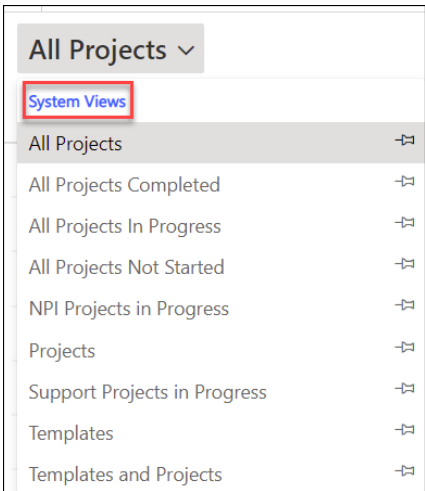# Views & Charts

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

> **Note** This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

> **Caution** Deleting a row of data from any View cannot be undone.
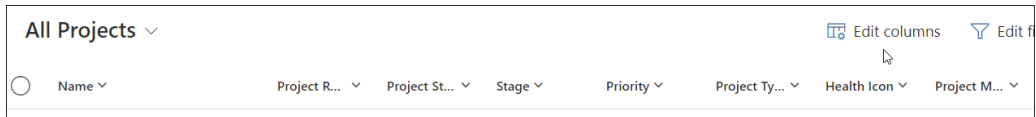
System Views

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.

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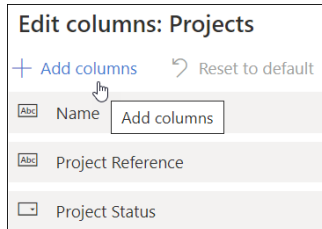

2. Edit the columns:
    1. Reorder or remove columns using the ellipses that appears when you hover over an existing column name and click **Apply**.
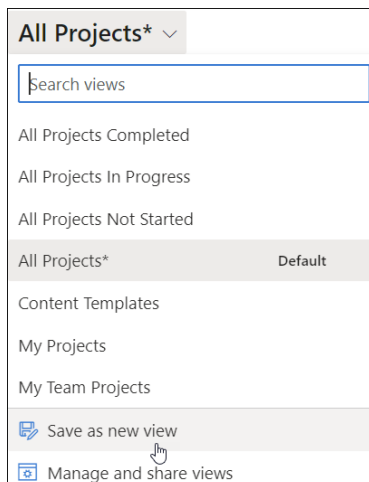   Or,
    2. To add new columns to the view: **Click Add columns**, select the column to add, click **Close**, reorder the column as necessary, and click **Apply**.
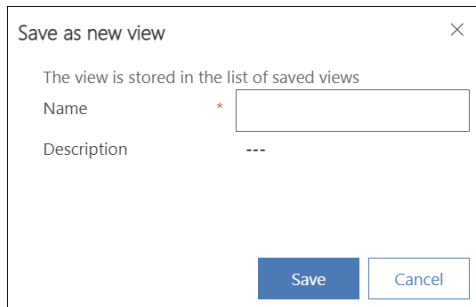

3. If the view is only meant to be temporary, the process is complete. If you would like to permanently save the view as a personal view:
    1. In the view selector drop-down click **Save as new view**.

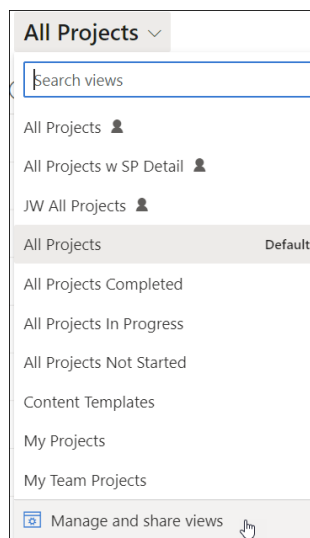   2. Fill in the fields and click**Save** to save the view as a personal view.

