

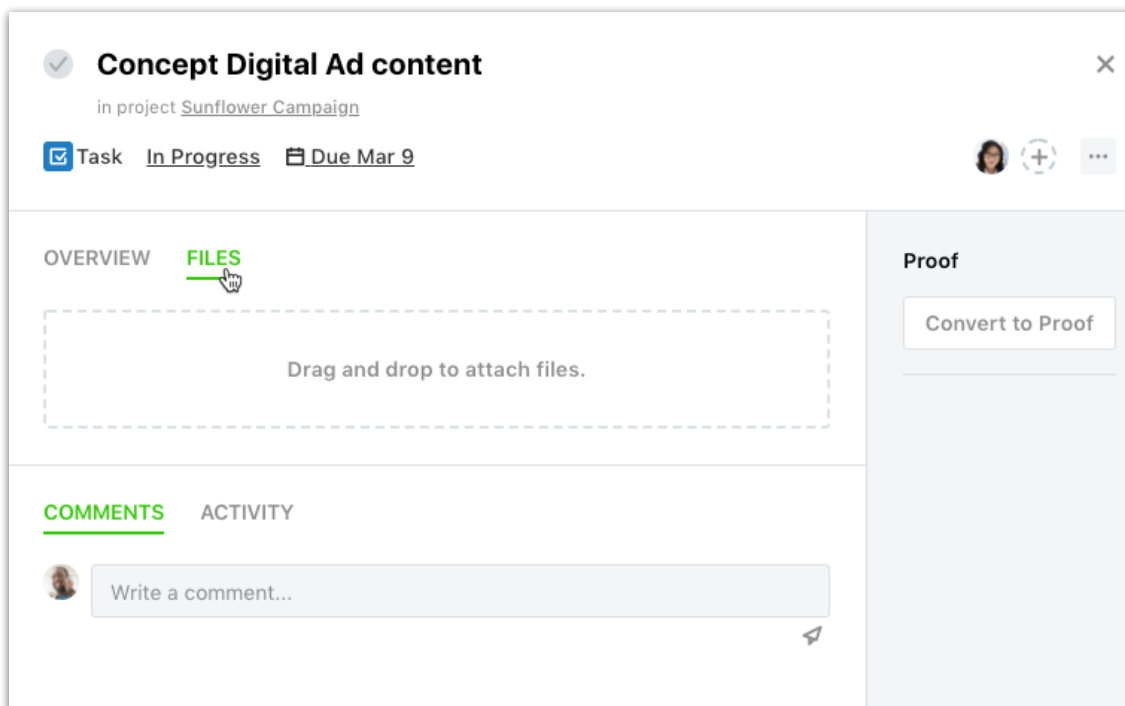
Managing Task Files

Published on 02/26/2018

Adding Files

inMotion allows you to associate file(s) with each task for ease of use and team collaboration.

From task details, select the **Files** tab to upload or manage task files.



You can drag and drop files from your computer into the available field. If you would like to browse your computer file menu instead, start by clicking on the drag and drop field.

Concept Digital Ad content ✕
in project [Sunflower Campaign](#)

Task [In Progress](#) [Due Mar 9](#)

OVERVIEW **FILES**

Drag and drop to attach files.
 truesoap-ad-digitalv1.pdf

COMMENTS **ACTIVITY**

Write a comment...

Proof
[Convert to Proof](#)

Once the file is uploaded, it will display beneath the drag and drop field. The name assigned to the task file will default to the original file name. Similar to other fields on the task details page, you can simply click the field to change the assigned name.

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OVERVIEW **FILES**

Drag and drop to attach files.

