Lytho Workflow Capabilities for Stakeholder Users

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A stakeholder is a user type in Lytho Workflow that can be given permissions to request work, review work, receive final deliverable files, receive custom reports, and collaborate on Requests and reviews. Lytho Workflow keeps a history of all Requests, files, and reviews so you can easily access past work and create new Requests when needed!

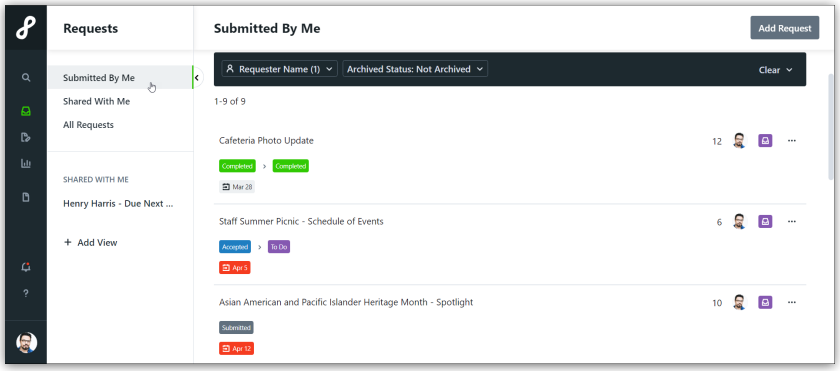
Managing Requests

A Request is a new job or brief that outlines the requirements of a Project or initiative.

> Access to Request forms is managed by your account's Lytho Workflow admin.

My Requests

Submit and manage your Requests from the **My Requests** tab in **Requests**. By default, this is the page that opens when you log into your Lytho account.



Requests may appear with the following statuses:

- **DRAFT** - Requests that you have started but not yet submitted
- **SUBMITTED** - Requests that you have submitted but have not yet been accepted
- **DECLINED** - Requests that have been submitted and have been declined. These can be resubmitted.
- **ACCEPTED** - Requests that you have submitted and have been accepted
- **COMPLETED** - Requests that you have submitted that have been completed

Learn more about creating and managing your Requests:

- How to create a Request (https://guide-ignite.inmotionnow.com/help/submitting-request#creating-a-request)
- How to modify a Request (https://guide-ignite.inmotionnow.com/help/submitting-request#modifying-a-request)
- How to delete a Request (https://guide-ignite.inmotionnow.com/help/submitting-request#deleting-a-request)
- How to resubmit a declined Request (https://guide.lytho.com/help/submitting-request#declined-requests)

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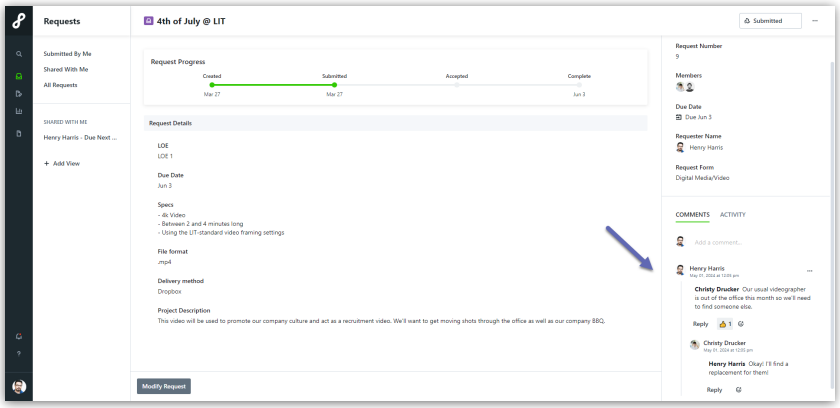
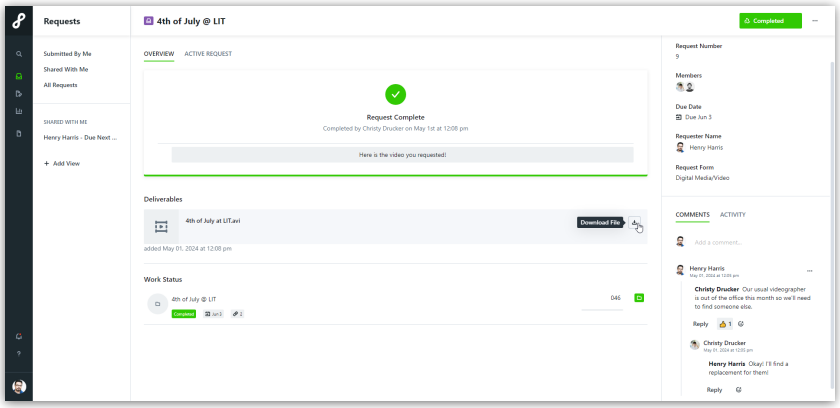
Open a submitted Request to view Request details, keep track of Request progress, and collaborate with your team.

