

Custom Views

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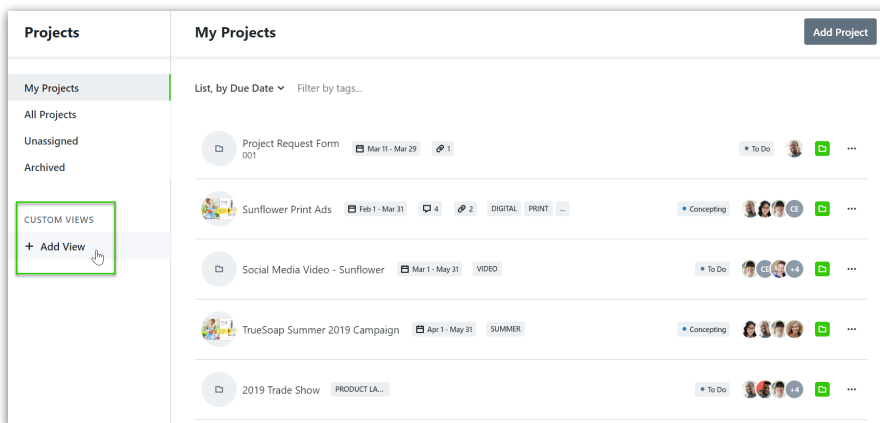


Does your view look different than the documentation below? Your account may have our newest Improved Views experience enabled! Please use [this page](https://guide-ignite.inmotionnow.com/help/getting-organized) (<https://guide-ignite.inmotionnow.com/help/getting-organized>) to assist you with Custom Views. If you have any questions, our team is happy assist you at support@lytho.com ().

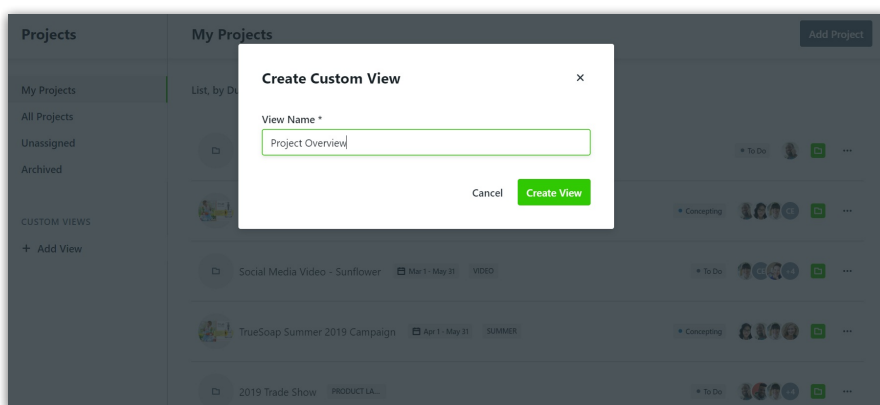
Custom Views allow you to create more empowering table views of Projects, Tasks, Proofs, and Requests. These customized views provide a comprehensive dashboard including the columns and filters you need to see all important information at a glance.

Getting Started with Custom Views

To implement these customized views, simply navigate to your desired workspace and click **Add View** under the **Custom Views** option.



Enter the name for your Custom View and click **Create View**.



Customize your view by selecting desired **Columns**, and applying appropriate **Filters** (i.e. team members, tags, custom fields, etc.).

Project Overview

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PROJECT NAME	PROJECT NUMBER	STARTED	DUE	COMMENTS	FILES
2019 Trade Show					
Clean House Marketing Launch		7/30/2018 8:00 am	11/30/2018 5:00 pm		
Concepting		3/11/2019 8:00 am	3/29/2019 5:00 pm		
Copy of Sunflower Social Media Video					
Digital Ads		3/18/2019 8:00 am	4/19/2019 5:00 pm		
Email Campaign		3/01/2019 8:00 am	3/15/2019 5:00 pm		
Email Campaign - Fall					
In-Store Aisle Display					
LiveWell - Half-page ad		8/03/2018 8:00 am	8/24/2018 5:00 pm	2	

Columns

- Campaign Name ✓
- Comments ✓
- Due ✓
- Files ✓
- Members ✓
- Project Number ✓
- Project Status ✓
- Started ✓
- Tags ✓
- Actual Cost ✓
- Budget ✓
- Campaign Due Date