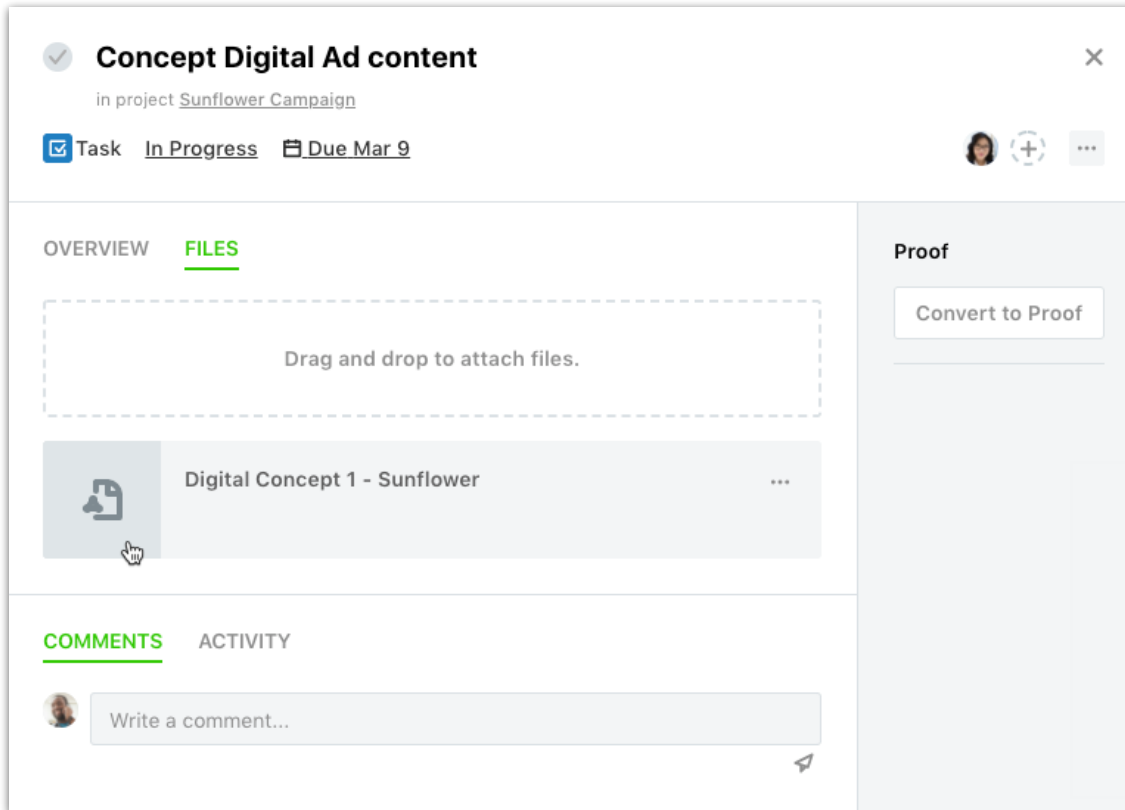
COMMENTS **ACTIVITY**

Write a comment...

Proof
[Convert to Proof](#)

