

Setting Up User Tags

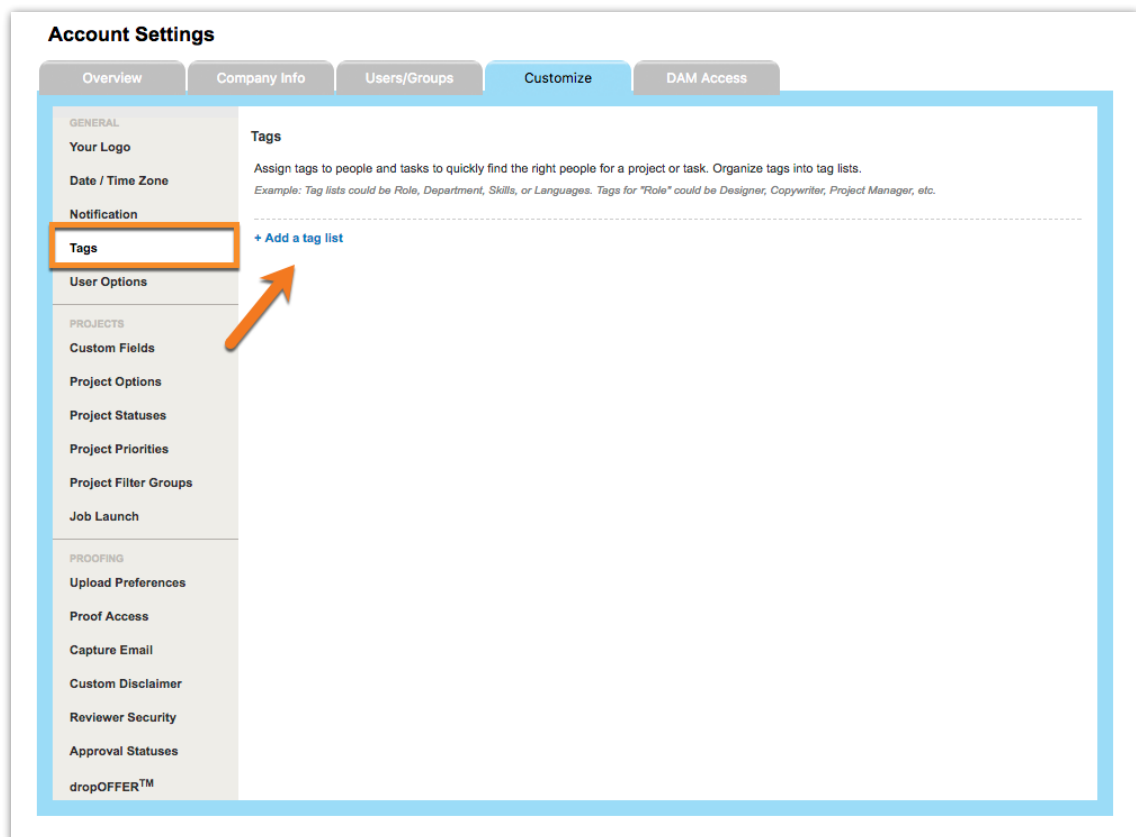
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What are User Tags?

Admins can create tags to **help identify your team members** by Role, Department, Location, etc. Then, you'll be able to **search and filter by these tags** when assigning your team members to Projects and Tasks.

