Creating a Pie Chart Widget

This article shows how to create a pie chart widget that shows the total number of tickets per issue type in the last 7 days. It applies to MSPbots users with an Autotask integration.

How to Create a Pie Chart Widget

1.

Navigate	e to Widgets on the MSPbots app menu.
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	<
88	Apps
	Bots
⊞	Dashboards
μ	Widgets
	Datasets
ß	Integrations
钧	Settings ~

2. Under My Widgets, click New Widget.

	☆ Widgets ×						
	🛅 Widgets 🕐						
	Q Search		=	My Widgets	Widgets Library	⊕ Quick Filter	
	Quick Filter	B	⊕ N	lew Widget			
	↑↓ Sort	Name 个					
3. Se	lect the Pie Chart widget ty	ype on the New	Widget	window.			~
Ne	w Widget (2)						×

						Create your widget
olumn hart	Pie Chart	Heatmap	Tree Grid	User TimeZone	Pivot Table	Create your own custom widget using our new, intuitive widgets. Select widget type to start creating
୯	1	Ĩ.				your widget or view tutorial to learn more.
arget ard	Gantt	Transparent Bar3D	Crud Plus			

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.

(j)	Basic Setting
U	* Name
8	(Sample) Tickets Per Issue Type
鐐	Description
٩	This pie chart shows the total number of tickets per issue type in the last 7 days.
	More Info
	Please Enter More Info
	* Role
	Admin 🛞 + 1 🗸
	Тад
	Tag ~

5. Go to the Dataset tab. Click the + button and select New Layer.

<i>(i)</i>	Data Source		
8		+	
Add Nev	v Layer		×
	New Layer This is description about new layer	Calculate Layer This is description about calculate layer	

- 6. On the Dataset window,
 a. Select the Dataset containing the information you want to use.
 b. Give a Name for the Datasource (optional).
 - Dataset:

Autotask / Autotask Ticket Statistics	✓ S₀
Show datasource name as	

- c. For Columns Display,
 - i. Using the Column Name dropdown, select the field you want to show in the drill through. Click the 🔂 button to add more rows.

ii. Give an Alias and select a Business Type for each.

Columno	Dian	
Columns	Disp	10

Select All Clear All								
Column Name			Alias	Business Type				
company_name	~	fx	Company	Text	~	₽	۲	Û
ticket_number	~	fx	Ticket Number	Hyperlinks	~	≞	۲	Ū
issue_type	~	fx	Туре	Text	~	≞	۲	Ū
sub_issue_type	~	fx	Sub-type	Text	~	≞	۲	Ū
create_date	~	fx	Date Created	Date Time	~	曲	۲	Ū
completed_date	~	fx	Date Completed	Date Time	~	≞	۲	Ū

- d. For Filter,

 Click the button and choose between Add Condition and Add Group.
 Add all the fields you want to be filtered.
 Set a condition/logic for each field using the next 2 dropdowns. For a guide on each options, refer to: What Conditions are Available for Creating Widgets?
 Select a logical operator for the filter group (AND or OR).

create_date V In	<pre> {previous/1/weeks/date Silcer </pre>	
Time Variate		
Previous V 1	Weeks(Mon-Sun) V Start Time	- End Time
Select a Field to use in the co Give an Alias for the measure Select a Format Type Click Add .	mputation. 	
Measure	Advance	
measure	Advance	
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count	\sim	
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* Fields	~	
* Fields Ticket Number	~	
* Fields Ticket Number	~	
* Fields Ticket Number * Alias Ticket Count	~	
* Fields Ticket Number * Alias Ticket Count	~	
* Fields Ticket Number * Alias Ticket Count Format Type		

f. For **Dimensions**, i. Select a field to be used for grouping the data.

Close

Confirm

- ii. Give an Alias for the measure.iii. Select a Format Type.

iv. Click Add.

* Fields			
Туре		\sim	
* Alias			
7.114.5			
Issue Type			
Format Type			
Text		\sim	≞
		_	
	Close	Confir	m

g. Other optional settings are:

- i. Order By Sorts the data based on the selected field.
- ii. Row Limit Sets a limit on how many rows of data will be shown.
- iii. The same 2 options are available on the dataset tab, the difference is that they apply to the pie chart shown instead of the drilldown.

<i>(i)</i>	Data Source
8	Autotask Ticket Statistics
¢	+
C	
	Order By Ticket Count × +
	Row Limit
	All Data
	4

h. Click Save. 7. Go to Config tab.

- - a. Select the Dimension for X-axis. This will determine the grouping used to partition the pie.

 - b. Set the Measure for Y-axis. This will be used for the values of each partition.
 c. (optional) For Sub X-axis, another measure can be added to further divide the pie chart.
 - d. For Measure Text, select the same Measure used for Y-axis.
 - e. (optional) Add a Pie Chart Title.

f. (optional) Add a Part Name.

i	X-Axis
8	Issue Type 🗸 🗸
錼	sub-X-Axis
C	· · ·
	Y-Axis
	Ticket Count ~
	Measure Text
	Ticket Count \sim
	Pie Chart Title
	Part Name

8. Click Apply. This will show a preview of the pie chart created.



Example: How to Create a Pie Chart Widget that shows the total number of tickets per issue type in the last 7 days

1. Navigate to Widgets on the MSPbots app menu.



2. Under My Widgets, click New Widget.

3.

