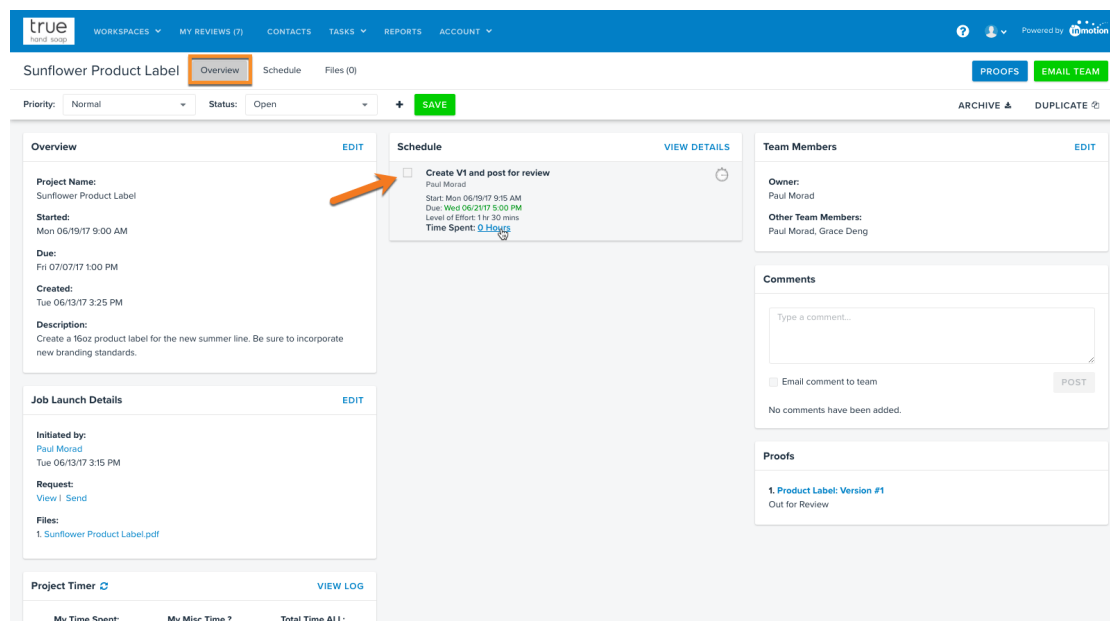
*Note: You can utilize the [Resource Allocation](#) (<http://guide.inmotionnow.com/help/assigning-resources>) capability, if you include a project start/due date and level of effort (LOE) for each task.*

4. Once you save your first task, click the pencil next to 'Project Owner' or 'My Team' to change the Project Owner or add/remove team members.



5. Select **Overview** to navigate back to the **Project Dashboard** for your project.

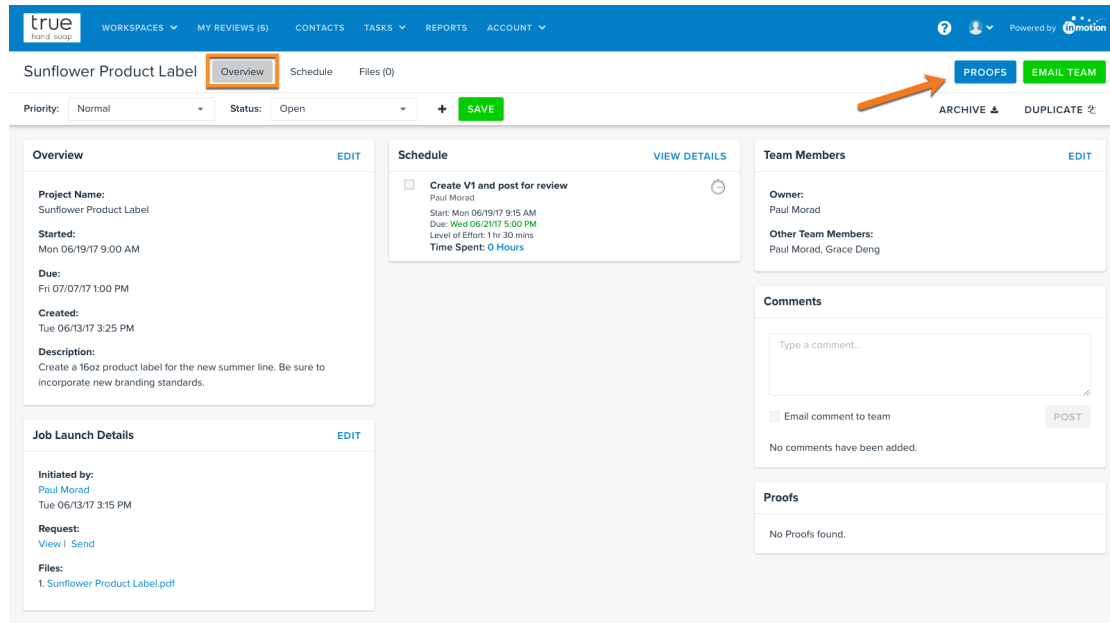
Complete the tasks by checking them off, enter time spent on task and click **SAVE**.



