PeopleSoft Pivot Grid Wizard

Data services

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Paula McDaniel
Data Analytics Learning and Education Instructor
Washington State Board of Community and Technical Colleges, Data Services
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Submit a Pivot Grid Migration Request

Options Menu

Expand All and Collapse All
Chart Type Icons
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Publish as Pagelet
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Update Filters
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Save
Reset
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Fluid Options
Viewer Options
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Save
Chart Options
Advanced Chart Options
Export Data
Save As
Save
Reset
Hide Chart
Update Filters
Show Help
Save As
Result View
Result View Columns
Allow Multiple Y Axis
Course Goal

The goal of this course is to train Query Developers on how to create pivot grids to view and analyze data.

Course Learning Objectives

At the end of this course users will be able to:

- Explain the limitations and considerations that must be taken into account when creating or selecting a query to use for a pivot grid.
- Create queries appropriate for use as a data source for pivot grids.
- Demonstrate understanding of the Pivot Grid Wizard set up and usage.
- Accurately use the pivot grid wizard to create pivot grids using a query as a data source.
- Demonstrate knowledge of how to migrate a pivot grid model from PCD to PRD.

Pivot Grid Viewer Layout

Below you will see where some of the terms defined in this section are seen within Pivot Grid Viewer.
Pivot Grid Terms

Aggregates

Aggregate functions include SUM, MIN, MAX, AVG, COUNT and DISTINCT COUNT.

Attach Tree

Used to attach a PeopleSoft Tree to an axis to display hierarchical information for that axis.

Axes and Values

Axes and Values are at the core of analytical and operational reporting.

Axis members are those attributes that qualify Values. They give structure to Values and they allow different views of the Values. They are also called Dimensions in a pivot grid.

Values are the metric that business users use to make business decisions. Generally, Values are number type fields except when the aggregate function COUNT is used on non-numeric fields.

Collapse All

A link in the grid title region used to collapse any expanded positions in the grid row or column for totals.

Configure Pivot Grid Views

A link used to create new Pivot Grid views or to edit existing ones.

Detailed View or Result View

All mapped fields selected to display in the pivot grid model in Step 2 of the Pivot Grid Wizard. The fields selected will display in a format very similar to a result set from PS Query.

Detach Tree

Used to remove a PeopleSoft Tree that is attached to an axis.

Drilling URL

When you build a query using PeopleSoft Query - Query Manager, you can define drilling URLs that are associated with this query. These settings are saved into the database as part of the metadata for this query. When you run this query, the query results show the results as URL links, which you can click to be redirected to either a PeopleSoft page, another query result page, or an external page.
**Dual Y Axis**

Allows for a primary and secondary Y Axis to be used; each on their own Y Axis sharing the same X Axis.

**Editable Facet**

A field which has been selected as an Axis Value Type and checked as an Editable Facet in Pivot Grid Wizard. Fields that have been so designated will display and act as a prompt, with no lookup list, in Pivot Grid Viewer.

**Expand All**

A link in the grid title region used to expand all the dimensions in the row and column positions for totals.

**Facet**

Similar to multi-select filter, but facet is displayed as a collection of check boxes instead of a drop-down list, and facet is applied to Pivot Grids fluid view only.

**Fluid Mode**

The PeopleSoft Fluid User Interface is designed to be a significant enhancement to the PeopleSoft’s “classic” user interface, which has been the interface display on browsers for PeopleSoft end users for well over a decade. The PeopleSoft Fluid User Interface moves away from pixel-perfect page layout and provides greater flexibility with the enhanced use of cascading style sheets (CSS3), HTML5, and JavaScript (if needed).

**Left Panel Tab**

The area of the rendered Pivot Grid Model that allows users to select facets, update prompts and or slice and dice the data.

**Mini Chart Facet**

The facet values that appear as a chart instead of a list of values. You are able to select a data point in the facet chart to filter data.

**Modal Window**

A pop up window that displays the detailed view when the chart graph or pivot grid total hyperlinks are clicked in Pivot Grid Viewer.

**Model View**

A different view of the default pivot grid model which has been created by using Save As, either by the developer or an end user.
**Multi Select Filter**

A drop-down list that enables you to select multiple items to filter data, which appears in grids and charts.

**Options Menu**

Area of Pivot Grid Viewer where the end user can find which options have been made available for personalization of the Pivot Grid.

**Overlay**

Two charts that share the same X and Y axes that are plotted and then one is superimposed over the other.

**Personalizations**

Changes to the original Pivot Grid Model configured and saved at the user level.

**Pivot**

A change of the dimensional orientation of a report inside Pivot Grid.

**Pivot Grid**

A component that provides a multidimensional presentation of data.

