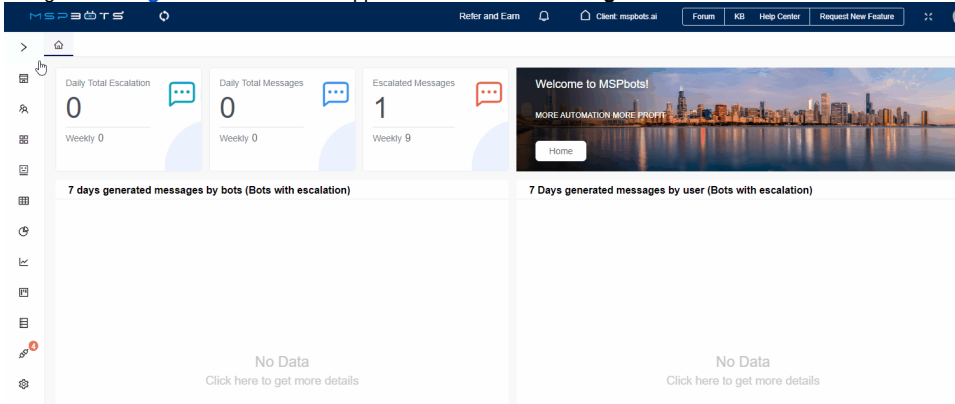


# Creating a Grid Widget

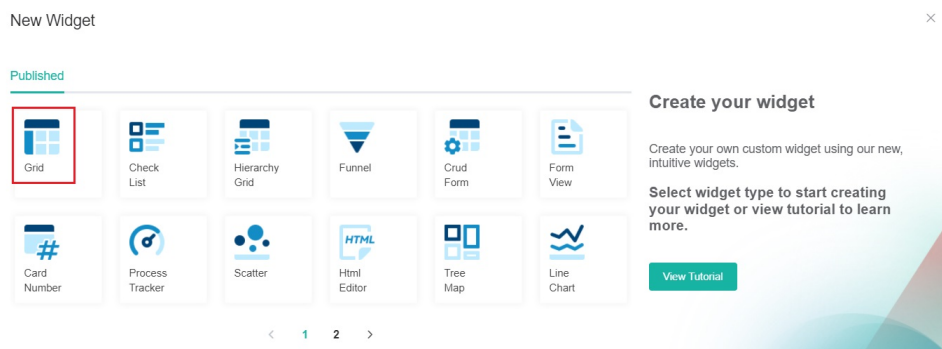
Watch this video or follow the procedure below to create a grid-type widget in MSPbots.

## How to create a Grid Widget:

1. Navigate to **Widgets** on the MSPbots app menu and click **New Widget**.





2. Choose the **Grid** widget type on the New Widget window.





3. When the Widget Builder window opens, go to the **Basic Setting** tab. Provide the following and click **Apply**:
  - **Name** - Give the widget a name.
  - **Description** - Give the widget a short description.


- **Role** - Select the roles that will have access to the widget.











## Basic Setting

\*

Name

(Sample) 7 Days Detailed Utilization Analysis

Description

A table showing the total actual hours for each technician in the last 7 days

More Info

Please Enter More Info

\*

Role

Admin

+ 1


▼


Tag

Tag

▼

4. Go to the **Dataset** tab. Click  and select **New Layer**.






## Data Source


+

Add New Layer

×



**New Layer**  
This is description about new layer



**Calculate Layer**  
This is description about calculate layer

5. In the Dataset window,

- a. Select the Dataset with the data you need.

Dataset:

ConnectWise Manage / Utilization daily time entry billable hour

Show datasource name as

- b. Enter a datasource name in the **Show datasource name as** field. (Optional)

- c. For **Columns Display**


- i. Go to the **Column Name** dropdown and select a field for the drill-through.

Columns Display:

Select All Clear All

Column Name	Alias	Business Type	
Select Column ^	fx	Enter Alias	Select Business Type ^
# tenant_code			
# log_date			
# cw_uid			
# total_time_entry			
# hours_billed_billable			+
# hours_billed_donotbill			+
# hours_billed_nocharge			
# actual hours			

- ii. Give an **Alias** and select a **Business Type** for your selection.

- iii. Click  to add more rows.

- d. For **Filter**


- i. Click  and choose either **Add Condition** or **Add Group**.


Columns Display:


Select All Clear All ☐ Keep Column

Column Name	Alias	Business Type	
id	fx	Id	Number
name	fx	Name	Text
business_id	fx	Business Id	Text

Filter:

AND OR 

Measure 

Dimension 

- ii. Select all the fields you want to filter.

- iii. Set conditions for each field using the subsequent two dropdowns. For a guide on each option on the list, refer to the article [What Conditions are Available for Creating Widgets?](#)

- iv. Select the logical operator **AND** or **OR** for the filter group.

