Widgets

Creating and Managing Within Investments in the Modern UX

Widgets

You can create/manage Widgets to any Grid view that supports Widgets. There are five (5) Widget Types:

- **Number Tile**: Displays a specific number based on the widget definition and filter criterion

- **Pie**: Displays a pie chart based on the widget definition and filter criterion

> *All but the Number Tile Widgets enables you to select a relevant Group by attribute and an Aggregation attribute (Count, Sum, Average, Min and Max).*

- **Bar**: Displays a bar graph based on the widget definition and filter criterion
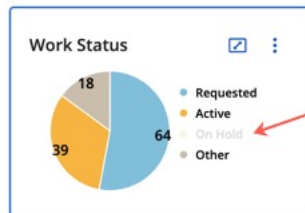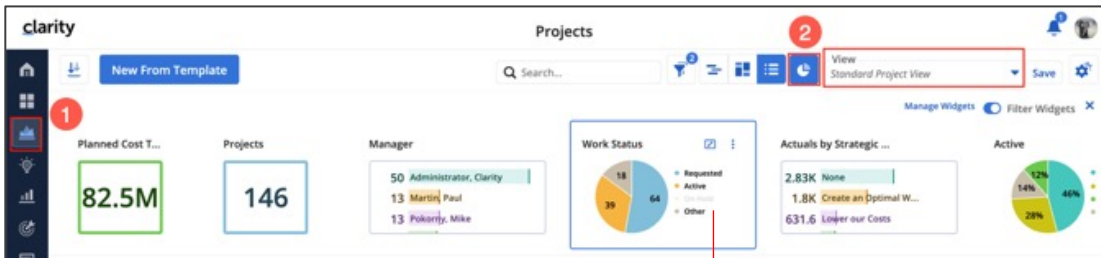

- **Progress Ring**: Displays a ring with a number based on the widget definition and filter criterion

- **Target** (Roadmaps Only): Displays targets either as **goals** or **constraints** on the number and money attributes of the Roadmap Item object
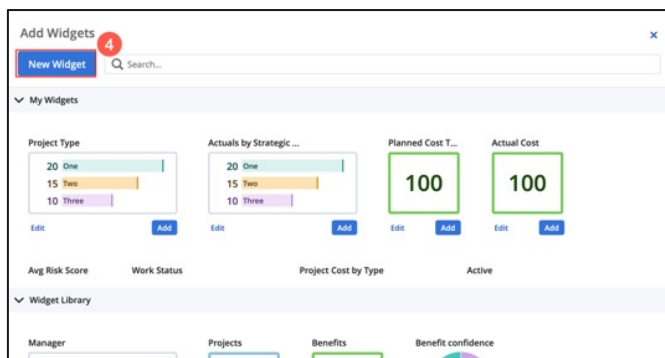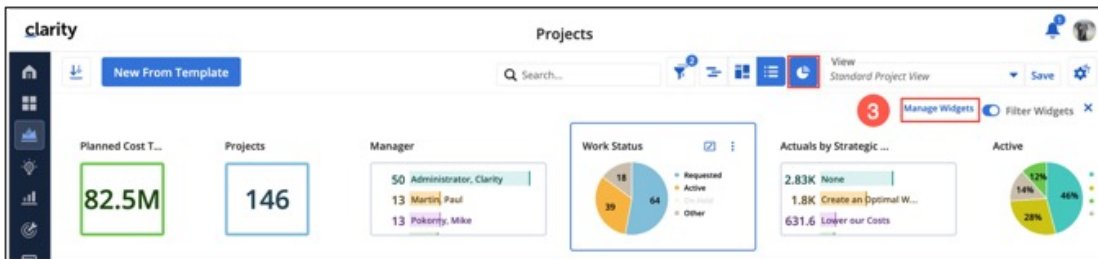
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1. Navigate to the Grid that supports Widgets (Ideas, Projects, Custom Investments, Staff, Risks, etc.)
2. Click on the **Show Widgets** button
   a. When Widgets are saved with the View, the display at the top of the page

Click attributes in the Legend to hide/display those values

3. Click **Manage Widgets**. The **Add Widgets** dialog box displays.
   a. When the **Filter Widgets** is enabled, the Widget results is based on the filter that is part of the View