**Publish as Tile**

Application developer can use this link to create the tiles that are used in the Fluid mode. These tiles are added with chart preview in fluid landing pages by end-users. They are configured to point to the Fluid Viewer component for the specific model.

**Publish as Pivot Grid**

A link in PeopleSoft Query - Query Manager used to access Pivot Grid Wizard. When you use the Publish as Pivot Grid link to access Pivot Grid Wizard, the wizard appears with the query definition and data columns populated.

**Report filter**

Report filter determines the range of values that appears in the Pivot Grid and the chart. In SQL terms, report filter is similar to a WHERE clause that limits the data returned. In PeopleSoft Pivot Grid, report filter presents a slice of data to viewers in both the chart and the grid. If the data source uses prompt values, they are automatically added as filters. You can customize prompt values when viewing the pivot grid. When you create a Pivot Grid model, you can select additional columns to use as filters.
Reset Layout

An option used to clear all the personalizations and to reset the Pivot Grid model to the default setting (without personalization).

Result View or Detailed View

All mapped fields selected to display in the pivot grid model in Step 2 of the Pivot Grid Wizard. The fields selected will display in a format very similar to a result set from PS Query.

Series

Chart with two dimensions that qualifies a value. For example, Region can be X-axis and Product can be series-axis to display the Sum of Sales.

Queries for Pivot Grids

Query as a Data Source

Pivot Grids can use queries, components or composite queries as a data source. In this course we will cover using queries as the pivot grid data source. When using query as the data source for the pivot grid there are certain considerations that must be taken into account or the pivot grid will fail.

Data Source Queries for Pivot Grid Naming Convention

Queries used as data sources for Pivot Grid should have a _PG designation at the end of the query name. XXX_XX_XXXXX_PG

- Example: QFS_AR_ITEM_DST_GL_PG

Query Considerations/Limitations for Use with Pivot Grid:

Before beginning in pivot grid wizard it is extremely important to learn how to select or create queries to use in conjunction with pivot grid wizard. There are certain aspects to take into consideration, as well as certain limitations that must be paid attention to when creating or selecting a query to use with a pivot grid. As pivot grid doesn't generally give an error message with the reason that a Grid failed to render, it can be especially important to pay close attention to using the correct protocol when creating a query to be used with a pivot grid model in order to successfully create functional pivot grids.
Considerations

When creating a query to use with a pivot grid, keep in mind that:

Any prompt values for the query will automatically be used as a prompt or filter for the pivot grid. Developers will have the option when creating the pivot grid to determine whether end users can change values in the prompt in the rendered pivot grid model.

- The institution prompt created in PS Query will display as a filter in Pivot Grid

Due to a bug, related prompts will fail in pivot grid viewer. As of this writing, Oracle has not yet released a date by which this will be corrected. A related prompt is one that is dependent on another prompt or criterion. For example, ACAD_CAREER is dependent on INSTITUTION. So while it is possible to filter on ACAD_CAREER when creating the pivot grid model, it is not possible for the query used to prompt on ACAD_CAREER.
• The query will be executed to render data on the grid and the chart, so users should consider these two points when constructing a query for a pivot grid model:
  o Query should be conducive to manipulation.
  o Query performance should be efficient enough to quickly render on the grid and on the chart. An inefficient query will cause pivot grid to render very, very slowly.
• Alternatives to Complex Queries
  o Request a SQL View to be created by Data Services

Limitations

• Query with UNION Clauses.
  o Query with the UNION clauses are currently not supported in pivot grid. Pivot grid does runtime manipulation on the SELECT field list in the query and this will not work properly with queries containing UNION clauses.
    ▪ Recommendation: Request a SQL View to be created by Data Services
• Query with JOINS on the Value Fields.
  o Query with the JOINS on value fields receive an error in pivot grid because pivot grid performs aggregation on the value fields and the same aggregation is used for the JOIN field. This will cause the query to fail syntactically while executing on the database.
  ▪ Recommendation: use different fields for Values and Join criteria.

• Query with Underlying Record Views Selecting the Same Field.
  o A query built on an underlying View that selects the same field more than once will fail when used as a data source for pivot grid if these fields are used as the axis columns in the pivot grid model. This is because the pivot grid uses a GROUP BY clause for the axis fields and the database fails to perform a GROUP BY on the same field more than once. Generally this will cause the pivot grid not to render but it could also display with incorrect results.
- Recommendation: Use different fields in the View creation but if that is not possible then change one to use a function such as UPPER or TRUNCATE.
• Query with Value Fields Used as Criteria
  o Value fields that are used as criteria in the query are not supported. If one of the selected fields in the query is selected as a value column in the pivot grid model and the same field is used as criteria in the query, the query will fail and the pivot grid model will not render. This is because when rendering the pivot grid model, aggregate functions are applied on the value fields and the same aggregation will be applied on the criteria. This issue does not only result in wrong criteria, but the query will also fail syntactically because there is an aggregation in the WHERE clause and normal criteria will not work. Note that a HAVING clause is needed for the aggregation.
    - Recommendation: use two fields, one representing the value column in the pivot grid and the other used as criteria.