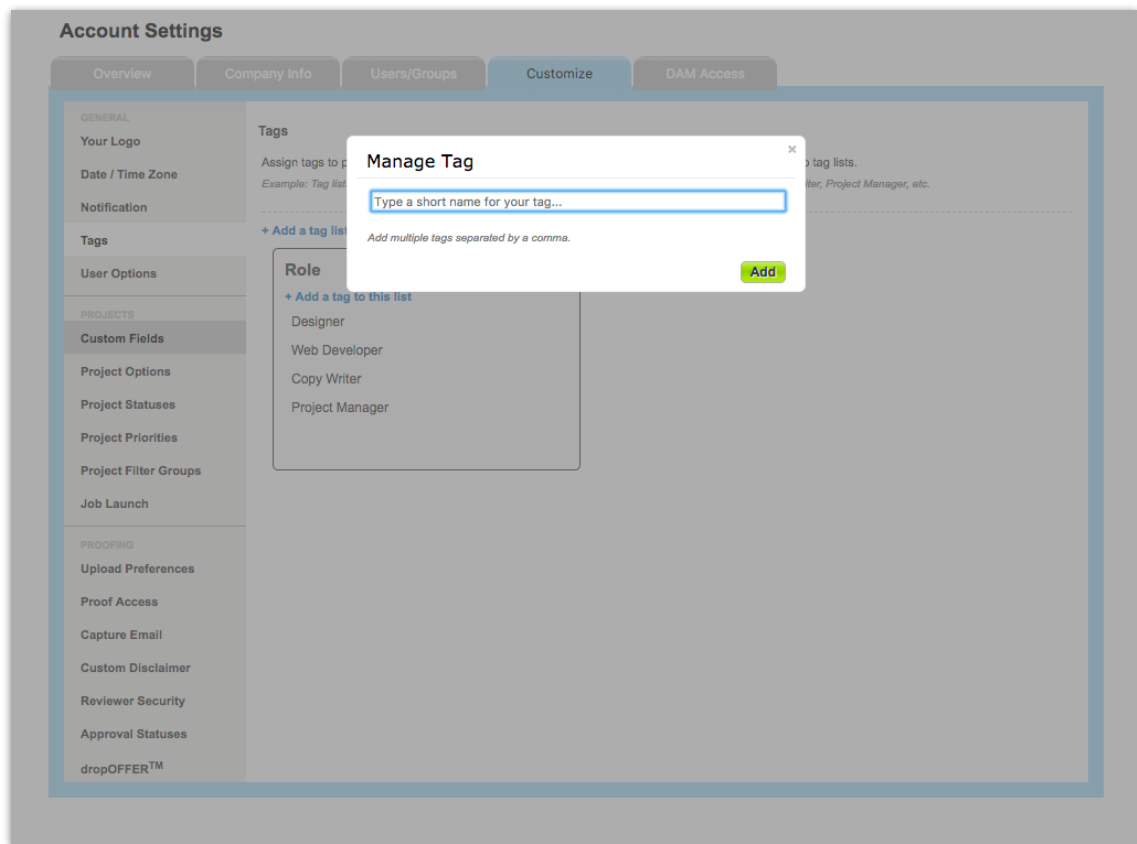
Setting up User Tags

1. To begin, create a **tag list** that describes a group of tags you will be assigning to users. *For example, a tag list named 'Role' might contain various tags like Designer, Web Developer, Copy Writer, Project Manager, etc.*
2. Navigate to **Account > Account Settings > Customize > Tags**. Click **+Add a tag list** to name and create your list.



3. Once you have created the tag list, click **+Add a tag to this list** to create the

applicable tags. You can type multiple tags separated by comma and click **Add** to save.



Assigning User Tags

To assign user tags to individual users, follow the steps below.

1. Navigate to **Account > Account Settings > Users/Groups** to find and select the applicable user record.
2. Once you have opened the user record you would like to edit, you can simply **check on or off the user tag(s)** relevant to the user.
3. Click **Save** to proceed.

My Account

Close

OverviewCompany InfoUsers/GroupsCustomizeDAM Access

Edit Existing User

Resend Credentials

Delete User

Edit user information in the fields below then select save.

Name: Grace Deng

Title: Graphic Designer

Email: grace@truesoap.com

User Name: grace_deng

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)

TAGS

Role

☐ Copy Writer
 ☒ Designer
 ☐ Web Developer
 ☐ Project Manager

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.

