

Managing Users

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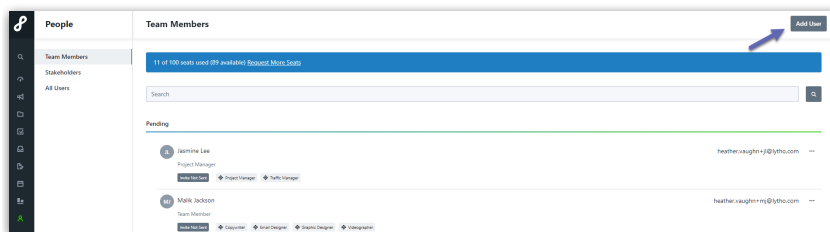
If your account uses [Single Sign On \(SSO\)](https://guide.lytho.com/help/user-authentication) (<https://guide.lytho.com/help/user-authentication>), managing users will work differently than displayed on this page. Please contact our [Support Team](https://support.lytho.com/support/tickets/new) (<https://support.lytho.com/support/tickets/new>) for additional information.

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.

Select a Role Type and [Role](https://guide.lytho.com/help/creating-roles) (<https://guide.lytho.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) (<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 at a later time, 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 Import Template](#)

Drag and drop to upload 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									



When filling in a Role, make sure that you are using the Role Name, not the Role Category. For example: Admin, not System.

Roles & Permissions Add Role

System

Admin

User will have complete access to all permissions available at all times, and will be able to create and edit other Admins.

Team Member

Project Manager

User is assigned all permissions related to project and task management. User is generally responsible for project oversight, work request traffic, and new work creation. Common job titles might be Project Manager, Traffic Coordinator, or Art Director.

Edit

Team Member

User is assigned permissions related to task creation and proof management. User is generally responsible for their assigned work. Common job titles might be Designer, Copywriter, or Production Artist.

Edit

Stakeholder

Requester

Edit

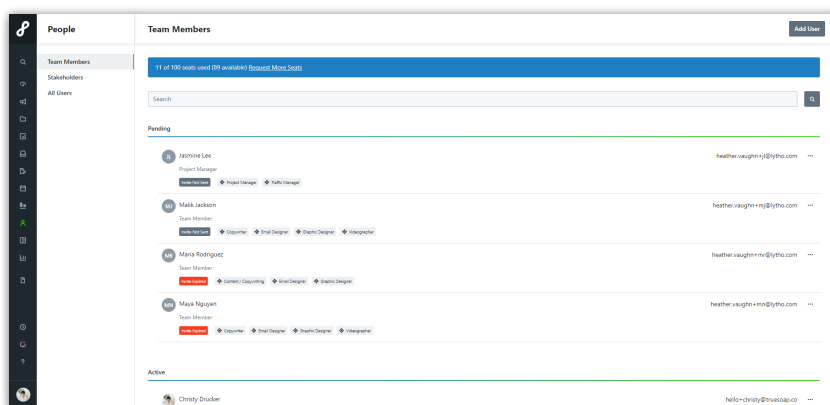
Reviewer

User is allowed to provide feedback on proofs that they have been invited to review.

Edit

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](https://guide.lytho.com/help/managing-users#reinviting-users) 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.



- Invited user's statuses will read "Invite Sent".
- If an invited user does not accept their invite within seven days, their status will turn red and read "Invite Expired".
- If you have unchecked 'Send welcome email to new users', the user's status will read "Invite Not Sent".

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.

Team Members

Add User

8 of 50 seats used (42 available) [Request More Seats](#)

Search

Invited

CE Catrina Edmond

catrina@truesoap.co

Edit
Reinvite
Deactivate

Active

Caleb Eisenhower

caleb@truesoap.co

...

Christy Drucker

christy@truesoap.co

...

Grace Deng

grace@truesoap.co

...

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.



Deactivating a Team Member or Admin? Check out our [best practices](https://lytho.knowledgeowl.com/help/best-practices-for-deactivating-team-members) (<https://lytho.knowledgeowl.com/help/best-practices-for-deactivating-team-members>) to ensure a smooth transition of work and responsibilities.

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	<div><div>Edit</div><div>Deactivate</div></div>
	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	...

Users in Lytho Workflow cannot be deleted due to their profile being tied to historical work. They will instead be moved to the **Inactive** section where they can be reactivated at any time if user seats are available.

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

...

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.