• Query with Value Fields Used as a Prompt
  o Value fields that are used as a prompt in the query are also not supported.
    - Recommendation: use two fields, one representing the value column in the pivot grid and the other used as criteria.
Query with Expressions that are used as Axis Fields in the Pivot Grid Model.
  o If a query has an expression and the expression is used as an axis field in a pivot grid model, the pivot grid will display an error while rendering results because query expressions are not supported in the ROLLUP clause in pivot grid and it may lead to unpredictable results.
  ▪ Recommendation: build a View with the Expression which can then be used in the pivot grid model.

Making Updates to a Query Used as a Pivot Grid Data Source

If the Query used for the pivot grid is changed the pivot grid must also be modified to ensure all changes are kept and displayed correctly in the pivot grid viewer and pagelets.
Also note that making excessive changes to a pivot grid model and/or the query data source can cause the model to permanently fail.

**Pivot Grid Wizard**

Use pivot grid wizard to create, update and maintain pivot grid models. There are five steps that walk Query Developers through the process of defining the fundamental components of the pivot grid (data, values, axes) as well as the initial display selections (chart type, viewing options). The definition of the data model in the pivot grid wizard will determine what actions are available to end users as well as the initial view.

**Pivot Grid Wizard Steps**

- Specify Pivot Grid Properties
- Select the Data Source
- Specify Data Model Values
- Specify Data Model Options
- Pivot Grid Display

**Pivot Grid Wizard Navigation**

To navigate to the pivot grid wizard follow this path: Main Menu --> Reporting Tools --> Pivot Grid --> Pivot Grid Wizard.

Users can select to either search for existing pivot grids or create a new one.
We are creating a new pivot grid so will select "Add a New Value" and enter the name for the pivot grid then click "Add".

Pivot Grid Naming Convention

The pivot grid naming convention is:

PGXX_XXXXXXXXXX.

- Example: PGCS_FTE_SUMMARY
How Pivot Grid Wizard Options Translate to Pivot Grid Viewer

This course is designed to help developers learn how to use Pivot Grid Wizard to create pivot grids, however to fully understand the options available in the wizard it is imperative that we understand how they translate to the display of the model in Pivot Grid Viewer. With this in mind, as we go through the course we will see where an option is located in Pivot Grid Wizard and then also how that option affects the display of the model in Pivot Grid Viewer.

Pivot Grid Wizard Set Up

Pivot Grid Wizard Set Up Screenshots will be denoted with:

Pivot Grid Viewer Display

Pivot Grid Viewer Display Screenshots will be denoted with:

As an example of this process, in the GIF below we see how in Pivot Grid Wizard the developer can select the Default View to display the pivot grid in one of three ways:

1. Grid Only
2. Chart Only
3. Grid and Chart
The changes to the selection of the Default View in Pivot Grid Wizard are saved and then the Pivot Grid Viewer screen is refreshed, so we can see in "real time" how a selection in Pivot Grid Wizard affects the display of the model in Pivot Grid Viewer.

By using this concept in this course we will show the developer not only how to set up options within Pivot Grid Wizard but also how those options display the model in Pivot Grid Viewer giving the developer an all-encompassing understanding of Pivot Grids.
Pivot Grid Viewer Classic vs Fluid Mode

Taking this a step further, remember that all pivot grids have the option to be opened in fluid mode or in classic mode in Pivot Grid Viewer. Whichever option is selected will affect how the display of the model is rendered. Within Pivot Grid Wizard there are a few options which will only display if the model is opened in classic mode and others that work only in fluid mode. These will be noted in the course. However, the unless otherwise noted the examples of how the pivot grid model will display in Pivot Grid Viewer will be shown in fluid mode.

Pivot Grid Wizard - Step 1 - Specify Pivot Grid Properties

The name of the pivot grid will pull in from the previous screen. The other options to fill in here include:

- **Pivot Grid Title**
  - This will be the title of the pivot grid and will display in the pivot grid results.

