Views & Charts

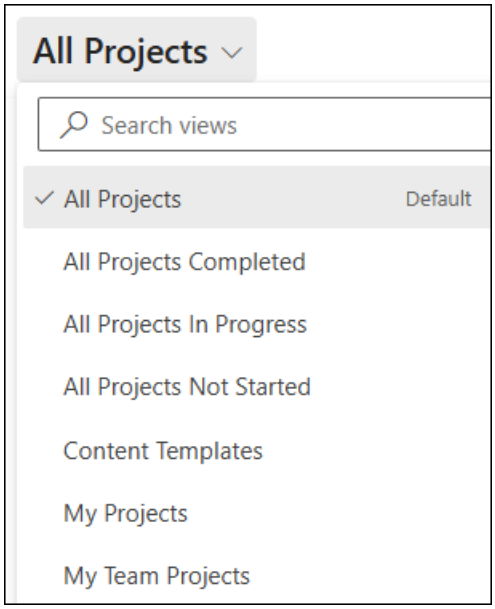
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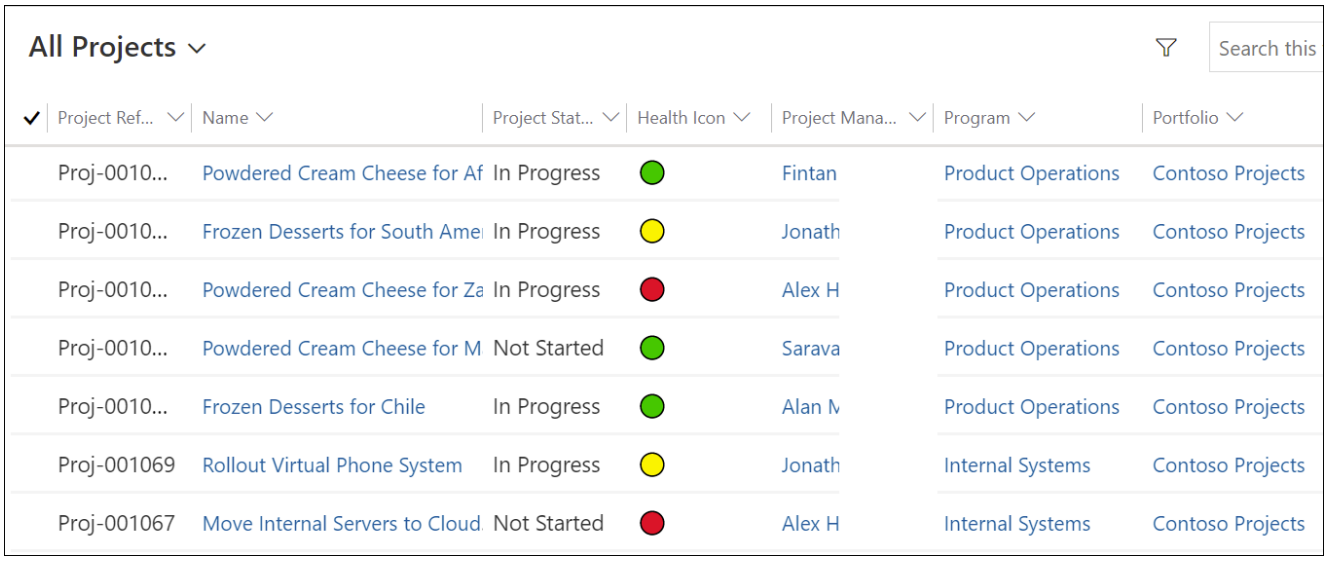
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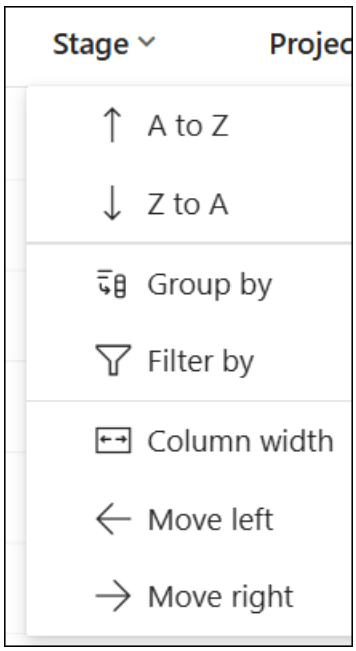
System Views

The various BrightWork 365 site map sections such as Requests, Projects, and Portfolios, each come with their own set of out of the box **system views,** in addition to any custom personal or system views you configured on your own. Different views will present a different number of rows of project information depending on view filters, and/or a different set of columns across the top.





