

# Shared Custom Views

Published on 02/23/2024

Sharing Custom Views ensures your team is working for the same perspective, decreasing confusion around what should be worked on next, and fostering alignment between and across teams.

## Sharing Custom Views

Members with the Permission to Share Custom Views have the ability to share their custom views with Team Members and Stakeholders. Custom Views can only be shared by their creators.

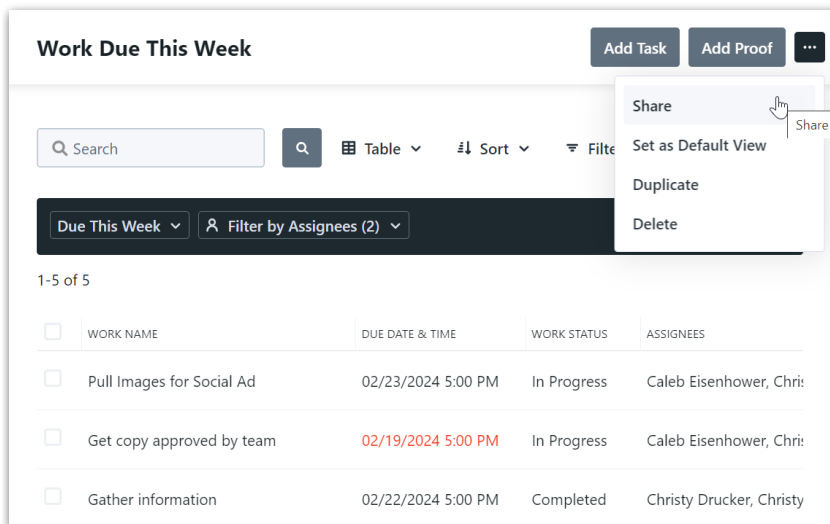


- Campaign, Project, Work, Request, Calendar, and Workload Custom Views can be shared with Team Members.
- Request Custom Views can be shared with Stakeholders.
- Each user can only access the information within a shared view if they have the proper permissions.



Lytho ProTip: Use [customized badge colors](https://guide.lytho.com/help/color-story) (<https://guide.lytho.com/help/color-story>) to make work items easier to identify at a glance!

To share a [custom view](https://guide.lytho.com/help/custom-views) (<https://guide.lytho.com/help/custom-views>), click on the actions menu in the top right corner of your view and select **Share**.



**Work Due This Week**

Buttons: Add Task, Add Proof, ...

Search: [Search] [Q]

Table [v] Sort [v] Filter [v]

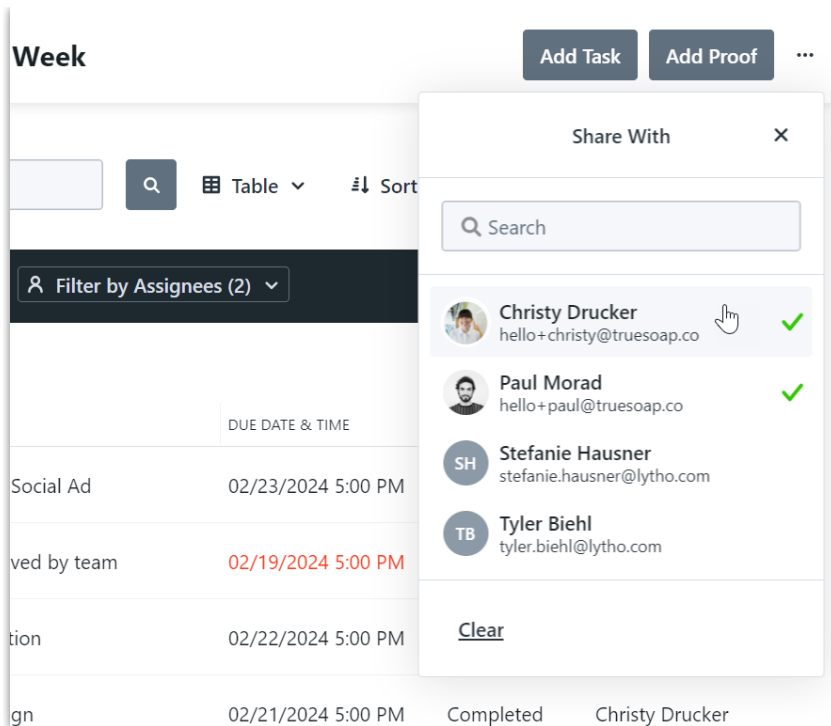
Due This Week [v] Filter by Assignees (2) [v]

