

# 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, select the appropriate user type and assign permissions as applicable.
5. Click '**Save**' to create the account.

**My Account**
Close

Overview
Company Info
Users/Groups
Customize
DAM Access

**Create New User**  Send credentials to new user

Edit user information in the fields below then select save.

Name:

Title:

Email:

User Name:

Password:

( Password criteria: should be at least 5 characters )

Re-type Password:

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)

**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.

**CONTACT FILTER GROUPS ACCESS** Select: **all** / **none**

**USER GROUPS**  
None

**TAGS**  
There are not any **Tag Lists & Tags** to be displayed.

Save
Cancel

## 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.

# 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:**

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**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

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