

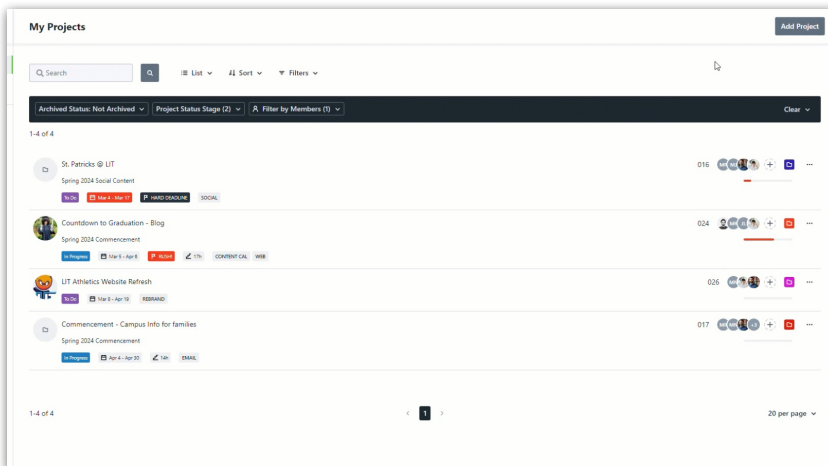
Editing Work Item Details

Published on 04/04/2024

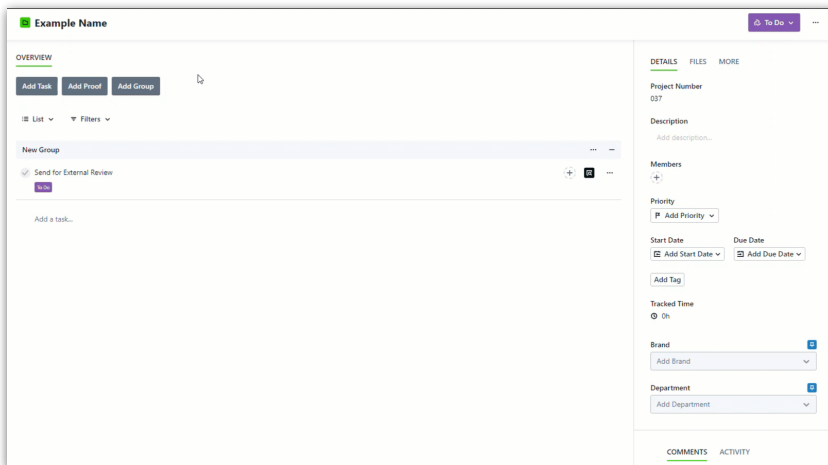
When working with Campaigns, Projects, Tasks, or Proofs there is a lot of information to keep up with. Workflow's design keeps everything uniform so that once you learn what a field looks like, you'll recognize it no matter where you see it!

Work Item Name

When creating a work item, you will be prompted to enter a name.



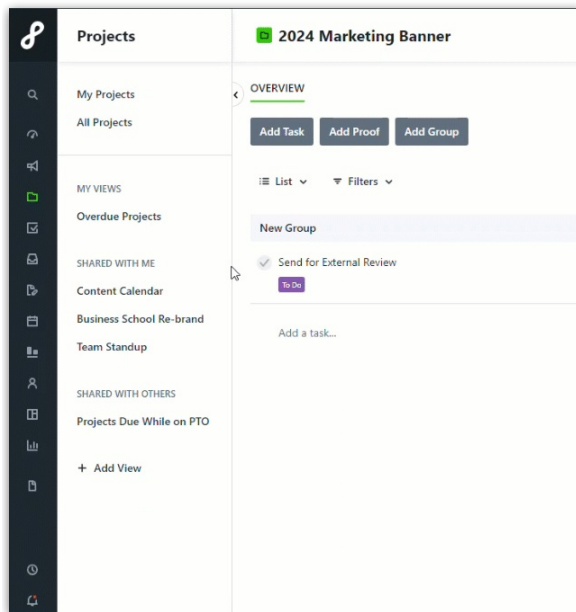
After you've named an item, you can update the name at any time. Start by hovering over the the Work Item Name to reveal the related text box and click to edit the text. Once you are finished, click anywhere outside the text box or use the Enter key to automatically save your changes.