## Review and Approval

### Post a New Proof

1. From the Overview section of the Project Dashboard, click the **PROOFS** button in the top right.



**True Project Management**

WORKSPACES MY REVIEWS (6) CONTACTS TASKS REPORTS ACCOUNT

Sunflower Product Label Overview Schedule Files (0)

Priority: Normal Status: Open + SAVE

**Overview** EDIT

**Project Name:**  
Sunflower Product Label

**Started:**  
Mon 06/19/17 9:00 AM

**Due:**  
Fri 07/07/17 1:00 PM

**Created:**  
Tue 06/13/17 3:25 PM

**Description:**  
Create a 16oz product label for the new summer line. Be sure to incorporate new branding standards.

**Job Launch Details** EDIT

**Initiated by:**  
Paul Morad  
Tue 06/13/17 3:15 PM

**Request:**  
View | Send

**Files:**  
1. Sunflower Product Label.pdf

**Schedule** VIEW DETAILS

☐ Create V1 and post for review

Paul Morad  
Start: Mon 06/19/17 9:15 AM  
Due: Wed 06/21/17 5:00 PM  
Level of Effort: 1 hr 30 mins  
Time Spent: 0 Hours

**Team Members** EDIT

**Owner:**  
Paul Morad

**Other Team Members:**  
Paul Morad, Grace Deng

**Comments**

Type a comment...

☐ Email comment to team POST

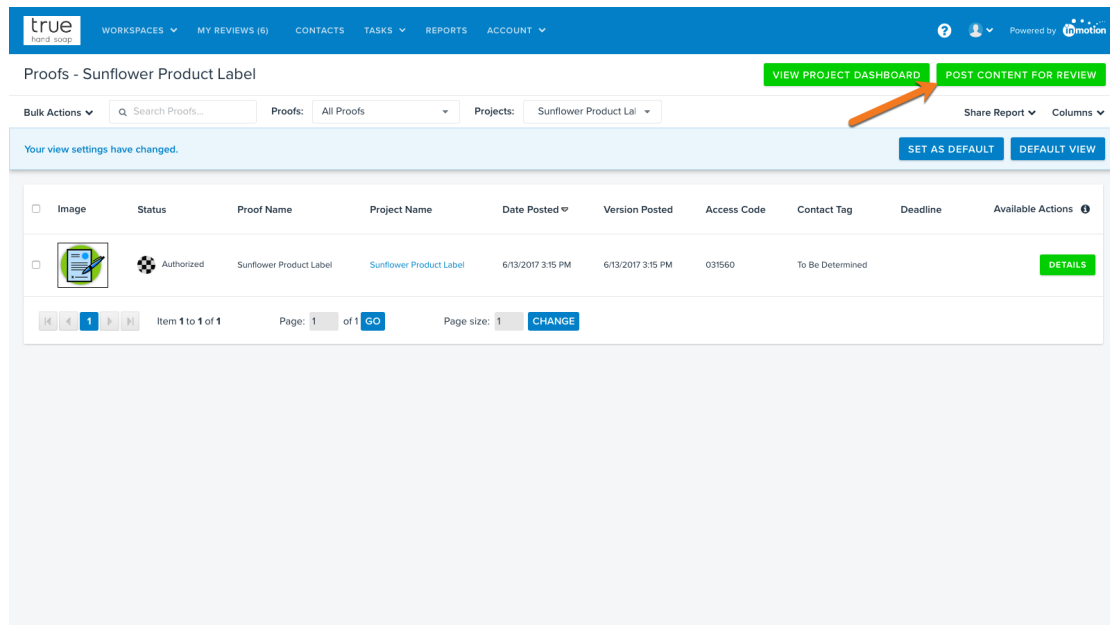
No comments have been added.

**Proofs**

No Proofs found.

