

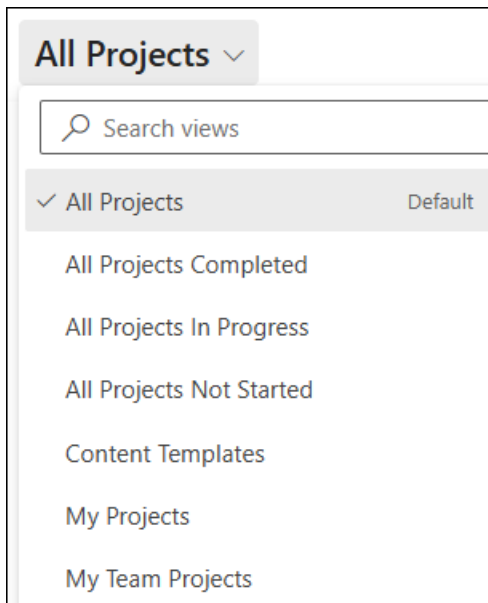
Views & Charts

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Caution Deleting a row of data from any View cannot be undone.

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.



The screenshot shows a dropdown menu for 'All Projects'. At the top is a search bar labeled 'Search views'. Below it is a list of view options: 'All Projects' (marked as 'Default'), 'All Projects Completed', 'All Projects In Progress', 'All Projects Not Started', 'Content Templates', 'My Projects', and 'My Team Projects'.

All Projects ▾	
Search views	
✓ All Projects	Default
All Projects Completed	
All Projects In Progress	
All Projects Not Started	
Content Templates	
My Projects	
My Team Projects	

All Projects ▾							Search this
✓	Project Ref... ▾	Name ▾	Project Stat... ▾	Health Icon ▾	Project Mana... ▾	Program ▾	Portfolio ▾
	Proj-0010...	Powdered Cream Cheese for Af	In Progress	●	Fintan	Product Operations	Contoso Projects
	Proj-0010...	Frozen Desserts for South Ame	In Progress	●	Jonath	Product Operations	Contoso Projects
	Proj-0010...	Powdered Cream Cheese for Za	In Progress	●	Alex H	Product Operations	Contoso Projects
	Proj-0010...	Powdered Cream Cheese for M	Not Started	●	Sarava	Product Operations	Contoso Projects
	Proj-0010...	Frozen Desserts for Chile	In Progress	●	Alan N	Product Operations	Contoso Projects
	Proj-001069	Rollout Virtual Phone System	In Progress	●	Jonath	Internal Systems	Contoso Projects
	Proj-001067	Move Internal Servers to Cloud	Not Started	●	Alex H	Internal Systems	Contoso Projects

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

Stage ▾	Project
↑ A to Z	
↓ Z to A	
🗑️ Group by	
🔍 Filter by	
📏 Column width	
← Move left	
→ Move right	

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

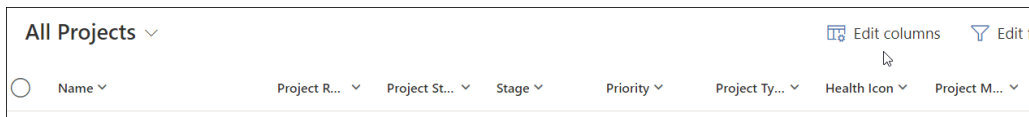
See [User Management](#) for more information about the Senior Managers team.

Introduction

In BrightWork 365, a Personal View is a type of view that a user can create by themselves and customize specifically for their own needs and use within the app. Unlike system views, which are predefined and available to all users, personal views are unique to each individual user, although they can be shared with colleagues if desired.

Configure a Personal View

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

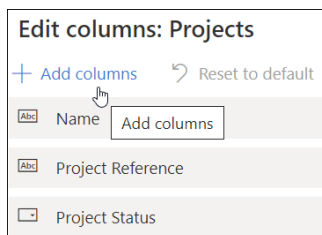


2. Edit the columns:

1. Reorder or remove columns using the ellipses that appears when you hover over an existing column name and click **Apply**.

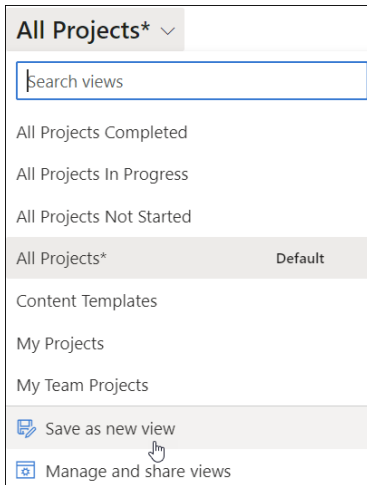
Or,

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:

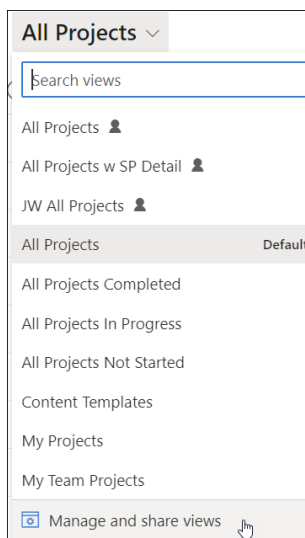
1. In the view selector drop-down click **Save as new view**.