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.
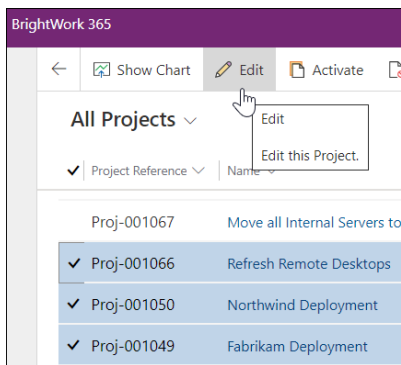   4. Assign permissions and click **Share**.

Views and Bulk Updates

It is possible to make bulk updates to certain fields in multiple records from a view screen using a couple of different options.

Note: Do not make edits to calculated columns such as the date column **Current Finish**.
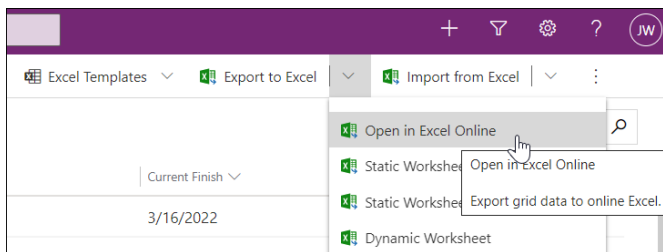
Option 1: Use the Edit Option

Select multiple rows in a view and click Edit in the menu bar.

Option 2: Open in Microsoft Excel Online

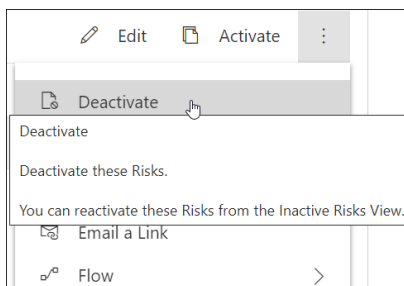Click Open in Excel Online from the Excel menu.
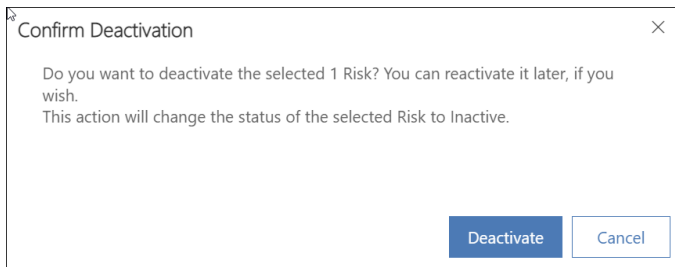

Item Activation Status & Views

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:

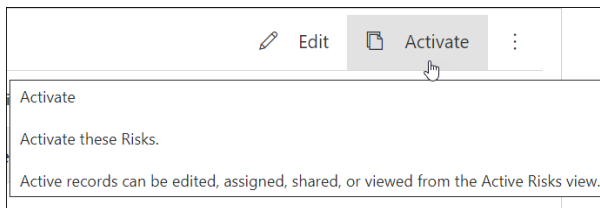1. Select the item row and click Deactivate in the menu.
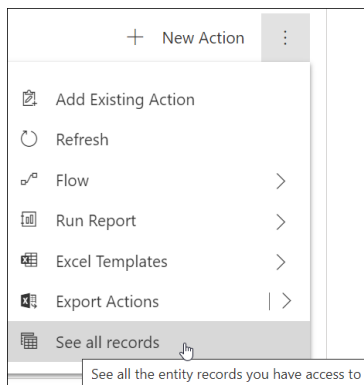

2. Confirm the deactivation.

Confirm Deactivation ✕

Do you want to deactivate the selected 1 Risk? You can reactivate it later, if you wish.
This action will change the status of the selected Risk to Inactive.

[Deactivate] [Cancel]

To activate an item:

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

✏ Edit   🗋 Activate   ⋮

Activate

Activate these Risks.

