Request Management

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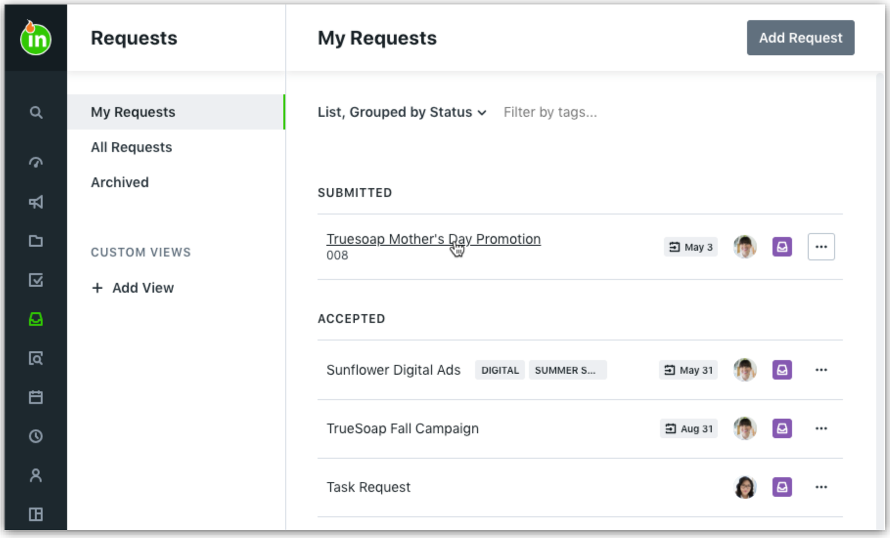
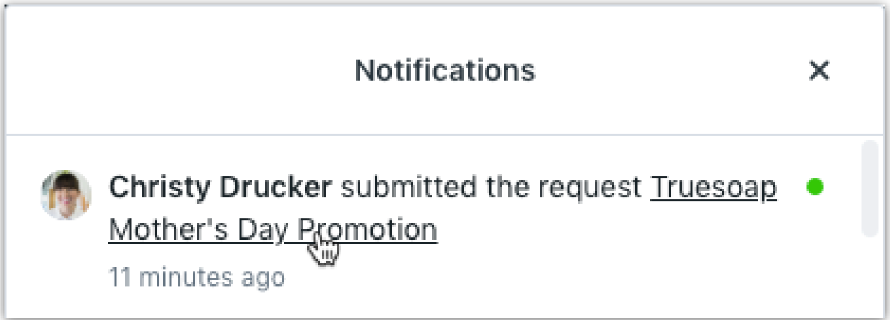
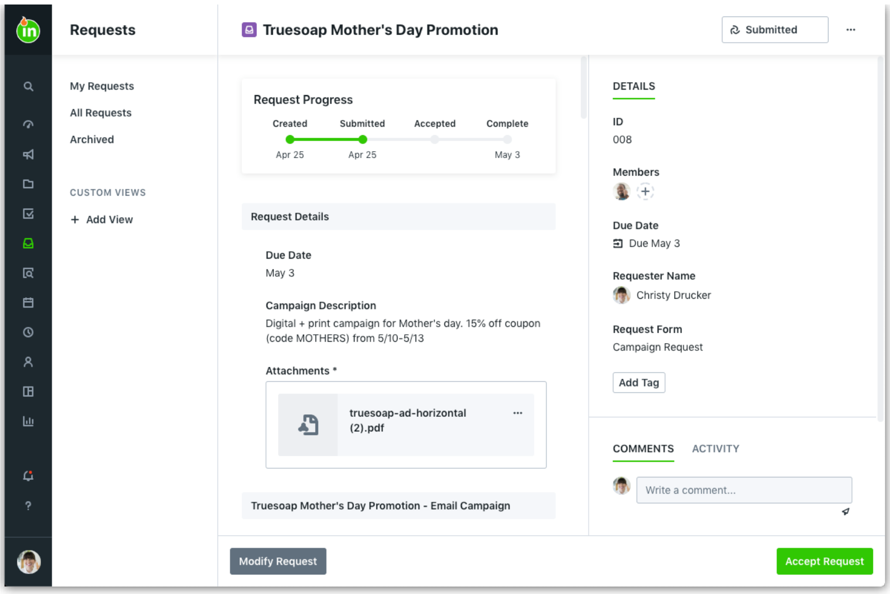
Viewing Submitted Requests