4. Click **New Widget**

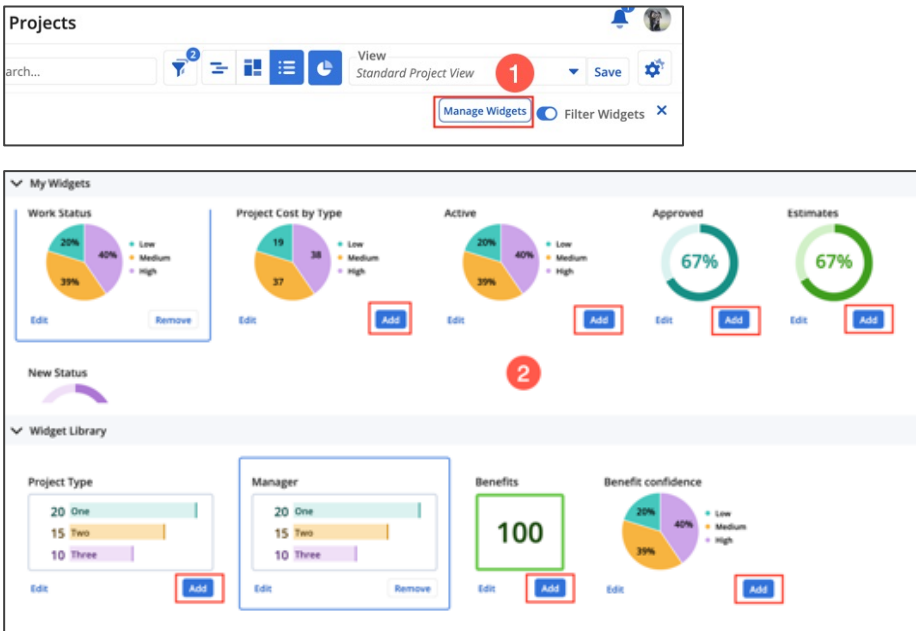5. Select the **Widget type** and click **Next**

6. Enter the **Details**
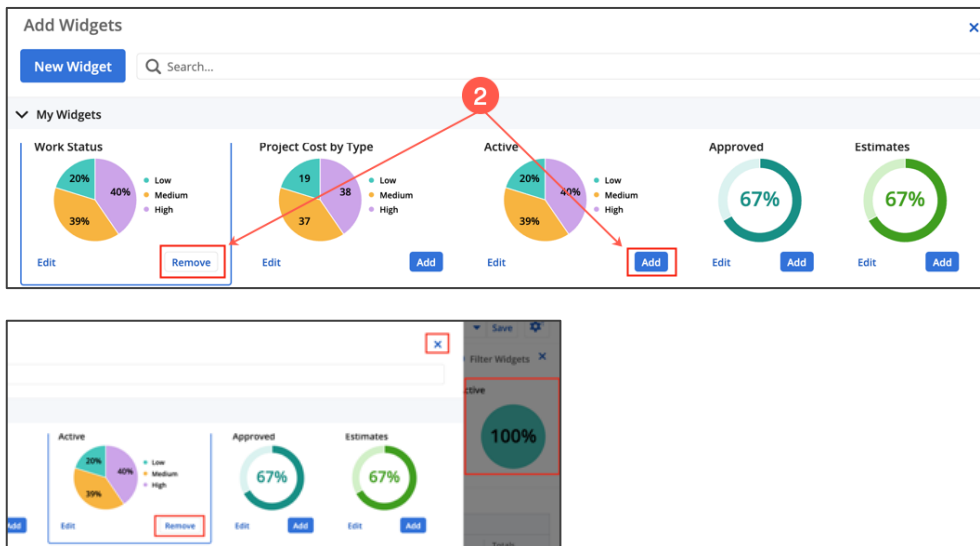   a. Click In the **Widget Library** to allow other users to access the Widget
7. Click **Create**

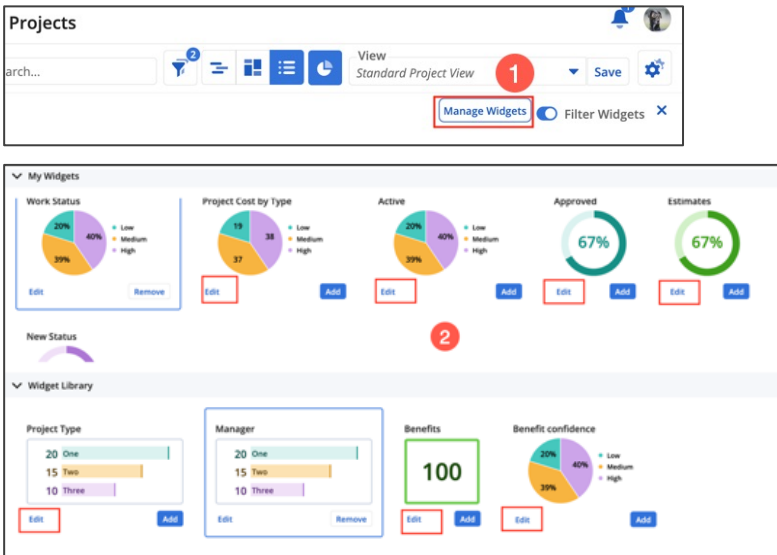1. Click Manage Widgets. The Add Widgets dialog box displays.

2. Click **Add/Remove** for any Widget you wish to add/remove from the Grid
   a. The Widget is added to the Grid
   b. The **Add/Remove** button toggles
3. Click **Close** (x)

1. Click **Manage Widgets**. The **Add Widgets** dialog box displays.

2. Click **Edit**
   a. Update attributes
3. Click **Save**
   a. The **Save** button is not enabled until you make a change to at least one attribute
4. Click **Delete** to delete the Widget
   a. There is no 'confirm' or 'undo'. If you delete in error, you need to recreate the Widget