If you are using the Business/Enterprise tier [Auto-Naming](https://guide.lytho.com/help/auto-naming) (<https://guide.lytho.com/help/auto-naming>) feature, you may not have the ability to set Project or Campaign names. Please work with your account admin if you are unable to set or update Project or Campaign names.

Badge Color

Any Admin or Team Member with access to a work item can [change the badge color](https://guide.lytho.com/help/color-story) (<https://guide.lytho.com/help/color-story>) by selecting the **Badge Icon**, using the color slider, keying in the **Hex** value or providing the **RGB** values, and selecting **Save**.



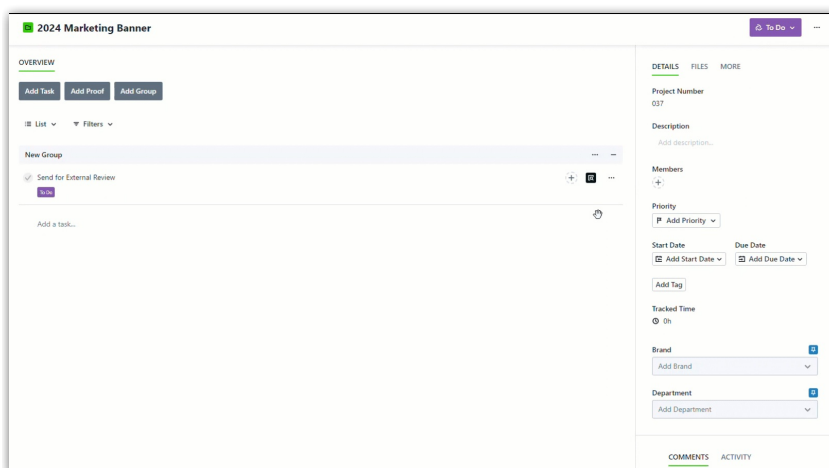
If a user updates a badge color, the badge's color will update for all users.

Work Status

As you make progress on your work, it's important to keep track of where your item is in its life cycle. Unless your item's status has been pre-defined using a Project Template, it will begin in your account's default To Do status. To update the status, click on the status box and choose from the available options.

Keep in mind the following general rules:

- **To Do** - Project work is not yet started.
- **In Progress** - Project work is active and underway.
- **Completed** - Project work was finished.

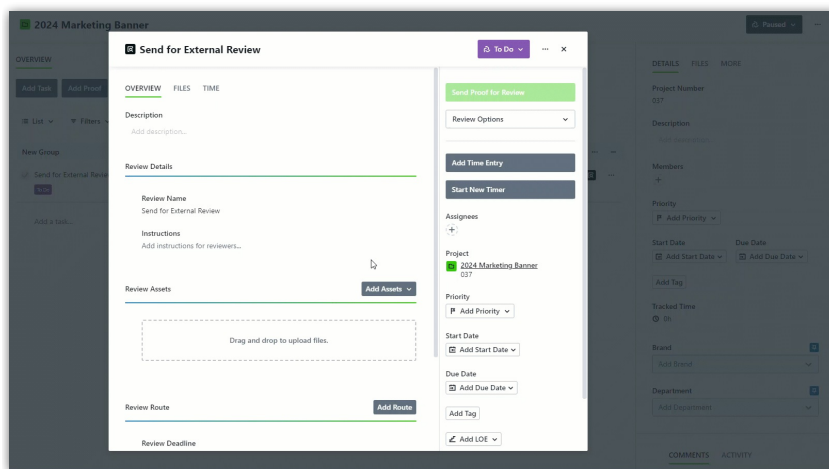




- If you are using the [Require the Completion Of...](https://guide.lytho.com/help/general-settings#require-the-completion-of-) (<https://guide.lytho.com/help/general-settings#require-the-completion-of->) feature, you will be unable to complete the Project or Campaign until all associated Tasks and Proofs have been completed.
- Your status options can be customized using the Business/Enterprise tier [Custom Statuses](https://guide.lytho.com/help/custom-work-statuses) (<https://guide.lytho.com/help/custom-work-statuses>) menu.

Start and Due Dates

Define a start date and due date for your work item to properly set expectations with your team. To set a date, click the dropdown menus below the **Start Date** and **Due Date** headers to open the date picker. Select your desired date and click **Save**.



Once a date is set, you can change the date or remove it. If the item is directly associated to a Request, a warning will display and the requester will be notified of any changes made to the due date.

Set Due Date
×

Changes made will also update the associated request.