Members include team members responsible for accepting the Request. You can collaborate with members via the **COMMENTS** box in the bottom right corner. @mention these team members to notify them of Request updates (i.e. @christy). We recommend keeping communication inside of the Request so that all pertinent information is in one place.



Users with the "A new comment without @mentioning" notification setting (https://guide.lytho.com/help/notifications#notification-preferences) enabled will receive notifications, even if they were not @mentioned.

Once work is complete, you will also be able to access your final deliverable from the Request details page. A notification will be sent letting you know your Request has been completed.



Shared Requests*

Requests may be shared so that other requesters can monitor progress or collaborate on Requests they did not submit. The ability to share requests will depend on your role's permissions. Contact your Lytho Admin if you do not have the the Share Request option.

From the **Options (...)** menu in the top-right corner, click**Share**. Click on the person(s) that you want to share the Request with and click out of the menu. A notification will show up in the bottom-right corner letting you know your Request has been shared. You can confirm who this Request has been shared with by clicking on the **Share Request** menu in the top-right corner.

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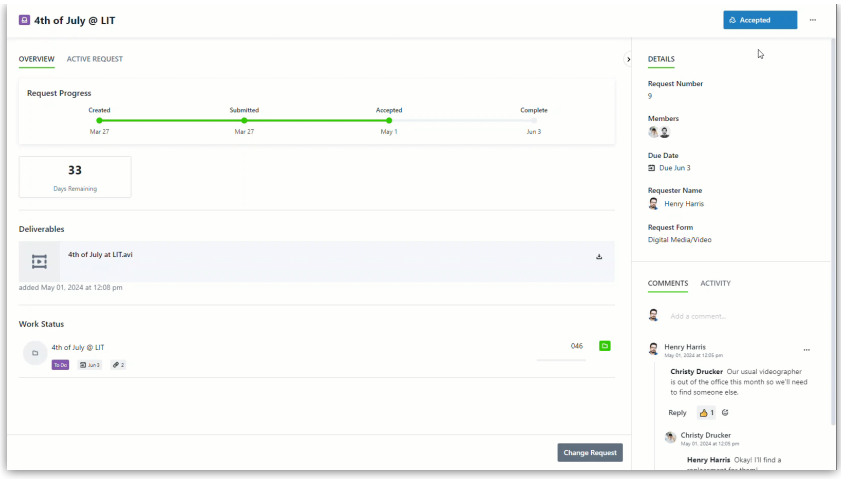
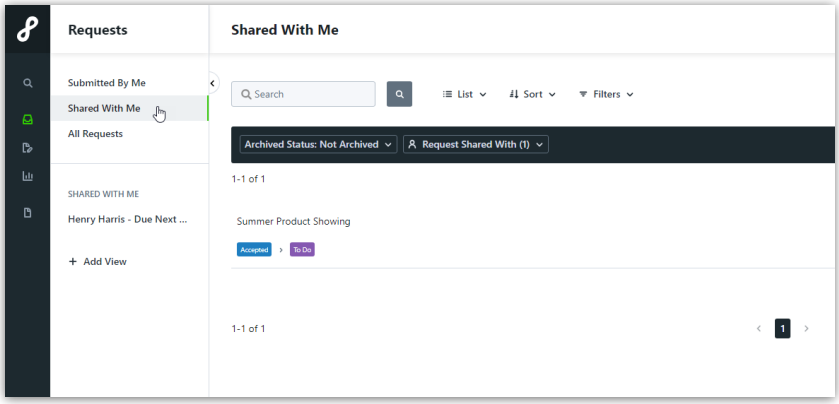