Filter:

AND OR +

log\_date

In

{last/7/days/unincluded}

☐ Slicer

×

sys\_name

Is Not Empty

Select

☐ Slicer

×

total\_time\_entry


Is Not Empty

Select

☐ Slicer

×

- e. For **Measure**

- i. Click the  sign corresponding to **Measure**.

Measure



- ii. When the Measure window opens, select a **Summary Type**.  
iii. Select a computation option from the **Fields** list.  
iv. Type an **Alias** for the measure.  
v. Select a **Format Type**.  
vi. Click **Add**.

Measure

Advance

\* Summarize Type

Please Select


\* Fields

Please Select

\* Alias

Format Type

Please Select




☐ Distinct

Close

Add

- f. For **Dimension**,

- i. Click the  sign corresponding to Dimension.

Dimension



- ii. Select a grouping option from the **Fields** dropdown.  
iii. Give an **Alias** for the dimension.  
iv. Select a **Format Type**.

v. Click **Add**.

\* Fields

Please Select


\* Alias

Format Type


Please Select

Close Add

g. For **DrillThrough Order By**,

- Click the  button.
- Select a parameter to automatically sort drill-throughs.

DrillThrough Order By



Summary


Status Name

Type Name


Create Time

Sprint Name

h. For **Order By** (Optional)

- Click the  button.
- Select a parameter to sort the data.

Order By



count\_summary

groupBy\_create\_time\_date\_days

i. **Row Limit** - Select an option to set a limit on how many rows of data will be shown. (Optional)

Row Limit

All Data

j. **Remove duplicate data** - Select this option if you have duplicate data to delete.

☐ Remove duplicate data

- k. **Materialized** - Select an option according to your requirements.

Materialized

Not Materialized

Not Materialized

Materialized

None

- l. Click **Save** to keep the Dataset configuration.

*The optional settings **Order By** and **Row Limit** are also available in the **Widget Builder** window. The settings configured in this area are applied to the grid widget. If the configurations were done in the Dataset window, the settings are applied on the drill-down.*

Widget Builder

ⓘ

☰

⚙️

☰

🕒

Data Source

CW test data

+

Order By

+

Row Limit

All Data

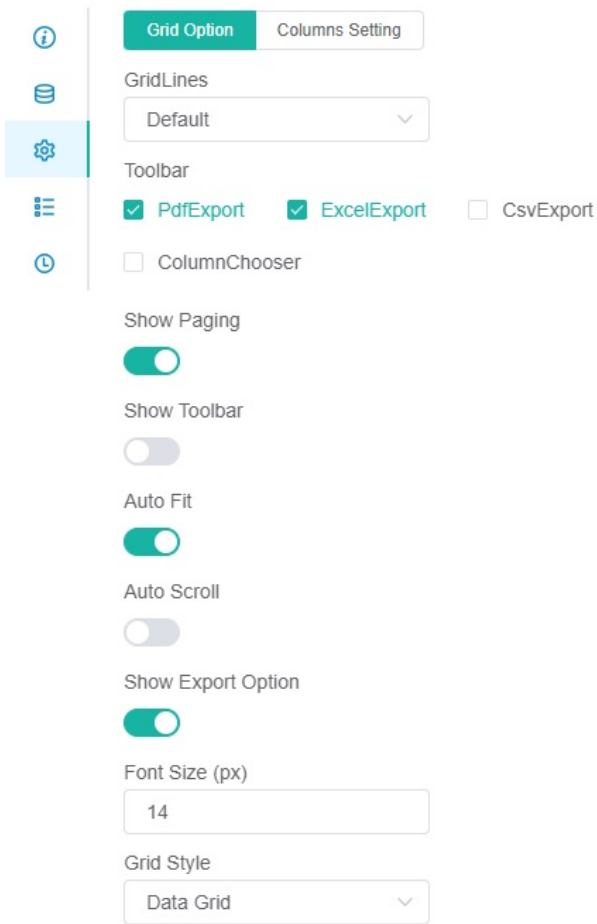
🗨️

[Outdent](#)

6. Go to the **Config** tab and configure the following settings:


a. Under **Grid Option**:

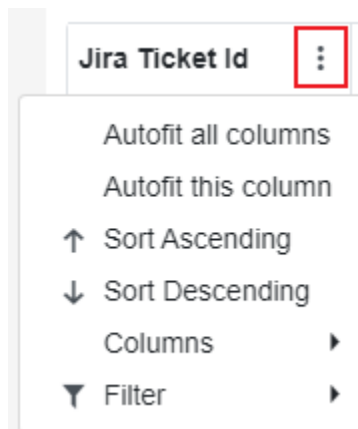
Widget Builder



The screenshot shows the 'Grid Option' settings in the 'Widget Builder'. The settings are as follows:

- GridLines**: Default
- Toolbar**: PdfExport (checked), ExcelExport (checked), CsvExport (unchecked)
- ColumnChooser**: unchecked
- Show Paging**: on
- Show Toolbar**: off
- Auto Fit**: on
- Auto Scroll**: off
- Show Export Option**: on
- Font Size (px)**: 14
- Grid Style**: Data Grid

- **Font Size** - Set the font size for the text in the table.
- **Grid Style** - Select the style of the grid for the table. Click  and select any of the following:
  - **Data Grid** - Shows all the tables
  - **Table** - Lets you customize the parameters to show on the widget by clicking.



- **Grid Lines** - Select the type of grid lines to use for the table. (default, both, none, horizontal, vertical)
- **Toolbar** - Select the file types for the export feature.
- **Show Paging** - If toggled on, this will show the paging settings at the bottom of the table.
- **Show Toolbar** - If toggled on, this will show the toolbar at the top of the table.
- **Auto Fit** - If toggled on, this will enlarge the page font size and users can scroll with the scroll bar to view the table. If toggled off, this will automatically adjust the page size to show all the data on that page.
- **Auto Scroll**
- **Show Export Option** - This option applies only when the **PDF** is the option selected for **Toolbar**.
  - If enabled, clicking **PDF Export** will show the following export options:

- Page orientation:
  - Portrait - vertical
  - Landscape - horizontal
- Page size:
 

Select the appropriate size.

Export Options

×

Page orientation: ☒ Portrait ☐ Landscape

Page Size:

Cancel

Export

- If disabled, clicking **PDF Export**, will export the PDF file with the following default settings:
  - Page orientation: Portrait
  - Page Size: A4

b. Under **Columns Setting**, edit the following options for each column:

- **Header Text** - Assign a column name.
- **Header Tooltip** - Add a tooltip for the column.
- **Text Align** - Set to the **Left**, **Center**, or **Right**.
- **Allow Filtering** - Toggle to allow users to filter the column.
- **Disable HTML** - Toggle to disable the use of HTML codes.
- **Max Width** - Set the width for the column.
- **Aggregates** - Select if the column's total will be included at the bottom of the table (**Sum**, **Count**, **Avg**, **Min**, or **Max**).
- **Number Format only** Set how many decimal places will be shown for the aggregate. (This is available only if **Avg** is selected.)

Grid Option

Columns Setting



Expand All

Name : *text*



Total Actual Hours : *number*



Header Text

Total Actual Hours

Header tooltip

Text Align

Right

Allow Filtering



Disable Html



Max Width

auto

Aggregates

Average



Number Format


0.00








7. Lastly, add conditional formatting under the **Condition** tab.


## Widget Builder











### Conditional Formatting

You can add rules to make the cells in this table change if they meet certain conditions.

[+ Add a rule](#)

Rules will be applied in this order

Click and drag to reorder

- Click the **+Add a rule** link.
- Enter a name for the new widget rule.

Edit a rule ×

Widget Rule

Red

Only the ">, <, =, >=, <=, !=" type is supported for the time being

AND OR ⊕

Total Actual Hours < 30

☒ Color Cell ☐ Color Entire Row

☐ Background Color

☐ Text Color

- Set the conditions for the rule.
- Select the format to be applied once conditions are satisfied. You can apply color to a cell or row.

### Conditional Formatting


You can add rules to make the cells in this table change if they meet certain conditions.

[+ Add a rule](#)


Rules will be applied in this order

Click and drag to reorder


Red

 When a cell in these columns is equal to it will be tinted this color

Green

 When a cell in these columns is equal to it will be tinted this color

Yellow

 When a cell in these columns is equal to it will be tinted this color

e. Click **Apply** to save and show a preview of the grid widget you created.

Preview

(Sample) 7 Days Detailed Utilization Analysis

Drag a column header here to group its column

PDF Export CSV Export Excel Export Columns ▾

Name	Total Actual Hours
Lynn Kleimola	2.23
Karen Foster	3.00
Tom Crossley	4.84
Adam Crossley	11.19
Jen Butler	11.37
John Wallask	14.94
Joel Collazo	19.49
Sum: 333.75	
Average: 20.86	

100 ▾ Items per page 1 of 1 pages (16 items)

< > << >>

< Close Apply

## Related Topics:

- [What Filter Conditions and Formats are Available for Creating Widgets](#)
- [How to Create a Target Card Widget](#)
- [Creating a Scorecard Dashboard](#)
- [How to Create Slicers in Widgets](#)
- [How to change the URL used by bots to send alerts](#)