# Custom Views for Stakeholder Users

Published on 06/22/2022

Stakeholders with permissions to create requests will be able to filter, sort, and create custom views within the Requests workspace. Creating unique views allows for easy access to requests and important information for your organization.

## Viewing Requests

By default the Requests workspace will show the **Submitted By Me** view, listing your active, submitted requests, ordered by due date. Archived requests are filtered out of this view.
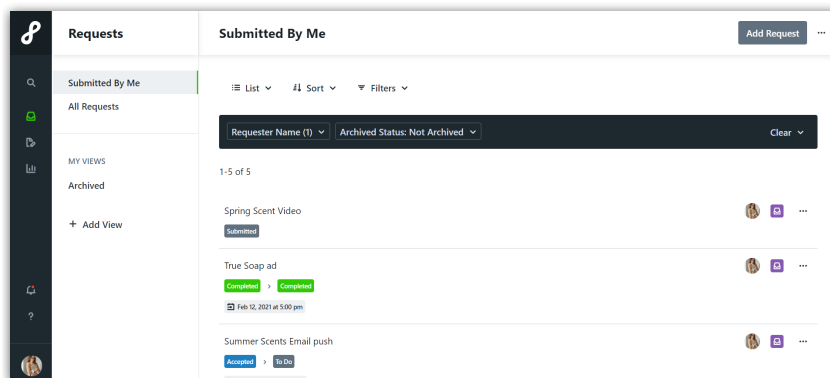


Narrow your results by clicking **Filters** and selecting from the available filters.
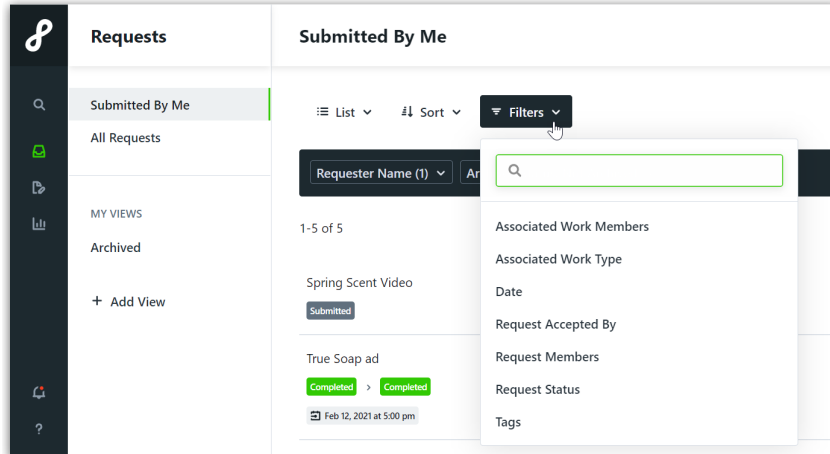