- **Description**
  - The pivot grid description field is the only area where developers can enter notes about the grid. There is no definition field for a pivot grid as there is in Query Manager.
    - Detailed description of purpose of pivot grid.
    - Any specific aggregation applied.
    - Include key search terms
    - Describe any changes or updates made to an existing grid including approval for the modification.
    - College code and email address of developer, for example, 890: pmcdaniel@sbctc.edu
    - Date pivot grid was created or updated
    - Business process number, if applicable.

- **Pivot Grid Type**
Select Public
- Owner
  - Select PeopleTools

**Pivot Grid Wizard Set Up**

Pivot Grid Wizard - Step 2 - Select the Data Source

The data source will be a query that was created for use with the pivot grid. While both Composite Queries and Components are available for use as data sources for pivot grids, the scope of this course only includes using a query as a data source.

- Click on the magnifying glass to the right of the Query Name field and search for the correct query.
- Click on the hyperlinked query name to pull it in.
- Once the query has been chosen the fields that have been selected to display in the query results will appear. The default is to include all fields.
- Click in the checkbox to select/deselect a field.
NOTE: If the field is not selected here it will not be available to display or use in the pivot grid with the exception of fields used as prompts in the query.

Users may also “Select All” or “Clear All” checkmarks.

**Pivot Grid Wizard Set Up**

While users may check to include fields used as prompts, it is not recommended as it could confuse end users. What will happen is that the field will be used as a prompt AND as a facet in
the final rendering of the pivot grid, effectively displaying the field twice in two different locations. In the screenshot below INSTITUTION was selected as a prompt in the query and checked to display in Step 2 Select a Data Source in the pivot grid wizard. So, it is showing up twice in the Pivot Grid Viewer rendering shown below. Thus, it is recommended to deselect all fields used as prompts in Step 2 of the Pivot Grid Wizard.

**Pivot Grid Viewer Display**

![Pivot Grid Viewer Display](image)

**Pivot Grid Wizard - Step 3**

Step 3 allows the developer to select how the fields from the query will be used in the Pivot Grid, either a Value, Axis or Display as well as possible different headings. Additionally, default prompt selections are also determined in this step. This step offers many different options on how the model will render in Pivot Grid Viewer. For this course we will only be reviewing the General Options tab.
Specify Data Model Values

Specify Data Model Values offers many different options on how the model will render in Pivot Grid Viewer.

Pivot Grid Wizard Set Up

Select Data Source Information - General Options

The General Options tab has nine columns which work together to help determine how the pivot grid will render data in Pivot Grid Viewer. The General Options columns are:

- Data Source Columns
  - These are the fields pulled in from the data source query selected for use in the pivot grid in Step 2.
- Column Label
  - Text entered here will override the heading text selected in the data source query.
- Aggregate Label
  - The text entered here will display in the pivot grid (not in the chart) if an aggregate is selected in the Aggregate Column. Note: when an aggregate is first applied to a field in the Aggregate Column the space in the Aggregate Label column for text will remain grayed out until the pivot grid model is saved, exited and then returned to.
- Field Format
  - Denotes the field type from the query data source.
- Column Type
  - Used to determine if the field will be used as an Axis, Value or Display.
- Total
- Allows the field to be used to "total by". For example, total by Admit Type.
  - Aggregate
    - Used to apply an aggregate value on fields. Aggregates available are:
      - Average
      - Count
      - Count Distinct
      - Maximum
      - Minimum
      - None
      - Sum
  - Total Name
    - Allows the developer to choose a distinct name for a field when totaled if it has been selected to "total by" in the Total Column.
  - Editable Facet (Only Fluid)
    - Will not display if Classic Mode is selected in Pivot Grid Viewer. Fields set as "Display" can not be set as an editable facet. If a field is selected as an Editable Facet it will display in the Prompts section of the left panel in fluid view of Pivot Grid Viewer. It will behave as a prompt as well though there is no lookup list associated with it. Since there is no lookup list end users can put in an incorrect value which will not return any results. Note: Security is not applied to user specific values so be careful which fields are selected as editable facets.

Next we will look at each of these columns in more detail and show how they will display in Pivot Grid Viewer.

**Data Source Columns**

The Data Source Columns are the fields from the data source query that were selected for use in the pivot grid during Step 2 of the wizard. How they display in Pivot Grid Viewer is entirely reliant upon how they are selected to be used. Those fields selected as Values will be used to measure the data for example.
Column Label

- This will override the heading text from the query. In this example, the heading texts from the query are ID and Appl Meth which were updated in the Column Label to display as Student ID and Application Method instead.

**Pivot Grid Wizard Set Up**

When the pivot grid is displayed the text entered in the Column Label will display instead of the text from the query.
Aggregate Label

- This is the label that can be applied to a field which has been aggregated. It will override both the heading text from the query and the Column Label in the chart and grid results. Note: when an aggregate is first applied to a field in the Aggregate Column the space in the Aggregate Label column for text will remain grayed out until the pivot grid model is saved, exited and then returned to. Here, Student ID Count is written in the Aggregate Label.