Depending on the column type, there are various options for altering how column data is presented:



Admin Area > Dynamics Teams

The Dynamics Teams link in the Admin Area of BrightWork 365 consists of system views, mostly filtered on the different team types in BrightWork 365. These views are included by Microsoft Power Platform and are generally not utilized directly by end users of the solution. An entry that is utilized by end users is the "Senior Managers" Dynamics Team, which can be found in the Local Business Owner Teams view of the Dynamics Teams link. This team is used to limit the users that are able to view cost and budget data for portfolios and programs, and to define the users returned in the following lookups:

- Group Manager

- Group Manager
- Portfolio Manager
- Portfolio Sponsor
- Program Manager
- Program Sponsor
- (Request) Reviewers
- (Request) Approvers

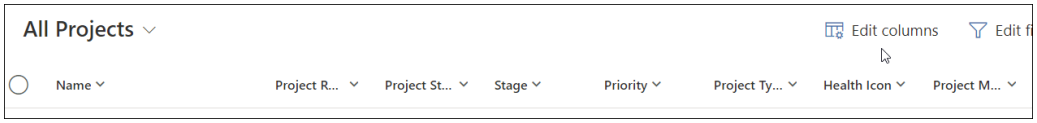
See User Management for more information about the Senior Managers team.

Introduction

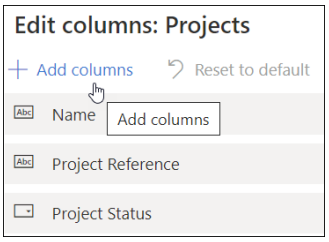
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Configure a Personal View

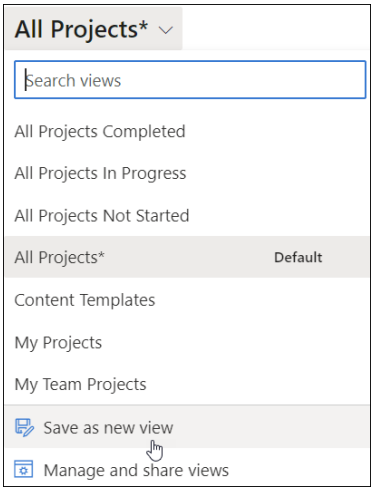
1. Within a view in the section of interest (e.g., Requests, Projects, Portfolios), click **Edit columns**.



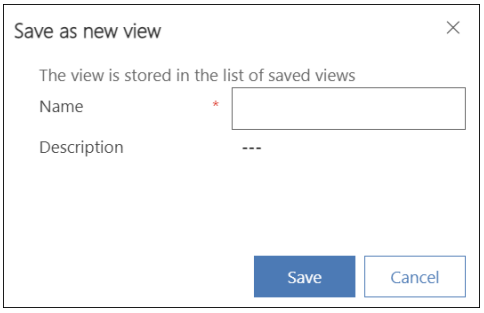
2. Edit the columns:
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    Or,
    2. To add new columns to the view: **Click Add columns**, select the column to add, click **Close**, reorder the column as necessary, and click **Apply**.



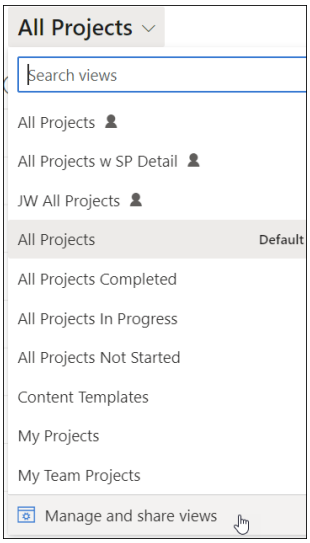
3. If the view is only meant to be temporary, the process is complete. If you would like to permanently save the view as a personal view:
    1. In the view selector drop-down click **Save as new view**.



2. Fill in the fields and click **Save** to save the view as a personal view.



3. To share a personal view:
    1. In the view drop-down click **Manage and share views**.



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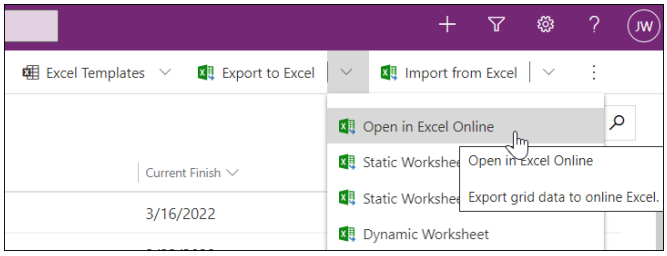
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It is possible to make bulk updates to certain fields in multiple records using Excel Online.