Filters currently in use will display in the filter bar. De-select the options to remove from your view or select **Clear** to the right to remove all filters.
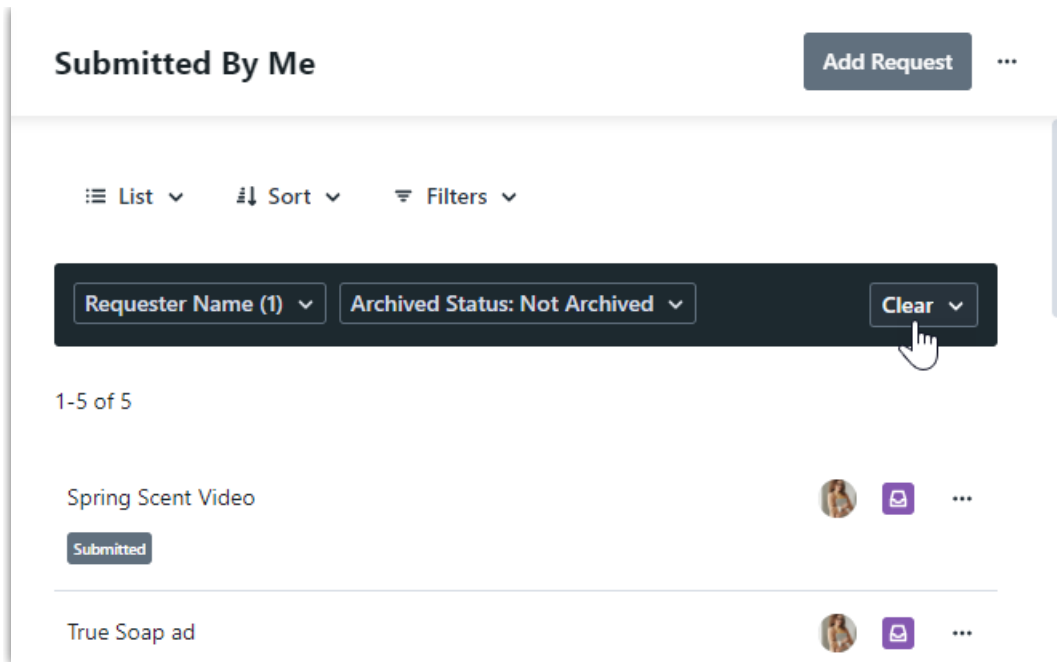
Change how your view is ordered by clicking **Sort** and selecting from the sort options. Options will sort in ascending order by default. Click your selection again to reverse the order.
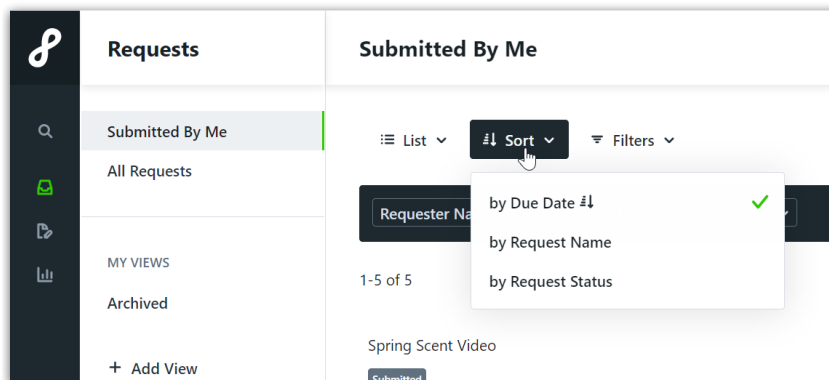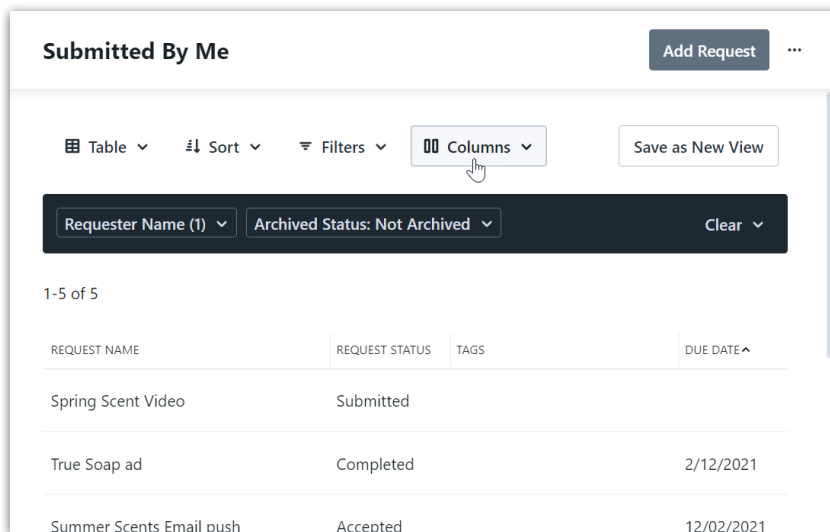