_Pivot Grid Wizard Set Up_

When the pivot grid is displayed the text displays Student ID Count.
Field Format

- States the format of the field from the query data source such as String, Date or Number.

Column Type

- Allows the users to select how to use and/or display the field in the final pivot grid results. Only fields selected as an Axis or Value will show in Step 4 and be used in the grid, chart or as a facet. Fields selected as Display will not appear in Step 4 and will only display in the Detailed View modal window in the pivot grid display. Fields selected as Display do not display in either the grid, chart or as a facet. There are three options:

  **AXIS**

  - An attribute that qualifies a value. Allows the field to be used as a facet in the pivot grid results. Can be dragged and dropped, used as a filter, totaled, etc. One of the axis column types will be selected as the X axis for the chart (which will be the row in the grid or detail view). The other fields selected as an axis type will become the pivot grid facets (filters) or editable facets (prompts).

_Pivot Grid Viewer Display_
## Specify Data Model Values

Specify the Column Type and the Aggregate functions for the selected Data Model.

**Title:** Having Fun with Pivot Grids

<table>
<thead>
<tr>
<th>Data Source Columns</th>
<th>Column Label</th>
<th>Aggregate Label</th>
<th>Field Format</th>
<th>Column Type</th>
<th>Total</th>
<th>Aggregate</th>
<th>Total Name</th>
<th>Editable Facet (Only Fluid)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Student ID</td>
<td>Student ID Count</td>
<td>String</td>
<td>Value</td>
<td></td>
<td>Count</td>
<td>Career Total</td>
<td></td>
</tr>
<tr>
<td>Career</td>
<td>String</td>
<td>Value</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Admit Type</td>
<td>String</td>
<td>Value</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Admit Type Total</td>
<td></td>
</tr>
<tr>
<td>App Method</td>
<td>String</td>
<td>Value</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>App Method Total</td>
<td></td>
</tr>
<tr>
<td>Acad Level</td>
<td>String</td>
<td>Value</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Level Total</td>
<td></td>
</tr>
<tr>
<td>App Date</td>
<td>Application Data</td>
<td>Date</td>
<td>Display</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select All | Clear All
**VALUE**

- The metric used to make business decisions. Must be a numeric field or an count aggregation of a non numeric field. One of the value fields will be selected as the Y axis in the chart (which will be the column in the grid or detail view). It is possible to have more than one value type field. They can be used as an Overlay or as a Dual Y Axes.

**Pivot Grid Wizard Set Up**
**Pivot Grid Viewer Display**

- Student ID is an example of a field being used as a Value Column Type. It is the Y Axes of the Chart and the Column in the Grid.

**DISPLAY**

- The field will not be used in the slicing and dicing of data, however it will display in the detail view of the chart.
  - The field will display in either the chart detail view (as shown below) or the grid detail view. However, it is not a facet which can be used to slice and dice the data. In our pivot grid, Application Date was selected as Display.
Checking the total box will allow for a total by the selected field. It opens up the Total Name column for the developer to establish a different name if totaling by the field. However, it will only total by one field at a time. In the example below Career, Admit Type, Application Method and Academic Level have all been checked to total their results.
However, when the pivot grid is rendered with all three selected as a row (or X axis) we see that the last field selected is the one that is being totaled, in this case Academic Level.

**Pivot Grid Viewer Display**

Note: Developers can use the Select All or Clear All hyperlinks to either select or clear all of the total checkboxes next to every Axis Column Type field.
Aggregate

- The aggregate column allows for users to select how to place an aggregate on a field with a Value Column Type. It works in conjunction with the Aggregate Label column for the heading text of the aggregated field. If the field has a format of string the only option that will work is Count or Count Distinct. The other options will display but it will always automatically revert back to count. Number fields can be aggregated by:
  - Average
  - Count
  - Count Distinct
  - Maximum
  - Minimum
  - None
  - Sum
**Pivot Grid Wizard Set Up**

![Pivot Grid Wizard Set Up Diagram]

**Pivot Grid Viewer Display**

![Pivot Grid Viewer Display Diagram]

*The Aggregated Total will display in Pivot Grid Viewer*
Total Name

- The Total Name column provides the heading text for the totaled by field results if the Total column has been checked.