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Click **Open in Excel Online** from the Excel menu at the top of the screen, make any necessary changes and save the changes.

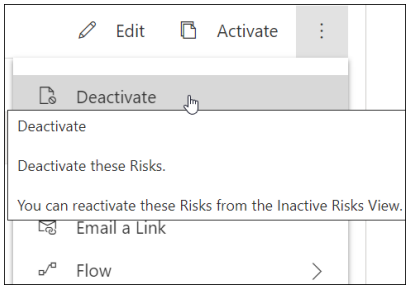


Item Activation Status

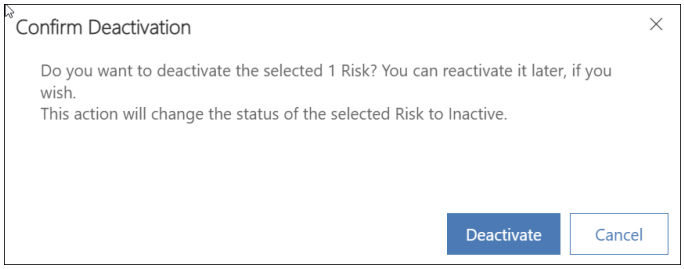
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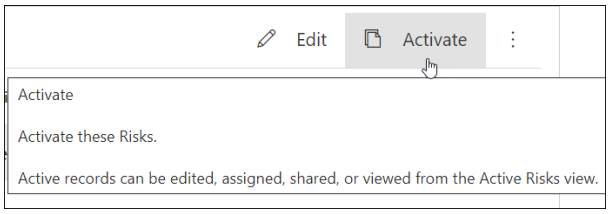


2. Confirm the deactivation.



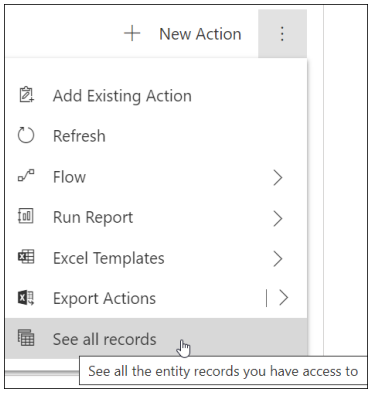
To activate an item:

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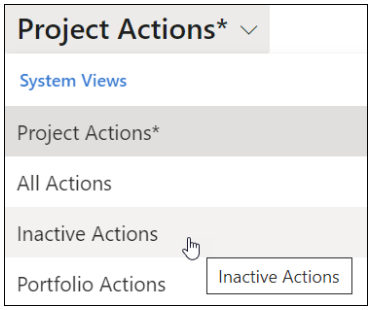


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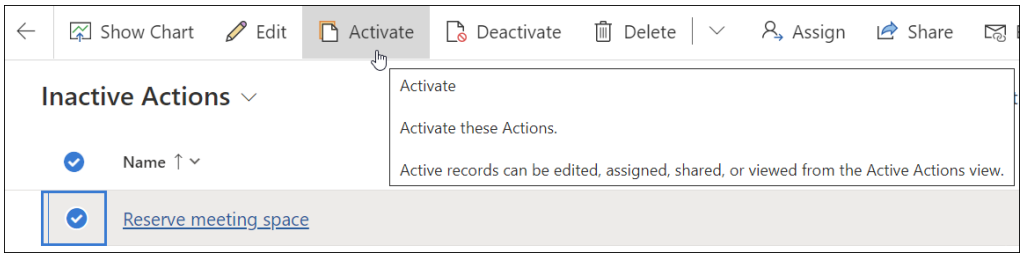
1. In the current view click **See all records** in the menu.