< April 2024 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

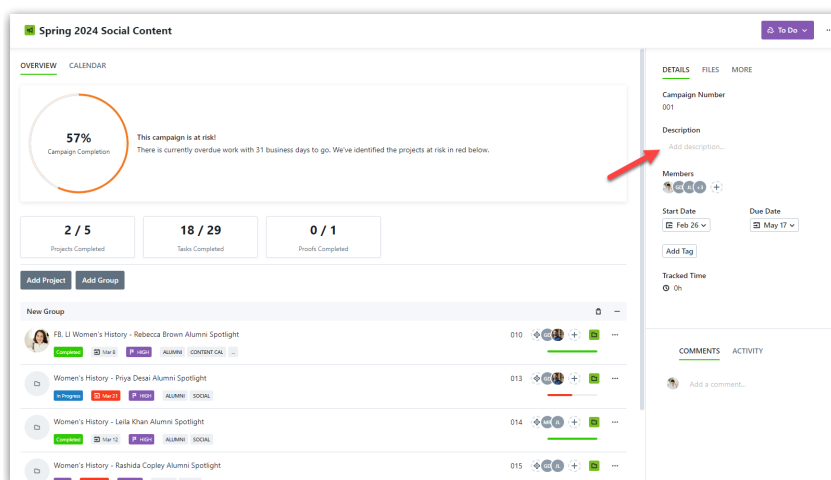
Remove Due Date
Save



Project, Task, and Proof start and due dates can be automatically calculated using the [Automatic Date Calculations](https://guide.lytho.com/help/automatic-date-calculations) (<https://guide.lytho.com/help/automatic-date-calculations>) feature on a [Project Template](https://guide.lytho.com/help/project-templates) (<https://guide.lytho.com/help/project-templates>).

Description

To provide valuable context and details regarding each work item, you can add a description. From the **Details** tab, under the **Description** header, click on **Add Description...**



Spring 2024 Social Content

OVERVIEW CALENDAR

57% Campaign Completion

This campaign is at risk! There is currently overdue work with 31 business days to go. We've identified the projects at risk in red below.

2 / 5 Projects Completed 18 / 29 Tasks Completed 0 / 1 Proofs Completed

Add Project Add Group

New Group

- FB, LI Women's History - Rebecca Brown Alumni Spotlight 010
- Women's History - Priya Desai Alumni Spotlight 013
- Women's History - Laila Khan Alumni Spotlight 014
- Women's History - Rashida Copley Alumni Spotlight 015

DETAILS FILES MORE

Campaign Number 001

Description Add description...

Members

Start Date Feb 26 Due Date May 17

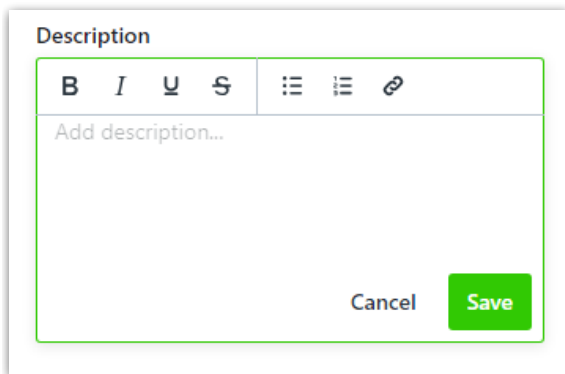
Add Tag

Tracked Time 0h

COMMENTS ACTIVITY

Add a comment...

Once you've clicked into the Description box, you can use the provided options to add emphasis to your text.

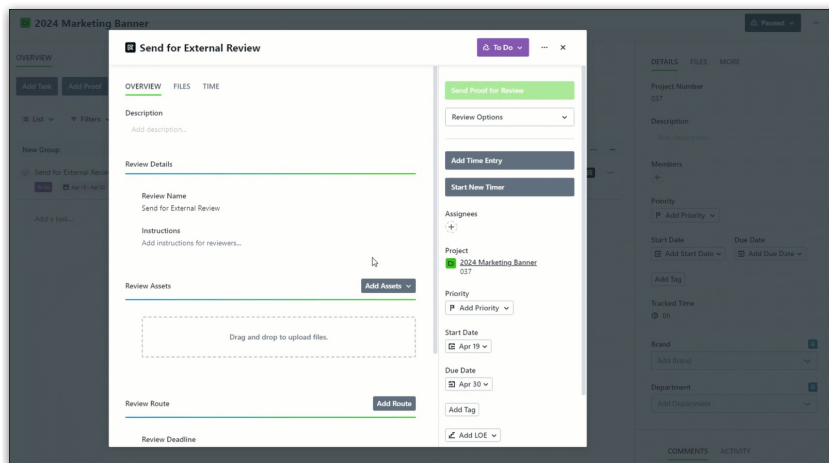


When you are finished, click **Save** to apply your description.

