

Managing Users

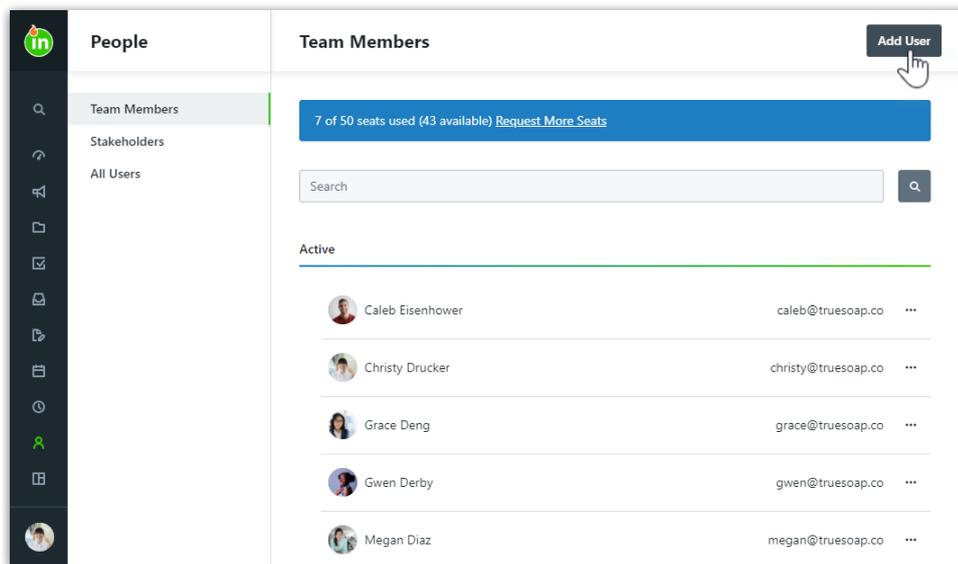
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Adding New Users



When adding paid seat users, select the **Team Members** sub-navigation to see how many seats are used and available.

To add a new user, select the **People** icon from the main navigation menu. Click **Add User** in the top right of the page.



To invite a single team member, the **INVITE** tab will appear by default in the **Create User** modal, allowing you to enter the user information.

Create User ×

INVITE IMPORT

First Name * **Last Name ***

Email Address *

Job Title

Role Type

Team Member Stakeholder

Role *

Send welcome email to new user

Cancel Create User

Select a Role Type and [Role](https://lytho.knowledgeowl.com/help/creating-roles) from the drop-down menu to apply the appropriate level of user permissions. If you have [Specialties](https://guide-ignite.inmotionnow.com/help/specialties) set up in your account, select the appropriate specialties for the user. If you prefer to manually invite this user, uncheck the **Send welcome email to new user** option to determine the appropriate invite timing.

To add multiple users, click on the **IMPORT** tab in the **Create User** modal, allowing you to bulk import up to 500 users at once.

Create Users ×

INVITE
IMPORT

Import new users in bulk by completing the provided User Import Template file and uploading it below. Any Roles included in the file must be created in your account before importing the users.

Send welcome email to new users

[⬇ Download User Import Template](#)

Drag and drop to attach file.

