

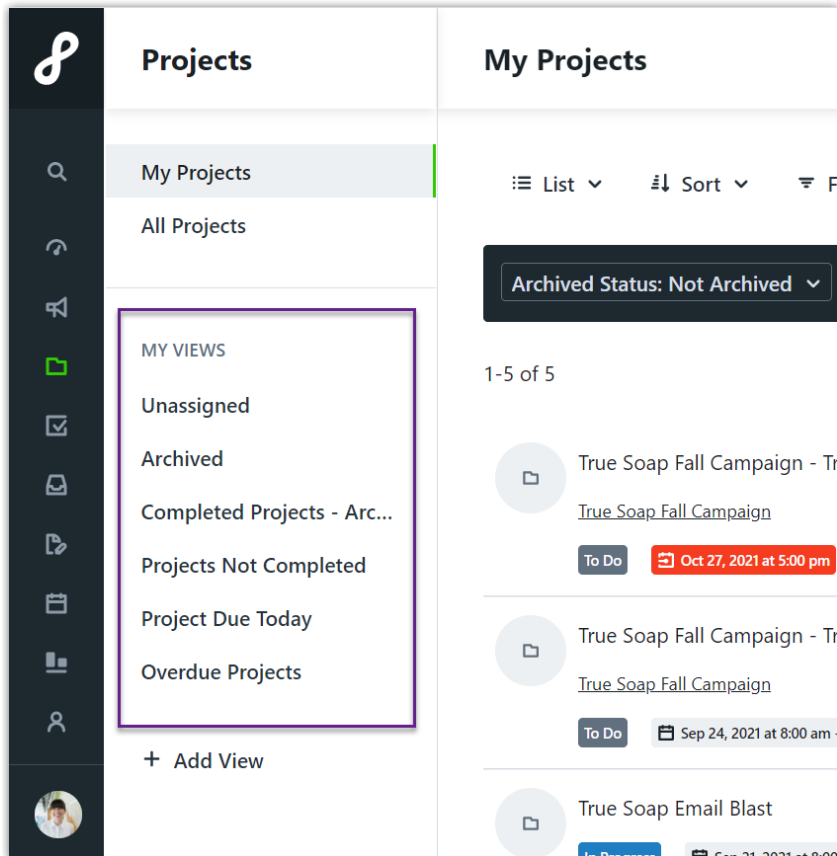
Creating Custom Views

Published on 01/27/2022

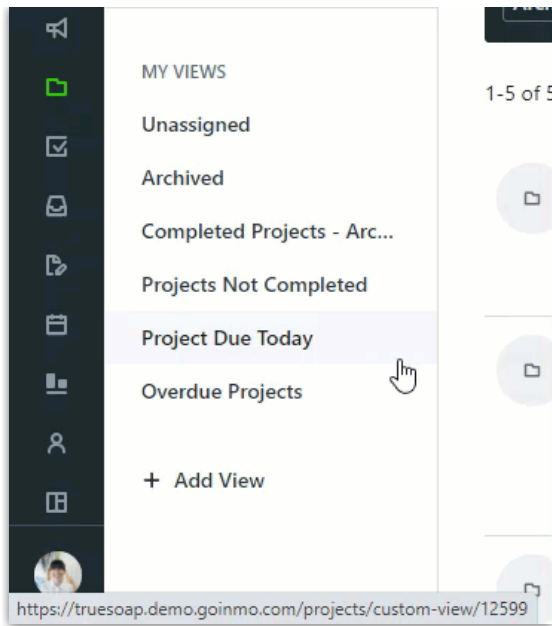
Save your favorite filters in Requests, Campaigns, Projects, Tasks, Proofs, Calendars, and Workload to return to when needed!

My Views

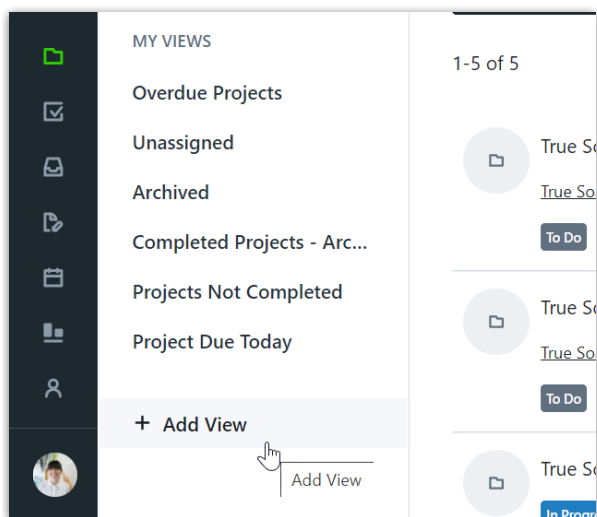
Views you have created will be saved within each respective workspace on the left side of your screen below **MY VIEWS**. These views are not shareable with other Team Members or Stakeholders.



Drag and drop functionality allows you to re-order your views as desired.



Create as many views as needed by clicking **+ Add View** at the bottom of your views list.