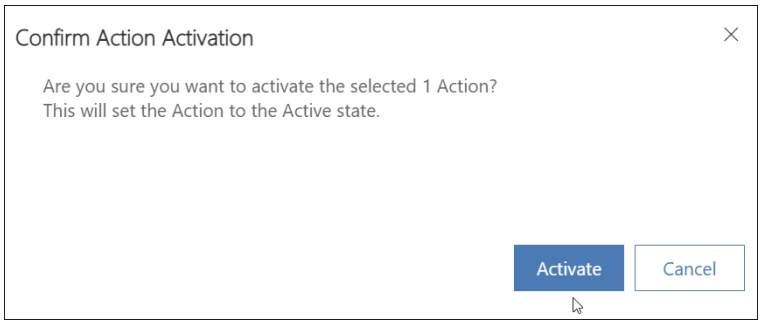
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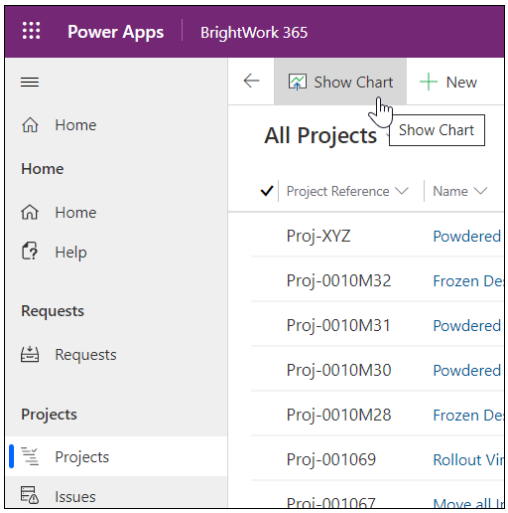
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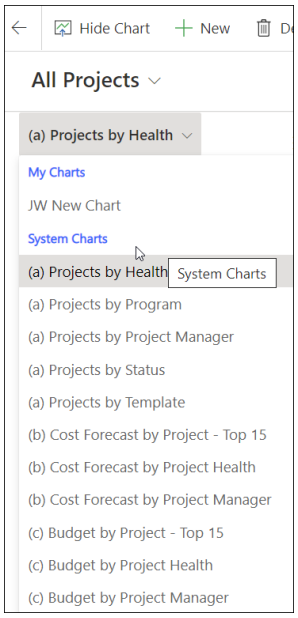
5. Return to the original view.

System Charts

The BrightWork 365 solution comes with a set of system charts accessible from the different Areas. To access the available charts click into a section on the Site Map and then click **Show Chart**.



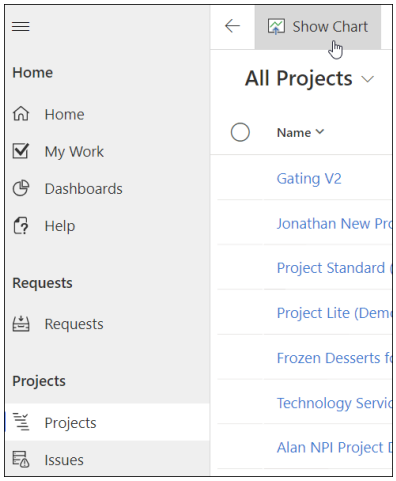
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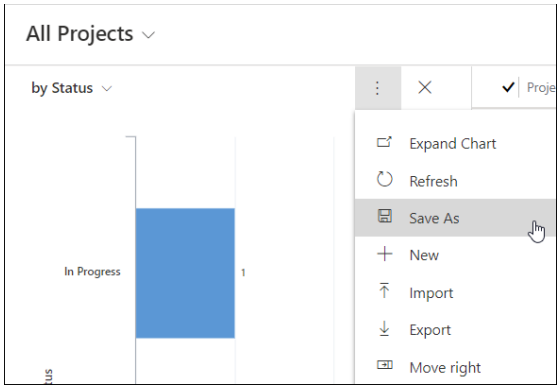
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Configure a Personal Chart

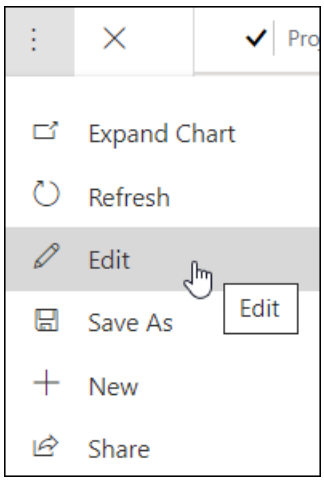
1. Click **Show Chart** at the top of a view's page.

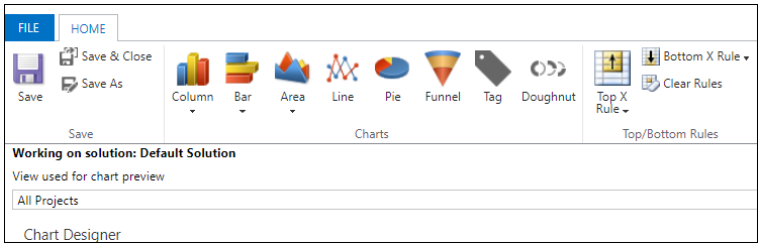


2. Click the ellipses next to an existing system chart you would like to use as the basis for your personal chart, choose **Save As** in the menu, fill in the fields, and click **Save**.