**Pivot Grid Wizard Set Up**

**Pivot Grid Viewer Display**
Editable Facet (Only Fluid)

If the field in this column is checked the field will appear and act as a prompt in the prompts section of Pivot Grid Viewer where they can not be used to slice and dice the data instead of as a facet filter. Only Axis and Value Column Types may be checked as Editable Facet, not Display Column Types. If the Column Type is Value the field may not be selected as the Y Axis (or Dual Y Axis) in Step 4 or it will not display as a prompt. The fields that have been checked as an Editable Facet will display under the Prompts area of the rendered model in Pivot Grid Viewer when the More Options hyperlink is clicked. Once the More Option hyperlink is opened users will be able to select a hyperlink to Show or Hide Operators allowing for the selection of the logical operator.

In the screenshot below we see that we have selected Admit Type, Application Method and Academic Level as Editable Facets. In this example Admit Type has also been selected as the X Axis (we will see this in Step 4) Since it is the X Axis, Admit Type will always remain a facet which can be sliced and diced.

**Pivot Grid Wizard Set Up**
However, since Application Method and Academic Level have not been selected as the X axis when the grid is rendered, and the More Options hyperlink is opened we see both these fields as additional prompts. Admit Type, which is the X Axis and so will always display as a filter, and Career, which was not selected as an Editable Facet, display as facets (filters) in the left panel.
There are a few things to keep in mind with this.

- At least one of the prompts in the query must be selected as visible in Step 3 Specify Data Model Values or neither the prompts nor the Editable Facet prompt will be able to be changed by the end user.
- The data entered in the Editable Facet prompt has to be the non translated value code if the field has a translate value.
  - There is also no way to add a look up list for the end user.
- When the pivot grid is first rendered the default view will not display the fields selected as an Editable Facet as a facet, but only as an additional prompt.
  - However, we will learn later in this course how to update the filters in the rendered pivot grid to select any of the fields chosen as an Axis Column Type as a facet. This means that we will still be able to use these fields to slice and dice data regardless of the default view.

*Pivot Grid Viewer Display*
Configure Visible Prompts

Select Query Prompt Values and Configure Visible Prompts

In this area of the Specify Data Model Values page the query developer will determine the default values for any prompts in the query as well as decide whether an end user will be able to update the prompts with different values. Remember that at least one of the prompts in the query must be selected as visible in Step 3 Specify Data Model Values or any editable facet prompts will not be visible to the end user either.

**Pivot Grid Wizard Set Up**

Since no visible prompts were selected no prompts or editable facets display in the left panel.

**Pivot Grid Viewer Display**
Pivot Grid Wizard - Step 4

Step 4 offers a plethora of options. There are display options, options on how the end user will be able to interact with the pivot grid, options how the grid will be set up. This step can be confusing just because of the sheer amount of available choices. Here we will again break down each choice with how it is set up in Pivot Grid Wizard and how it will display in Pivot Grid Viewer.

Specify Data Model Options
The Specify Data Model Options page has many, many options to choose from including:

- View Options
- Grid Options
- Chart Options
- Display Options
- Fluid Mode Options

We will look at all of these options and how they function.
View Options

The View Options tab has two very important sections: selecting the Default View and Specify Axis Information. The default view will determine how the data will be displayed and the axis information will determine which fields are used for the X and Y axis and which fields are used for filters.

Default View

The default view can be:

- Pivot Grid Only
- Chart Only
- Pivot Grid and Chart

Note: only fields selected as a Value or Axis in step 3 will display in the Specify Axis Information box.
**Pivot Grid Only**

The Pivot Grid Only view will display the pivot grid results as a grid with no chart.

**Pivot Grid Wizard Set Up**

Specify the values for the Display and View Options for the Pivot Grid and Chart.

**Pivot Grid Viewer Display**
DETAILED VIEW

Clicking on the hyperlinked Value total to the right of the desired field will show a modal window with the detailed view of the first 100 rows of data with a display very similar to a query result set.

Note: the detailed view is where fields selected as Display in Step 3 will appear. In our example, Application Date was selected as Display in Step 3 and while it does not display in the grid or as a facet it does display in the detailed results as shown below.