Sort, filter, column, and view type options are located in dropdown menus at the top of your view. The options available are dependent on the workspace and view type. View types include [List](https://guide-ignite.inmotionnow.com/help/list-views) (<https://guide-ignite.inmotionnow.com/help/list-views>), [Table](https://guide-ignite.inmotionnow.com/help/table-views) (<https://guide-ignite.inmotionnow.com/help/table-views>), and [Kanban](https://guide-ignite.inmotionnow.com/help/kanban-views) (<https://guide-ignite.inmotionnow.com/help/kanban-views>).

My Work - To Do

Add Task
Add Proof
...

Table
Sort
Filters
Columns

Save as New View
Save to View

Archived Status: Not Archived
Filter by Assignees (1)
Project Status (1)
Clear

1-19 of 19

	WORK NAME	START DATE & TIME	DUE DATE & TIME	COMMENTS	FILES	TAGS
<input type="checkbox"/>	True Soap Spring Scent Ad	10/22/2021 8:00 am	1/27/2022 5:00 pm			
<input type="checkbox"/>	Proof for review	9/29/2021 8:00 am	1/20/2022 5:00 pm			
<input type="checkbox"/>	1st draft of copy due	10/20/2021 8:00 am	1/13/2022 5:00 pm			
<input type="checkbox"/>	Pull branding material	9/22/2021 8:00 am	12/30/2021 5:00 pm			
<input type="checkbox"/>	Copy		12/22/2021 5:00 pm			

Filters currently applied will show inside the filter bar. Deselect a filter to remove from the view. Select **Clear** on the far right to remove all filters.

My Work - To Do

Add Task
Add Proof
...

Table
Sort
Filters
Columns

Save as New View
Save to View

Archived Status: Not Archived
Filter by Assignees (1)
Project Status (1)
Clear

1-19 of 19

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<input type="checkbox"/>	Pull branding material	9/22/2021 8:00 am	12/30/2021 5:00 pm			
<input type="checkbox"/>	Copy		12/22/2021 5:00 pm			

When making changes to your view select **Save to View** to save your preferences or **Save as New View** to create a new saved view with the current preferences.

My Work - To Do

Add Task
Add Proof
...

Table
Sort
Filters
Columns

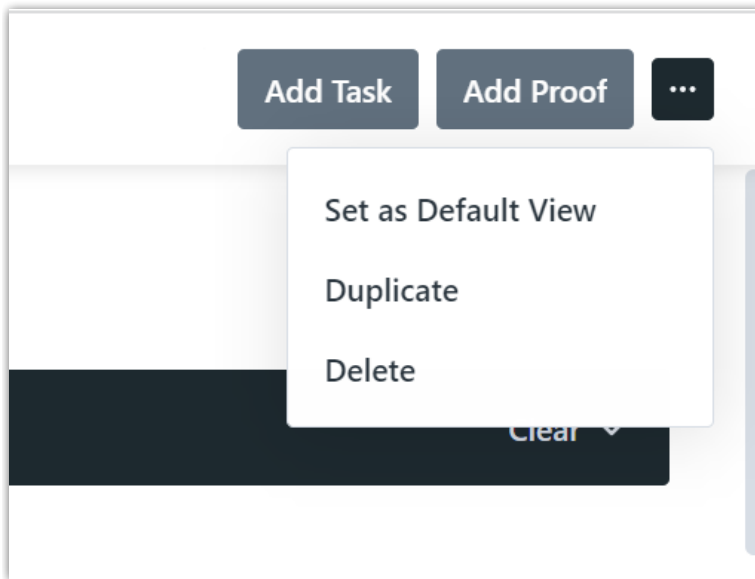
Save as New View
Save to View

Archived Status: Not Archived
Filter by Assignees (1)
Project Status (1)
Clear

1-19 of 19

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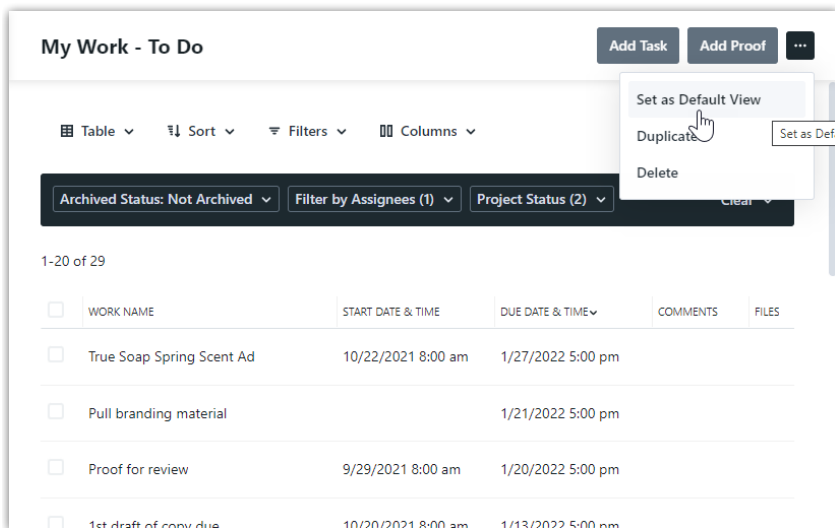
The ellipses menu in the top right corner allows you to duplicate your view or delete if no longer needed. You also have the option to set the current view as your Default View for the current workspace.