O Search			- 14	· Midgata	Midroto Librony	O Ouiak Filte
Quick Filter		8		idaet	widgets Library	(+) QUICK FILE
1↓ Sort	Na	ame 个				
ct the Pie Chart (widget type o	n the New W	idget windo	ow.		
Nidget ⑦	widget type of	n the New W	'idget windo	ow.	Create your w	idget
the Pie Chart	widget type of	n the New W	(idget windo	DW.	Create your w Create your own custo intuitive widgets.	idget m widget using our nev

- 4. When the Widget Builder window opens, go to Basic Setting tab. Provide the following and click Apply: Name - Tickets Per Issue Type
 Description - This pie chart shows the total number of tickets per issue type in the last 7 days.

• Role - Admin and User

<i>(i)</i>	Basic Setting
	* Name
8	(Sample) Tickets Per Issue Type
鐐	Description
C	This pie chart shows the total number of tickets per issue type in the last 7 days.
	More Info
	Please Enter More Info
	* Role
	Admin 🛞 🕂 1
	Тад
	Tag ~

5. Go to **Dataset** tab. Click the 🕂 button and select **New Layer**.

	(i)	Data Source					
	8		+				
	Add Nev	w Layer		×			
		New Layer This is description about	Calculate Layer This is description about				
6.	On the Datas <i>a.</i> Sele <i>b.</i> Give _{Datas}	et window, ct the Dataset: Autotask Ticket Stati e a Name for the Datasource (options et otask / Autotask Ticket Statistics	stics al).				
	Show	datasource name as					
	c. For	Columns Display, add the fields be	low (format: Column Name - Alias - Busin	ess Type			

- i. company_name Company Text
 ii. ticket_number Ticket Number Hyperlinks (Additional Steps: Click the paintbrush icon > select Autotask Ticket URL as Format > Click Save)
 iii. issue_type Type Text

- iv. sub_issue_type Sub-type -Text
 v. create_date Date Created Date Time
 vi. completed_date Date Completed Date Time

Column Name			Alias	Business Type			
company_name	~	fx	Company	Text	~	۲	Ū
ticket_number	~	fx	Ticket Number	Hyperlinks	~ E	۲	Ū
issue_type	~	fx	Туре	Text	- E	۲	Ū
sub_issue_type	~	fx	Sub-type	Text	- E	۲	创
create_date	~	fx	Date Created	Date Time	- E	۲	۵.
completed_date	~	fx	Date Completed	Date Time		۲	Û

		Format
		AutoTask Ticket URL
		Open on current page Select the display format of the business type (Each business type has
	₿	multiple display formats).
	ß	Close
d. For Filter		

- i. Click the button and choose Add Condition.
 ii. Select the field create_date for the first dropdown then In for the second one.
 iii. For the third dropdown, select Previous > 1 > Weeks (Mon-Sun)

Fill	ter:	
	AND OR \oplus	<u>~</u> ₪
	create_date > In > {previous/1/weeks/data Slicer ③	
M	Time Variate	+
т	Previous V Meeks(Mon-Sun) V Start Time End Time	之 前
Di	Clear Save	+

- e. For Measure,
 i. Click the button to show the Measure window.
 ii. Select Count for Summary Type.
 iii. Select Ticket Number for Fields.

 - iv. Type **Ticket Count** as an Alias.v. Select **Number** for Format Type.

vi. Click Confirm

	Measure		Ad	vance	
:	* Summarize Typ	e			
	count		~		
	* Fields				
	Ticket Number		~		
	* Alias				
	Ticket Count				
	Format Type				
	Number		~	≞	
	Distinct				
		Close	Con	firm	
f. For Dimen i. Se ii. Ty iii. Se iv. Cl	sions, elect Type for the field /pe Issue Type as an elect Text for Format lick Confirm	l. Alias. Type.			
	* Fields				
	Туре			~	
	* Alias				
	Issue Type				
	Format Type				
	Text			\sim	≞
		Clo	se	Con	firm

g. Click Save.

7. On the **Dataset tab**, for Order By, click the 🔂 button and select Ticket Count.

	(i)	[Data Source	
	8		Autotask Ticket Statistics	
	鐐		+	
	Ŀ	(Order By	
			Ticket Count × +	
		F	Row Limit	
			All Data	÷
8.	Go to Config a. Sele b. Sele c. Sele	tab. ect Issu ect Tick ect Tick	e Type for X-axis. et Count for Y-axis. et Count for Measure Text.	
		i	X-Axis	
		8	Issue Type 🗸 🗸	
		翰	sub-X-Axis	
		U		
			Y-Axis	
			Ticket Count ~	
			Measure Text	
			Ticket Count	
			Pie Chart Title	
			Part Name	

9. Click Apply. This will show a preview of the pie chart created.