If you have the user permission to accept requests in the system, you will receive in-app and email notifications when a new request has been submitted. To view a request, select the request name from the **My Requests** list or from the notification itself.

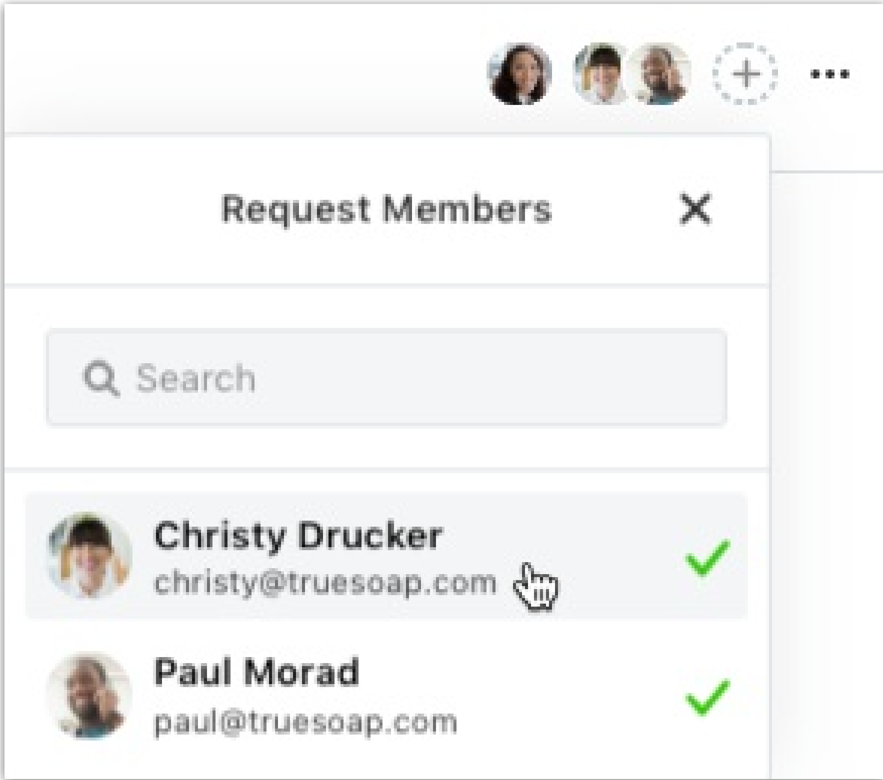




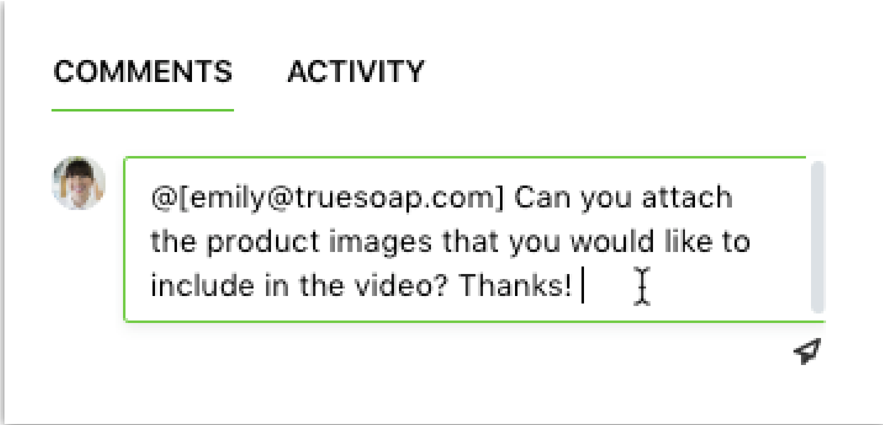
From the request details, you can view the requester name, request information, attachments, and request due date.