Active records can be edited, assigned, shared, or viewed from the Active Risks view.
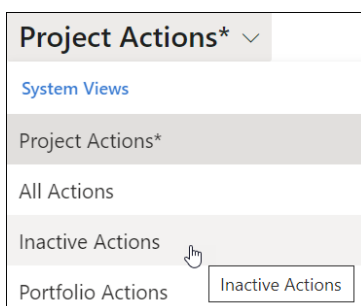
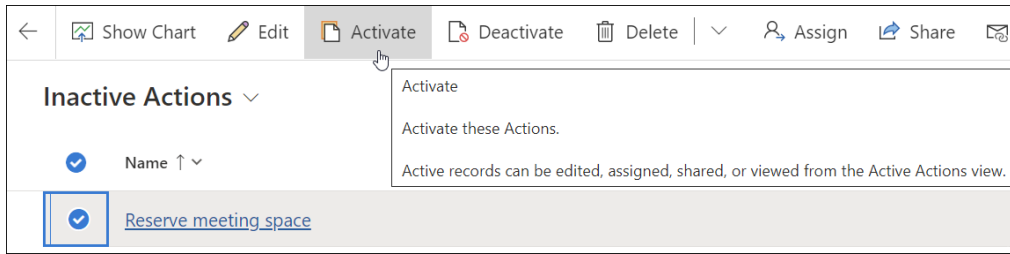Deactivated items may be removed from certain views. To find these items in order to activate them once again:

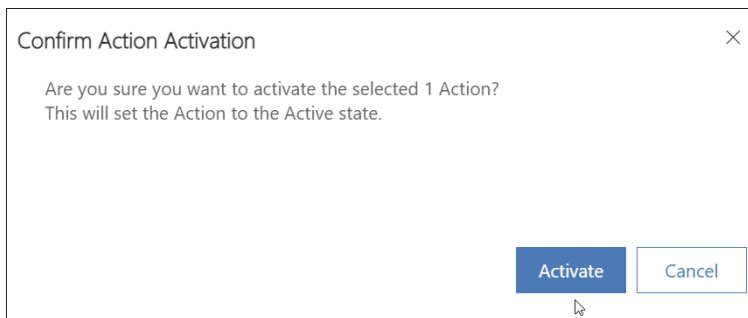1. In the current view click **See all records** in the menu.

\+ New Action   ⋮

🗐   Add Existing Action

🗘   Refresh

⧉   Flow   ⟩

📊   Run Report   ⟩

📧   Excel Templates   ⟩

📗   Export Actions | ⟩

🗒   See all records

See all the entity records you have access to

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

Project Actions* ⌄

System Views

Project Actions*

All Actions

Inactive Actions

Portfolio Actions   Inactive Actions

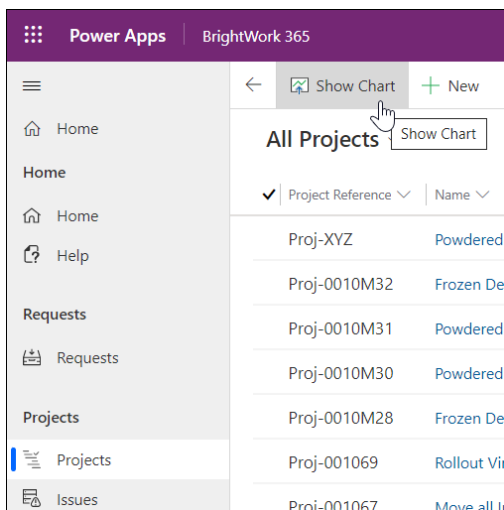3. Select the item's row and click Activate.
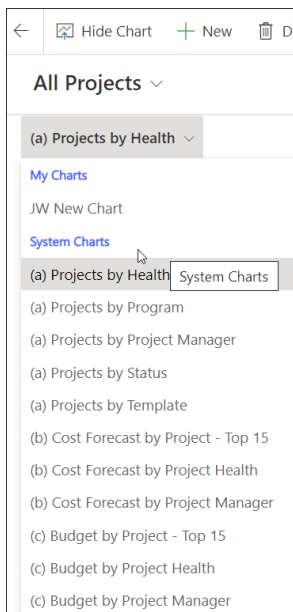