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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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Edit

Activate

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**.

People

Team Members

Add User

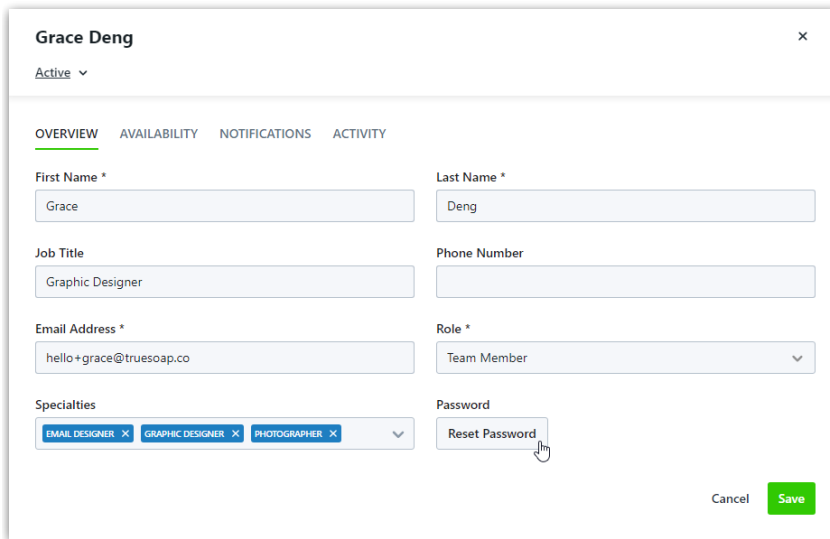
Active

	Christy Drucker	Admin	hello+christy@truesoap.co	...
	Grace Deng	Team Member	hello+grace@truesoap.co	...
	Natalie Williams	Admin	nataliewilliams@lytho.com	...
	Paul Morad	Admin	hello+paul@truesoap.co	...
	Paul Morad	Project Manager	haztheroughnpaul@lytho.com	...

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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.



Grace Deng ×

Active ▼

OVERVIEW AVAILABILITY NOTIFICATIONS ACTIVITY

First Name * Last Name *

Job Title Phone Number

Email Address * Role * Team Member ▼

Specialties EMAIL DESIGNER GRAPHIC DESIGNER PHOTOGRAPHER ▼ Password Reset Password

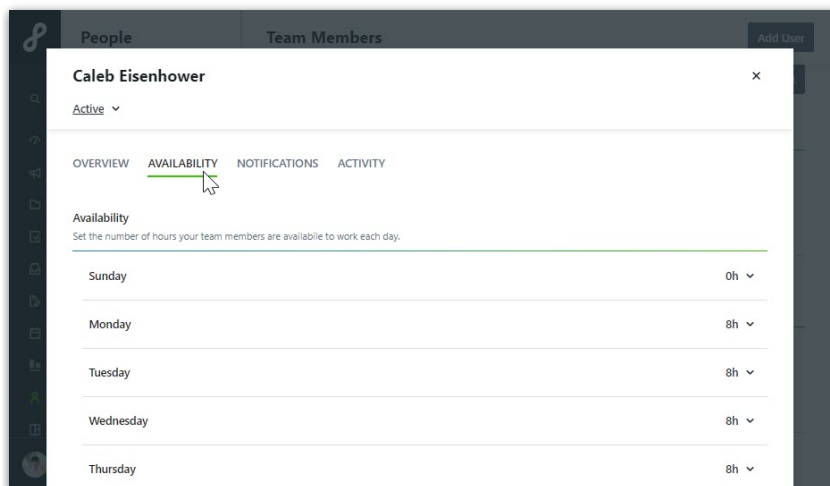
Cancel Save



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

Managing User Availability

Manage [availability](https://guide.lytho.com/help/availability) and [time off](https://guide.lytho.com/help/availability#adding-editing-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.



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](https://guide.lytho.com/help/notifications) 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.

Christy Drucker

Active

OVERVIEW
AVAILABILITY
NOTIFICATIONS
ACTIVITY

Campaigns, Projects, & Work

	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



In the above screenshot "inMotionNow Support" created the user Christy Drucker. If inMotionNow Support or Lytho Support are seen in this activity log, it means that the user was created either by SSO by the [Self Registration](https://guide.lytho.com/help/general-settings#self-registration) (<https://guide.lytho.com/help/general-settings#self-registration>) feature.

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

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