By default, any team member with the permission to**Accept Request** will be assigned and notified of the new request. If you would like to take ownership of the request acceptance, you can unassign any other team members from the request. Click the team member avatar(s) in the top right-hand corner and simply deselect the users that no longer need to be involved.



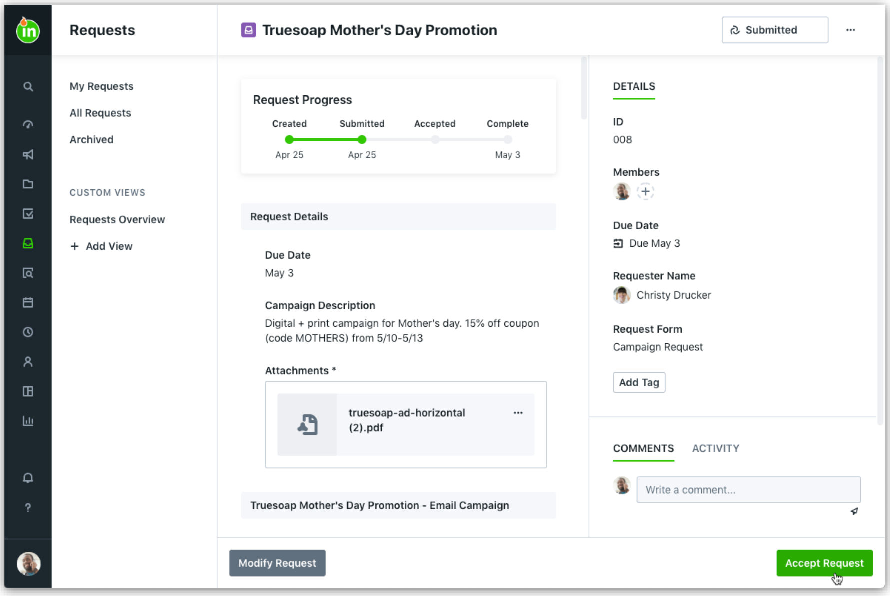
If you need clarification or additional details from the requester, you can @mention them from the **Comments** section of the request. The requester will receive a notification of your comment and can reply to you at any point in time. You or the requester can also modify the request as long as it is in the status of **Submitted**.