View Requests that have been shared with you in the**Shared With Me** tab on the inner left navigation bar.

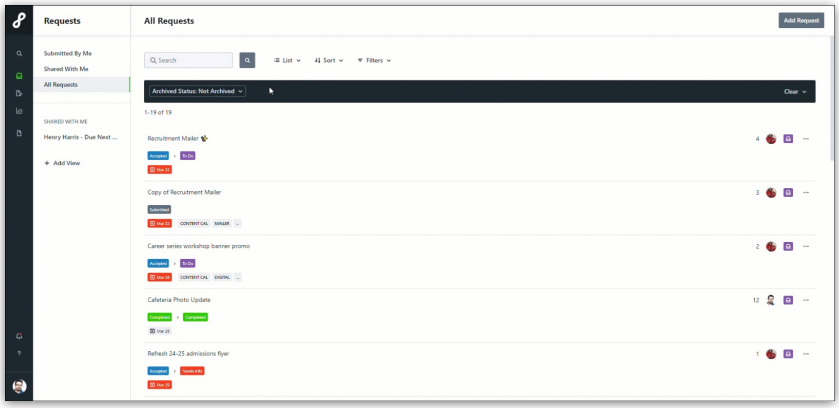


**Request Sharing is only available for Business & Enterprise customers.*

Keeping Up With Requests

Lytho's Request view allows you to set up aCustom View (https://guide.lytho.com/help/custom-views) to filter and sort data as well as change the view layout so that you can more easily organize your Request list.

To change between the List View (https://guide.lytho.com/help/list-views) and Table View (https://guide.lytho.com/help/table-views), select the first dropdown option above the filter bar and select the view you would like. By default, **List** will be selected.