1-5 of 5

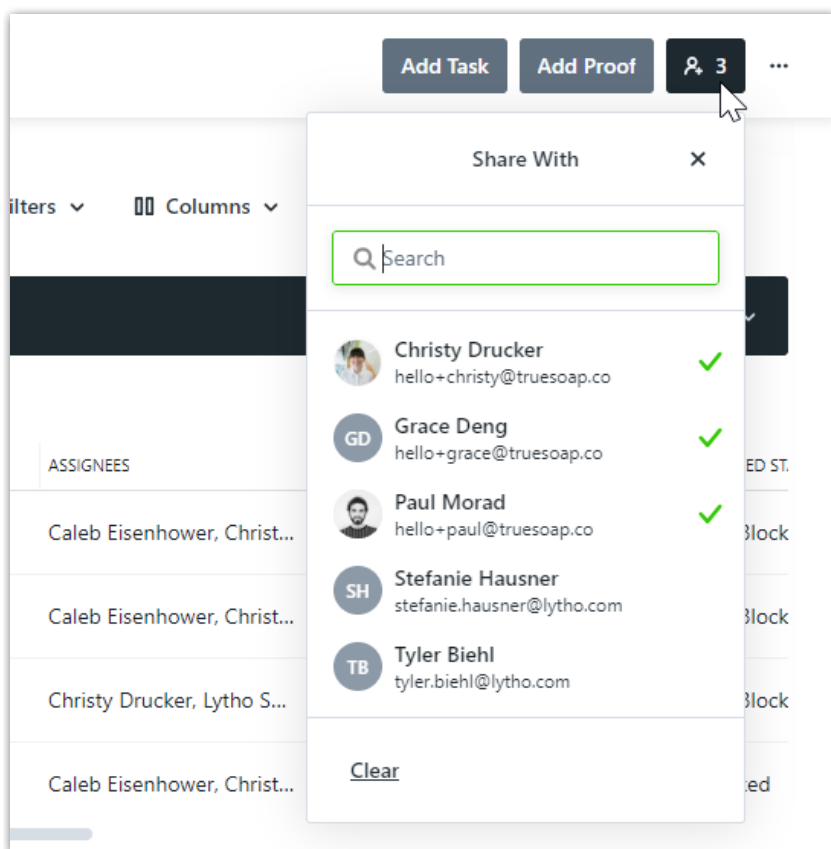
WORK NAME	DUE DATE & TIME	WORK STATUS	ASSIGNEES
<input type="checkbox"/> Pull Images for Social Ad	02/23/2024 5:00 PM	In Progress	Caleb Eisenhower, Chri
<input type="checkbox"/> Get copy approved by team	02/19/2024 5:00 PM	In Progress	Caleb Eisenhower, Chri
<input type="checkbox"/> Gather information	02/22/2024 5:00 PM	Completed	Christy Drucker, Christy

Dropdown menu options: Share, Set as Default View, Duplicate, Delete

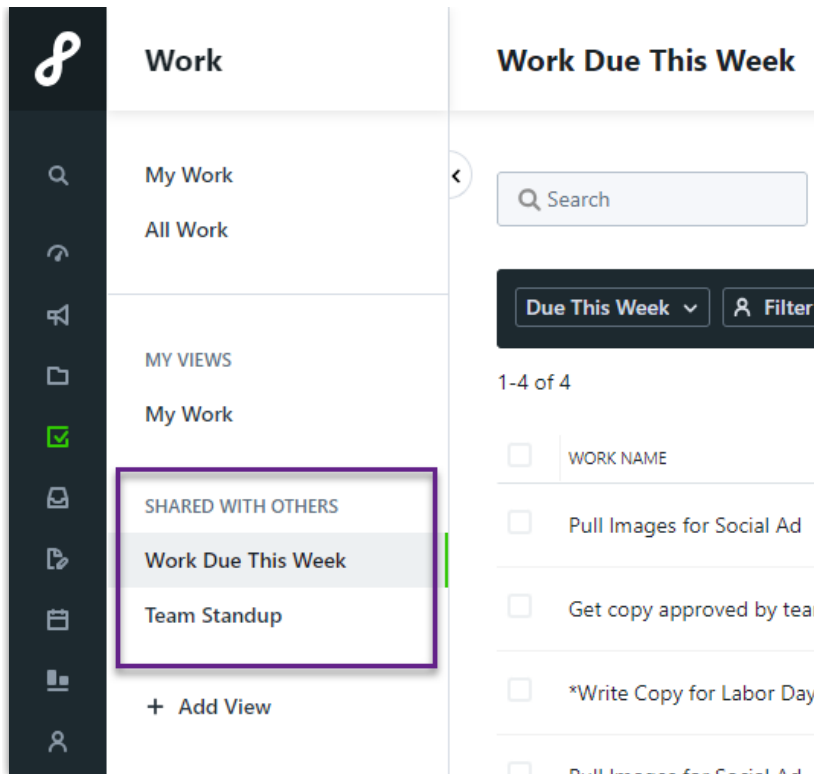
Choose the user(s) you want to share your view with from the dropdown list. A green check mark will appear next to your selections. Close the window to confirm your choices.