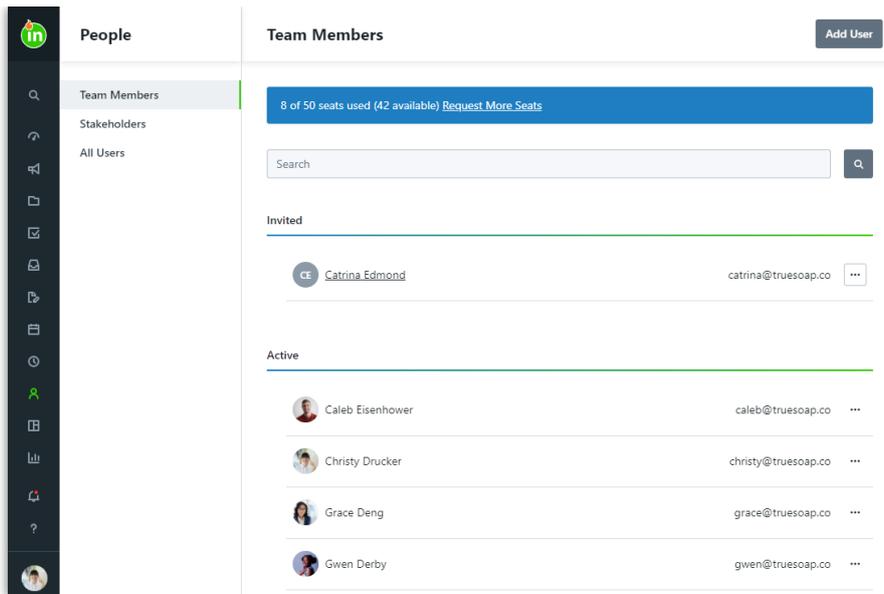
Cancel
Create Users

Click **Download User Import Template** to open a CSV template to add users. The template provides an example of how to input the relevant data for each user.

	A	B	C	D	E	F	G	H	I
1	Email Address	First Name	Last Name	Job Title	Phone Number	Role	Specialties		
2	johndoe@company	John	Doe	Graphic D	(919) 555-1212	Team Member	Designer, Artist		
3									
4									
5									
6									
7									
8									
9									

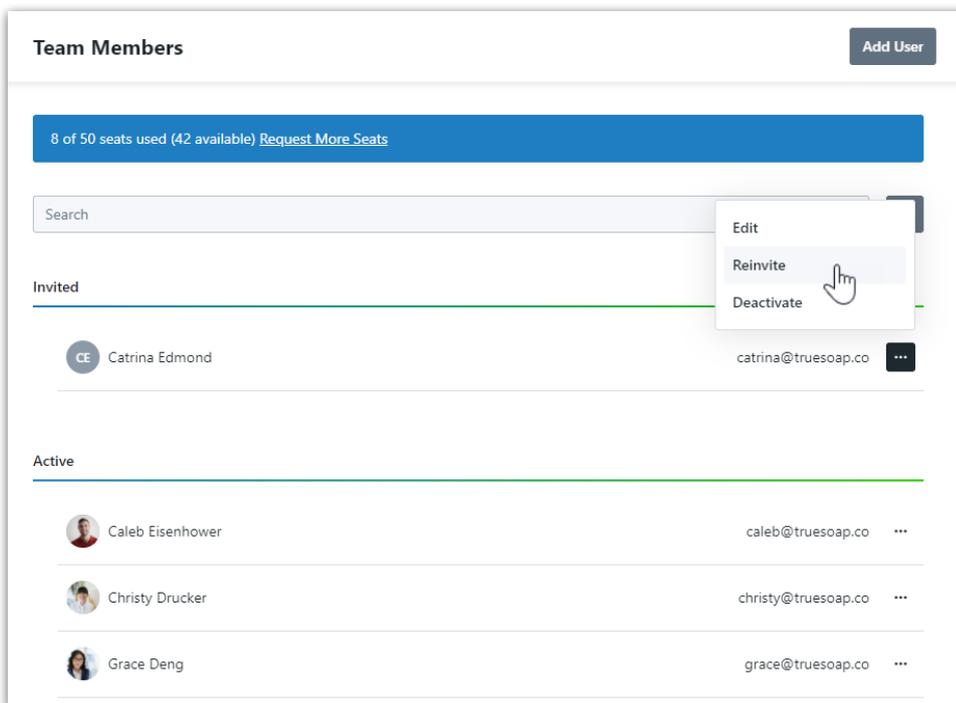
Once all user information is added, drag and drop the updated CSV file into the **Create User** modal to begin the import. If you would like to manually invite these users, uncheck the **Send welcome email to new users** option. Click **Create Users** to complete the import.

Once the user(s) have been created, they will receive an email inviting them to set up their account with inMotion ignite. From the **People** management screen, new users will show in the **Invited** section until they set up their account. Once they have logged in to the account, their user card will move to the **Active** section.



Reinviting Users

If a user fails to set up their account within seven days of user creation, the link in their email invitation will expire. You can reinvite users at any point in time from the **People** management screen. Select the action menu on the right of their user card and then select **Reinvite**. This will resend the email invitation prompting the user to set up their account.



Deactivating Users

If a user leaves your organization or you need to disable their account for any reason, you can deactivate a user account from the People management screen.

Select the options menu found to the right side of the relevant user card and choose **Deactivate**.

