Chart Widgets

Chart widgets display graphical charts on the Dashboard, and allow you to refine them in real-time and open the full chart or a table when clicked. For more information on creating graphical charts, see Create and Edit Charts and Reports.

Similarly, if you choose to create a new chart in the widget, it will be saved to its respective table charts library. In the Dashboard, clicking an item in the chart legend will filter the chart in real-time by excluding that item.
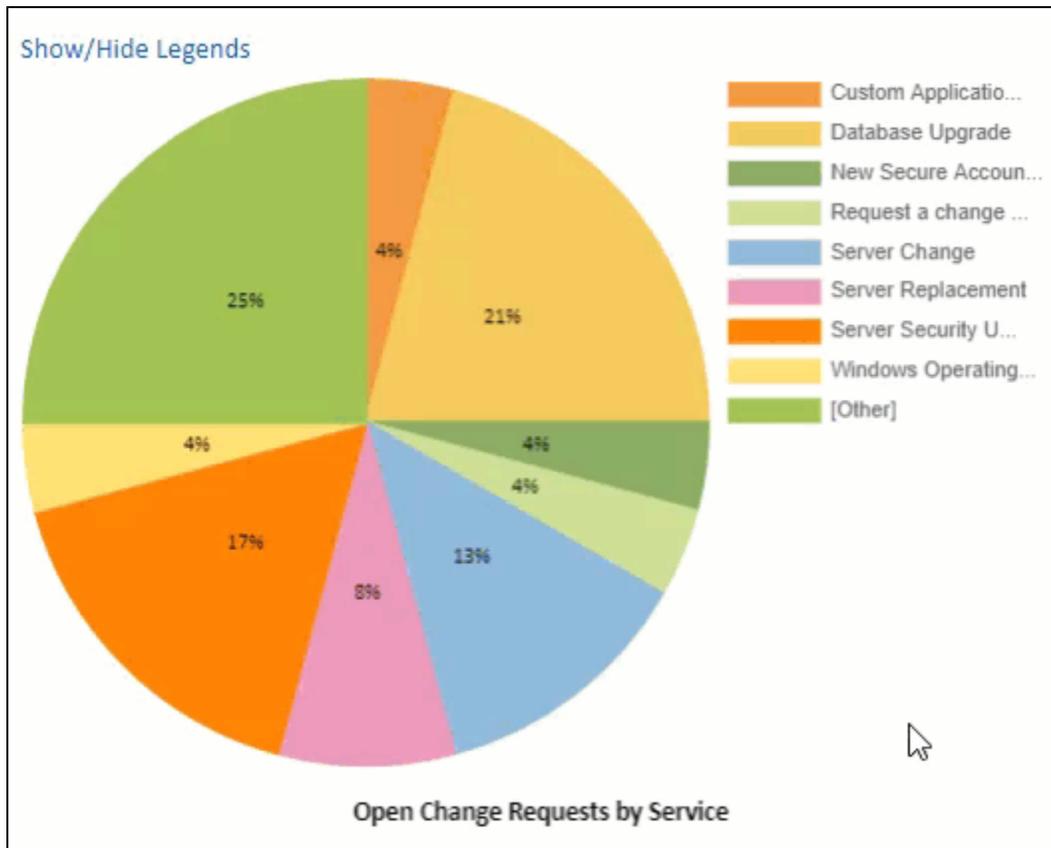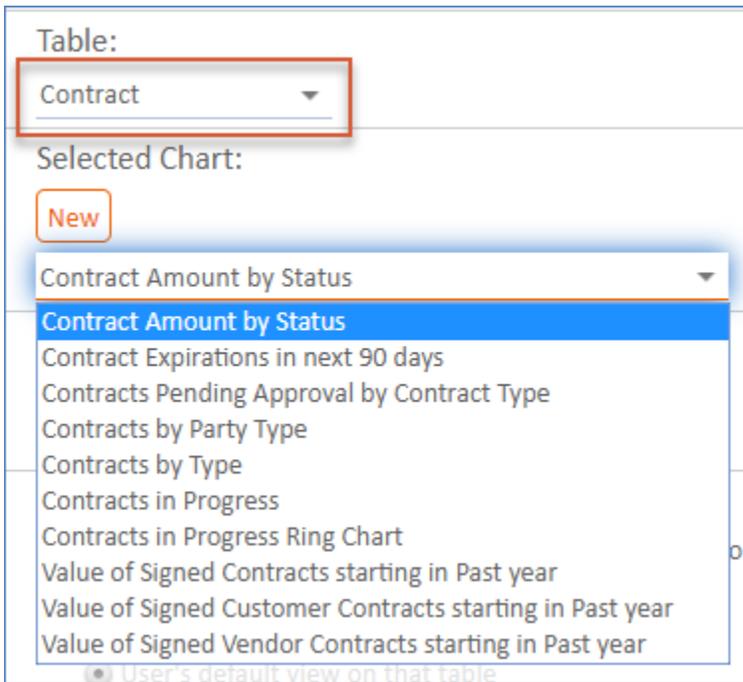

Chart widgets also support drill downs. If a drill down is added to a chart widget, clicking one of the groupings on the chart will drill it down by the chart drill-down settings. See drill downs for more information.

Add and Manage Charts

To choose a chart...

1. In the Options tab select a Table, and then select a chart from the list that appears.

2. Or click New to open the Charts and Reports wizard. This will be simplified so that you can only create graphical chart types with JavaScript enabled. See JavaScript Graphical Charts for more information.

> ⚠️ Chart widgets always use JavaScript for the display, regardless of whether the source chart has JavaScript enabled. This is needed to make the chart interactive and responsive on the Dashboard.

Chart Widget Options

- The Apply Dashboard Filters option defines whether the chart should be acted on when you use a filter. This will recalculate the chart in real-time with the filter searches, similarly to performing a refresh. See Dashboard Filters for more information.

- The options in Actions on Click determine what happens when the user clicks the chart on the Dashboard. This can either open a full-sized window of the chart with greater detail, including the Report tab if relevant, or it can open a table of results.

Actions on Click
- ○ Open full sized Chart in New Window (along with a tab for the html Report, if defined)
- ● Open Table of Results in New Window
    - ● User's default view on that table
    - ○ This view:
        - Client Project Detail View ▼

> ⚠ You must click the chart header to open the option selected in Actions on Click.

- You can also select a chart refresh interval. A refresh will recalculate all the searches used in the charts, which could become very intensive on the system if you are using a particularly complex set of charts.

Chart Layout Appearance

The chart can be added to the dashboard in the Layouts tab of the Dashboard setup. Note that the underlying size of the chart will have an effect on the way it displays on the dashboard. If the chart is too large, it can appear compressed or overlapping on the dashboard. You can test out the appearance by saving a layout and viewing it in the live dashboard.