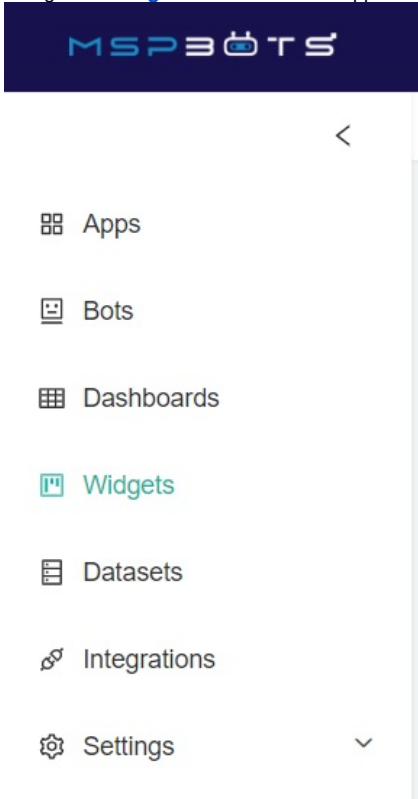


How to Create a Gantt Chart Widget

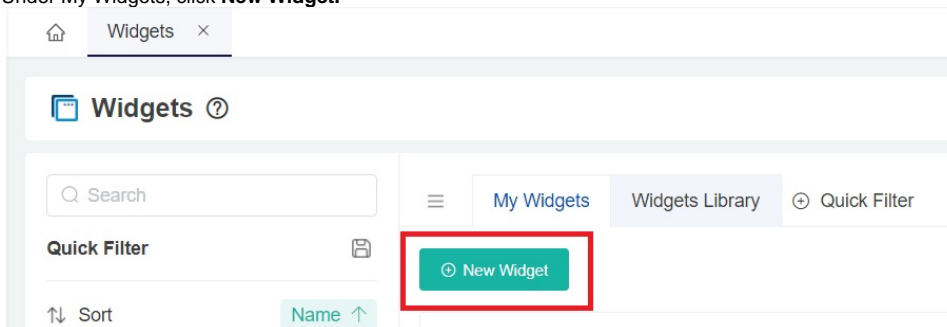
This article is a guide for creating a Gantt Chart widget. Follow this procedure to create a table of tasks or projects with the start time, duration, end time, progress, and assigned resources.

To make a Gantt chart widget

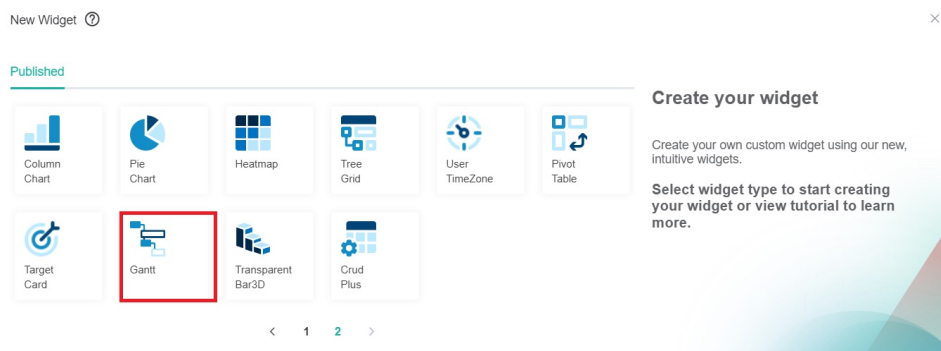
1. Navigate to **Widgets** on the MSPbots app menu.



2. Under My Widgets, click **New Widget**.



3. Select the **Gantt** widget type on the New Widget window.



4. 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 you want to give access to.

Widget Builder

i
 [Database Icon]
 [Gear Icon]
 [Clock Icon]

Basic Setting

* Name

Description

This Gantt chart widget displays projects grouped by WBS displayed along with start date, end date, budget hours (days), and actual hours.

More Info

* Role

Admin + 1

Tag

Tag

- Next, go to the **Dataset** tab. Click the button and select **New Layer**.