ARCHIVE DUPLICATE

2. Click **POST CONTENT FOR REVIEW** to add assets for review to your project.



**True Project Management**


WORKSPACES MY REVIEWS (6) CONTACTS TASKS REPORTS ACCOUNT

Proofs - Sunflower Product Label

VIEW PROJECT DASHBOARD POST CONTENT FOR REVIEW

Bulk Actions Search Proofs... Proofs: All Proofs Projects: Sunflower Product Label Share Report Columns

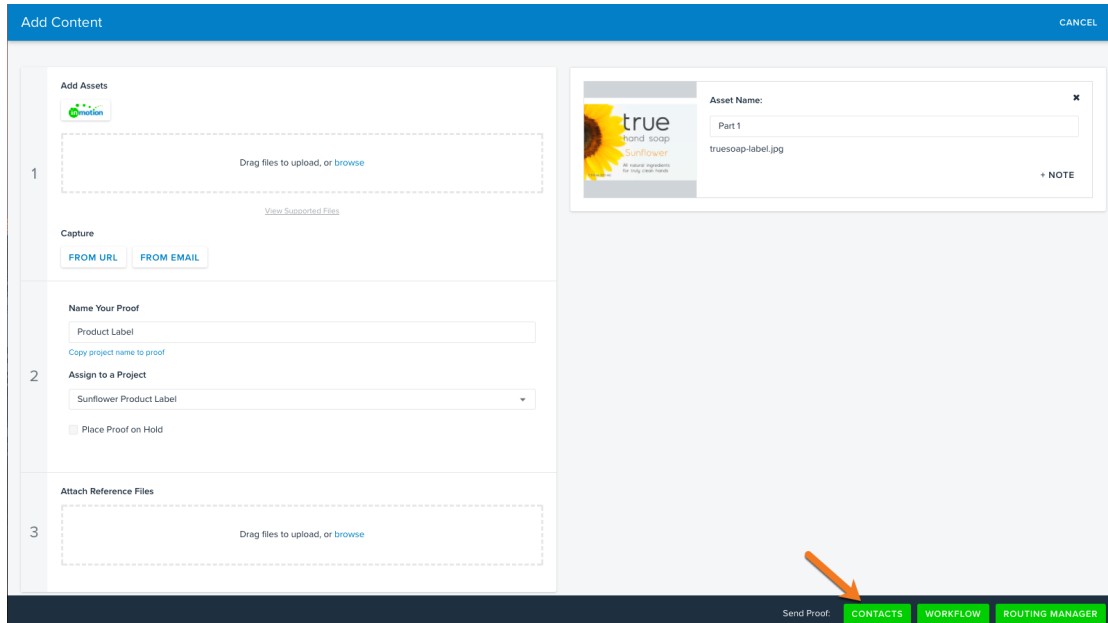
Your view settings have changed. SET AS DEFAULT DEFAULT VIEW

<input type="checkbox"/>	Image	Status	Proof Name	Project Name	Date Posted	Version Posted	Access Code	Contact Tag	Deadline	Available Actions
<input type="checkbox"/>		Authorized	Sunflower Product Label	Sunflower Product Label	6/13/2017 3:15 PM	6/13/2017 3:15 PM	031560	To Be Determined		DETAILS

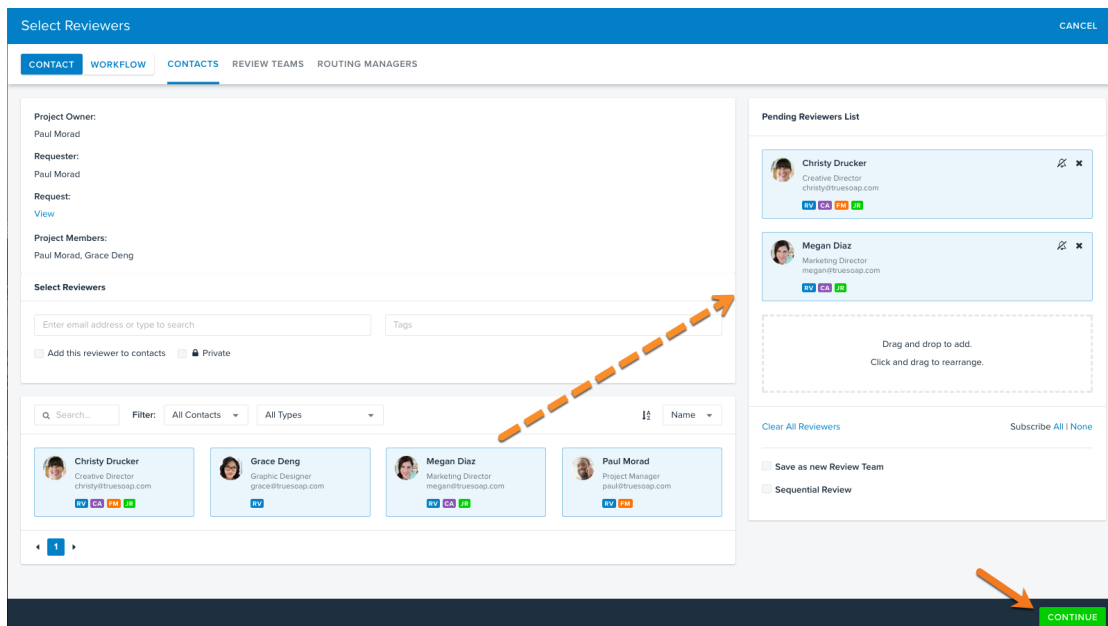
Item 1 to 1 of 1 Page: 1 of 1 GO Page size: 1 CHANGE