Project Overview

1-4 of 4

PROJECT NAME	PROJECT NUMBER	STARTED	DUE	COMMENTS	FILES	TAGS
Project Status						PRODUCT LAUNCH
Members		7/30/2018 8:00 am	11/30/2018 5:00 pm			PRODUCT LAUNCH
Date		3/11/2019 8:00 am	3/29/2019 5:00 pm			
Department						
Budget		3/18/2019 8:00 am	4/19/2019 5:00 pm			
Product Line		3/01/2019 8:00 am	3/15/2019 5:00 pm			
Actual Cost						
Email Campaign - Fall						

After your desired filters are selected, click **Save to View** to save these selections to your custom view.

Project Overview

Product Line | Department: Marketing | +

Save to View | Clear

1-4 of 4

PROJECT NAME	PROJECT NUMBER	STARTED	DUE	COMMENTS	FILES	TAGS
Sunflower Print Ads		2/01/2019 8:00 am	3/31/2019 5:00 pm	4	2	DIGITAL
Sunflower Social Media Video	003		3/29/2019 9:42 pm			
TrueSoap Summer 2019 Campaign		4/01/2019 8:00 am	5/31/2019 5:00 pm			SUMME
Video Request	002		3/29/2019 10:30 pm		1	

Once complete, your Custom View will be saved within each respective workspace. You can continue to create as many views as needed by clicking **Add View**; however, these views cannot be shared with other Team Members or Stakeholders.

Project Overview

Product Line | Department: Marketing | +

Save to View | Clear

1-4 of 4

PROJECT NAME	PROJECT NUMBER	STARTED	DUE	COMMENTS	FILES	TAGS
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Sunflower Social Media Video	003		3/29/2019 9:42 pm			
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Video Request	002		3/29/2019 10:30 pm		1	

+ Add View

Additionally, within the action (ellipses) menu next to **Add Project**, you have the options to **Duplicate** the view or **Delete** it, if it's no longer necessary.

The screenshot shows a 'Project Overview' page with a table of projects. A dropdown menu is open next to the 'Add Project' button, showing 'Duplicate' and 'Delete' options. The table has columns for Project Name, Project Number, Started, Due, Comments, Files, and Tags.

PROJECT NAME	PROJECT NUMBER	STARTED	DUE	COMMENTS	FILES	TAGS
Sunflower Print Ads		2/01/2019 8:00 am	3/31/2019 5:00 pm	4	2	DIGITAL
Sunflower Social Media Video	003		3/29/2019 9:42 pm			
TrueSoap Summer 2019 Campaign		4/01/2019 8:00 am	5/31/2019 5:00 pm			SUMME
Video Request	002		3/29/2019 10:30 pm		1	



Custom Views allow you to sort, resize, and reorder your data by dragging and dropping selected columns. Additionally, select data (i.e. the name of your Projects, Tasks, Proofs or Requests) are hyperlinked to quickly and easily take you directly to each individual view.

Bulk Actions in Custom Views

Do you ever need to archive or delete multiple tasks, proofs, or projects all at once? Use Bulk Archive to keep your workspace clear of work items that are finished or Bulk Delete to remove work items you don't need, all in just a few clicks.

The screenshot shows a 'Digital ads- Scents' view with a table of digital ads. The table has columns for Project Name, Started, Due, Tags, Project Status, and Members. There are checkboxes for each row. At the bottom, there is a 'Select All' button and a status '0 selected'.

<input type="checkbox"/>	PROJECT NAME	STARTED	DUE	TAGS	PROJECT STATUS	MEMBERS
<input type="checkbox"/>	Summer Scents Digital Ad	6/03/2019	6/14/2019	DIGITAL, SCENT	Completed	Grace Deng, Chisty Dr...
<input type="checkbox"/>	Fall Scents Digital Ad	10/18/2019	10/31/2019	DIGITAL, SCENT	Completed	Paul Moran, Grace Den...
<input type="checkbox"/>	Winter Scents Digital Ad	12/16/2019	12/27/2019	DIGITAL, SCENT	To Do	Paul Moran, Grace Den...