

Requester Insights

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What are Requester Insights?

Requester Insights enables an enhanced '**My Job Launches**' page that allows your requesters to see information about their requests like:

- **Project Name** - updates in real-time; what you call the project may be different from the original request name
- **Project Status** - updates in real-time; clients always know the status of their projects
- **Project Deadline** - updates in real-time; clients can see if a project deadline has been changed
- **Project Owner** - updates in real-time; clients can see who is managing their requested work
- **Review Action** - Adds an additional button in the '**Available Actions**' column that will take the requester to a filtered 'My Reviews' page for the applicable project.

Enabling Requester Insights

1. Navigate to **Account tab > Account Settings > Customize > Job Launch**
2. Check the box '**Allow Requester Insights.**'
3. Click '**Save.**'

Overview
Company Info
Users/Groups
Customize
Credit Summary
DAM Access

- Add Your Logo
- Date / Time Zone
- Upload Preferences
- Proof Access Options
- Reviewer Security
- dropOFFER™
- Notification
- Custom Disclaimer
- Approval Statuses
- Project Filter Groups
- Project Options
- Project Statuses
- Project Priorities
- Streamline Upload
- Job Launch

Job Launch Settings

- Allow Requester Insights.
(Ability to share project details with Job Launch requesters. Controllable per-project basis.)
- Allow Job Launch Submitters to upload assets.
- Allow Job Launch Submitters to select/create Project Group during submission.
- Allow new Job Launch Submitters to self register.
- Force self-registered submitters to validate their email address prior to a Job Launch submission.
- Include ID on Job Launch submission.
- Include default Job Launch Form in the form selection.

Job Launch Name:
(Substitution of "Job Launch" name displayed in the application and in email notification.)

Custom Form Name:
(Text of descriptive label to be displayed on submission page representing custom form selection. For example: "Request type", "Order type", "Category", etc.)

Score Name:
(Text of column header to be displayed in JobLaunch Manager Workspace. For example: "Scoring", "Importance", "Weight".)

Job Launch Form Assignment

Form:

Assigned to : Dark Helmet

Customizing Requester Insights Per Project

New Projects

On the '**Create a New Project**' page, you can check the boxes in the upper right corner to allow for the Requester Insights option you wish to share. Check all three boxes if you'd like to give your requester access to all the options, or a combination thereof. Now, after you approve the project, the requester will be able to view the project information on their own workspace without requiring updates from your team.

Note: This is only visible when you create a project from a request.

Create a New Project Cancel

Base project on template:

Modify the Project Details

Name the project:

Share Details with Requester

Project Name & Project Owner

Project Due Date

Project Status

Describe the project (optional):

Set a project start date:

Set a due date (optional):

Assign Project Group (optional):

Internal Print Video Web

Existing Projects

From the Project Dashboard, click **'Edit'** under the Project Overview section.

Overview		Edit
Project Name:	True Soap Campaign	
Started:	Fri 03/10/17 9:00 AM	
Due:	Not Set	
Created:	Fri 03/10/17 1:20 PM	
Description:	None	

This will open the **'Make Changes to This Project'** page, where you can check the boxes in the upper right corner to allow for the Requester Insights option you wish to share.

Note: This is only visible when the project was created from a request.

Make Changes To This Project Cancel

Project: True Soap Campaign

Base project on template:

Modify the Project Details

Name the project:
True Soap Campaign

Share Details with Requester

Project Name & Project Owner

Project Due Date

Project Status

Describe the project (optional):

Set a project start date:

Set a due date (optional):

Assign Project Group (optional):

Internal Print Video Web

My Job Launches with Requester Insights

Here is an example of My Job Launches with Requester Insights enabled.

My Job Launches											
Workspace My Reviews(1) Contacts Tasks Reports Account Help											
View Settings: Columns											
Default View Set as Default											
	NAME	STATUS	DATE SUBMITTED	DESIRED DUE DATE	SUBMITTED BY	FORM NAME	PROJECT NAME	PROJECT OWNER	PROJECT STATUS	PROJECT DEADLINE	AVAILABLE ACTIONS
	True Soap Campaign	Being Reviewed	5/8/2017 1:06:25 PM	Not Set	Megan Diaz	Print	N/A	N/A	N/A	N/A	receipt review duplicate
	Spring Campaign	Released To Project	3/16/2017 10:01:40 AM	Not Set	Megan Diaz	Print	Sunflower Campaign	Paul Morad	Open	5/15/2017 5:00 PM	receipt review duplicate

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