Pivot Grid Viewer Display
<table>
<thead>
<tr>
<th>Student ID</th>
<th>Career</th>
<th>Admit Type</th>
<th>Application Method</th>
<th>Application Date</th>
<th>Created By</th>
</tr>
</thead>
<tbody>
<tr>
<td>201343072</td>
<td>UGRD</td>
<td>FYIR</td>
<td>HSD</td>
<td>01/19/2016</td>
<td>12/03/2015</td>
</tr>
<tr>
<td>201343084</td>
<td>UGRD</td>
<td>FYIR</td>
<td>HSD</td>
<td>02/19/2016</td>
<td>12/03/2015</td>
</tr>
<tr>
<td>201362352</td>
<td>UGRD</td>
<td>REA</td>
<td>HSD</td>
<td>02/13/2016</td>
<td>12/03/2015</td>
</tr>
<tr>
<td>201384022</td>
<td>UGRD</td>
<td>FYIR</td>
<td>HSD</td>
<td>03/11/2016</td>
<td>12/03/2015</td>
</tr>
<tr>
<td>201330007</td>
<td>UGRD</td>
<td>FYIR</td>
<td>HSD</td>
<td>02/19/2016</td>
<td>12/03/2015</td>
</tr>
<tr>
<td>201384115</td>
<td>UGRD</td>
<td>FYIR</td>
<td>HSD</td>
<td>03/19/2016</td>
<td>12/03/2015</td>
</tr>
<tr>
<td>201384473</td>
<td>UGRD</td>
<td>REA</td>
<td>HSD</td>
<td>02/16/2016</td>
<td>12/03/2015</td>
</tr>
<tr>
<td>201330007</td>
<td>UGRD</td>
<td>REA</td>
<td>HSD</td>
<td>02/18/2016</td>
<td>12/03/2015</td>
</tr>
<tr>
<td>201384296</td>
<td>UGRD</td>
<td>FYIR</td>
<td>HSD</td>
<td>02/16/2016</td>
<td>12/03/2015</td>
</tr>
<tr>
<td>201384256</td>
<td>UGRD</td>
<td>RUN</td>
<td>HSD</td>
<td>03/13/2016</td>
<td>12/03/2015</td>
</tr>
<tr>
<td>201384296</td>
<td>UGRD</td>
<td>FYIR</td>
<td>WWW</td>
<td>02/11/2016</td>
<td>12/03/2015</td>
</tr>
<tr>
<td>201384240</td>
<td>UGRD</td>
<td>FYIR</td>
<td>HSD</td>
<td>03/21/2016</td>
<td>12/03/2015</td>
</tr>
<tr>
<td>201384256</td>
<td>UGRD</td>
<td>FYIR</td>
<td>HSD</td>
<td>02/19/2016</td>
<td>12/03/2015</td>
</tr>
<tr>
<td>2011853891</td>
<td>UGRD</td>
<td>REA</td>
<td>HSD</td>
<td>02/13/2016</td>
<td>12/03/2015</td>
</tr>
</tbody>
</table>
Chart Only

The Chart Only view will display the pivot grid results as a chart with no grid.

**Pivot Grid Wizard Set Up**

Instead of displaying in a modal window by clicking a hyperlink as in Pivot Grid Only the detailed view of the first 100 rows of data is shown directly below the chart.

**Pivot Grid Viewer Display**
DETAILED VIEW

Clicking on a particular area of the graph will display the detailed view for that area. For example, clicking on the graphical representation for International Students we see that this part of the pie is now outlined to show that it has been selected and the number of rows of detailed information is 10.

**Pivot Grid Viewer Display**

Pivot Grid and Chart

The Pivot Grid and Chart view will display both the chart and the pivot grid with the grid being at the top of the page and the chart at the bottom.

**Pivot Grid Wizard Set Up**
**DETAILED VIEW**

The first 100 rows of the detailed view modal window is again available by clicking on the hyperlinked totals to the right of the fields in the grid or by clicking on a particular area of the graphical representation of the data (ie, bar or pie piece).

**Pivot Grid Viewer Display**
Specify Axis Information

<table>
<thead>
<tr>
<th>Specify Axis Information</th>
<th>Data Source Columns</th>
<th>Field Format</th>
<th>Grid Axis</th>
<th>Chart Axis</th>
<th>Display As</th>
<th>Dual Y Axis</th>
<th>Define Threshold</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 ID</td>
<td>String</td>
<td>Column</td>
<td>▼</td>
<td>Y-Axis</td>
<td>▼</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Acad Year</td>
<td>String</td>
<td>Filter</td>
<td>▼</td>
<td>Filter</td>
<td>▼</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Item Type</td>
<td>String</td>
<td>Filter</td>
<td>▼</td>
<td>Filter</td>
<td>▼</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Amt</td>
<td>Signed Number</td>
<td>Column</td>
<td>▼</td>
<td>Y-Axis</td>
<td>▼</td>
<td></td>
<td>Define Threshold</td>
</tr>
<tr>
<td>5 Descr</td>
<td>String</td>
<td>Filter</td>
<td>▼</td>
<td>Filter</td>
<td>▼</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 Short Descr</td>
<td>String</td>
<td>Row</td>
<td>▼</td>
<td>X-Axis</td>
<td>▼</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Group Name</td>
<td>String</td>
<td>Filter</td>
<td>▼</td>
<td>Filter</td>
<td>▼</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8 Institution</td>
<td>String</td>
<td>Filter</td>
<td>▼</td>
<td>Filter</td>
<td>▼</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