CONTACT FILTER GROUPS ACCESS

Select: all / none

USER GROUPS

None

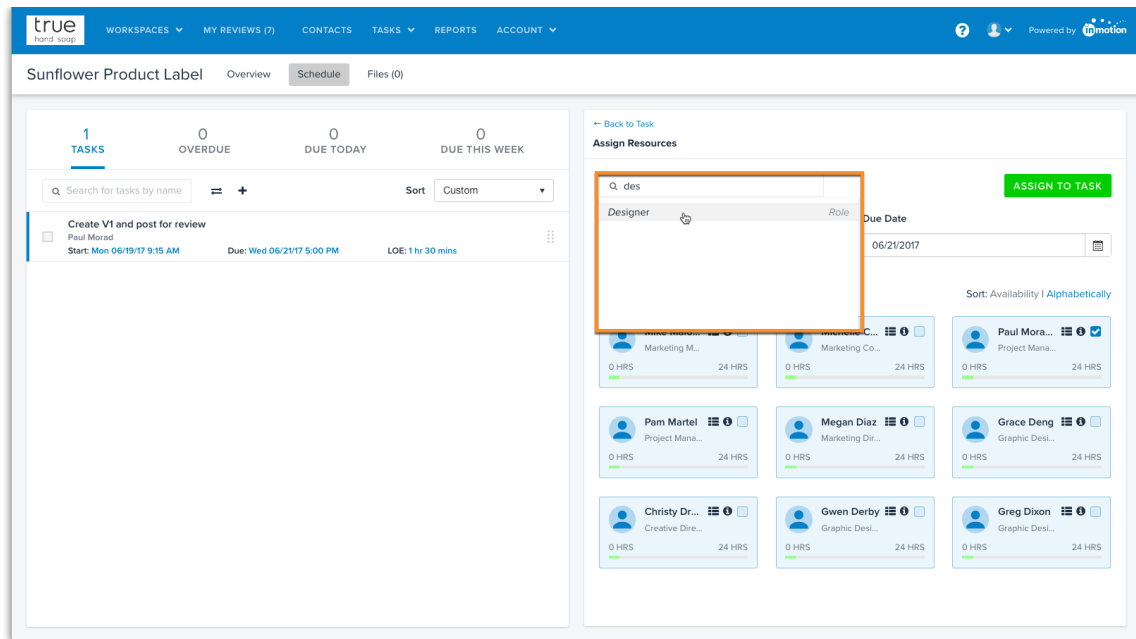
Save

Cancel

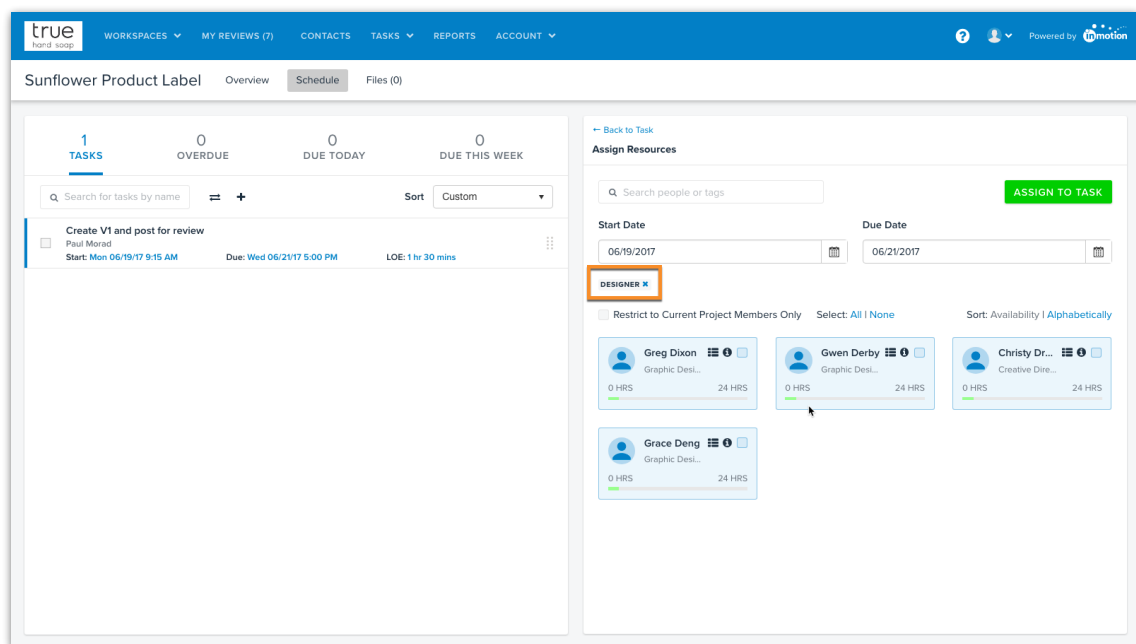
Search by User Tag

When [Assigning Resources](http://guide.inmotionnow.com/help/assigning-resources) (<http://guide.inmotionnow.com/help/assigning-resources>) to a task or project from the Project Dashboard, you can search the available resources by user tag to narrow your results.