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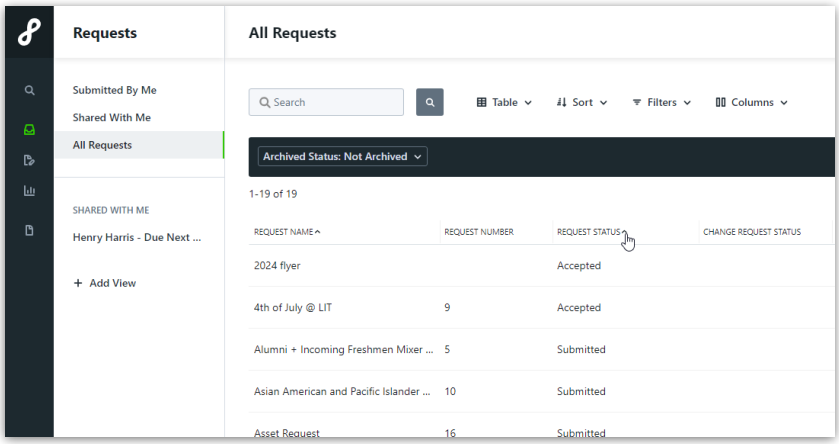
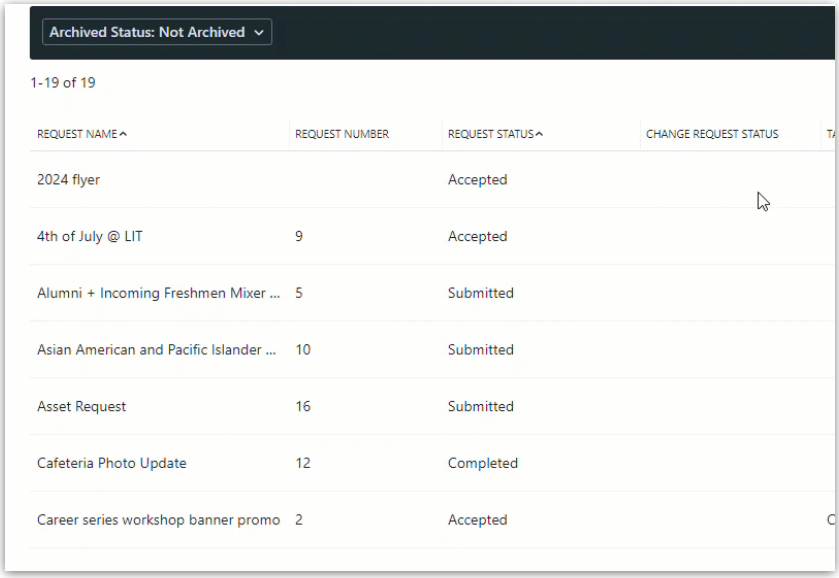
From either view, you can sort your data by Due Date, Request Name, or Request Status. If you are in the Table View, you can sort columns manually by clicking on the column headers. Shift + Click to sort multiple columns. A columns that has been sorted will show the ^ or ⌄ symbol next to the column name.



From the Table menu, select which columns you want to see via the**Columns** menu. You can select as many columns as you want and can rearrange by clicking on the column title and dragging and dropping to a new space.



Use the **Filters** menu to limit the data based on what you're specifically looking for.

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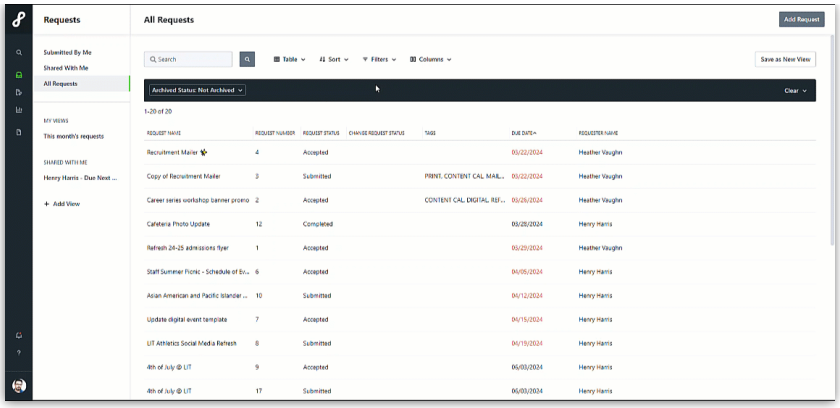
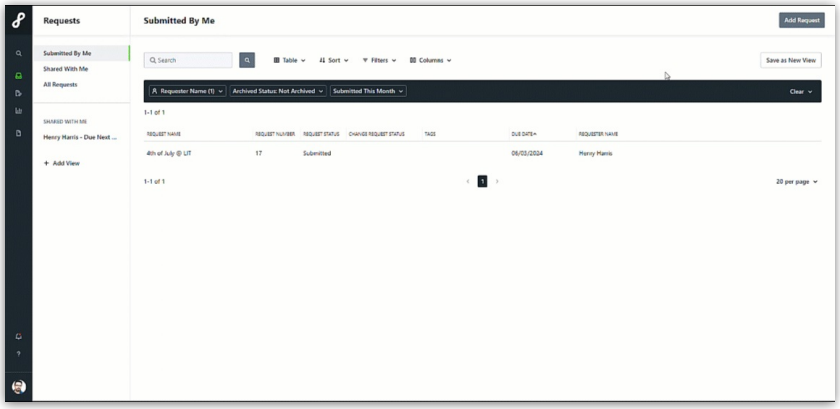


By default, archived work will be filtered out. You can remove this filter by clicking on**Archived Status: Not Archived** and clicking the **Clear** option.