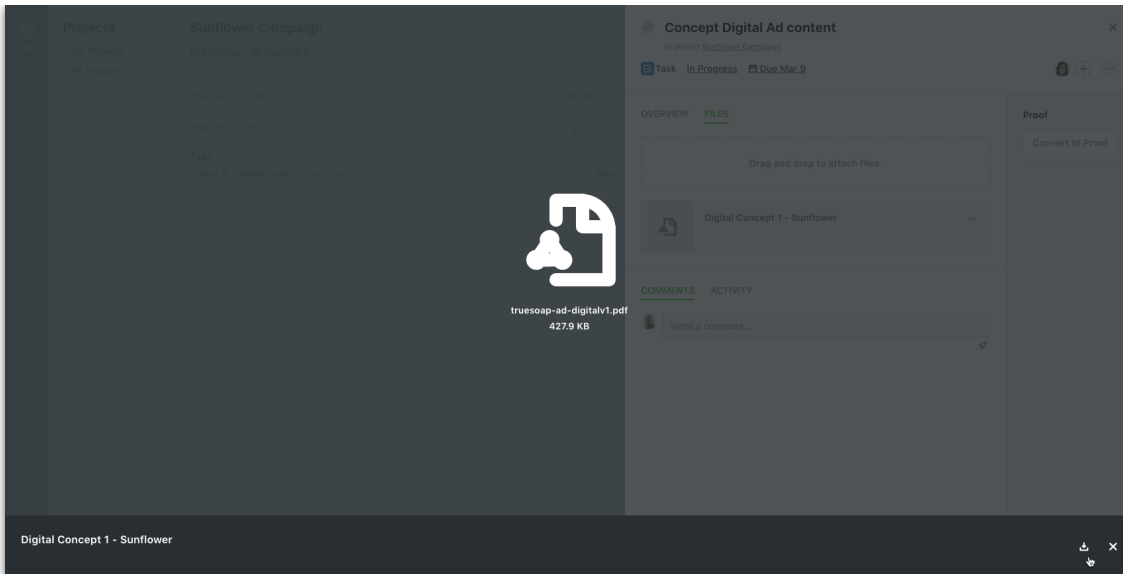
Previewing and Downloading Files

Click on the thumbnail to the left of the file card to open a larger preview of the task file. Image files will display a preview of the uploaded file, all other file types will display a relevant icon.



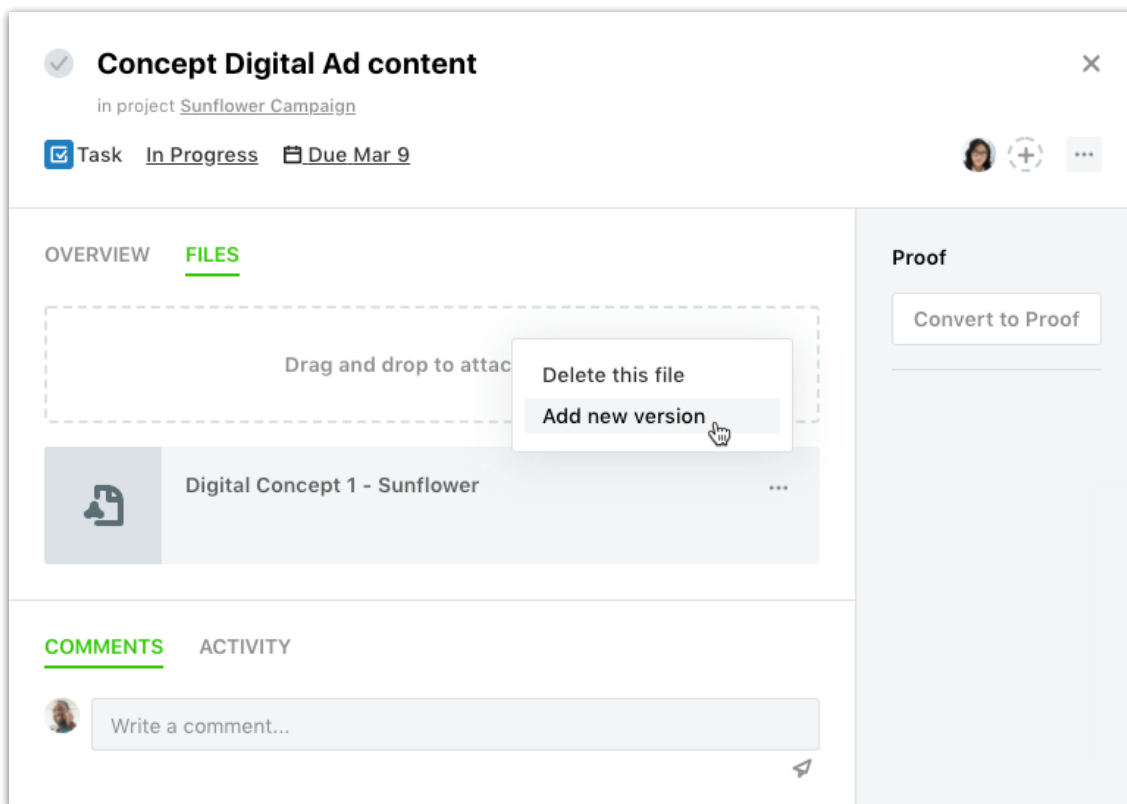
In the bottom left hand corner, the updated name and original file name will display. To download the file, click on the corresponding icon in the bottom left hand corner.

To close the file preview, click the **X** in the bottom right-hand corner or select **ESC** on your keyboard.

