

Project Filter Groups

Published on 05/04/2017

What are Project Filter Groups?

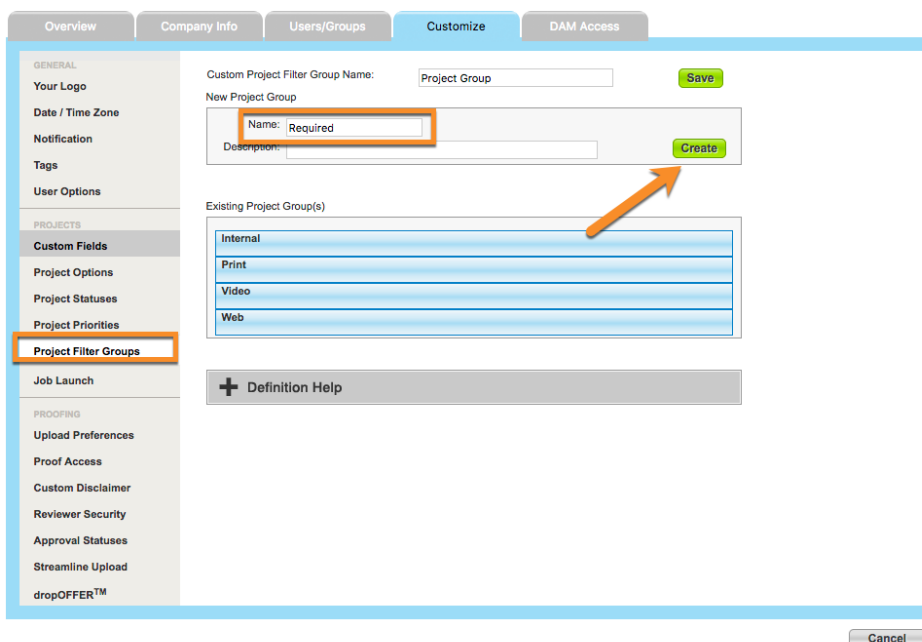
A Project Filter Groups are customizable categories that allow users to filter projects based on the assigned category. They useful when project campaigns have multiple projects/deliverables that each require unique due dates. Project filter groups can also provide valuable data when reporting on your project information. Commonly used project groups are defined by department, campaign, and/or project types (print, email, etc.).

Creating Project Filter Groups

As an Administrator, you can create custom Project Filter Groups by navigating to Account > Account Setting > Customize > Project Filter Groups.

1. From here, you can customize the naming convention of 'Project Groups' to something else such as, "Brand," "Department," etc. This will change the Project Group category header to your custom name throughout inMotion.
2. To create a new group, simply enter the group name into the **'New Project Group'** section and click **'Create.'**

