

# Managing Proof Access with User Groups

Published on 07/14/2015

## What are User Groups?

User Groups allow you to restrict access to proofs. Once you create a user group and assign it to a proof accordingly, only the members of the applied user group can view that proof in the Proofs Workspace. This feature is helpful when you have multiple departments in the same account (e.g. Digital, Print, Web) and you don't want one group's work cluttering the workspace for other users.

1. Before you create user groups, Admin and Staff users are able to view **all proofs** on the account.
2. Once you create a user group, staff users will be **unable to view any proofs** unless assigned to the applied user group. Administrators can always view all proofs.
3. inMotion automatically creates a user group, **'No User Group,'** which contains any user that is not assigned to a user group. You can apply this option to proofs as well.
4. A recommended best practice is to also create a group, **'All Users,'** so that if necessary you can still give proof access to your entire team. *Note: Remember to add any new users to this group upon user creation.*

## Creating a New User Group

1. Navigate to **Account > Account Settings > Users/Groups**, and click **'New Group.'**
2. Enter a name for the user group.
3. Select the users that you want to assign to each group by clicking the check box next to their name.

4. (Optional) Check the box to notify all group members whenever a proof is returned to this group.
5. Click **'Save.'**

**My Account** Close

Overview Company Info Users/Groups Customize DAM Access

**Create New User Group**

Insert a group name in the field below, select any users you wish to belong to the group, and then select save.

Group Name:

To add a user to this group check the box next to that name. To delete a user from this group uncheck the box.

**GROUP MEMBERS**

<input type="checkbox"/> ChristyDrucker (Christy Drucker)	<input type="checkbox"/> GwenDerby (Gwen Derby)	<input type="checkbox"/> MeganDiaz (Megan Diaz)	<input type="checkbox"/> PamMartel (Pam Martel)
<input type="checkbox"/> GraceDeng (Grace Deng)	<input type="checkbox"/> HannahReese (Hannah Reese)	<input type="checkbox"/> MichelleCorey (Michelle Corey)	<input type="checkbox"/> PaulMorad (Paul Morad)
<input type="checkbox"/> GregDixon (Greg Dixon)		<input type="checkbox"/> MikeMalone (Mike Malone)	

**RETURNED PROOF NOTIFICATION**

Notify group members whenever proof is returned.

Save Cancel

## Assigning a User Group During Proof Upload

1. Follow the steps to upload a new proof for review.
2. On the **'Release Options'** page, click on the **'Assign to User Group'** dropdown menu.
3. Choose the applicable user group. *Note: **'No User Group'** will give proof access to any user that is not a member of any group.*

## Release Options

**Review Interface Options:**

<b>Options:</b>	<p><b>Approval Review</b> <span style="color: green;">✔</span> <span style="color: red;">✘</span></p> <p>Approval Statuses:</p> <p><input checked="" type="checkbox"/> Approved as is <input checked="" type="checkbox"/> Approved with changes</p> <p><input checked="" type="checkbox"/> Change and resubmit <input checked="" type="checkbox"/> Contact me</p> <p><input checked="" type="checkbox"/> Not relevant</p> <p><input type="checkbox"/> Place proof "On Hold"</p> <p><input type="checkbox"/> Allow forwarding</p> <p><input type="checkbox"/> Allow proof download</p> <p><input checked="" type="checkbox"/> Allow proof printing</p>
<b>Assign to User Group:</b>	<div style="border: 1px solid #ccc; background-color: #fff; padding: 5px;"> <p><input checked="" type="checkbox"/> Required</p> <p><input type="checkbox"/> No User Group</p> <p><input type="checkbox"/> All Users</p> <p><input type="checkbox"/> Digital</p> <p><input type="checkbox"/> Print</p> <p><input type="checkbox"/> Web</p> </div>
<b>Deadline:</b>	

## Assigning a User Group to an Existing Proof

1. Navigate to the **Proof Info** page.
2. Click **'Edit'** in the top right of the **'Proof Details'** section.
3. Click the **'User Filter Group'** dropdown menu and select the applicable group. If you leave the blank option selected, this will apply the **'No User Group'** option mentioned above.

Proof Details		See Reviews	Save
Proof Status:			In Review
Proof ID:	True Soap Campaign		
Project Name:	True Soap Campaign		
Access Code:	f60574		
Deadline:	<input type="text"/> 		
Owner:	Paul		
User Filter Group:	<input checked="" type="checkbox"/> All Users <input type="checkbox"/> Digital <input type="checkbox"/> Print <input type="checkbox"/> Web		
Subscriber List:			
Web Page URL Reference:			
Instructions:	<p><b>How to review content:</b></p> <p>Step 1 - Navigate to each page to view</p> <p>Step 2 - Make mark-ups using annotation tools (optional)</p> <p>Step 3 - Set an approval status for every page (required)</p> <p>Step 4 - Submit your review (required)</p>		
Proof Posted Date:	4/6/2017 4:55:14 PM		
Current Version:	2 (4/7/2017 9:37:49 AM)		
Approval Statuses:	<input checked="" type="checkbox"/> Approved as is <input checked="" type="checkbox"/> Approved with changes <input checked="" type="checkbox"/> Change and resubmit <input checked="" type="checkbox"/> Contact me <input checked="" type="checkbox"/> Not relevant Approval statuses can't be changed under current proof state.		