Change a Gadget

You can reconfigure gadgets that you created. In most cases, this means changing the selected filter. For client summaries, you can also change how the information is grouped and sorted, as well as its format (Summary Type).

There are no configuration options for an Active Incident in Region gadget.

If you have a number of filters to define, you will likely want to create them from the Filters tab. However, you can also view, edit, and build new filters as you work within the gadget.

Note: Any time you modify your dashboard, be sure to save your changes.

Use the appropriate procedure based on the type of gadget:

- Incidents - division
- Client List
- Client Summary
- Regional Client Summary

To change a division incident gadget

1. Click the **Dashboard** tab.
2. Choose the appropriate dashboard from **Current Dashboard**.
3. Click the gadget's configure icon.
4. Change the **Division**.
5. Click **Apply**.
6. Click **Save**. The *Save Dashboard* window opens.
7. Click **Save**.

To change a client list gadget

1. Click the **Dashboard** tab.
2. Choose the appropriate dashboard from **Current Dashboard**.
3. Click the gadget's configure icon.
4. To use a different filter, open the **Filter** drop-down and click the filter you want.
5. To change the gadget by changing an existing filter:
    a. Open the **Filter** drop-down and click the filter you want.
    b. Click **View**. The filter opens in a new window.
    c. Add to or change the search terms and search sets.
    d. Click **Save** or **Save As**. A pop-up window opens.
    e. If appropriate, enter or change the filter **Name**.
    f. Click **Save**. The pop-up window closes.
    g. Close the filter window. The gadget shows the revised filter.
6. To change the gadget by adding a new filter:
    a. Click **New**. The search window opens.
    b. Add one or more search terms and/or search sets.
    c. Click **Search**. Your results show in the window.
    d. Click **Save** or **Save As**. A pop-up window opens.
    e. Enter the **Name** of the new filter.
    f. Click **Save**. The pop-up window closes.
    g. Close the filter window. The gadget shows the new Filter.
7. If appropriate, clear or select **Incident Mode Enabled**.
8. Click **Apply**.
9. Click **Save**. The *Save Dashboard* window opens.
10. Click **Save**.

To change a client summary gadget

1. Click the **Dashboard** tab.
2. Choose the appropriate dashboard from **Current Dashboard**.
3. Click the gadget's configure icon.

4. To use a different filter, open the **Filter** drop-down and click the filter you want.
5. To change the gadget by changing an existing filter:
    a. Open the **Filter** drop-down and click the filter you want.
    b. Click **View**. The filter opens in a new window.
    c. Add to or change the search terms and search sets.
    d. Click **Save** or **Save As**. A pop-up window opens.
    e. If appropriate, enter or change the filter **Name**.
    f. Click **Save**. The pop-up window closes.
    g. Close the filter window. The gadget shows the revised filter.
6. To change the gadget by adding a new filter:
    a. Click **New**. The search window opens.
    b. Add one or more search terms and/or search sets.
    c. Click **Search**. Your results show in the window.
    d. Click **Save** or **Save As**. A pop-up window opens.
    e. Enter the **Name** of the new filter.
    f. Click **Save**. The pop-up window closes.
    g. Close the filter window. The gadget shows the new Filter.
7. If appropriate, change **Group By**.
8. If appropriate, change **Sort By**.
9. If appropriate, change the **Summary Type**:
    - Pie Chart
    - Bar Chart
    - Table
    - Counter Box
10. If appropriate, clear or select **Incident Mode Enabled**.
11. Click **Apply**.
12. Click **Save**. The *Save Dashboard* window opens.
13. Click **Save**.

To change a regional client summary gadget

1. Click the **Dashboard** tab.
2. Choose the appropriate dashboard from Current Dashboard.
3. Click the gadget's configure icon.
4. To use a different filter:
    a. Select the **Filter**.
    b. Select the summary group from **Group By**.
5. To change the gadget by changing an existing filter:
    a. Select the **Filter**.
    b. Click **View**. The filter opens in a new window.
    c. Add to or change the search terms.
    d. Click **Save** or **Save As**. A pop-up window opens.
    e. If appropriate, change the **Name** of the filter.
    f. Click **Save**. The pop-up window closes.
    g. Close the filter window. The gadget shows the revised **Filter**.
    h. Select the summary group from **Group By**.
6. To change the gadget by adding a new filter:
    a. Click **New**. The search window opens.
    b. Add one or more search terms and/or search sets.
    c. Click **Save** or **Save As**. A pop-up window opens.
    d. Enter the **Name** of the new filter.
    e. Click **Save**. The pop-up window closes.
    f. Close the filter window. The gadget shows the new Filter.
    g. Select the summary group from **Group By**.
7. If appropriate, clear the **Incident Mode Enabled** check box.
8. Click **Apply**.
9. Click **Save**. The *Save Dashboard* window opens.
10. Click **Save**.