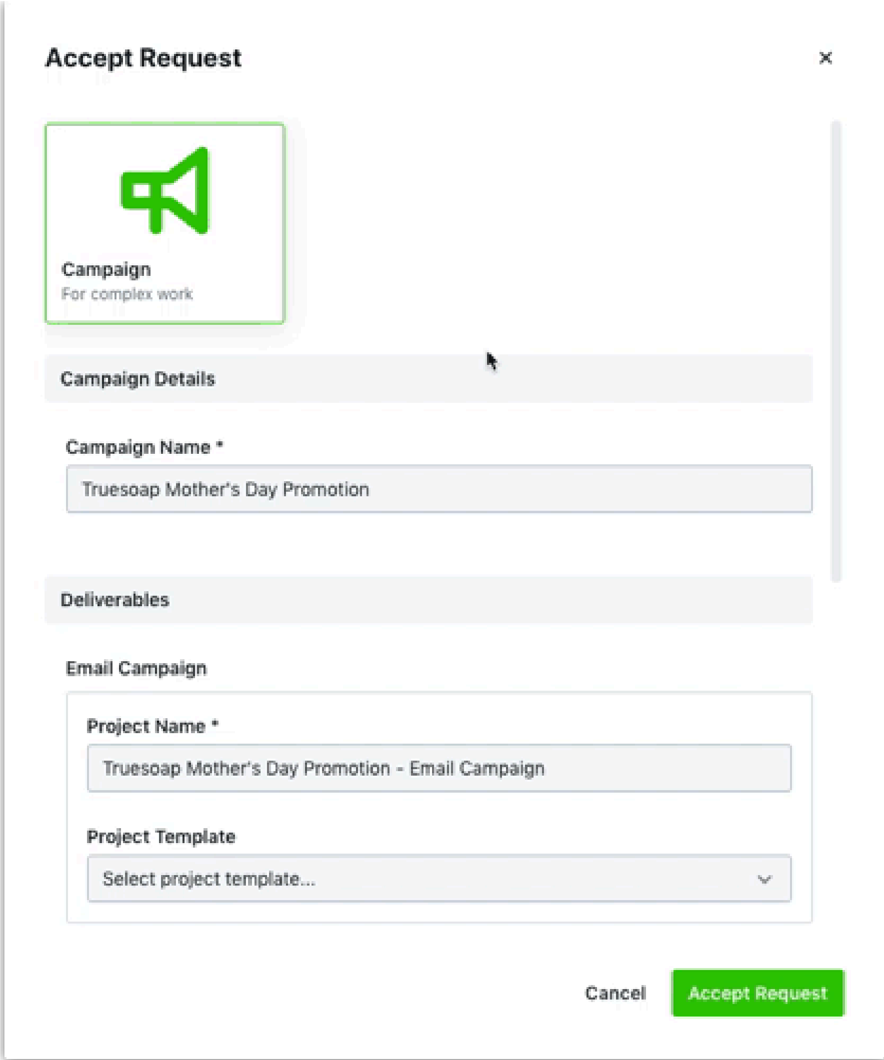
The requester will receive an in-app and email notification if the due date is changed after submission.

Accepting a Request

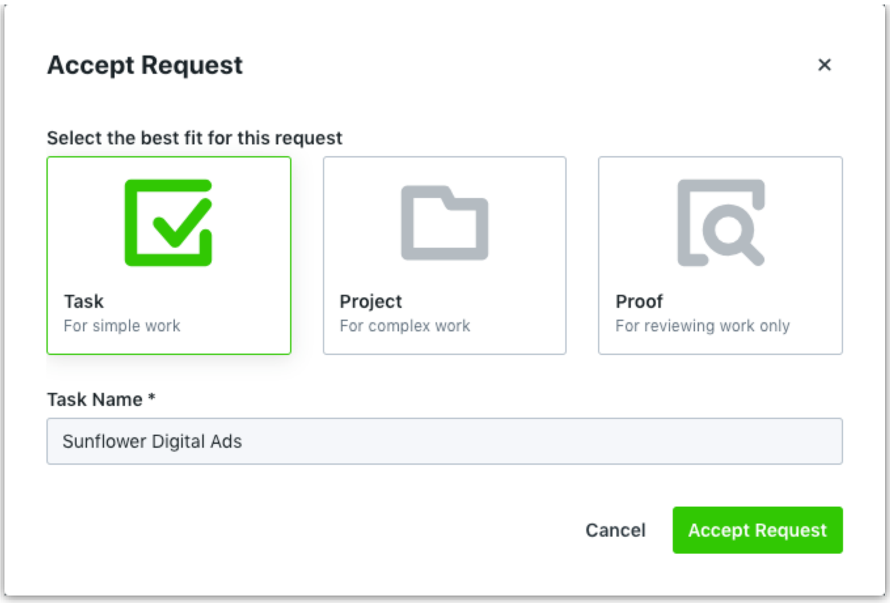
To accept the request, click **Accept Request** in the bottom right-hand corner of the page.