You can save views to be used later by clicking on the**Save as New View** button above the filter bar on the right side. These views can later be accessed under the **My Reviews** section of the inner-left navigation bar.



Submitting Reviews

My Reviews

When a review has been routed for your approval, you will receive an email notification, in-app notification, and an item under the "My Reviews" page on the left-hand navigation bar.

Click **Start Your Review** to be taken directly to the review and approval environment.

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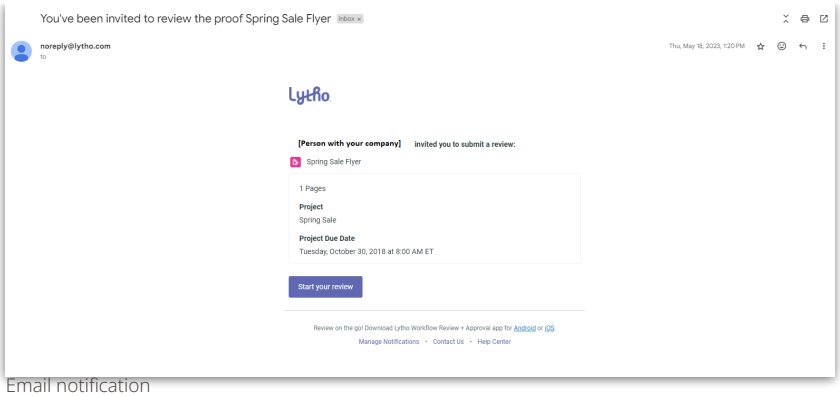
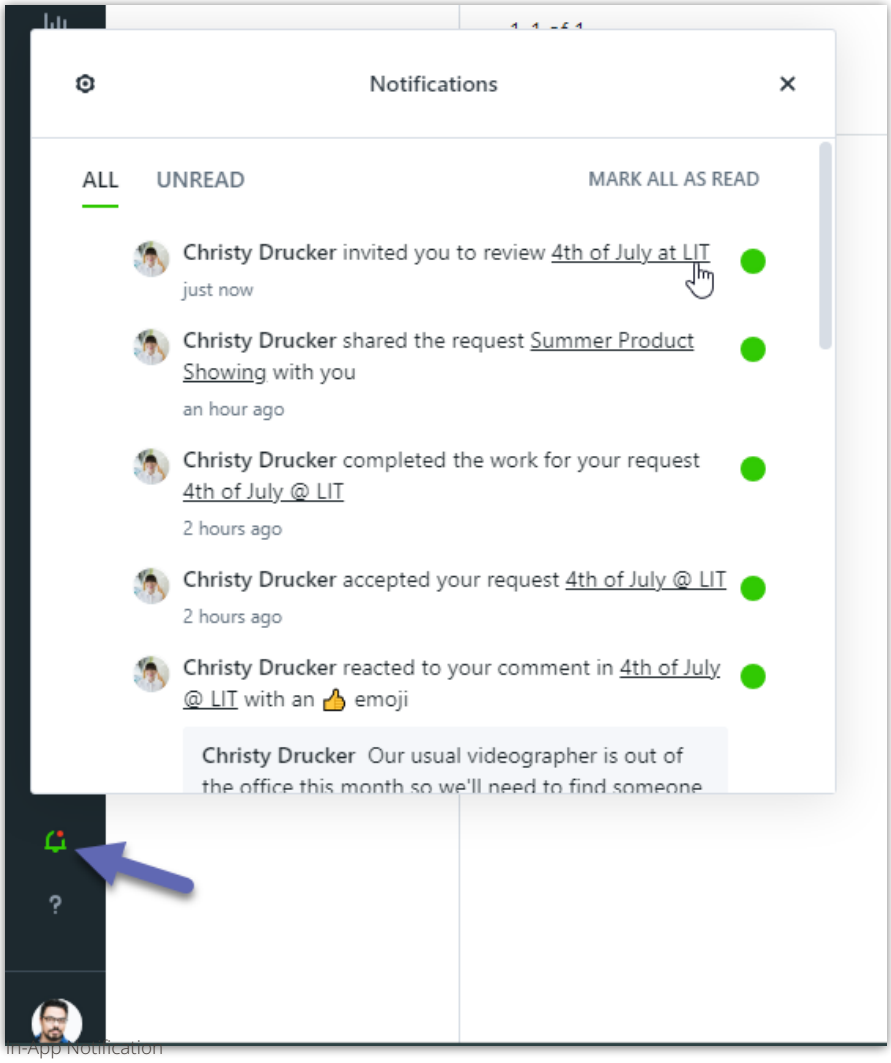


