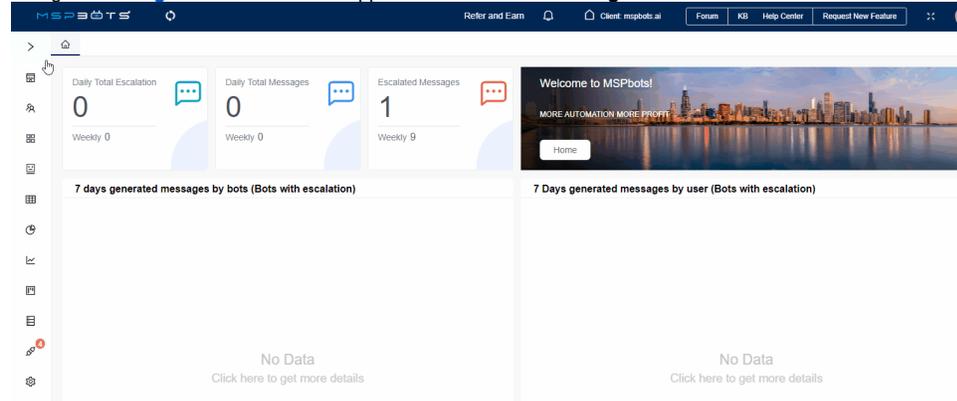


# Creating a Grid Widget

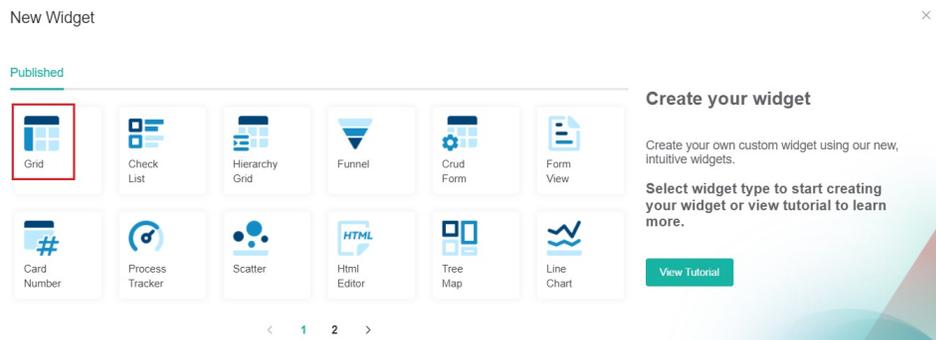
Watch this video or follow the procedure below to create a grid-type widget in MSPbots.

## 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**

**Description**

**More Info**

**\* Role**

**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 Busin v	+ -
# 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 v fx	Id	Number v	+ -
name v fx	Name	Text v	+ -
business_id v fx	Business Id	Text v	+ -

Filter:

AND OR +

+ Add Group

+ Add Condition

Measure +

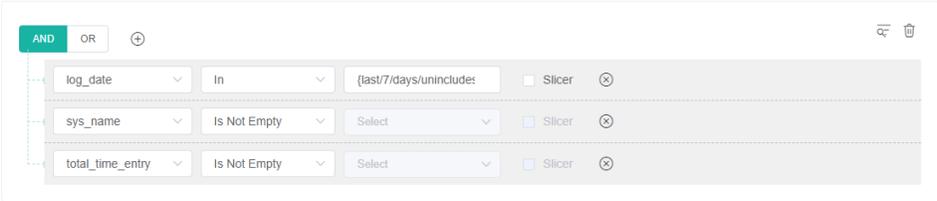
Dimension +

- 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:



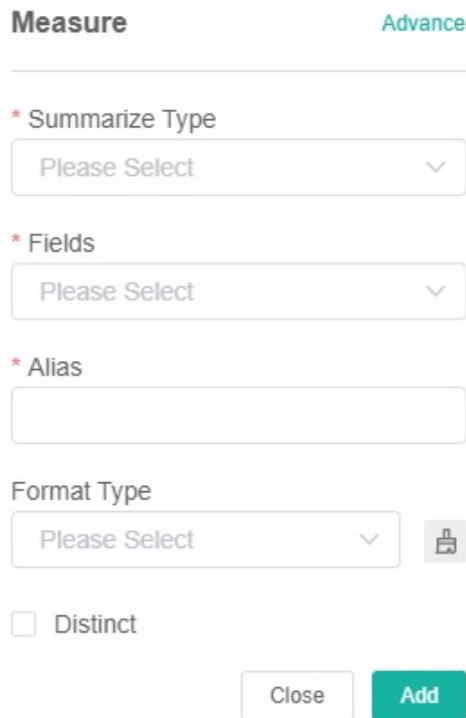
e. For **Measure**

- 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**.