For campaigns, you will have an opportunity to review any project templates associated with the campaign's deliverables. Make any adjustments as needed and click **Accept Request.**

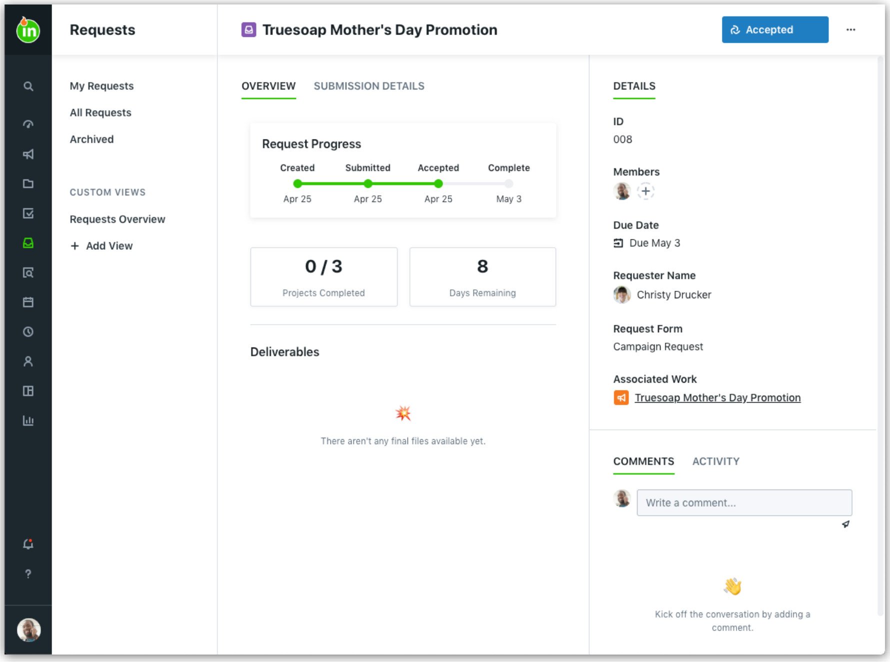


For all other requests, you will be prompted to create a work item associated with the request. Based on user permissions, you may see the option to create a task, proof, or project. Select the preferred work item, edit the name if necessary, and click **Accept Request.**

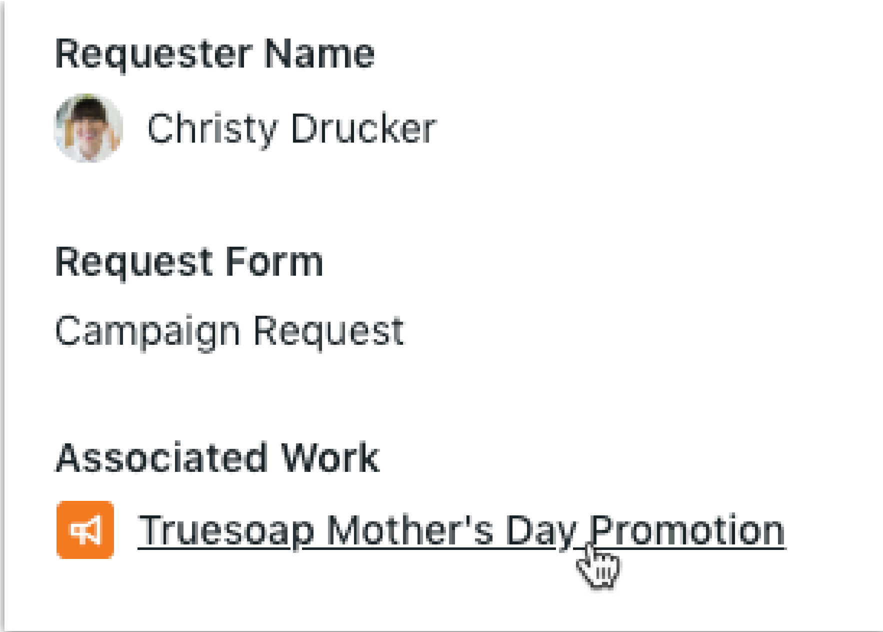


A pop-up notification in the bottom right-hand corner of the screen will confirm acceptance and provide a link to the newly created work item.