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**.



2. Click on the ellipses next to the view you want to share and click **Share**.
 3. Search for and select the user or team you would like to share the personal view with.
 4. Assign permissions and click **Share**.
-

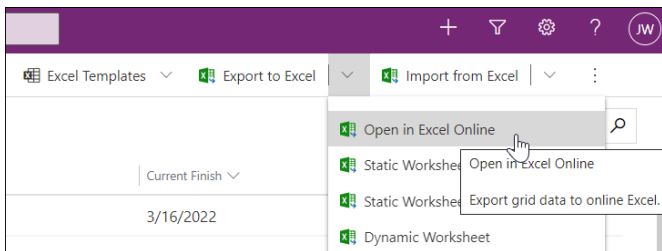
Bulk Updates

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

Note Do not make edits to calculated columns such as the date column **Current Finish**.

Open in Excel Online

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

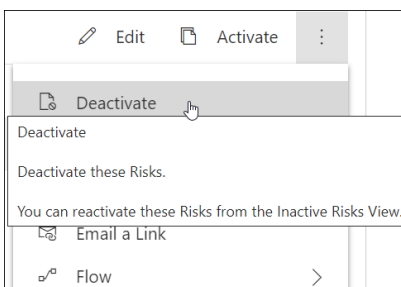


Item Activation Status

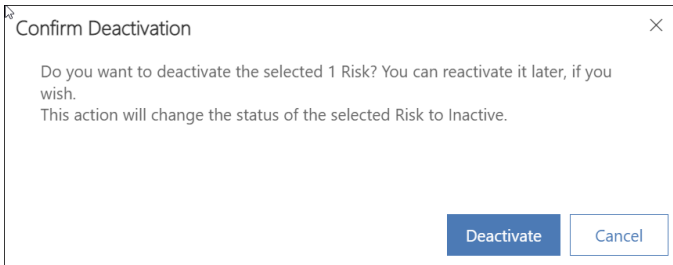
Items can be deactivated and activated throughout BrightWork 365 which will affect their visibility in views. Deactivated records will be locked. Users with edit permission can activate a deactivated record.

To deactivate an item:

1. Select the item row and click Deactivate in the menu.

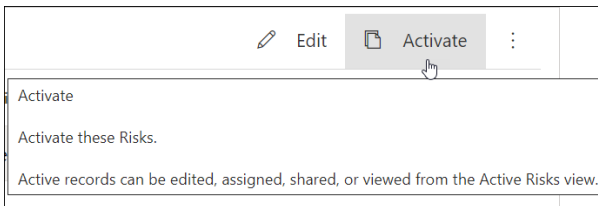


2. Confirm the deactivation.



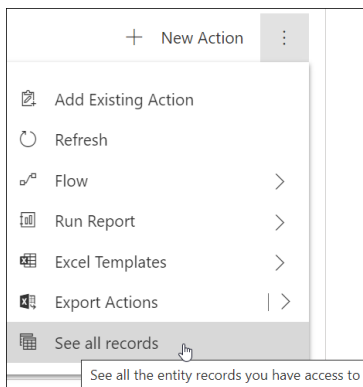
To activate an item:

1. Select the deactivated item row and click Activate in the menu.

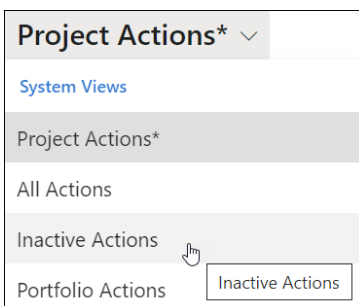


Deactivated items may be removed from certain views. To find these items in order to activate them once again:

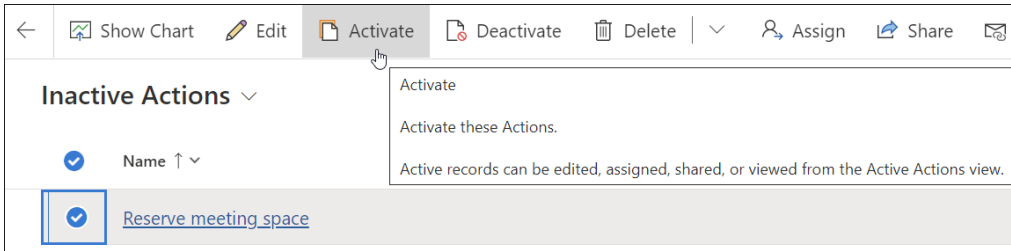
1. In the current view click **See all records** in the menu.