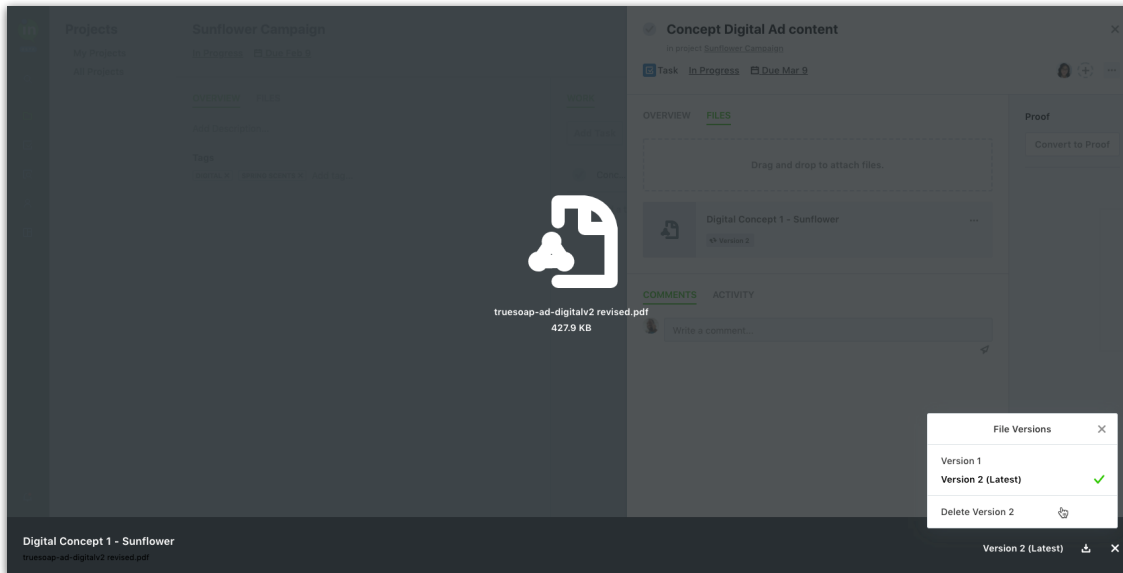


Versioning Files

inMotion will also allow you to store multiple versions of a file. If you would like to update a task file with a new version, select the options menu to view additional options. Click **Add new version** to select the updated file from your computer.



Once you have uploaded the new version, you can preview the updated file. From the file preview, you can then view the version history or delete the current version selected.



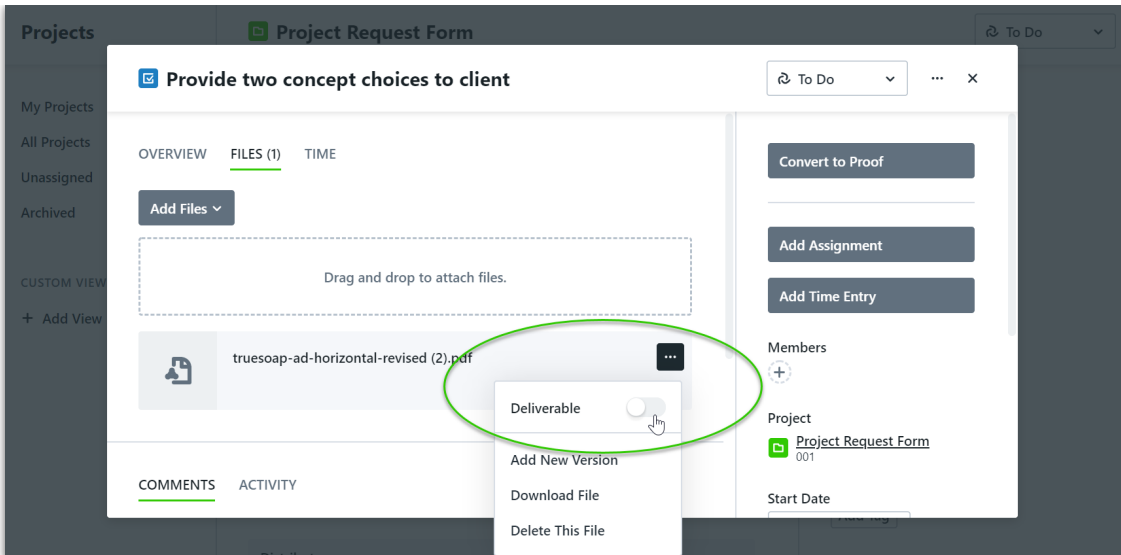
Identifying a File as a Deliverable

Files uploaded to tasks can be labeled as a deliverable, which will immediately share the file with the requester. This keeps stakeholders updated and delivers final files more quickly, even if the entire task or project is not completed.