Once the request is accepted, the requester will receive in-app and email notifications as well as an updated progress bar on the request.

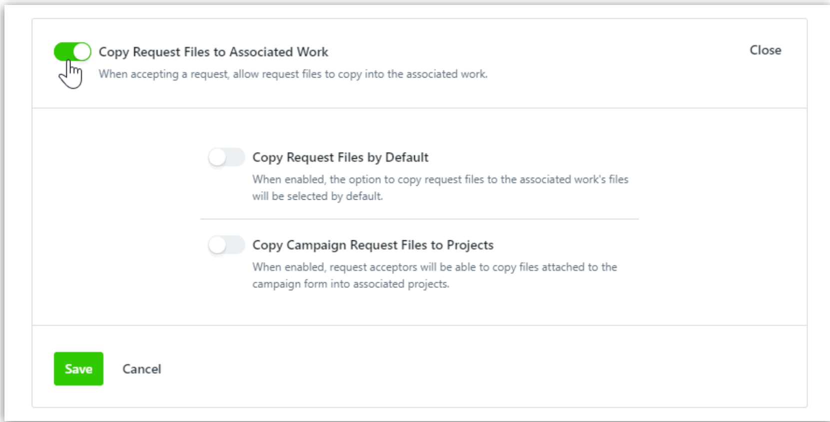


Internally, after the request is accepted, any team member with the permission to view the request and work item will now see a link to the associated work item in the **Overview** section of the request details.



Copying Request Files to Associated Work

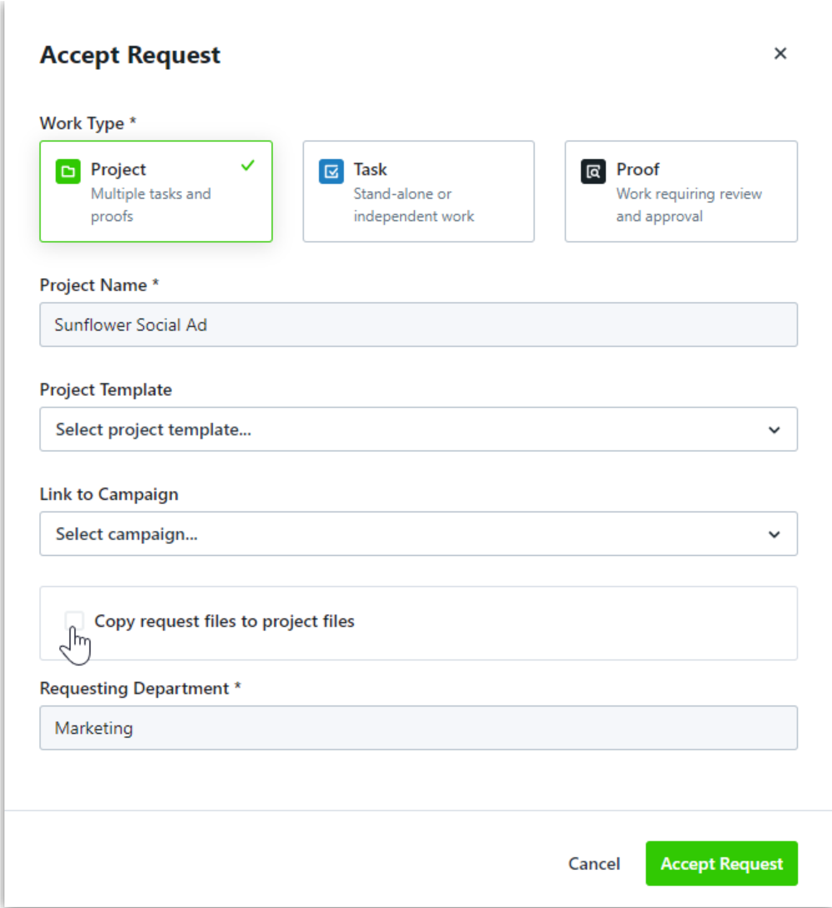
You have the ability to copy files shared in the request form directly to the associated work when accepting a request. To turn this feature on, navigate to your account settings and toggle on **Copy files to Associated Work** in **Features**.