Email notification

Select the **bell icon** towards the bottom of your global navigation to view your notifications. Select the review name to be taken directly to the review and approval environment.



In-App Notification

Content that you have been invited to review will be located in the**My Reviews** tab in **Reviews**.

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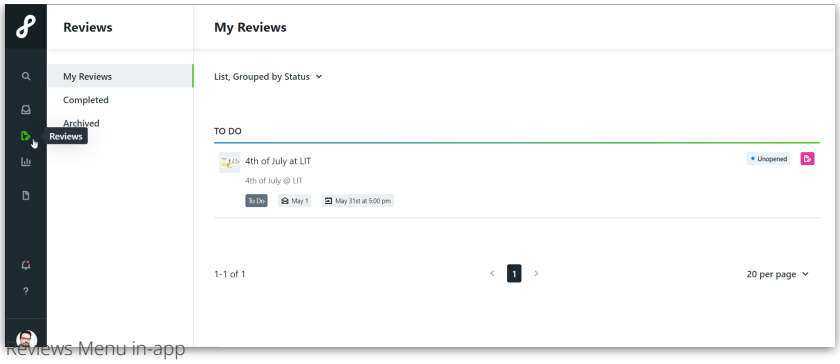
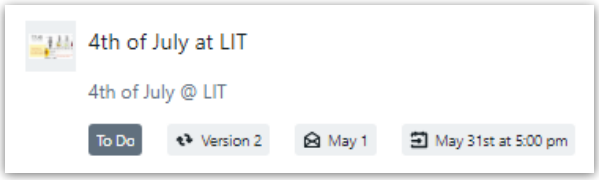


Reviews Menu in-app

Reviews may appear in the following sections:

- **TO DO** - Items that you need to review
- **IN REVIEW BY OTHERS** - Items that you have reviewed but are still waiting on others to review
- **RETURNED** - Items that have been returned to the Proof owners and may be completed or sent for another round of reviews.

The area under the review name provides additional context, such as the associated Project name, the current Proof version, the date you were invited to the review, and the review's deadline, if applicable.



Click on the review to open it in the review environment and submit your approval. Use the links below to learn more about reviewing assets.

- An Introduction to Review & Approval (https://guide-ignite.inmotionnow.com/help/intro-review-approval)
- Submitting a Review (https://guide-ignite.inmotionnow.com/help/quick-start-guide-submitting-a-review)
- Reviewing a Media Asset (https://guide-ignite.inmotionnow.com/help/reviewing-a-media-asset)
- Reviewing a Web Page (https://guide-ignite.inmotionnow.com/help/reviewing-a-media-asset)
- Collaborating During a Review (https://guide-ignite.inmotionnow.com/help/collaborating-during-a-review)
- Viewing Review Versions (https://guide-ignite.inmotionnow.com/help/proof-versioning)
- Lytho Review App for iOS and Android (https://guide-ignite.inmotionnow.com/help/inmotion-ignite-review-app-for-ios-and-android)

Archived Reviews

When the review has been completed and associated work is archived, the review will appear in the **Archived** list. Reviews will remain available for reference.