3. If you would like to make changes to your new personal chart, choose **Edit** in the menu and make necessary changes in the Chart Designer.

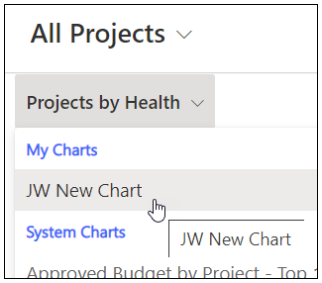




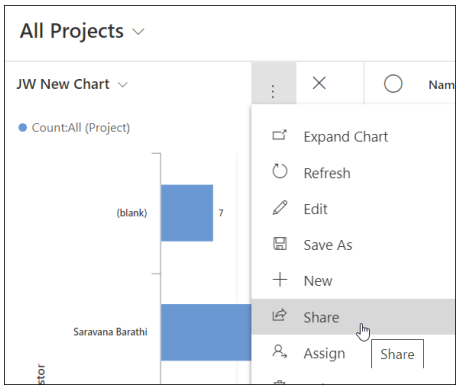
4. Save your changes.

Share a Personal Chart

1. Select the personal chart in the chart drop-down.



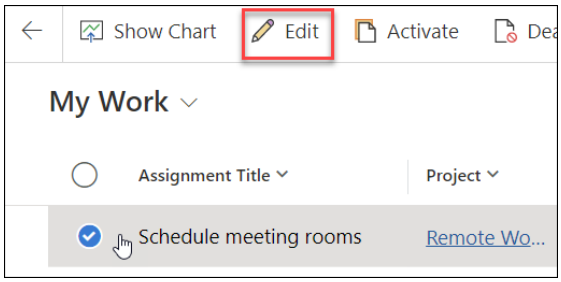
2. Click the ellipses next to the personal chart and click **Share**.



3. Add the user or team you would like to share the personal chart with.
4. Assign permissions and click **Share**.

Edit Items in a List View

1. Click to the left of the first position column to highlight the row.
2. Click **Edit** at the top of the page.

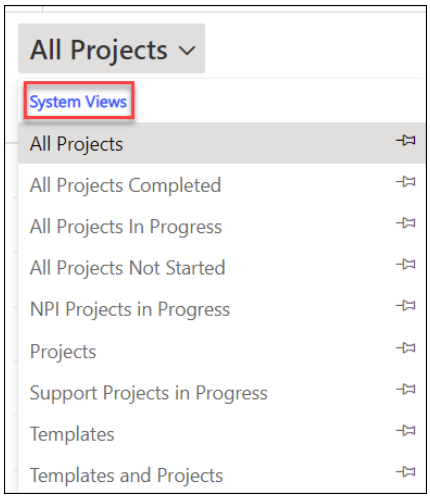


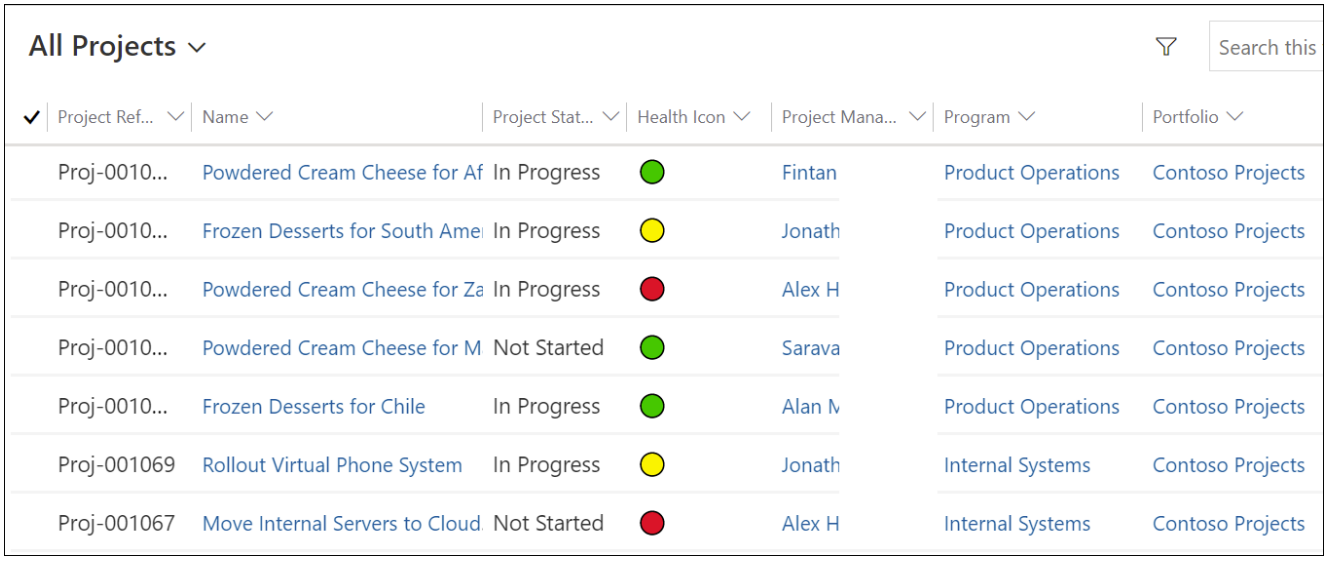
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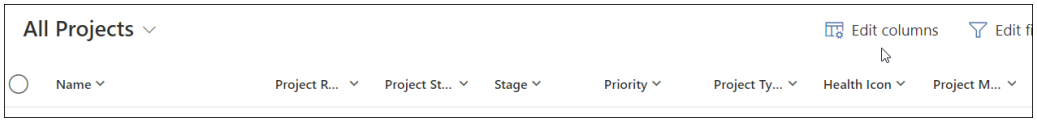