4. Confirm the activation.

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**.
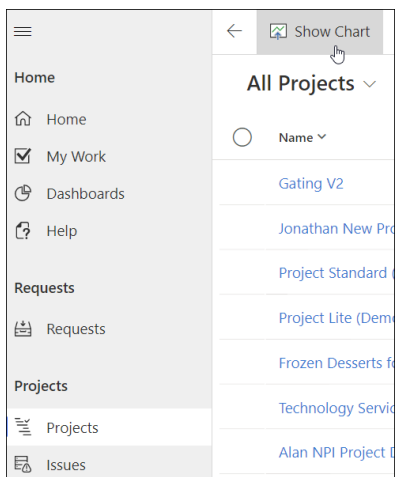

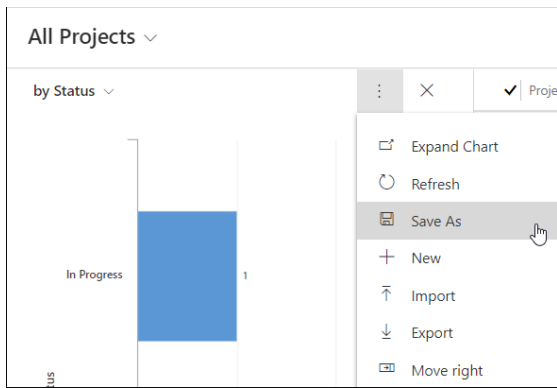Click on the drop-down arrow to view the available System Chart options.
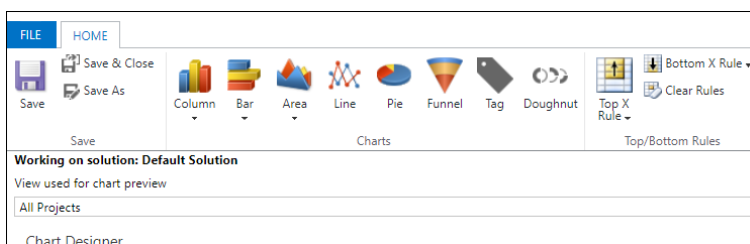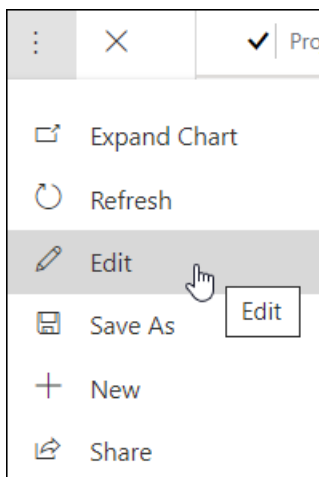
Configure a Personal Chart

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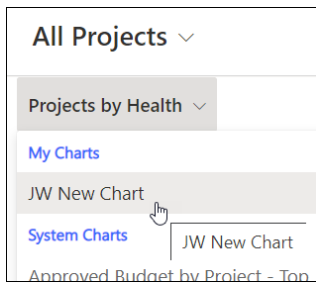
3. If you would like to make changes to your new personal chart, choose **Edit** in the menu and make necessary changes in the Chart Designer.
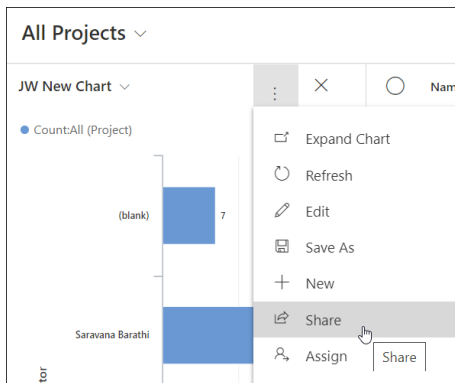

4. Save your changes.

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.