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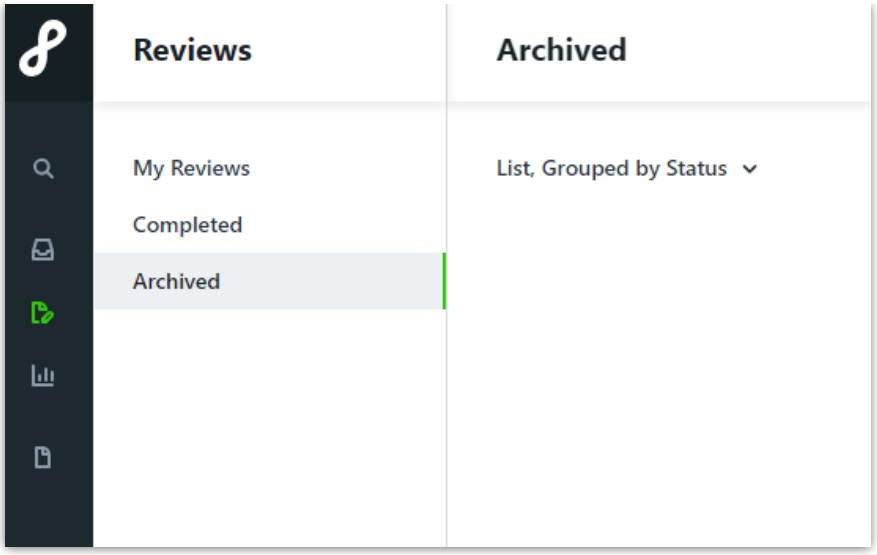
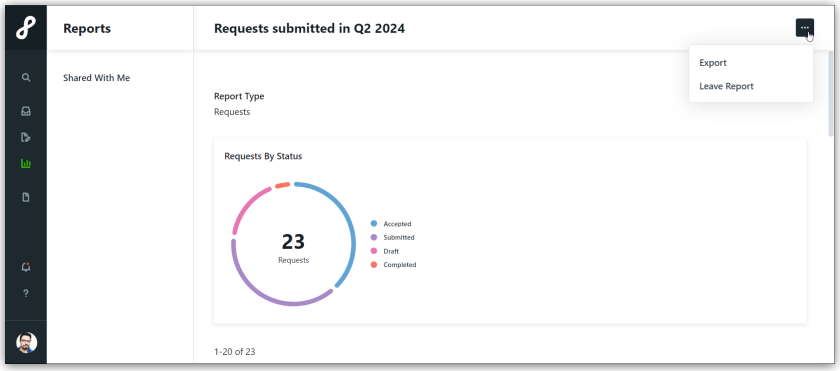


Viewing Shared Reports

**Report Sharing is only available for Business and Enterprise customers.*

View any reports that have been shared with you in the**Shared With Me tab** in **Reports**.

All reports are updated in real time. Open the report to view shared data. To export a report to CSV, click on the action menu in the top right corner of your screen and select **Export**. To remove your access to the report, select **Leave Report**.



Updating Settings

Access your personal settings by clicking your avatar in the bottom left corner of your screen and selecting **Personal Settings**.