Introduction

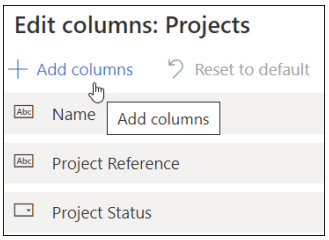
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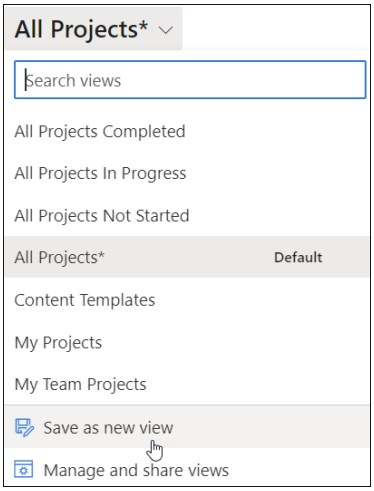
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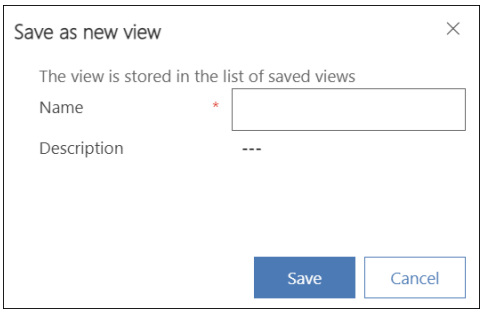
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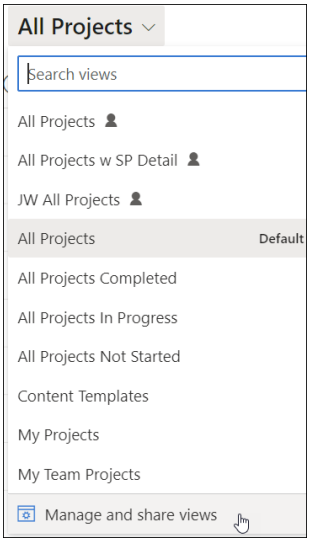
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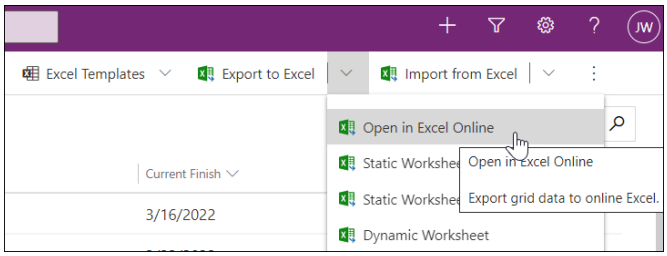
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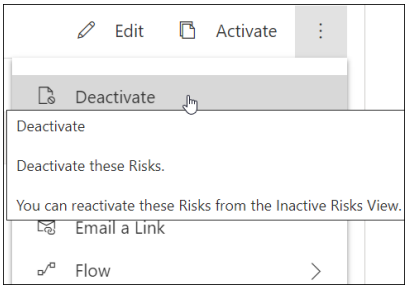