## Viewing by Table

In addition to the List view, you also have the option to view requests in Table view. Table views provide more control over what information you see, making it easier to find what you need you need at-a-glance.
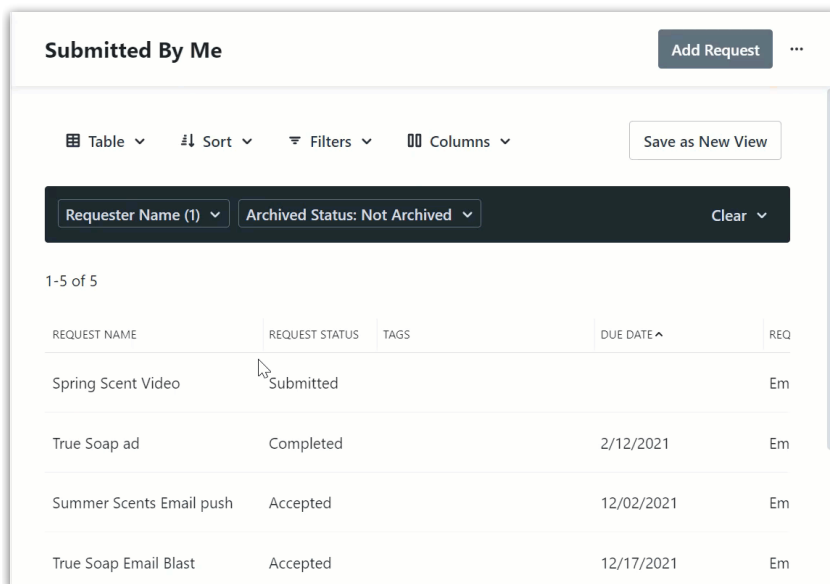
Click **List** and select **Table** to update your view.
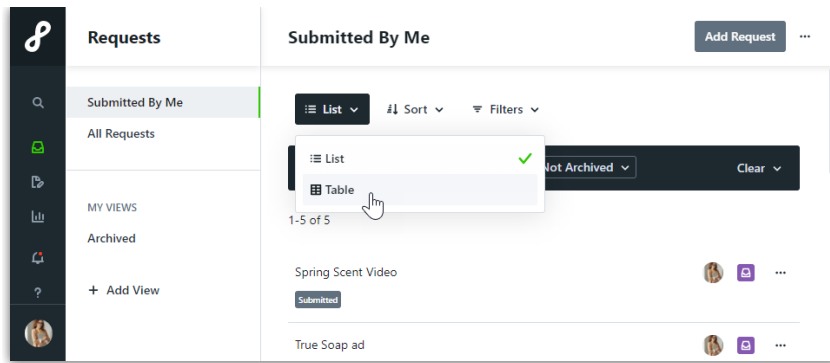
Add or remove columns by clicking Columns and selecting from the dropdown choices.



