Dashboard Widgets

The dashboard is created from a collection of widgets. Once a widget has been created, it is stored in a widgets library and becomes available to any system dashboards, based on the user's team permissions. Dashboards support these types of widgets:

Adding and Removing Widgets

1. Create or edit a dashboard.
2. In the Widgets section, select the widgets to add to the Dashboard or create new widgets. The list of available widgets includes charts from all the tables you can access, as well as some useful predefined widget types.
   - To add a widget, select it in the Available widgets list and click the right arrow.
   - To remove a widget, select it in the Selected widgets list and click the left arrow.
3. Or, click New to create a new widget. For setup details, see the article for the relevant widget type.

Widget Appearance

By default, widgets use the default visual settings from the Power User Look and Feel scheme, where widget styles are set on the Dashboards and Charts/Reports tabs. For example, charts use the Chart Series color palette on the Charts/Reports tab.

You can override the default color palette by selecting the "Use custom styles for the style of this widget" option on the General tab of the Widget wizard. This opens style options that mirror those in the Look and Feel scheme wizard. With this option, you can create a personalized appearance for every element of each widget on the dashboard. However, that means the widget's color palette does not change if the Look and Feel scheme is updated.

Widget Permissions

Permissions to set up and manage widgets are controlled by user teams. If a user does not have permission to view a widget, it doesn't appear in their widget library. Further, if a user can't view fields or tables that are used in the calculations for a widget, those items are filtered out of the data shown on the widget. If the user cannot access any data on a widget, the widget is simply blank on the dashboard.

In the Apply tab of each widget setup, you can define team-based restrictions for the widget.