Account Settings

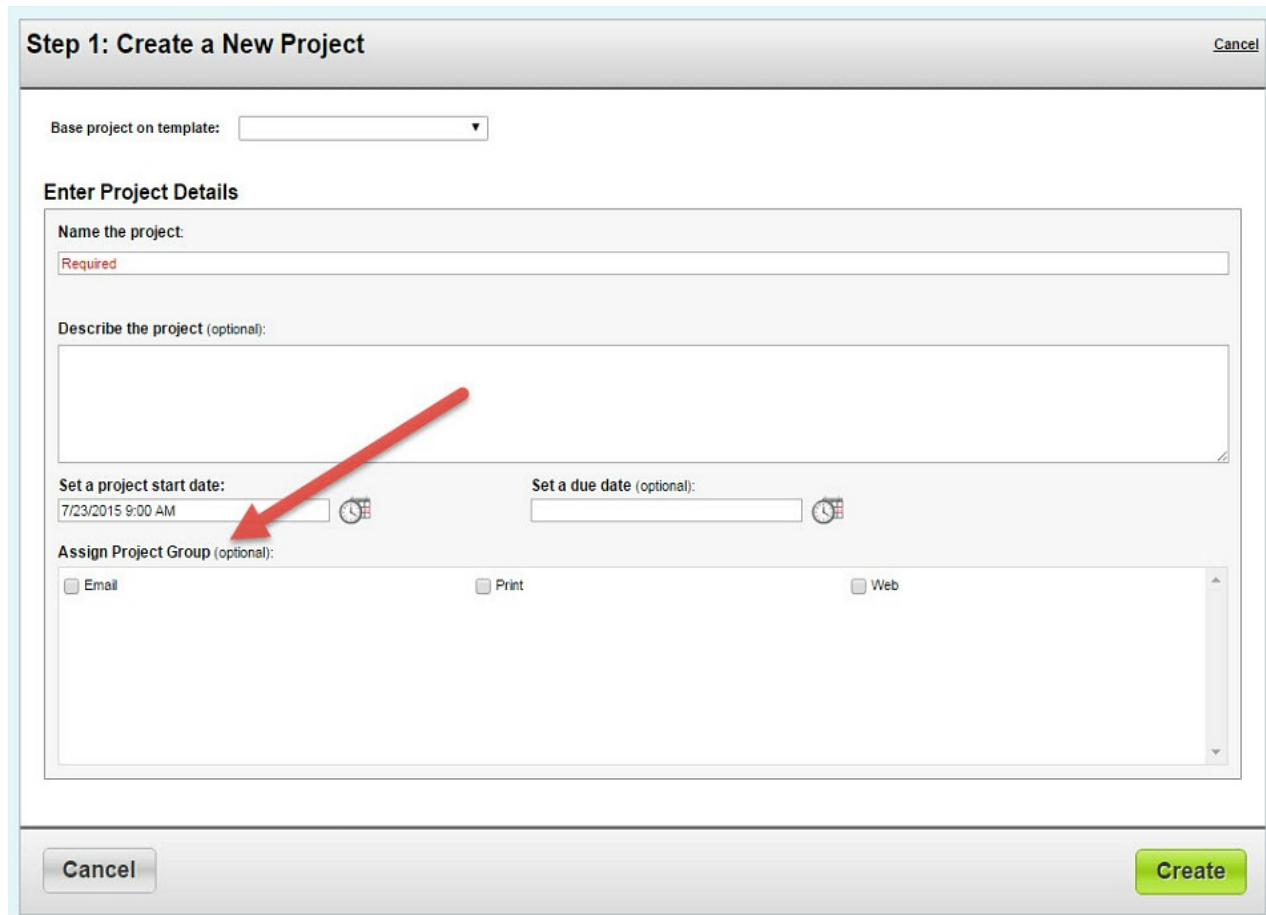


The screenshot displays the 'Account Settings' page, specifically the 'Customize' tab under 'Project Filter Groups'. The sidebar on the left lists various settings categories, with 'Project Filter Groups' highlighted. The main content area includes a 'Custom Project Filter Group Name' field set to 'Project Group' with a 'Save' button. Below this is the 'New Project Group' section, which has a 'Name' field (containing 'Required') and a 'Description' field, both with 'Create' buttons. An orange arrow points to the 'Create' button for the 'Name' field. The 'Existing Project Group(s)' section shows a table with four rows: 'Internal', 'Print', 'Video', and 'Web'. At the bottom of the main content area is a '+ Definition Help' button. A 'Cancel' button is located at the bottom right of the interface.

Existing Project Group(s)
Internal
Print
Video
Web

Assigning Project Filter Groups

Project Filter Groups are selected at project creation or from an existing project's dashboard. From the Project Dashboard, you will need to click '**Edit**' in the '**Overview**' section to update the Project Group.



Step 1: Create a New Project Cancel

Base project on template:

Enter Project Details

Name the project:
 Required

Describe the project (optional):

Set a project start date: 7/23/2015 9:00 AM Calendar icon

Set a due date (optional): Calendar icon














































Assign Project Group (optional):
☐ Email ☐ Print ☐ Web

Cancel Create

Using Project Filter Groups in the Workspace

Once Project Filter Groups have been assigned, you can then filter your Project Workspace by selecting the group you'd like to see by using the Project Group drop down menu.

If Job Launch Manager permissions are enabled, Project Filter Groups can also be viewed in the Job Launch Workspace. Ensure that the Project Group column is shown, then filter by group.

FORM NAME 		BRAND 	AVAILABLE ACTIONS 				
1, Hubbell -	Communic	<div> Select BRAND to filter <input checked="" type="checkbox"/> Unassigned(52) <input checked="" type="checkbox"/> Marathon Special Products(3) <input checked="" type="checkbox"/> Benshaw(6) <input checked="" type="checkbox"/> Century(1) <input checked="" type="checkbox"/> Morse(1) Select: all / none Apply Filter </div>					
			details	preview	release	reject	make project
	Default Fo						
			details	preview	release	reject	view project
	Video Request	Unassigned					
			details	preview	release	reject	view project
	Video Request	Unassigned					
			details	preview	release	reject	view project
	Video Request	Unassigned					
			details	preview	release	reject	view project
	Video Request	Unassigned					
			details	preview	release	reject	view project
	sdfsd	Unassigned					
			details	preview	release	reject	view project
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