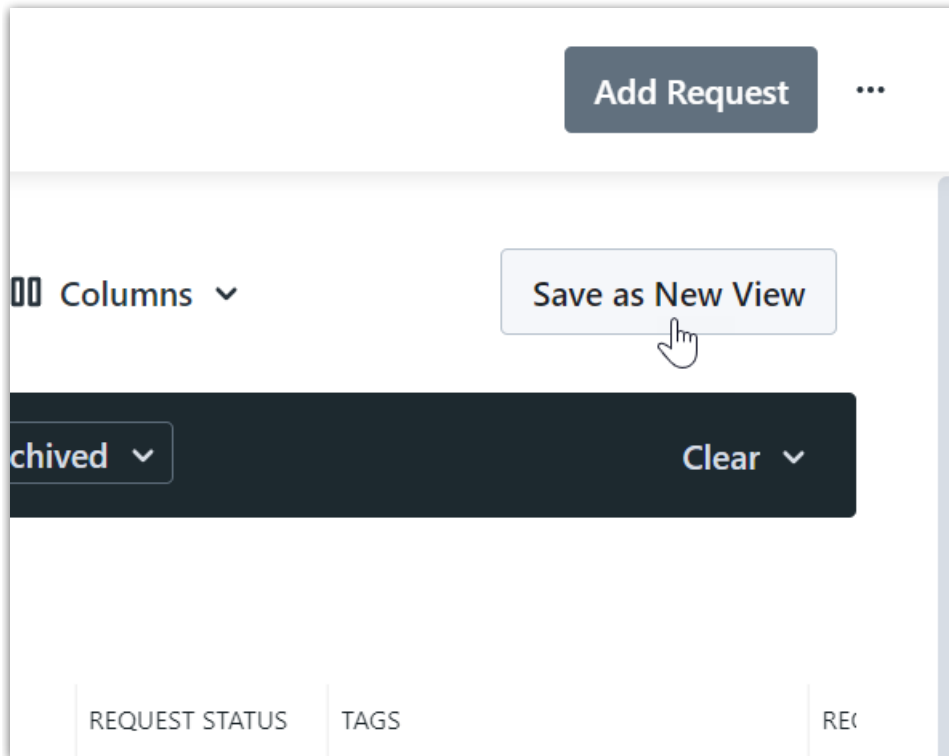Sort, resize, and reorder your data by dragging and dropping selected columns.



## Saving Custom Views

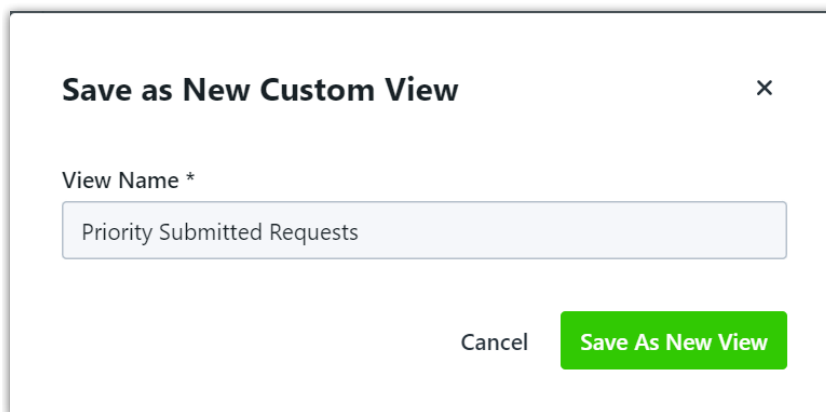Save your preferences to return to whenever needed! When adding to a view select**Save as New View** in the top right.


Saved views are unable to be shared with other users.



Enter a name for your view and click**Save As New View.**



Any custom view you create will be listed under**MY VIEWS** to the left of your screen. Select**+ Add View** to create new views from scratch. Drag and drop functionality allows you to re-order your list of custom views however desired.

MY VIEWS

Archived

Priority Submitted Reque...

Summer Campaign Requ...

+ Add View
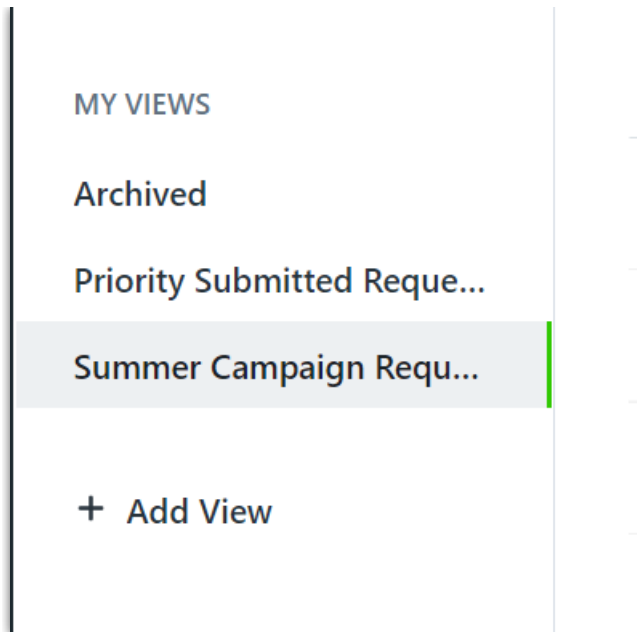
The actions menu in the top right of your custom view allows you to duplicate your view or delete if no longer needed. If you have a view that you return to daily, select **Set as Default View** to immediately access when viewing Requests.