1. In the search box, begin typing the tag you'd like to use and it will appear. Select the tag to narrow your search.



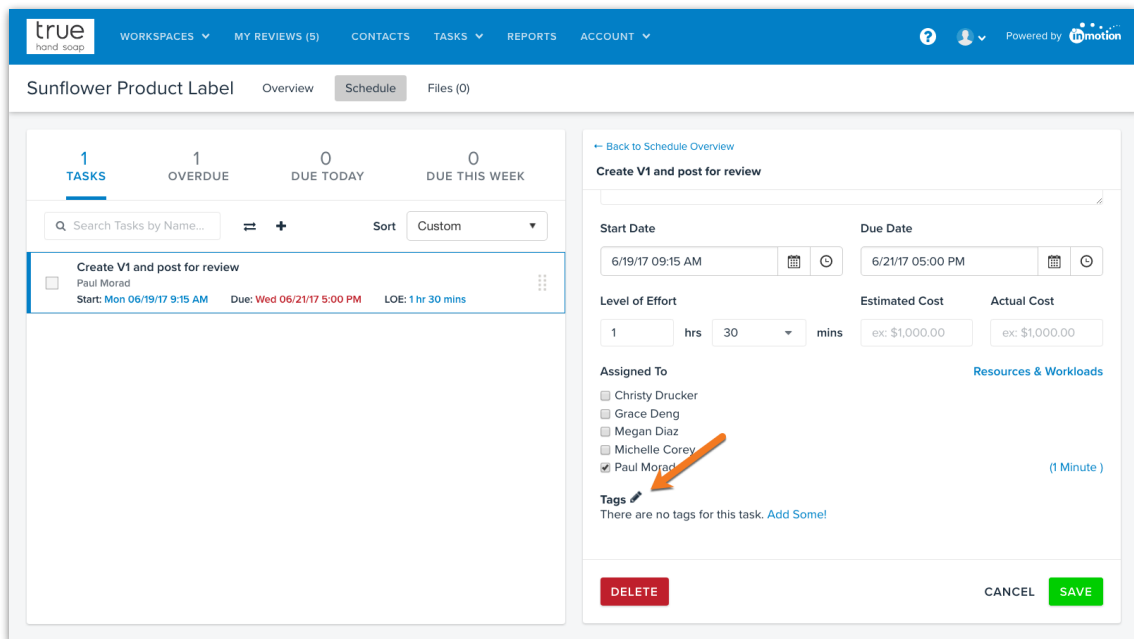
2. Once you have applied the tag to narrow your search, you will see it appear above the list of users. You can click the **X** to the right of the tag in order to remove the search filter.