Once your view has been shared, a new icon will appear indicating the number of people the view is shared with. Select this icon to see who the view is being shared with. You can stop sharing your view by clicking to deselect the user(s).

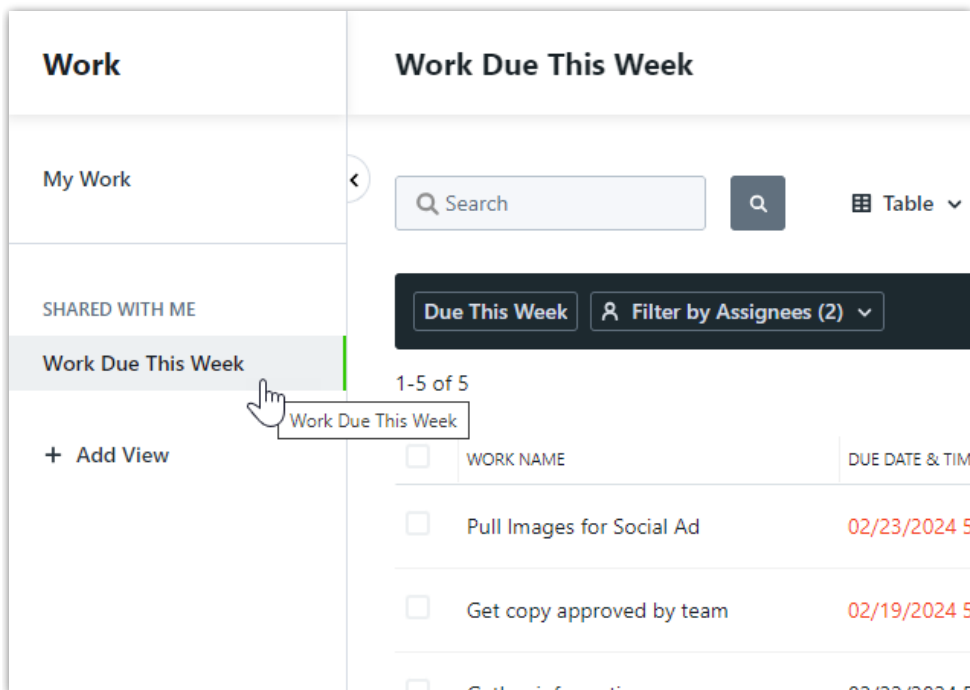


Views you are currently sharing will appear under **SHARED WITH OTHERS** on the left side of your workspace.