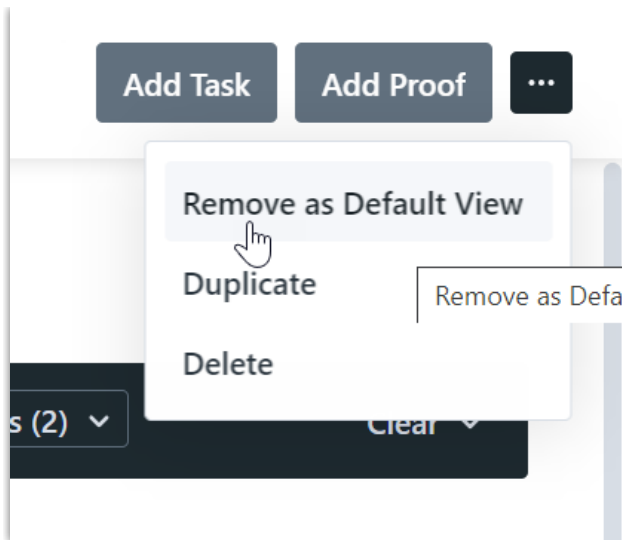
Default Views

Have a favorite saved view that you return to on a daily basis? Lytho Workflow gives you the ability to set a saved view as the default view for individual workspaces.

Navigate to your desired view and click the actions menu in the top right corner of your screen. Select **Set as Default View** to set. Now when you return to the workspace your preferred view will automatically show.



If you wish to set a new view as your default or remove the default view all together, select **Remove as Default View** from the same menu.



Recommended Views

To help get you started creating your own views, we've put together a guide for views we know will be helpful in your day-to-day.

Requests					
View Name	Role	Purpose	Recommended Filters:	Recommended Columns	View type
My In Progress Requests, Submitted by Me	Team Member	Keep track of requests that are in progress	<ul style="list-style-type: none"> Requester Name: Your Name Archived Status: Not Archived Request Status: Accepted 		List or Table
My Requests Pending Acceptance	Team Member	Keep track of requests yet to be accepted	<ul style="list-style-type: none"> Requester Name: Your Name Archived Status: Not Archived Request Status: Submitted 		List or Table

Projects

View Name	Role	Purpose	Recommended Filters:	Recommended Columns	View type
Projects Due this Week (templated report with filters added)	PM	Proactively manage to ensure on-time delivery or communicate updated status with requester.	<ul style="list-style-type: none"> Date/Due=This week or custom range 		Table
Completed Projects to Archive	PM	Review Completed Projects to Archive	<ul style="list-style-type: none"> Project Status= Completed Archived Status = Not Archived 		Table

Work

View Name	Role	Purpose	Recommended Filters:	Recommended Columns	View Type
Returned Proofs	Designer	Allow designers to quickly see which proofs have been returned and focus on actions that need to be taken	<ul style="list-style-type: none"> Work Type = Proofs Work Status = Returned Members = User Name 	<ul style="list-style-type: none"> Approval Status Due Date Review Returned Date Review Name Proof Version Review Deadline Tiers Total Reviewers 	Table

Review Status	PM	Proactively manage reviews to ensure they are delivered on time.	<ul style="list-style-type: none"> • Work Type = Proofs • Work Status = To Do, In Progress, In Review, Returned • Date Range = This week/month 	<ul style="list-style-type: none"> • Due Date • Start Date • Approval Status • Work Name • Project Name • Review Version • Active Tier • Work Status 	Table
Designers/Copywriters to manage work	Designer/Copywriter	Allow designers to quickly see what work is on their plate, so they can proactively manage their schedule including time off.	<ul style="list-style-type: none"> • Assignees = Person's name • Work Type = Task &/or Proofs • Date Range = This month • Work Status (all but completed) • Archived Status = Not archived 	<ul style="list-style-type: none"> • Work Name • Project Name • Start Date • Due Date • Work Status • Work Type • Any applicable CF's 	Table

Designers/Copywriters to manage work	Designer/Copywriter	Allow designers to quickly see what work is on their plate, so they can proactively manage their schedule including time off.	<ul style="list-style-type: none"> • Assignees = Person's name • Work Type = Task &/or Proofs • Date Range = Due this week • Work Status (all but completed) • Archived Status = Not archived • Kanban, by Due Date 		Kanban (Good for someone who is coming from a Jira or Trello background)
Workload View for Teams	Create for a group of People either by name or by Specialty	Allow managers and/or traffic to quickly see at a glance the workload of various teams to help justify decisions you make based on the information you are seeing.			
Workload View for Individuals	Create for an individual	Use for a 1:1 to see workload and have good conversations with team members to adjust work, or address issues as needed.			



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