Team Members Add User

7 of 50 seats used (43 available) [Request More Seats](#)

Search

Active

Caleb Eisenhower	caleb@truesoap.co	⋮
Christy Drucker	christy@truesoap.co	⋮
Grace Deng	grace@truesoap.co	⋮
Gwen Derby	gwen@truesoap.co	⋮
Megan Diaz	megan@truesoap.co	⋮
Pam Martel	pam@truesoap.co	⋮

Note: A context menu is open over the 'caleb@truesoap.co' entry, showing 'Edit' and 'Deactivate' options. A hand cursor is pointing at the 'Deactivate' option.

The user will then move to the **Inactive** section.

Team Members Add User

Active

Christy Drucker	christy@truesoap.co	⋮
Grace Deng	grace@truesoap.co	⋮
Gwen Derby	gwen@truesoap.co	⋮
Megan Diaz	megan@truesoap.co	⋮
Pam Martel	pam@truesoap.co	⋮
Paul Morad	paul@truesoap.co	⋮

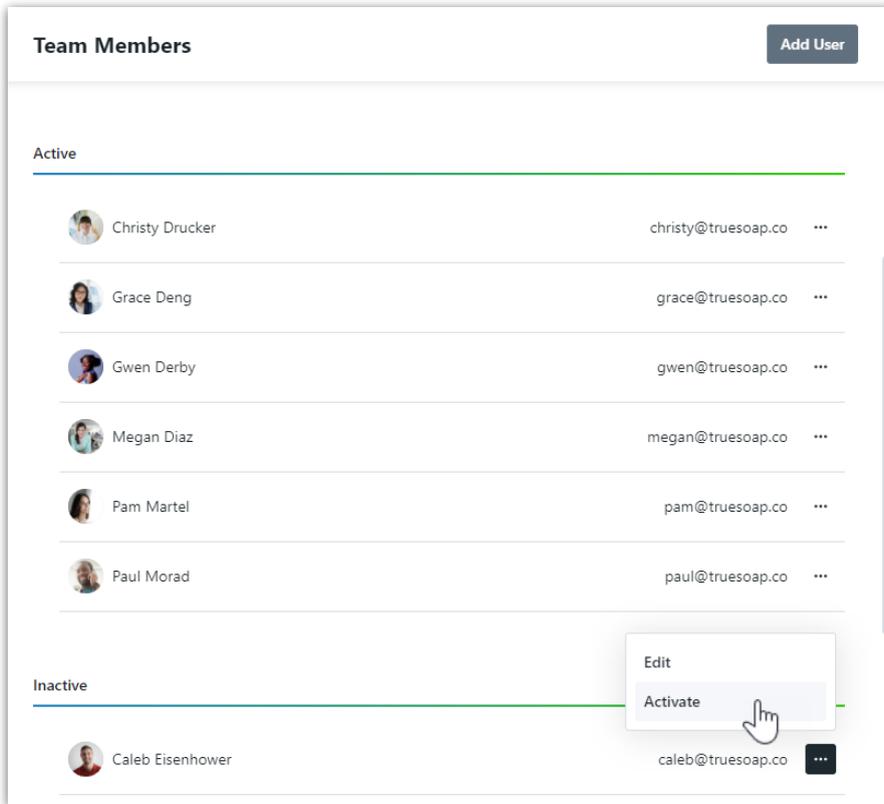
Inactive

Caleb Eisenhower	caleb@truesoap.co	⋮
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Deactivating a user will maintain all historical data related to their past activity in the account, however they will no longer be available for assignment to work. The deactivated user will no longer be able to login or receive email notifications. If the deactivated user was a paid user seat, this will become an available seat for a new user.