Widget Builder

i
 [Database Icon]

Data Source

+

Add New Layer

New Layer
This is description about new layer

Calculate Layer
This is description about calculate layer

- On the Dataset window,
 - Select the Dataset containing the information you want to use.

- b. Give the data source a name and enter it in the **Show datasource name as** field (optional).

Dataset:

ConnectWise Manage / ConnectWise Manage Project Phase and Tickets

Show datasource name as

- c. For Columns Display

- On the **Column Name** drop-down, select the fields you want to include in the Gantt chart. Click the **+** button to add more rows.
- Give each row an **Alias** and select a **Business Type** for each.

Columns Display:

Select All Clear All

Column Name	Alias	Business Type	
project	Project Name	Text	
project_start_date	Start Date	Date Time	
project_end_date	End Date	Date Time	
board	Board	Text	
hours_budget	Budget	Text	
actual_hours	Actual Hours	Text	
project_manager	Project Manager	Text	
phase_wbs_rank	WBS Rank	Number	

- d. For Filter

- Click the **+** button and choose **Add Condition** or **Add Group**.

Filter:

AND OR +

+ Add Group

+ Add Condition

project_name

Equals

VIP Revenues

Slicer

- Add all the fields you want to filter.
- Set a condition or logic for each field using the next two drop-downs. For a guide on each option, refer to [What Conditions are Available for Creating Widgets?](#)

Filter:

AND OR +

project_start_date

In

{last/1/years/uninclude}

Slicer

Time Variate

Last

1

Years

Start Time

End Time

Include this year

Clear Save

- Select a logical operator for the filter group (AND or OR).
- Click **Save**.

7. Next, go to the **Config** tab.

- On the **Column** tab, choose the columns to display in the Gantt chart and select the data source field for each.

- Group - This will group the task name based on the field selected.
- Task Name
- Resources
- Start Date
- End Date

- Duration - Adds "days" as a unit by default. If the field selected is in hours, divide the field by 24 hours using the **fx** button in the dataset window. Refer to Step 6c below.

vii. Progress

The screenshot shows the 'Configuration' panel for the 'Progress' view, with the 'Column' tab selected. On the left, a vertical sidebar contains icons for information, data, settings (highlighted), and a clock. The main panel has two tabs: 'Column' (active) and 'Timeline'. Below the tabs are several configuration items, each with a toggle switch and a 'Mapping to' dropdown menu. The items are: Group (toggle on, mapping to Board), Task Name (toggle on, mapping to Project Name), Resources (toggle on), Start Date (toggle on), End Date (toggle on), Duration (toggle on), and Progress (toggle on, partially visible).

Configuration Item	Toggle	Mapping to
Group	On	Board
Task Name	On	Project Name
Resources	On	
Start Date	On	
End Date	On	
Duration	On	
Progress	On	

- b. On the **Timeline** tab, configure how the dates will be shown. By default, the dates are shown weekly for Top tier and daily for Bottom tier.
- i. Count - Determines the data that will be shown per unit. For example, if the unit used is day and the count is 2, the data shown will be for Mon - Wed - Fri - Sun, and so on.
 - ii. Unit - Select Hour, Day, Week, Month, or Year.
 - iii. Format - Choose among the available date formats in the drop-down field.

The screenshot shows the 'Configuration' panel for the 'Progress' view, with the 'Timeline' tab selected. The 'Column' tab is also visible. The panel is divided into two sections: 'Top tier' and 'Bottom tier', each with its own toggle switch and configuration fields. The 'Top tier' section has a toggle on, and fields for Count (1), Unit (Month), and Format (Jan 01, 2019). The 'Bottom tier' section has a toggle on, and fields for Count (1), Unit (Week), and Format (01).

Tier	Toggle	Count	Unit	Format
Top tier	On	1	Month	Jan 01, 2019
Bottom tier	On	1	Week	01

8. Click **Apply**. This will show a preview of the created Gantt Chart widget. Below is an example.

Preview