Assignment

Unless a Team Member has the specific "View All" [permissions](https://guide.lytho.com/help/managing-roles-and-permissions#assigning-permissions) (<https://guide.lytho.com/help/managing-roles-and-permissions#assigning-permissions>), they will not be able to view or edit those work items until they are added as a assignee/member.

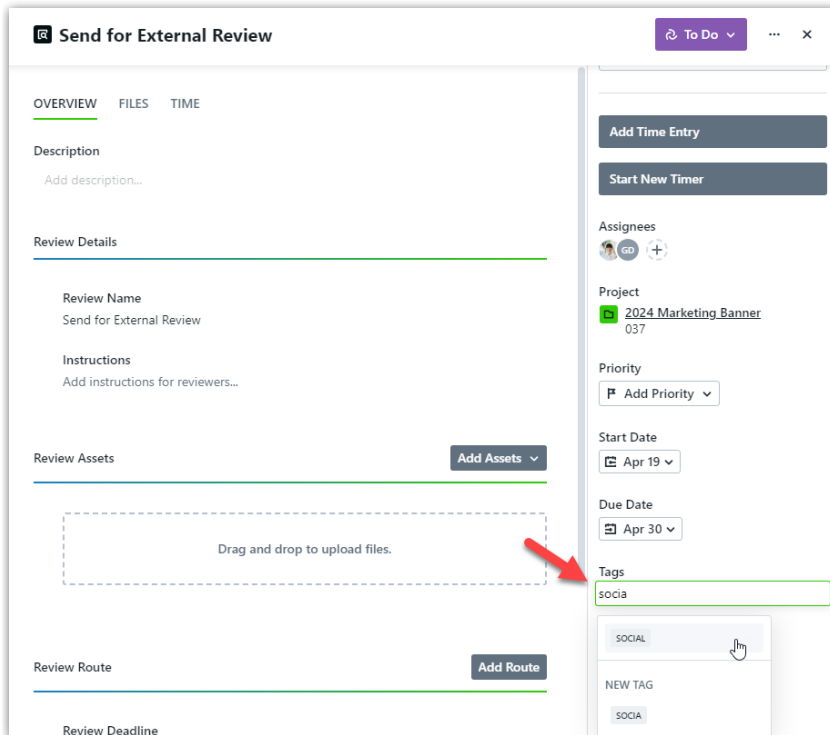
To add an assignee/member, click the plus icon under the **Details** tab. Click to select the Team Members/Admins you would like to assign to the work item. A green checkmark will display on the right side of each member selected. To clear all members from the project, select **Clear**.




If a user is assigned to a lower tier item, they will automatically be assigned to the higher tier items. (Ex. Task -> Project, Project -> Campaign).

Tags

Tags (<https://guide.lytho.com/help/managing-tags>) are system-wide fields that can help categorize and filter Campaign, Project, Task, and Proof data. From the **Details** tab, click **Add Tag...** below the Start and Due Dates to assign a new or existing tag. Once you begin typing, the system will search for and display any [existing tag](https://guide.lytho.com/help/managing-tags#creating-and-editing-tags-at-the-account-level) (<https://guide.lytho.com/help/managing-tags#creating-and-editing-tags-at-the-account-level>) with matching characters. You can click to select the appropriate tag when available, or continue typing to create a new tag. Click the tag you would like to create, or **hit return** when finished typing.

