Managing your views

In this article

Learn how to create, save, and manage your project views.
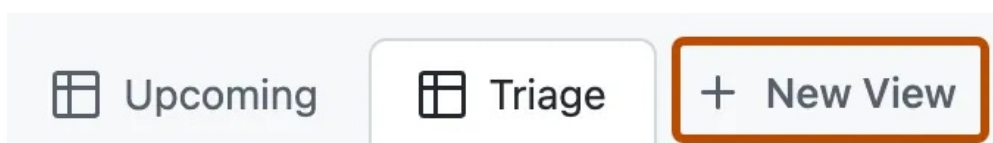
Creating a project view 🔗

Project views allow you to quickly view specific aspects of your project. Each view is displayed on a separate tab in your project.

For example, you can have:

- A view that shows all items not yet started (filter on "Status").
- A view that shows the workload for each team (group by a custom "Team" field).
- A view that shows the items with the earliest target ship date (sort by a date field).

To add a new view:
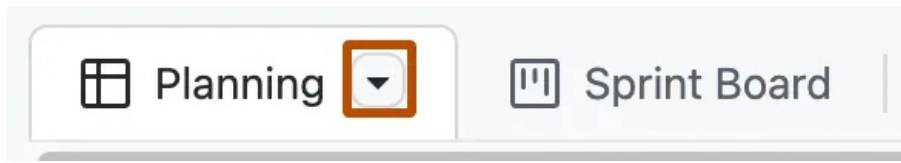
1 To the right of your existing views, click **New view**

Alternatively, open the project command palette by pressing `Command` + `K` (Mac) or `Ctrl` + `K` (Windows/Linux) and start typing "New view."

The new view is automatically saved.

Duplicating a view 🔗

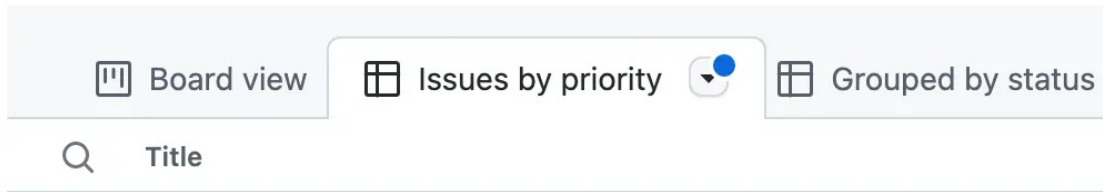You can duplicate an existing view and use it as a base to make further changes.

1 Switch to the view you want to duplicate.

2 Click ▾ next to the name of the currently open view.
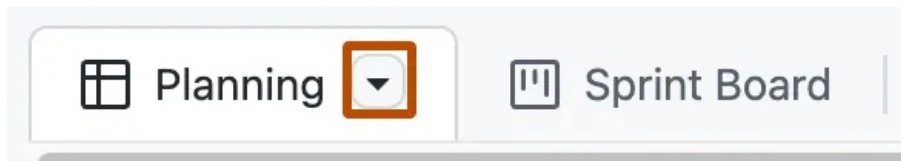
3 Click ⫿▢ **Duplicate view**.

Saving changes to a view 🔗

When you make changes to a view - for example, sorting, reordering, filtering, or grouping the data in a view - a dot is displayed next to the view name to indicate that there are unsaved changes.

If you don't want to save the changes, you can ignore this indicator. No one else will see your changes.

1 Click ▾ next to the name of the currently open view.

2 Click **Save changes**.

Alternatively, open the project command palette by pressing `Command` + `K` (Mac) or `Ctrl` + `K` (Windows/Linux) and start typing "Save view."
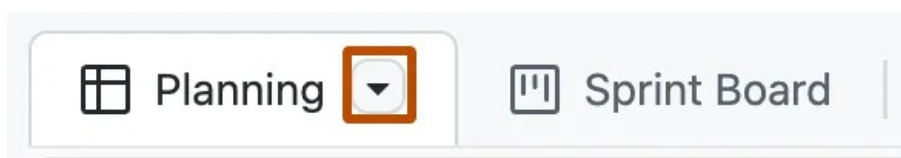
Reordering saved views 🔗

To change the order of the tabs that contain your saved views, click and drag a tab to a new location. The new tab order is automatically saved.

Renaming a saved view 🔗

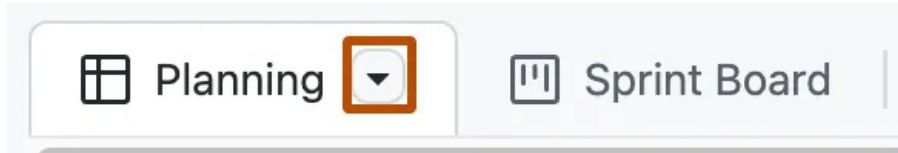You can rename your saved views. The name change is automatically saved.

1 Switch to the view you want to rename.

2 Click ▾ next to the name of the currently open view.

3. Click ✏️ **Rename view**.

4. Type the new name for your view.

5. To save your changes, press `Return` .

Deleting a saved view 🔗

1. Switch to the view you want to delete.

2. Click ▾ next to the name of the currently open view.

3. Click 🗑️ **Delete view**.

Alternatively, open the project command palette by pressing `Command` + `K` (Mac) or `Ctrl` + `K` (Windows/Linux) and start typing "Delete view."