Applying User Tags to Tasks

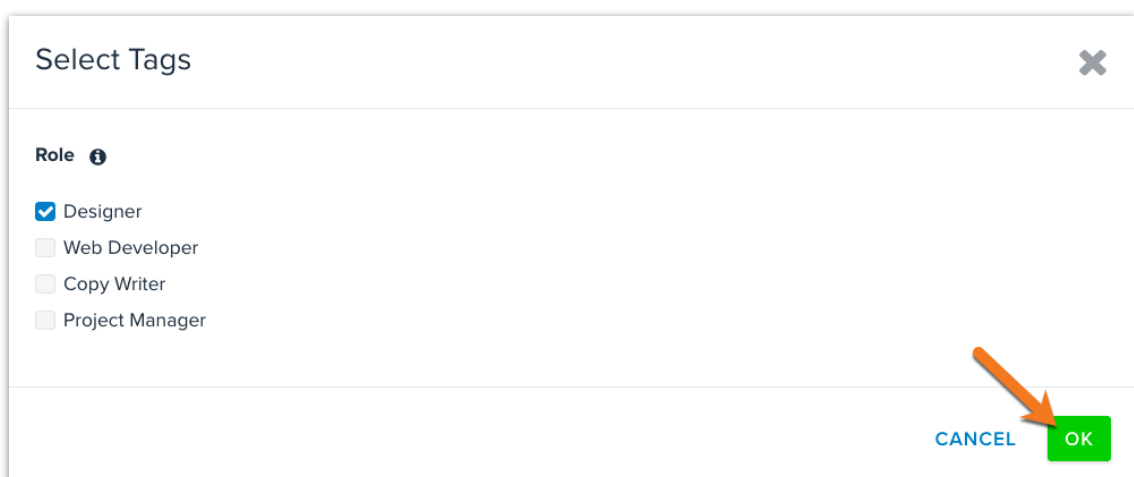
User Tags can also be applied to individual tasks in order to assist with assigning resources. When the tag is applied directly to the task, it will automatically filter the available resources. This is commonly used when the project member creating tasks is not the user who assigns the resources to each task.

1. Select the appropriate task and scroll to the bottom of the task information pane.
2. Click the edit icon next to **Tags** to apply a tag to the task.



The screenshot shows the True Project Management interface. The top navigation bar includes 'true hand soap', 'WORKSPACES', 'MY REVIEWS (5)', 'CONTACTS', 'TASKS', 'REPORTS', and 'ACCOUNT'. The main header shows 'Sunflower Product Label' with tabs for 'Overview', 'Schedule', and 'Files (0)'. The left sidebar displays task statistics: 1 TASKS, 1 OVERDUE, 0 DUE TODAY, and 0 DUE THIS WEEK. A search bar and a list of tasks are visible. The task 'Create V1 and post for review' by Paul Morad is selected, showing details like Start Date (6/19/17 09:15 AM), Due Date (6/21/17 05:00 PM), Level of Effort (1 hr 30 mins), Estimated Cost (\$1,000.00), and Actual Cost (\$1,000.00). The 'Assigned To' list includes Christy Drucker, Grace Deng, Megan Diaz, Michelle Corey, and Paul Morad. An arrow points to the 'Tags' section, which currently shows 'There are no tags for this task. Add Some!'. At the bottom are 'DELETE', 'CANCEL', and 'SAVE' buttons.

3. In the **Select Tags** modal, check off the box(es) that are applicable to the task and click **OK**.



The screenshot shows the 'Select Tags' modal. It has a title bar with a close button (X). Below the title is a section for 'Role' with an information icon. The roles listed are: Designer (checked), Web Developer, Copy Writer, and Project Manager. At the bottom right, there are 'CANCEL' and 'OK' buttons. An arrow points to the 'OK' button.

4. Now, when you click **Resources & Workloads**, the list of available team members will automatically be filtered by the applied tag.



true
hand soap

WORKSPACES ▼ MY REVIEWS (5) CONTACTS TASKS ▼ REPORTS ACCOUNT ▼

?

Powered by

Sunflower Product Label Overview Schedule Files (0)

1 TASKS

1 OVERDUE

0 DUE TODAY

0 DUE THIS WEEK

Q Search Tasks by Name...

≡ +

Sort Custom ▼

Create V1 and post for review

Paul Morad

Start: Mon 06/19/17 9:15 AM Due: Wed 06/21/17 5:00 PM LOE: 1 hr 30 mins

← Back to Task

Assign Resources

Q Search people or tags

ASSIGN TO TASK

Start Date

06/19/2017

Due Date

06/21/2017

Designer

☐ Restrict to Current Project Members Only

Sort: Availability | Alphabetically

Greg Dixon

Graphic Designer

0 HRS

24 HRS

Gwen Derby

Graphic Designer

0 HRS

24 HRS

Christy Drucker

Creative Director

0 HRS

24 HRS

Grace Deng

Graphic Designer

0 HRS

24 HRS

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