2. Change the resultant screen's view to the Inactive view.



3. Select the item's row and click Activate.



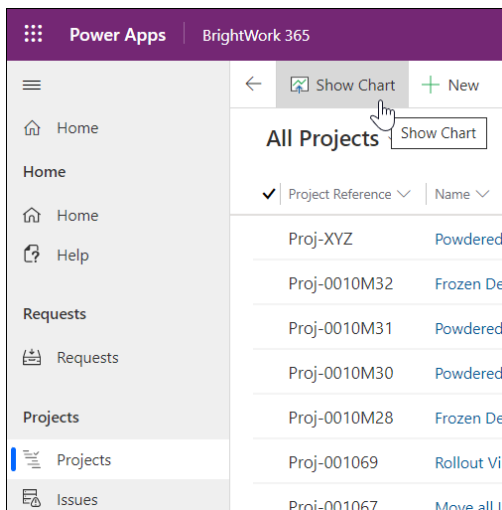
4. Confirm the activation.



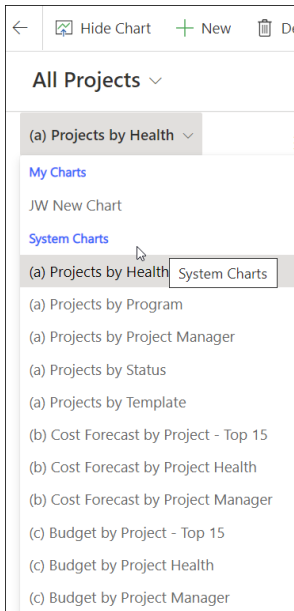
5. Return to the original view.

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**.



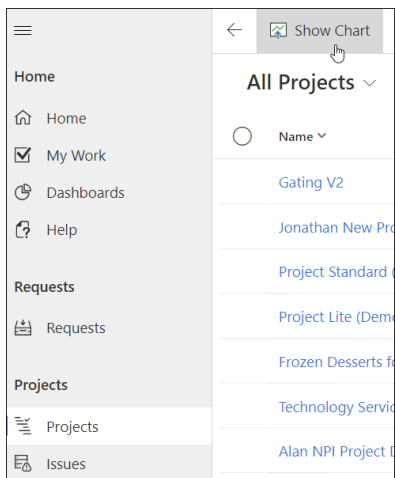
Click on the drop-down arrow to view the available System Chart options.



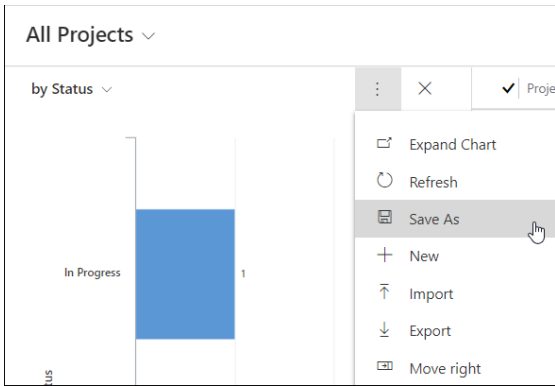
Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Configure a Personal Chart

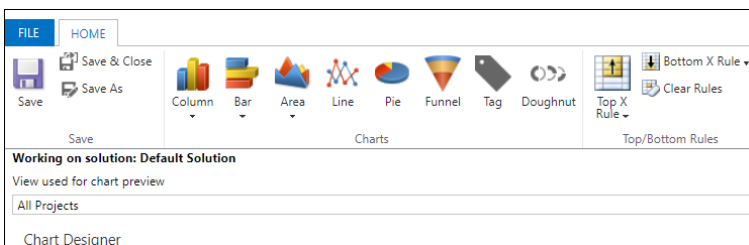
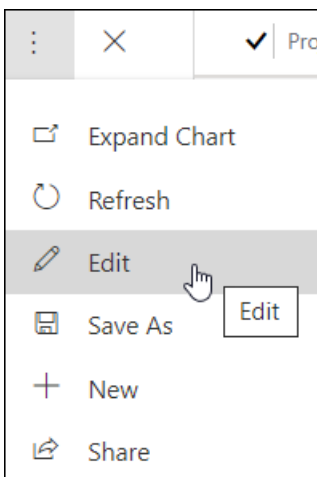
1. Click **Show Chart** at the top of a view's page.



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**.



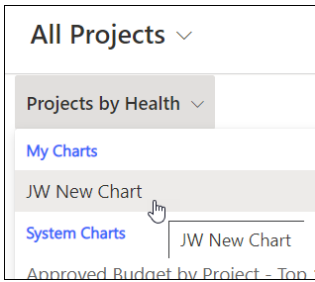
3. If you would like to make changes to your new personal chart, choose **Edit** in the menu and make necessary changes in the Chart Designer.



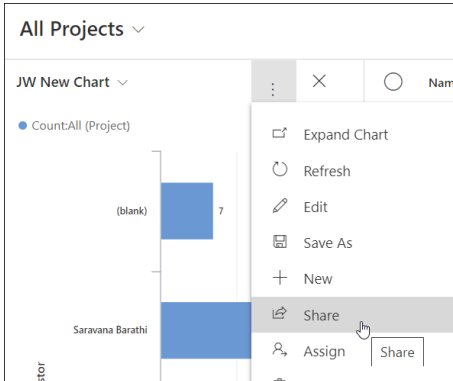
4. Save your changes.

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.