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)

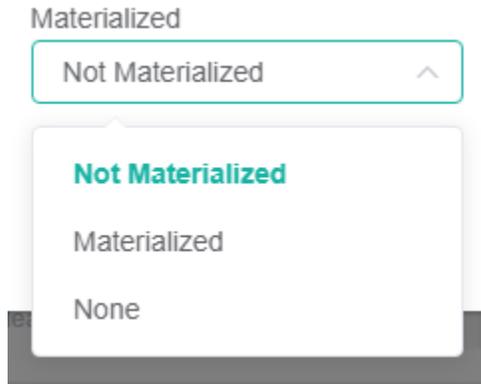
Row Limit

All Data

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

Remove duplicate data

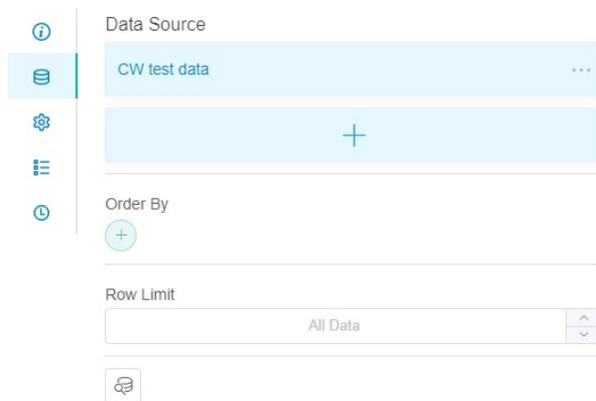
k. **Materialized** - Select an option according to your requirements.



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

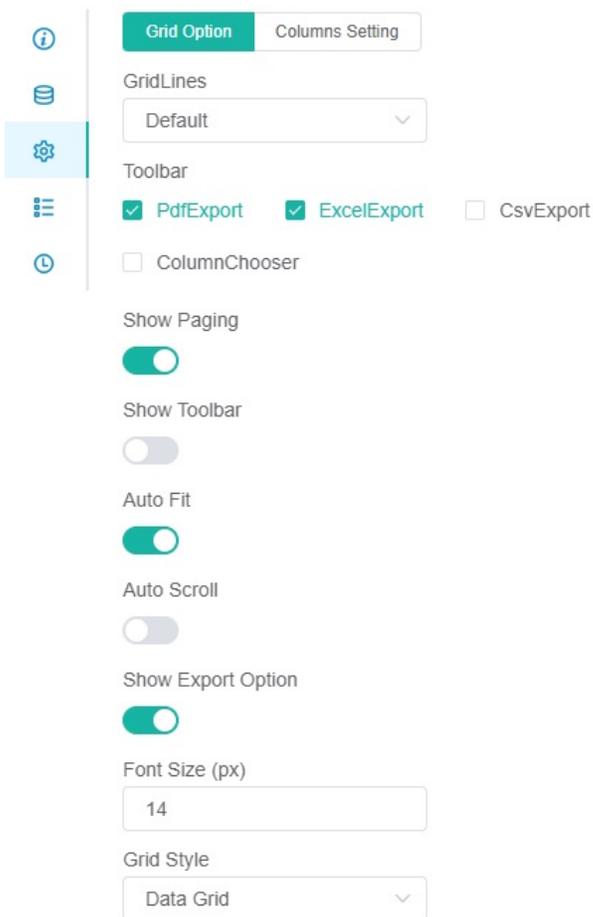


[Outdent](#)

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

a. Under **Grid Option**:

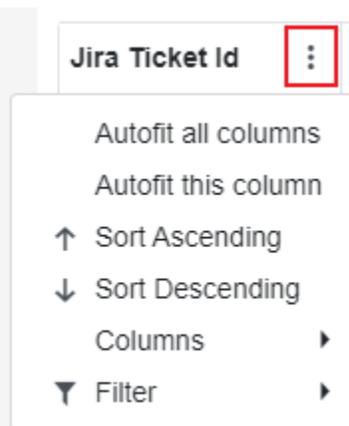
Widget Builder



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.



The screenshot shows a table header 'Jira Ticket Id' with a context menu open. The menu options are:

- Autofit all columns
- Autofit this column
- Sort Ascending
- Sort Descending
- Columns
- Filter

- **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

Header tooltip

Text Align  ▼

Allow Filtering

Disable Html

Max Width

Aggregates  ✕ ▼

Number Format  ▼

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

## Widget Builder

The screenshot shows the 'Conditional Formatting' tab in the Widget Builder. On the left is a vertical sidebar with icons for information, data, settings, menu, and refresh. The main content area has the following text:

- 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.

The 'Edit a rule' dialog box is shown. It has a title bar 'Edit a rule' with a close button. The main content includes:

- A text input field containing 'Red'.
- A warning message: 'Only the ">, <, =, >=, <=, !=" type is supported for the time being'.
- A condition builder with 'AND' and 'OR' buttons, a plus sign, and a trash icon. The condition is 'Total Actual Hours < 30'.
- Radio buttons for 'Color Cell' (selected) and 'Color Entire Row'.
- Checkboxes for 'Background Color' and '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

The screenshot shows a list of three conditional formatting rules:

- Red**: When a cell in these columns is equal to it will be tinted this color. (Includes a red color swatch, a settings icon, and a trash icon.)
- Green**: When a cell in these columns is equal to it will be tinted this color. (Includes a green color swatch, a settings icon, and a trash icon.)
- Yellow**: When a cell in these columns is equal to it will be tinted this color. (Includes a yellow color swatch, a settings icon, and a trash icon.)

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	

<< 1 100 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](#)