Once enabled, you have a couple additional options for how you would like this feature to work:

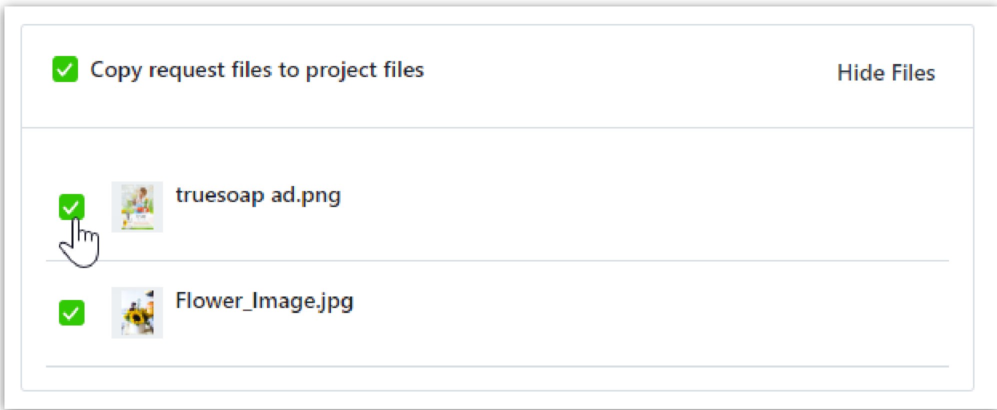
- **Copy Request Files by Default** will automatically select all files to be copied over to the associated work. You will still have the option to uncheck any files you don't want copied over.
- **Copy Campaign Request Files to Projects** (https://guide-ignite.inmotionnow.com/help/campaign-management-accepting-a-campaign-request#copying-campaign-request-files-to-projects)* will allow you to copy files from a campaign request to the associated project. (**Available only to Business and Enterprise Customers*)

If you choose not to enable **Copy Request Files by Default**, this is how the accept request modal will appear when accepting a request with files attached. Select the box to the left of **Copy request files to project files** to copy.

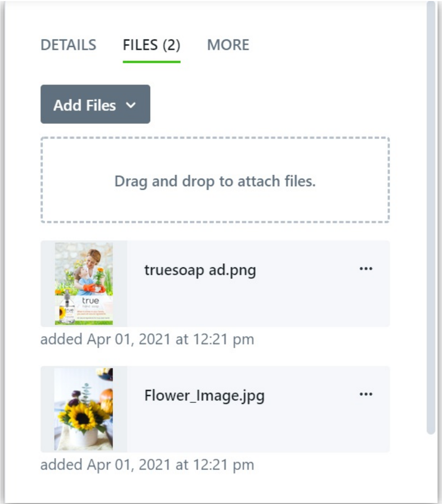


All files will be copied by default. To view the files selected, select**Show Files**.

Unselect any files you do not want copied to the associated work.