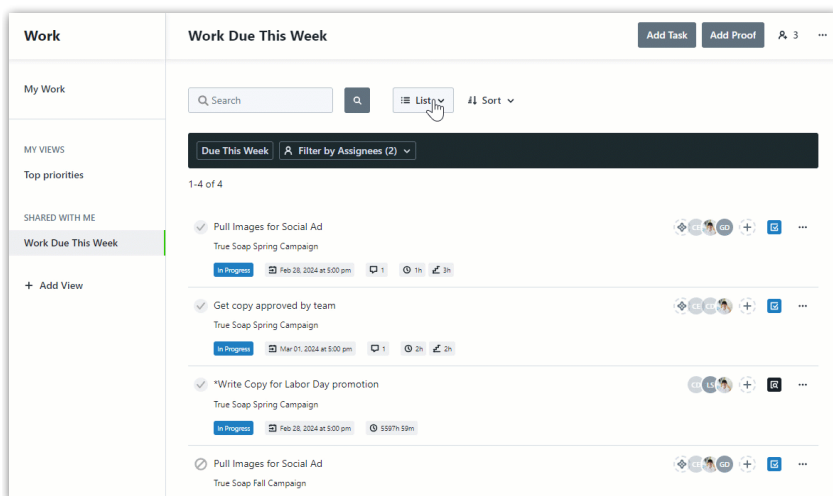


## Viewing Shared Custom Views

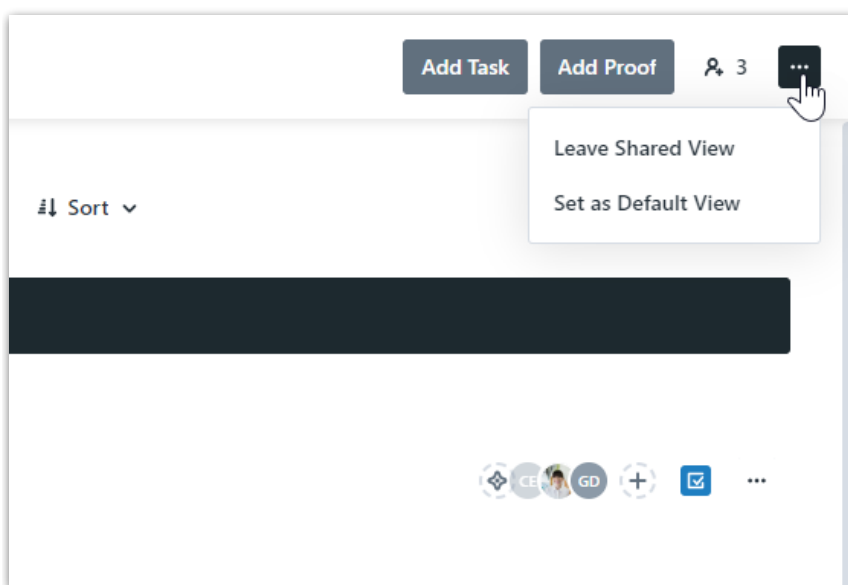
Views that have been shared with you will appear under **SHARED WITH ME** on the left side of your workspace.



You have the ability to update the view type and sort order on views that have been shared with you. The shared view will reset to its original settings once you leave, so you don't have to worry about making any permanent changes.



Within the actions menu in the top right corner, you have the ability to leave the view or set as your [default view](https://guide.lytho.com/help/custom-views#default-views) (<https://guide.lytho.com/help/custom-views#default-views>).



## Recommended Shared Custom Views

To help get you started creating custom views for sharing, we've put together a guide for views that can enhance team alignment. Check out our page on [Recommended Views](https://guide.lytho.com/help/recommended-custom-views) (<https://guide.lytho.com/help/recommended-custom-views>) for view ideas to create for your individual team members.

View Name	Role(s)	Purpose	Recommended Filters	Recommended Columns	View Type	View Area
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Weekly Standup	Team Members	Provide a view of the team's priorities for the week and enable contributors to give status updates.	<ul style="list-style-type: none"> <li>• Archived Status: Not Archived</li> <li>• Date: Due, This Week</li> </ul>	<ul style="list-style-type: none"> <li>• Work Name</li> <li>• Assignees</li> <li>• Due Date &amp; Time</li> <li>• Work Status</li> <li>• Work Type</li> <li>• Work Priority</li> <li>• Project Name</li> <li>• Project Priority</li> <li>• Project Name</li> <li>• Project Priority</li> <li>• Campaign Name</li> </ul>	Table	Work
Upcoming Campaigns/ Projects	Project Managers	To get a wide look at upcoming Campaigns or Projects and determine if resources or expectations need to shift.	<ul style="list-style-type: none"> <li>• Archived Status: Not Archived</li> <li>• Campaign Status Stage: To Do</li> </ul>		Gantt	Campaigns or Projects

Team Member PTO	Team Members	To provide access to a specific team members work while they are away, ensuring nothing gets missed.	<ul style="list-style-type: none"> <li>• Archived Status: Not Archived</li> <li>• Work Status Stage: To Do, In Progress</li> <li>• Assignees: OOO Team Member</li> <li>• Date, Due: OOO time frame</li> </ul>		List	Work
Brand Calendar	Social, Brand, and Communication teams	To keep everyone aligned on when content is going live.	<ul style="list-style-type: none"> <li>• Archived Status: Not Archived</li> <li>• Any tags used to label go-live dates such as: brand, email, social, etc,</li> </ul>		Calendar or Gantt	Calendars or Work
Multi-Project Kick-off	Project Members	To align on work items and due dates needed to complete a project.	<ul style="list-style-type: none"> <li>• Project Name</li> </ul>	<ul style="list-style-type: none"> <li>• Work Name</li> <li>• Start Date &amp; Time</li> <li>• Due Date &amp; Time</li> <li>• Assignees</li> <li>• Specialties</li> <li>• Blocked Status</li> <li>• Tags</li> </ul>	Table	Work

Specialties	Groups of specialty team members like Graphic Designers or Videographers.	Maintain alignment between team members with similar roles to foster collaboration and prevent duplicate work.	<ul style="list-style-type: none"> <li>• Archived Status: Not Archived</li> <li>• Specialty</li> <li>• Work Status Stage: To Do, In Progress</li> </ul>		Work	Calendar
Team Workload	Team Members	To provide transparency into and alignment of team workloads for resourcing.	<ul style="list-style-type: none"> <li>• People: Team Members</li> <li>• Specialty</li> </ul>		Workload	Workload

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