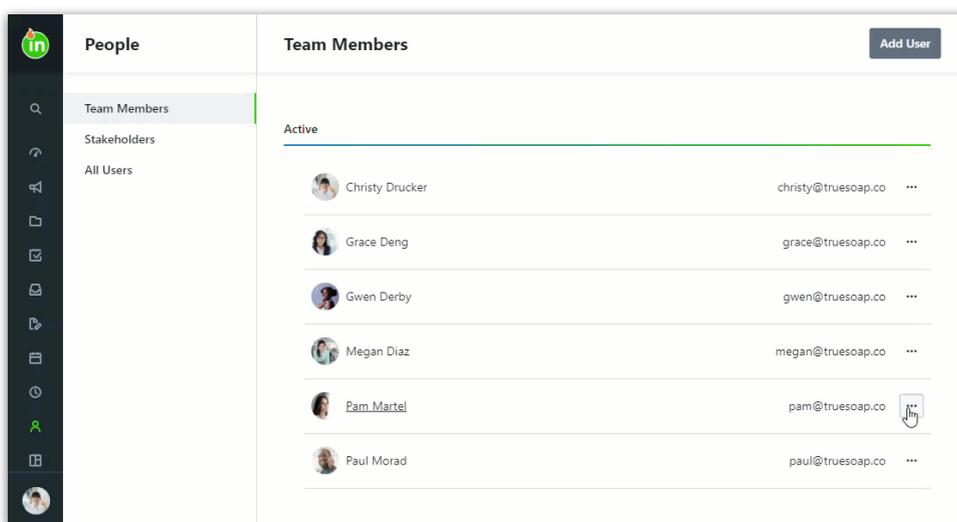
Activating Users

If for any reason you need to activate a previously deactivated user, you can click on the action menu found on the inactive user card and select **Activate**. This will move the user back to the **Active** section.



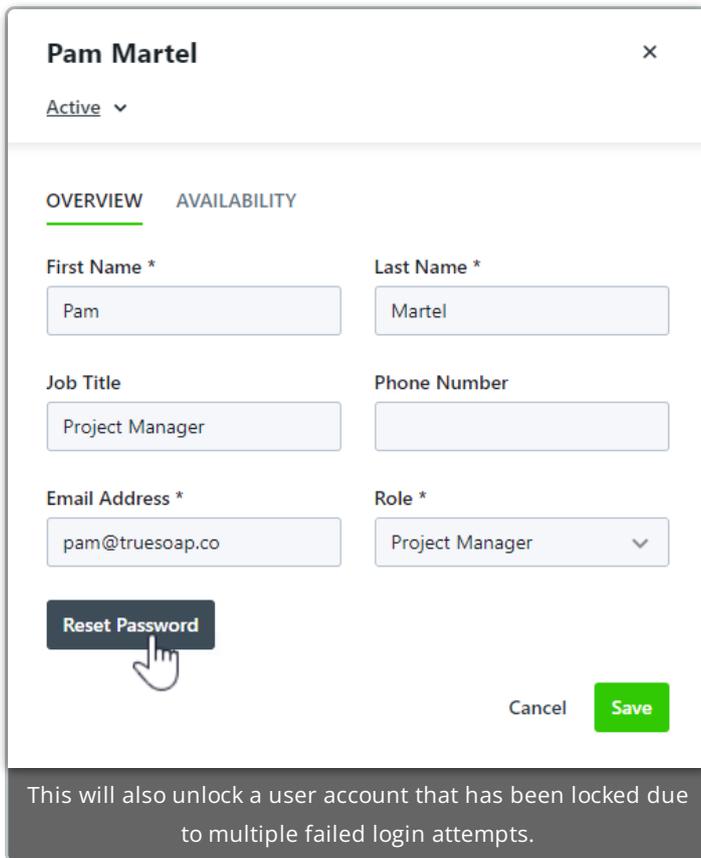
Editing User Emails

Admins can update any user's email address. To do so, find the user you'd like to edit. Open the action menu to the right of their name, then **Edit**, make your changes, and click **Save**.



Resetting User Passwords

Admins can also trigger a password reset email for all active users. To do so, find the user who needs their password reset. Open the action menu to the right of their name, then **Edit**, then **Reset Password**. They will receive an email with instructions to reset their password.



Pam Martel ×

Active ▾

OVERVIEW AVAILABILITY

First Name * Pam **Last Name *** Martel

Job Title Project Manager **Phone Number**

Email Address * pam@truesoap.co **Role *** Project Manager ▾

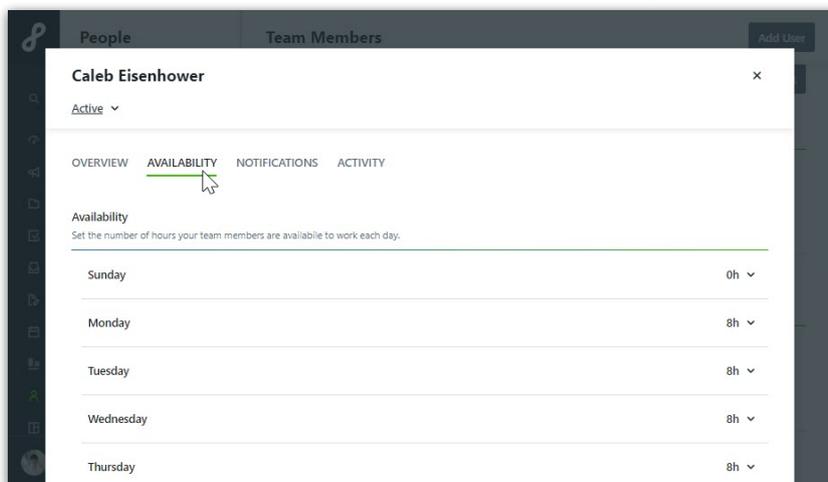
Reset Password

Cancel **Save**

This will also unlock a user account that has been locked due to multiple failed login attempts.

