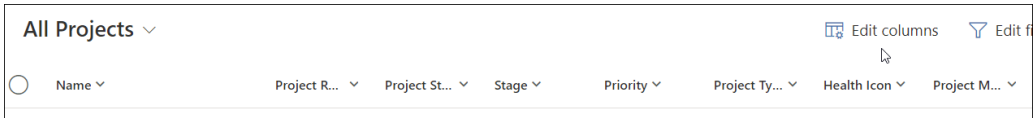


Configure a Personal View

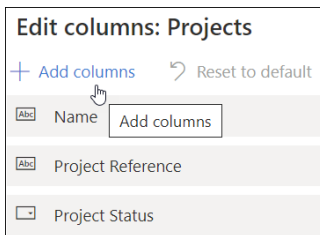
Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

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



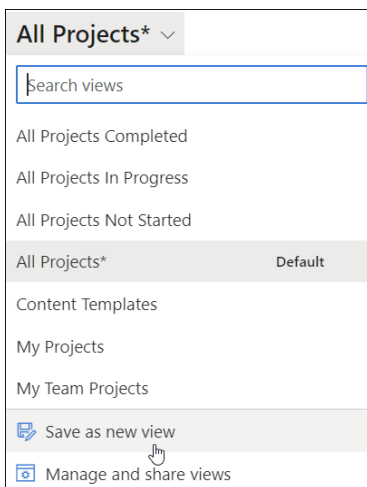
2. Edit the columns:

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**.

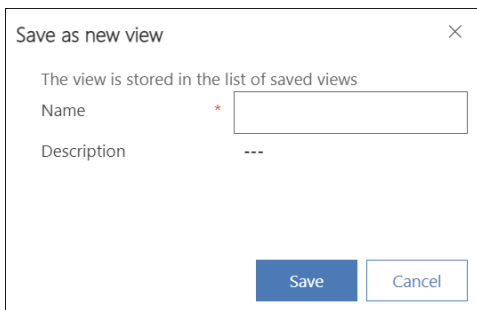


3. If the view is only meant to be temporary, the process is complete. If you would like to permanently save the view as a personal view:

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



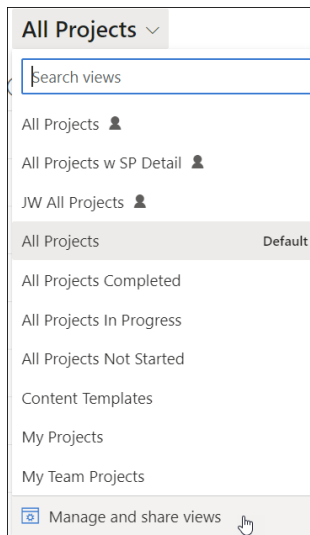
2. Fill in the fields and click **Save** to save the view as a personal view.



The dialog box is titled "Save as new view" and has a close button (X) in the top right corner. Below the title, it says "The view is stored in the list of saved views". There are two input fields: "Name" with a red asterisk indicating it is required, and "Description" with three dashes indicating it is optional. At the bottom, there are two buttons: "Save" (blue) and "Cancel" (white with blue border).

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**.