Item Activation Status

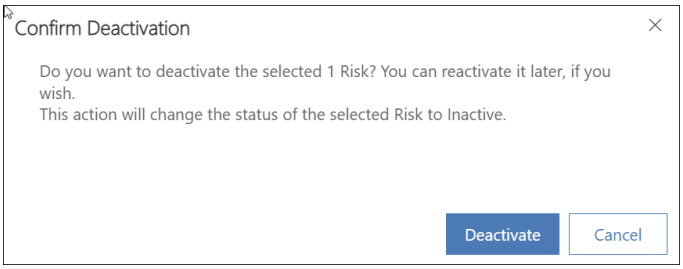
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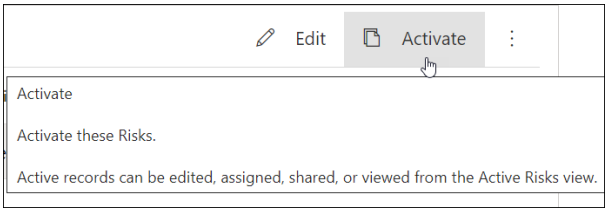


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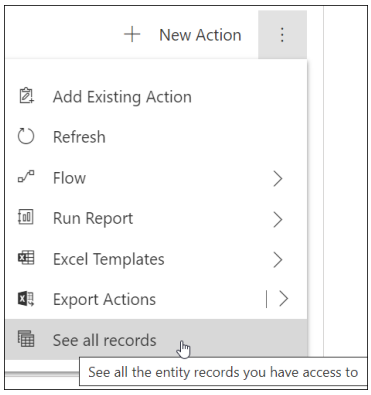
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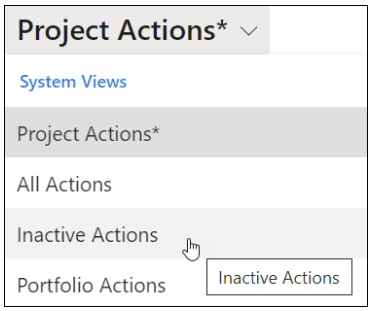


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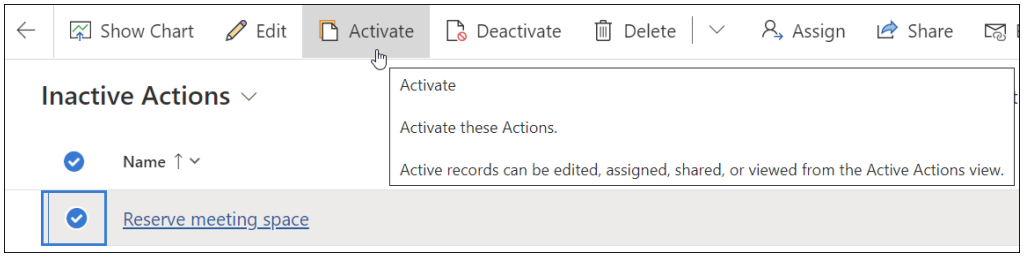
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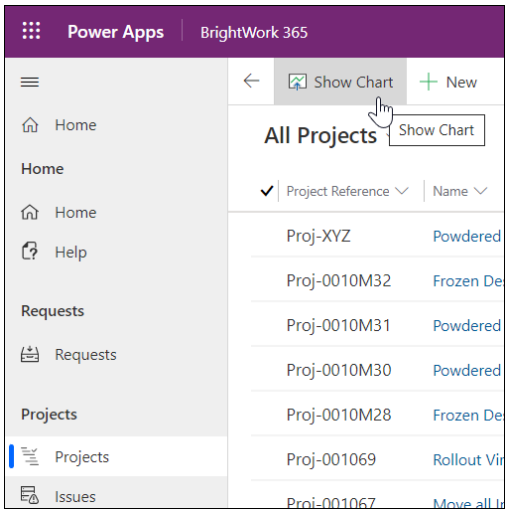
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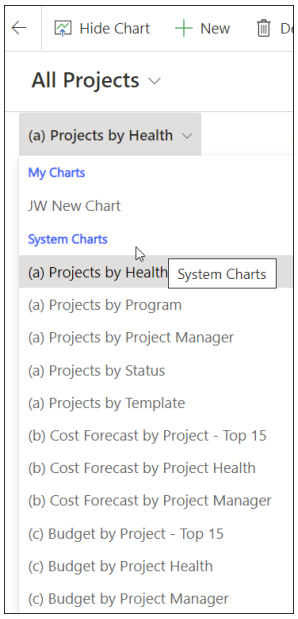
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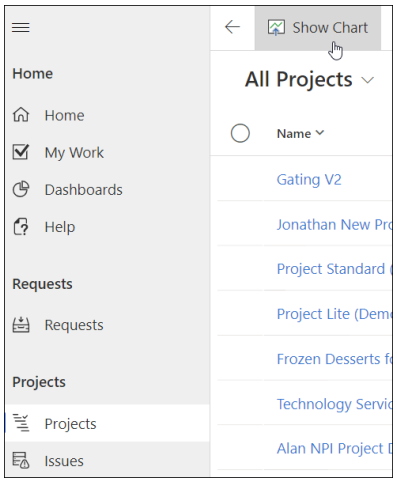
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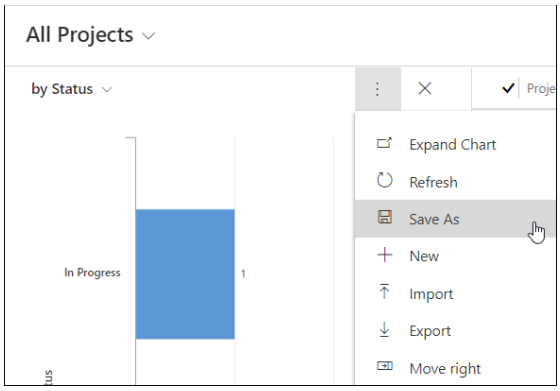
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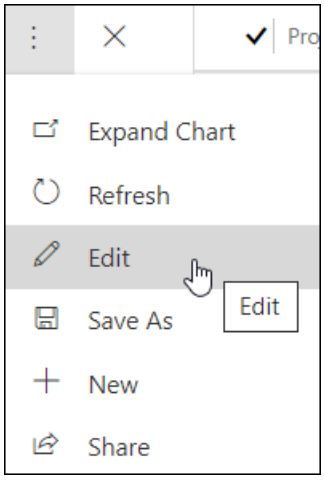
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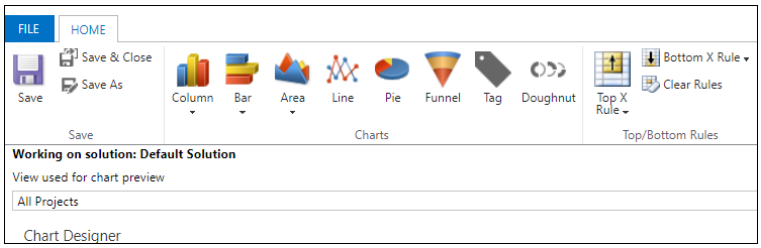