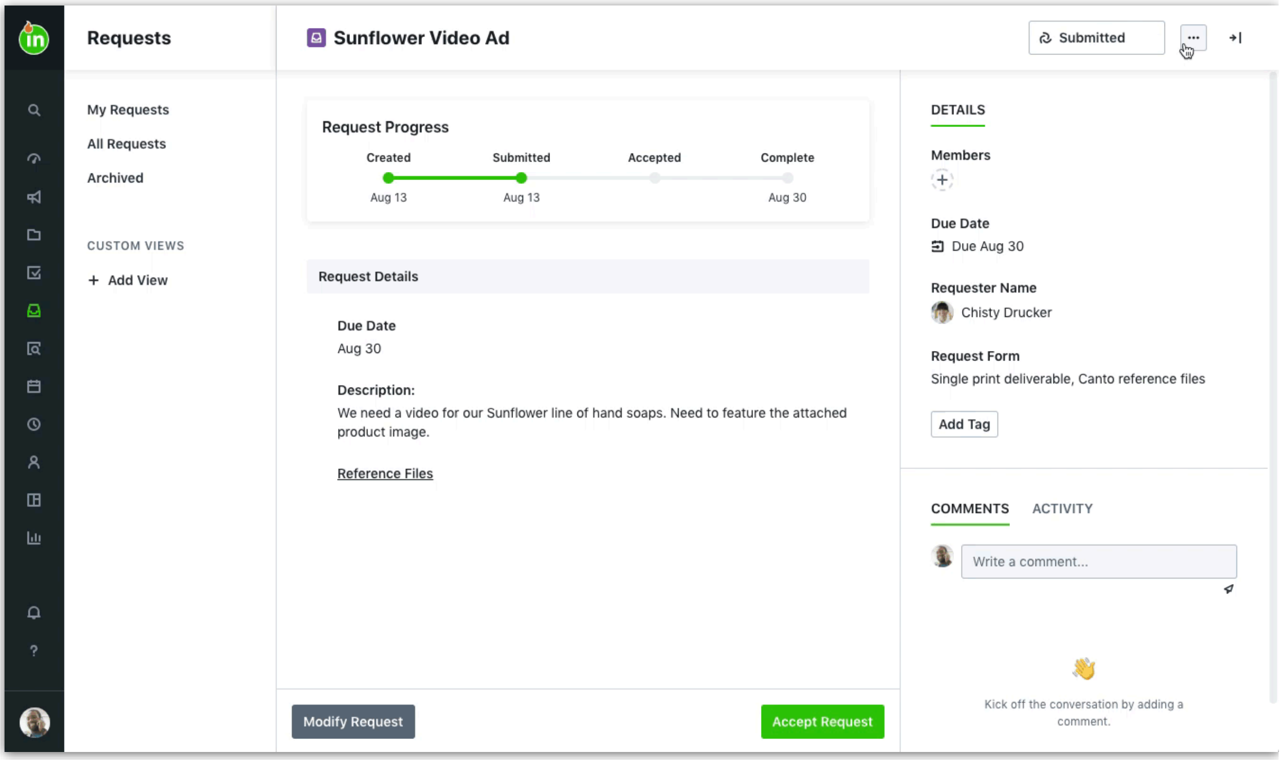
Once the request has been accepted, the copied files will be found in the right side of the associated work, under **FILES**.



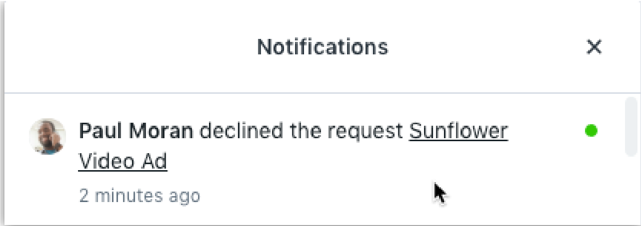
Declining a Request

For users with the "Decline Request" permission, submitted requests with insufficient information can be declined, removed from the queue, and returned to the requester with a note about what else is necessary before the request can be approved. This option lets traffic managers keep the queue organized and reduce visual clutter when awaiting additional information.

To decline a submitted request, click the action menu in the top right of the request, then**Decline**. You will be required to enter a reason for declining before clicking **Decline Request**.



Once declined, the request's status changes from "Submitted" to "Draft" and will be returned to the requester's draft requests. The requester will also receive a notification that the request was declined.



When viewing the declined request, the requester will see the note explaining why it was returned so they can add the necessary information before resubmitting.