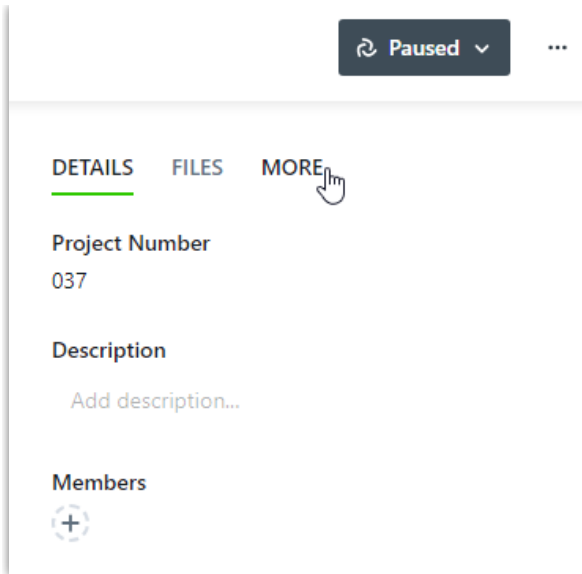


Custom Fields*

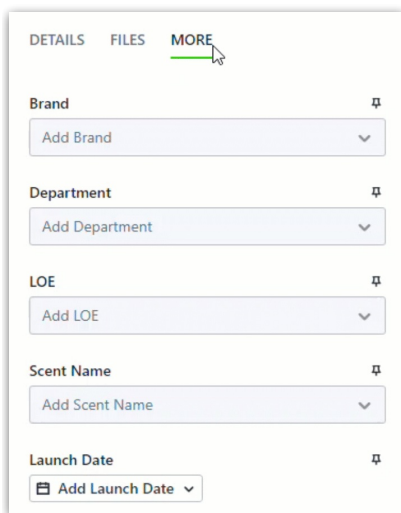
**Available only to Business & Enterprise Customers*

**Limited to Campaigns and Projects*

Custom Fields (<https://guide.lytho.com/help/managing-custom-fields>) enable you to add unique fields to Projects and Campaigns in order to search for and report on valuable details that are unique to your process and business. Common examples might include Department, Channel, Brand, Line, Part Number, etc. From a Campaign or Project, under the **Details** tab, select **More**.



Any Custom Fields [that your team has created](https://guide.lytho.com/help/managing-custom-fields#creating-custom-fields) will be stored here. To pin a Custom Field to the main Details section, select the **Pin** icon to the right of the Custom Field.



Pinned Custom Fields will now appear on the bottom of the Details tab.

DETAILS
FILES
MORE

Project Number
037

Description
Add description...

Members
+

Priority
Add Priority

Start Date
Add Start Date

Due Date
Add Due Date

Add Tag

Tracked Time
0h

Brand
Add Brand

Department
Add Department

Reorganizing Work

If a lower tier work item isn't assigned to a higher tier work item or the assignment needs to be updated, select the actions menu in the top right corner of the lower tier work item and select **Move to [...]**.

Send for External Review
To Do

OVERVIEW
FILES
TIME

Description
Add description...

Review Details

Review Name
Send for External Review

Instructions
Add instructions for reviewers...

Review Assets
Add Assets

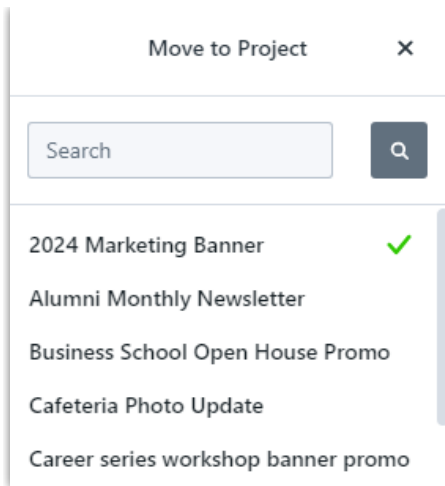
Start New Timer
Move to Project
Remove from Project
Duplicate
Archive
Delete

Project
2024 Marketing Banner
037

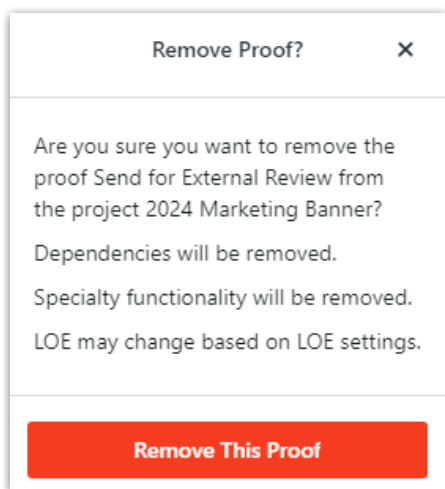
Priority
Add Priority

Start Date
Apr 19

Search for or select from the list of higher tier work items to move your work item.



To remove an assignment, select the actions menu in the top right corner of the lower tier work item and select **Remove from [...]**.



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