*Note: Another way to route content is by hovering over **Workspaces** and clicking **Proofs Workspace**. From there, click the same **POST CONTENT FOR REVIEW** button.*

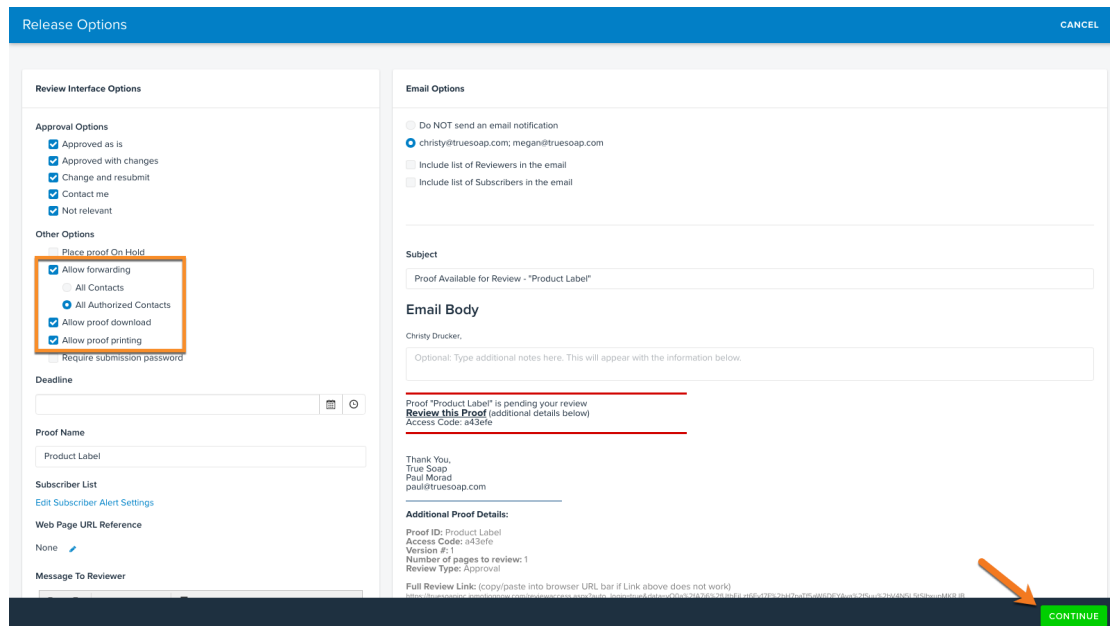
3. In Step 1 of the **Add Content** page, select your file(s) using one of the available selections. Your file will begin the upload progress in the right hand column. If you have a multiple page document, you will see each page load as a separate asset. You can name each asset/page accordingly.
4. In Step 2, enter a name for your proof.
5. When you're ready to proceed, select **CONTACTS** in the bottom right of the page.



6. Drag and drop the applicable reviewer contact cards to the **Pending Reviewers List** on the right. This will notify the chosen contacts of a proof available for review. Be sure to include yourself! Click **CONTINUE** in the bottom right to proceed.



7. On the [Release Options](http://guide.inmotionnow.com/help/post-a-proof#release-options) (<http://guide.inmotionnow.com/help/post-a-proof#release-options>) page, be sure to select '**Allow Forwarding**' and '**Allow Proof Download**' if you would like to test these features in the review environment. Click **CONTINUE** to proceed.




Release Summary

CANCEL

Please review the content, reviewers and release options before selecting the Finalize button below.