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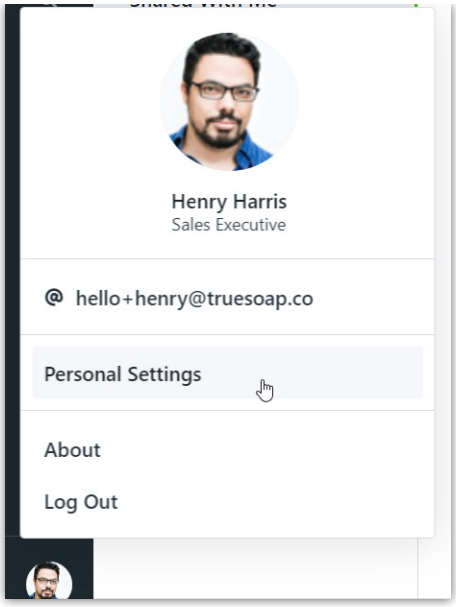
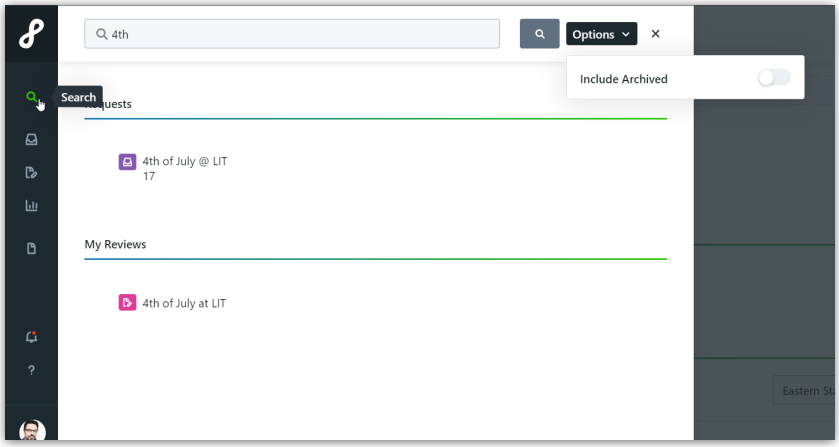


From Personal Settings, three pages will be available:

- **My Profile** - edit your profile details (https://guide-ignite.inmotionnow.com/help/profile-management#profile-details) and update your password (https://guide-ignite.inmotionnow.com/help/profile-management#password)
- **Notifications** - manage your notification preferences (https://guide-ignite.inmotionnow.com/help/notifications#notification-preferences)
- **Integrations** - set up your storage integrations (https://guide-ignite.inmotionnow.com/help/storage-integrations#setting-up-your-storage-integrations)

Searching for Work

When looking for items in Lytho Workflow, you can always utilize global search (https://guide-ignite.inmotionnow.com/help/global-search)! Clicking on the **Options** button and toggling on **Include Archived** items will expand the search results you can get.



You can also use the search bar found on the Requests page to search from your submitted requests. This page provides you the added benefit of sorting and filtering as mentioned in the above "Keeping up with Requests" section of this article.

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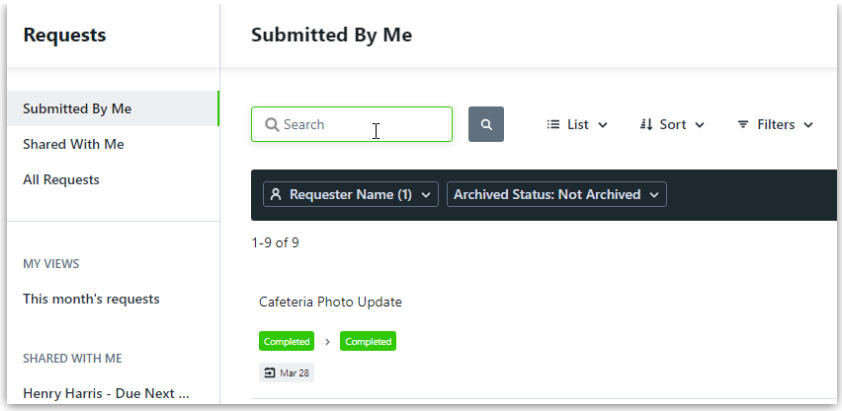

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