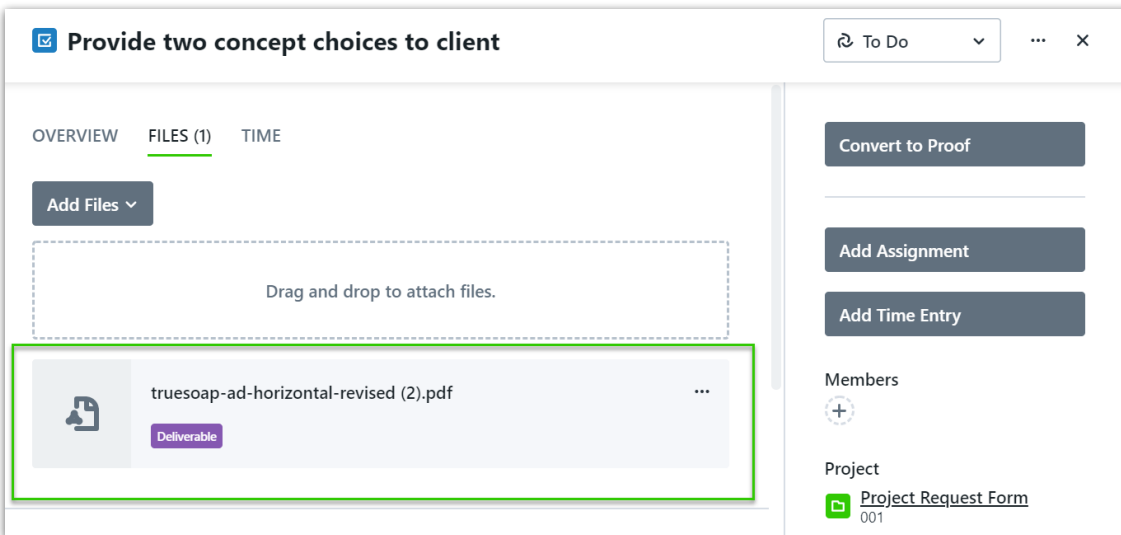


In order to mark task files as deliverables, the task must either be directly associated with a request or part of a project or campaign that was created from a request.

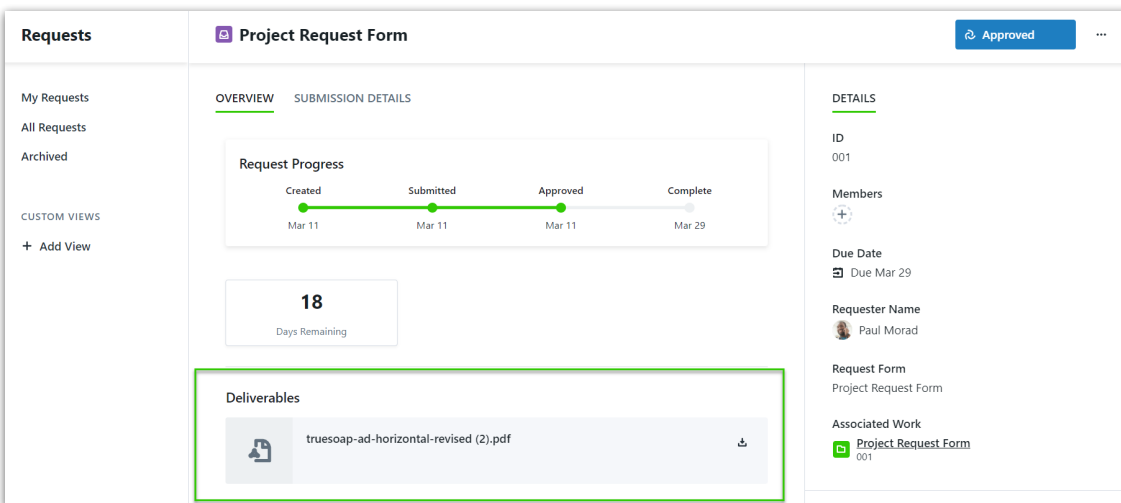
To mark a task file as a deliverable, navigate to the file, click the options icon, and select **Deliverable**.