Uploaded Content

EDIT




Asset Name:  
Part 1  
7oz Label - Sunflower.jpg


Assigned Project: Sunflower Product Label

Reviewers List

EDIT



Christy Drucker  
Creative Director  
christy@truesoap.com  
[TV](#) [IG](#) [FB](#) [YT](#)



Megan Diaz  
Marketing Director  
megan@truesoap.com  
[TV](#) [IG](#) [FB](#) [YT](#)

Release Options

EDIT

Proof Name: Product Label

Proof Type: Approval

Access Code: a43efe

Instructions to Reviewer: [Show](#)

Deadline:

Subscriber List:

Email Notification: On [Preview Email](#)

Landing Page: None

Assigned to User Group: -----

Web Page URL Reference: None

Other Options:

☐ Place proof "On Hold"

☒ Allow forwarding

☒ Allow Proof Download

☒ Allow Proof Printing



Want to save this proof as a quick release template in the future? Give the template a name and click the save button.

SAVE

FINALIZE

1. To access the posted proof as a reviewer, you can either:
  - Use the link in the **'Proof Available for Review'** email notification you received.
  - Navigate to **My Reviews** and click on the **REVIEW** button to the right of your listed proof.



true hand stop									
WORKSPACES MY REVIEWS (7) CONTACTS TASKS REPORTS ACCOUNT									
My Reviews									
Search Proofs...									
Columns									
Image	Status	Proof Name	Project Name	Date Posted	Deadline	Access Code	Last Viewed	Posted By	Available Actions
	Pending Review	Product Label	Normal	6/13/2017 4:25 PM EDT		e43efe		Paul Morad	<a href="#">REVIEW</a>
	In Review	Email Blast - Spring Campaign	Normal	6/2/2017 10:03 AM EDT		27141	6/9/2017 1:52 PM EDT	Paul Morad	<a href="#">REVIEW</a>
Item 1 to 2 of 10 Page: 1 of 5 GO Page size: 2 CHANGE									

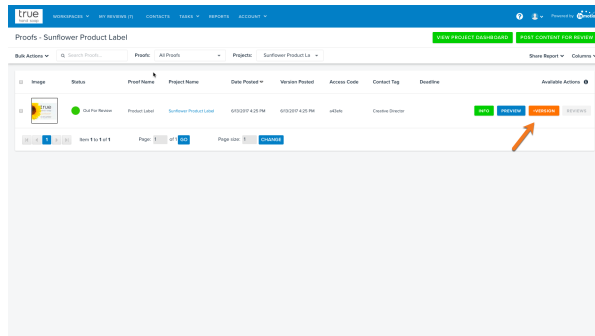
2. Leave comments and/or annotations, and select an approval status for each page of the review. Refer to our [Introduction to Review + Approval](http://guide.inmotionnow.com/help/reviewing-an-asset) (<http://guide.inmotionnow.com/help/reviewing-an-asset>) to learn more about the available features of the review environment.
3. Confirm and submit your review to finish.

## Review the Feedback

1. Hover over **Workspaces** and click **Proofs Workspace**. Locate the proof you submitted for review.  
*Note: You can see either the Proof ID or Access Code located in the email.*
2. Click the **REVIEWS** button to the right of the proof.
3. This will enter you into a [read-only](http://guide.inmotionnow.com/help/read-only) (<http://guide.inmotionnow.com/help/read-only>) mode of the review where you can view the submitted feedback.

## Post New Version for Review

1. From the **Proofs Workspace**, click the **+VERSION** button to the right of the proof and [add your updated content](http://guide.inmotionnow.com/help/post-new-version). (<http://guide.inmotionnow.com/help/post-new-version>)



2. Click **RELEASE NOW** in the bottom right to send the new version to the same reviewers.

3. Navigate to **My Reviews** to access the review for version 2.

*Note: Once you enter the review environment, you'll see a [Previous Version](http://guide.inmotionnow.com/help/versioning) (<http://guide.inmotionnow.com/help/versioning>) button located on the top left hand side of the review environment. Click the button, and the previous version will open in a new tab of your browser.*

4. Confirm and submit your review to finish.

Repeat all steps as many times as necessary to gain familiarity with the basics of inMotion! Keep a consolidated document with all questions to review with your Customer Success representative.

## Next Steps!

Email your Customer Success representative to schedule the Feature Review Call. When you schedule check-in calls with us, we commit to having enough time available to serve you. That affects how many other customers we can serve that day. For that reason, if you need to adjust the time or reschedule the call, please let us know 24 hours in advance.