Add Request    ...

Set as Default View

Duplicate

Delete

DUE DATE          REQUESTER NAME

Christy Drucker
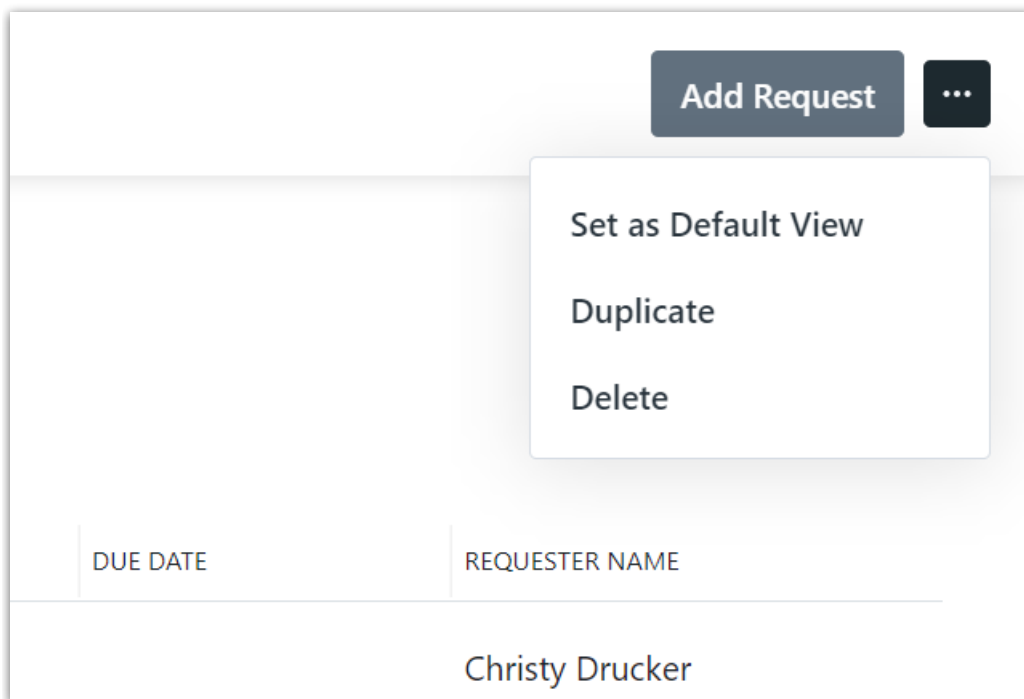
## Recommended Views

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.

| View Name | View Purpose | View Type | Filters | Columns |
|-----------|--------------|-----------|---------|---------|

| Submitted By Me | Keep track of all requests submitted by me | Table | • Use Preset filters | • Request Name<br>• Submitted Date<br>• Request Status<br>• Due Date<br>• Associated Work Status |
|---|---|---|---|---|
| Not Yet Accepted | Keep track of all my requests yet to be accepted | Table | • Requester Name: Your Name<br>• Request Status: Submitted, Declined | • Request Name<br>• Submitted Date<br>• Request Status<br>• Due Date<br>• Associated Work Status |
| In Progress | Keep track of all my requests in progress | Table | • Requester Name: Your Name<br>• Request Status: Accepted | • Request Name<br>• Submitted Date<br>• Request Status<br>• Due Date<br>• Associated Work Status |

| Completed Requests | Keep track of all my completed requests | Table | • Requester Name: Your Name<br>• Request Status: Completed | • Request Name<br>• Submitted Date<br>• Request Status<br>• Due Date<br>• Associated Work Status |
|---|---|---|---|---|