Managing User Availability

Manage availability and time off for your users from the people page or a users report. Select a Team Member and click the **AVAILABILITY** tab to make updates.



People **Team Members** Add User

Caleb Eisenhower ×

Active ▾

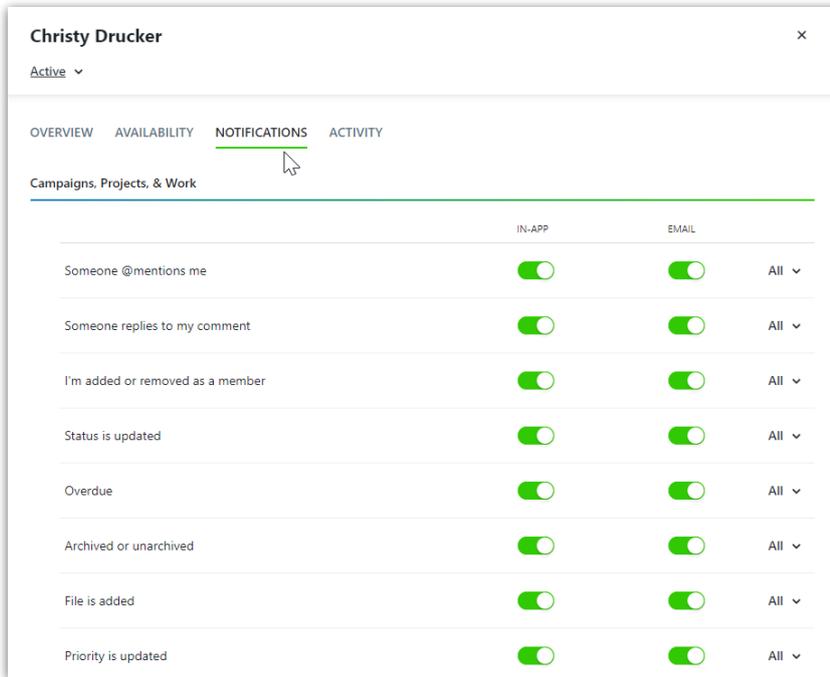
OVERVIEW **AVAILABILITY** NOTIFICATIONS ACTIVITY

Availability
Set the number of hours your team members are available to work each day.

Sunday	0h ▾
Monday	8h ▾
Tuesday	8h ▾
Wednesday	8h ▾
Thursday	8h ▾

Managing User Notifications

Manage the notification settings of your users directly from the people page or a user report. Select a user and click the **NOTIFICATIONS** tab to make updates. Users will still have the ability to make changes to their notification settings.



	IN-APP	EMAIL	
Someone @mentions me	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All ▾
Someone replies to my comment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All ▾
I'm added or removed as a member	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All ▾
Status is updated	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All ▾
Overdue	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All ▾
Archived or unarchived	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All ▾
File is added	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All ▾
Priority is updated	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	All ▾

User Activity Log

View a log of actions taken against a user from the people page by selecting a user and clicking the **ACTIVITY** tab.

Christy Drucker

Active ▾

OVERVIEW AVAILABILITY NOTIFICATIONS **ACTIVITY**

-  **Paul Morad** turned the *My review expired* App notification **On**
September 8th at 4:21 pm
-  **Paul Morad** turned the *My proof is sent out for review* App notification **On**
September 8th at 4:21 pm
-  **Christy Drucker** turned the *My review expired* Email notification **Off**
September 8th at 4:15 pm
-  **Christy Drucker** turned the *My review expired* App notification **Off**
September 8th at 4:15 pm
-  **inMotionNow Support** created user *Christy Drucker*
December 13, 2018 at 2:42 pm

The following activities are captured:

- User created
- Invitation resent
- Request password reset
- Password reset by email
- Role updated
- Notification preference updates
- Email changed
- User requested more seats
- User disabled