



Project Filter Groups

Published on 02/03/2017

What are Project Filter Groups?

Project Filter Groups are customizable categories that allow users to filter projects based on the assigned filter group. They are 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

Overview

Company Info

Users/Groups

Customize

DAM Access

GENERAL

Your Logo

Date / Time Zone

Notification

Tags

User Options

PROJECTS

Custom Fields

Project Options

Project Statuses

Project Priorities

Project Filter Groups

Job Launch

PROOFING

Upload Preferences

Proof Access

Custom Disclaimer

Reviewer Security

Approval Statuses

Streamline Upload

dropOFFER™

Custom Project Filter Group Name: Save

New Project Group

Name:

Description:

Create

Existing Project Group(s)

Internal
Print
Video
Web

+ Definition Help

Cancel

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.

Create a New Project

CANCEL

Budget

Specs

Design Direction

Describe the project

Set a project start date

5/10/2017 9:00 AM

Set a due date

Assign Project Group

☐ Internal

☐ Video

☐ Print

☐ Web

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.