



An Introduction to User Management

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What is a User?

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.

Adding New Users

1. Go to **Account > Account Settings > Users/Groups**
2. Click **'New User'** to begin.
3. Enter in the appropriate user details and assign permissions as applicable.
4. Click **'Save'** to create the account.

User Types

User Types are assigned to team members based on their role and responsibilities within the team. Users typically fall under four different categories:

- **Admin** - This permission level gives the user access to everything within your workspace including all functionality and global Account Settings.
- **Staff** - This permissions level has full functionality ability with no access to global Account Settings.
- **CSR** - This permission level has limited functionality. CSRs can view returned proofs, re-notify reviewers, and view project information. This is primarily intended to provide Read-Only access. CSRs cannot make any changes or add contacts.
- **Vendor** - This permission allows external users to post content for review and view feedback on uploaded content. This user type is not available by default and can be turned on by request.



User Permissions

Some unique permissions can be applied based on the User Type selected:

- **Reviewer Permissions** - Gives them access to the My Reviews tab if they have a contact record. Can be applied to an Admin, Staff or CSR user type.
- **Public Contact Access** - Gives them visibility to all contacts who aren't marked as "Private." Can be applied to a Staff user type.
- **Job Launch Manager** - Gives the user access to the Job Launch Workspace where all new Job Launch requests are managed. Job Launch Managers can be notified by email when specific forms they're assigned to have been submitted. Can be applied to an Admin or Staff user type.
- **Job Launch Submitter** - Gives the user access to the My Job Launches space. From there, they can submit any forms to which they've been given access. Can be applied to an Admin, Staff or CSR user type.
- **Task Resource** - Allows this user to be assigned to tasks and show as a resource on the Assign Resources screen. When this is disabled, the user can still be assigned as a team member to an overall project.
- **Project Schedule Manager** - Gives the user access to the Project Schedule page, with the ability to create or edit tasks. When this is disabled, the user can be assigned tasks but will not be able to edit their own deadlines or task details.

Editing and Deleting Users

1. Go to **Account > Account Settings > Users/Groups**
2. Click on the user you wish to Edit or Delete.
3. To delete, click '**Delete User**' in the top right corner.
4. If editing, make any necessary changes and select **Save**.

My Account

[Close](#)
[Overview](#)
[Company Info](#)
[Users/Groups](#)
[Customize](#)
[DAM Access](#)

Edit Existing User

[Resend Credentials](#)
[Delete User](#)

Edit user information in the fields below then select save.

Name:

Title:

Email:

User Name:

Additional Return Notification Recipients:

These emails will receive notifications when your Reviews are completed.
Separate email addresses with a comma (email@home.com,email2@home2.com)

RESET PASSWORD

Password:

(Password criteria: should be at least 5 characters)

Re-type Password:

USER TYPE

☐ Admin

Full access to all features of the application including global administrator features.
(Admin access should be limited to only key personnel)

☒ Staff

Provides access to upload, sort, search and edit proof details as well as manage contacts and view reports. (Most common User Type)

☐ CSR

Similar access as the Staff User Type but upload capabilities have been removed.
(Recommended for sales and customer service users)

☐ Vendor

Provides streamline upload access. (inVite feature)

PERMISSIONS

☒ Reviewer Permissions

Allow this user to access and review pending proofs they have been invited to participate on as a reviewer from their workspace.

☐ Public Contact Access

Allow access to public contacts
If unchecked, this user will only be able to view contacts, review teams and workflow teams that they have created or have access through as a contact filter group (restriction does not apply to administrators).

☐ Job Launch Manager

Allow this user to access, manage and review pending Job Launch.
Includes the ability to migrate Job Launch into Project.

☐ Allow this user to use an enhanced Job Launch workspace.

☒ Job Launch Submitter

Allow this user to submit Job Launch.
Select accessible form(s) for this user:

☒ Best of Dynamic Demo ☒ Best of Email

CONTACT FILTER GROUPS ACCESS Select: [all](#) / [none](#)

USER GROUPS

None

TAGS

There are not any [Tag Lists & Tags](#) to be displayed.

[Save](#)
[Cancel](#)