

# Recommended Custom Views

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To help get you started creating your own [custom views](https://guide.lytho.com/help/custom-views) (<https://guide.lytho.com/help/custom-views>), we've put together a guide for views that can enhance your everyday efficiency.

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"> <li>Requester Name: Your Name</li> <li>Archived Status: Not Archived</li> <li>Request Status: Accepted</li> </ul>		List or Table
My Requests Pending Acceptance	Team Member	Keep track of requests yet to be accepted	<ul style="list-style-type: none"> <li>Requester Name: Your Name</li> <li>Archived Status: Not Archived</li> <li>Request Status: Submitted</li> </ul>		List or Table
Requests Pending My Acceptance	PM	Keep track of requests that require me to accept or decline	<ul style="list-style-type: none"> <li>Archived Status: Not Archived</li> <li>Requests Status: Submitted</li> </ul>		List or Table

Projects					
View Name	Role	Purpose	Recommended Filters:	Recommended Columns	View Type

Projects Due this Week	PM	Proactively manage to ensure on-time delivery or communicate updated status with requester.	<ul style="list-style-type: none"> <li>• Date/Due=This week or custom range</li> <li>• Project Status Stage = To Do, In Progress</li> </ul>		Table
Completed Projects to Archive	PM	Review Completed Projects to Archive	<ul style="list-style-type: none"> <li>• Project Status= Completed</li> <li>• Archived Status = Not Archived</li> </ul>		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"> <li>• Work Type = Proofs</li> <li>• Work Status = Returned</li> <li>• Members = User Name</li> </ul>	<ul style="list-style-type: none"> <li>• Approval Status</li> <li>• Due Date</li> <li>• Review Returned Date</li> <li>• Review Name</li> <li>• Proof Version</li> <li>• Review Deadline</li> <li>• Tiers</li> <li>• Total Reviewers</li> </ul>	Table

Review Status	PM	Proactively manage reviews to ensure they are delivered on time.	<ul style="list-style-type: none"> <li>• Work Type = Proofs</li> <li>• Work Status = To Do, In Progress, In Review, Returned</li> <li>• Date Range = This week/month</li> </ul>	<ul style="list-style-type: none"> <li>• Due Date</li> <li>• Start Date</li> <li>• Approval Status</li> <li>• Work Name</li> <li>• Project Name</li> <li>• Review Version</li> <li>• Active Tier</li> <li>• Work Status</li> </ul>	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"> <li>• Assignees = Person's name</li> <li>• Work Type =Task &amp;/or Proofs</li> <li>• Date Range = This month</li> <li>• Work Status (all but completed)</li> <li>• Archived Status = Not archived</li> </ul>	<ul style="list-style-type: none"> <li>• Work Name</li> <li>• Project Name</li> <li>• Start Date</li> <li>• Due Date</li> <li>• Work Status</li> <li>• Work Type</li> <li>• Any applicable custom fields</li> </ul>	Table

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



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