2. Click the ellipses next to an existing system chart you would like to use as the basis for your personal chart, choose **Save As** in the menu, fill in the fields, and click **Save**.



3. If you would like to make changes to your new personal chart, choose **Edit** in the menu and make necessary changes in the Chart Designer.

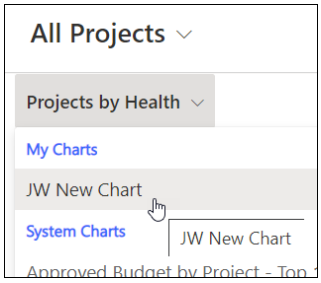




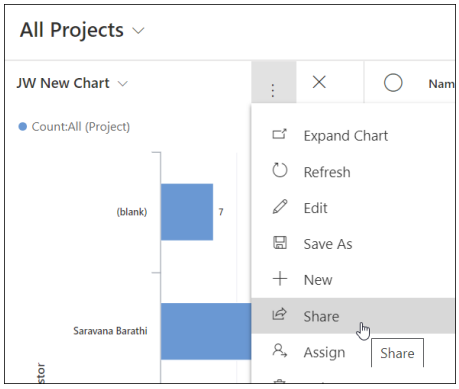
4. Save your changes.

Share a Personal Chart

1. Select the personal chart in the chart drop-down.



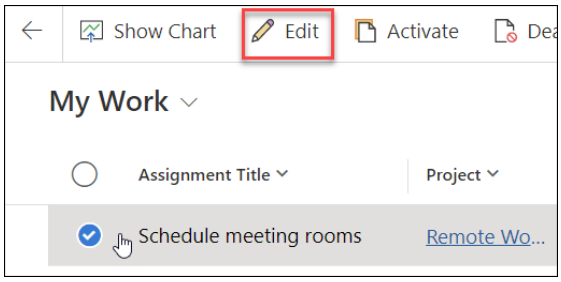
2. Click the ellipses next to the personal chart and click **Share**.



3. Add the user or team you would like to share the personal chart with.
4. Assign permissions and click **Share**.

Edit Items in a List View

1. Click to the left of the first position column to highlight the row.
2. Click **Edit** at the top of the page.


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Edit
Activate
My Work
Assignment Title
Project
Schedule meeting rooms
Remote Wo...