The file will then be labeled as a **Deliverable**.

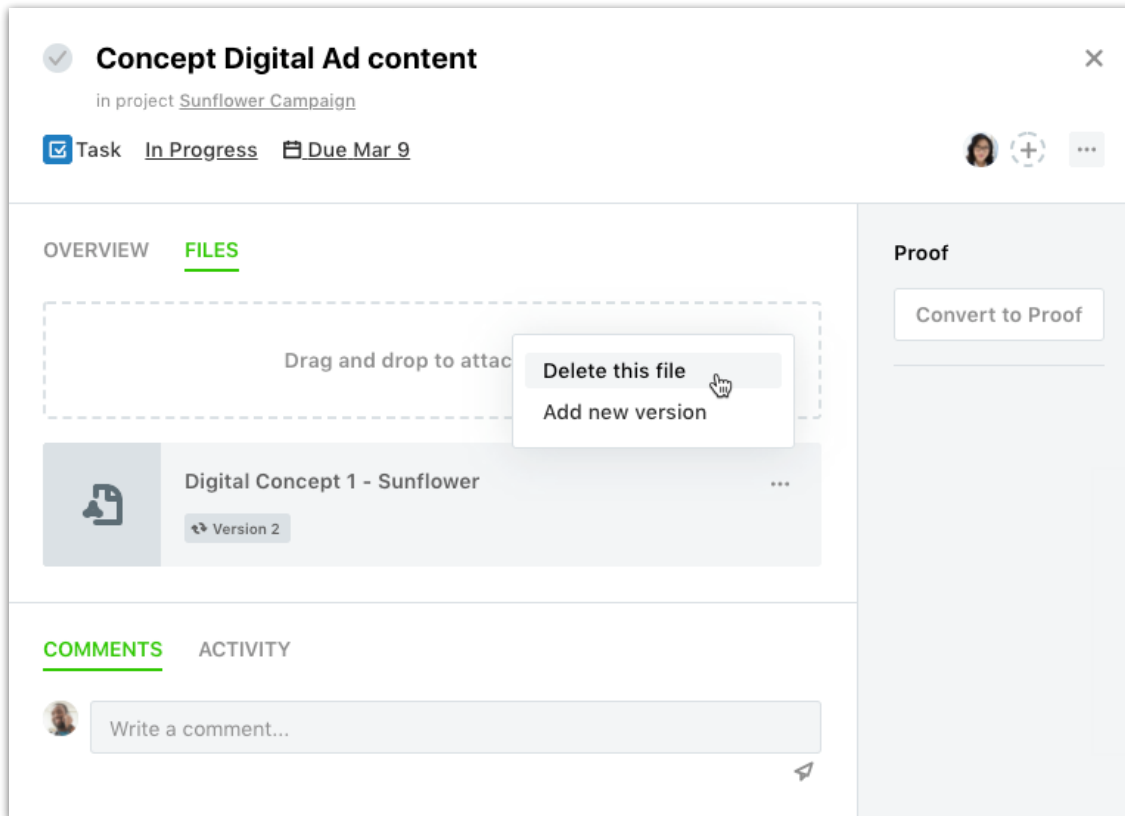


Respective requesters will have access to the file prior to the project completion.



Removing Files

If you would like to delete a file, select the options menu towards the right of the file card to view additional options. Click **Delete this file** to permanently remove it from the task. This will delete both the latest file and all associated versions.



The screenshot displays a task titled "Concept Digital Ad content" within the "Sunflower Campaign" project. The task is marked as "In Progress" and has a due date of "Mar 9". The interface is divided into several sections: "OVERVIEW" and "FILES" (the active section), "COMMENTS", and "ACTIVITY". A file card titled "Digital Concept 1 - Sunflower" is shown with a "Version 2" indicator. A context menu is open over the file card, offering the options "Delete this file" and "Add new version". On the right side, a "Proof" section contains a "Convert to Proof" button. At the bottom, there is a "COMMENTS" section with a text input field labeled "Write a comment...".