There are 7 columns in the Specify Axis Information box:

- Data Source Columns
- Field Format
- Grid Axis
- Chart Axis
- Display As
- Dual Y Axis
- Define Threshold

**Data Source Columns**

These are the fields selected as an Axis or Value column type in Step 3. The name of these fields comes from the heading text of the field in the data source query.
**Field Format**

Details whether the field is string, number, etc.
The Grid Axis and Chart Axis

Remember that pivot grids can display as both a grid and a chart. The Grid Axis column allows the developer to select options related to the grid while the Chart Axis column allows for selecting options related to the chart. Note: fields that were selected as Display in Step 3 will not appear in Step 4 as they will only display in the Detailed View in Pivot Grid Viewer.

The Grid Axis has the following three options on how to use the field within the pivot grid model:

- Column - Will display as a column in the grid portion of the model.
- Row - Will display as a row in the grid portion of the model.
- Filter - Will display in the left panel as an option to slice and dice the data.

The Chart Axis options depend on the selection for the Grid Axis.

Grid Axis Selection of Column

When Column is selected in the Grid Axis the Chart Axis options are:

- Y Axis
- Overlay
- Filter

SINGLE COLUMN/Y AXIS

Pivot Grid Wizard Set Up
If only a single Column/Y Axis combination selection is made then Pivot Grid Viewer will display the field as a Column in the grid section and as the Y Axis in the chart section of the pivot grid model.
**Pivot Grid Viewer Display**

**TWO COLUMN/Y AXIS**

If two fields are selected as Column the developer can select one field to be a Column/Y Axis and another to be a Column/Y Axis as well.

**Pivot Grid Wizard Set Up**
The Two Column/Y Axes fields will simply display their totals on the same Y Axis on the left side of the graph IF Chart Only Default Display has been selected.

**Pivot Grid Viewer Display**

If the Chart Only Default View was not selected both fields will display as Columns in the grid section. If the Default View Pivot Grid and Chart was selected however, only the first field will display on the Y Axis as shown below.

**Pivot Grid Viewer Display**
COLUMN/Y AXIS AND COLUMN OVERLAY

The Column/Overlay will display only if the Default View Chart Only was selected in Step 3. The overlay will be on the same Y Axis as the Column/Axis field.

**Pivot Grid Wizard Set Up**

If two fields were selected as Column/Y Axis and Column/Overlay, Pivot Grid Viewer will display the field selected as Column/Y Axis as the Y Axis in the chart section and the field selected as Column/Overlay as the Overlay IF the Default View Chart Only was selected. No other default views will display the overlay.
If the Chart Only Default View was not selected both fields will display as Columns in the grid section. If the Default View Pivot Grid and Chart was selected however, only the first field will display on the Y Axis as shown below.

**Pivot Grid Viewer Display**

**Grid Axis Selection of Row**

When Row is selected in the Grid Axis then the Chart Axis options are:

- X Axis
**ROW/X AXIS**

**Pivot Grid Wizard Set Up**

When the Grid Axis selection of Row and the Chart Axis selection of X Axis is made Pivot Grid Viewer will display the selected field as a row in the grid and the X Axis in the chart.

**Pivot Grid Viewer Display**

**ROW/X AXIS/SERIES**

Once one field has been selected as the X Axis, another field may be chosen as a Series in the chart.
**Pivot Grid Wizard Set Up**

When a Series has been chosen both of the fields selected as a row will display in the chart IF Chart Only has been selected as the Default View.

**Pivot Grid Viewer Display**
If any other Default View is selected both fields selected will display as rows in the Grid but only the first will display as the X Axis in the Chart.

**Pivot Grid Viewer Display**

![Pivot Grid Viewer Display](image)

**Grid Axis Selection of Filter**

When Filter is selected in the Grid Axis then the Chart Axis option is:

- Filter
  - Note that the list shows X Axis and Series however, if selected as a Chart Axis the Grid Axis will change to match the selection in the Chart Axis.

**FILTER/FILTER**

**Pivot Grid Wizard Set Up**

![Pivot Grid Wizard Set Up](image)
If Filter is selected as the Grid Axis it will also be selected for the Chart Axis. Filters display as Facets in Pivot Grid Viewer for both the chart and the grid.
Grid Axis and Chart Axis Balance

The .gif below shows how the Grid Axis and Chart Axis columns must balance. If one is changed the options for the other will change as well.
**Display As**

This column allows the developer to display the value as a percentage or as a percentage of total. It will only display for fields selected as Value in Step 3.

**Pivot Grid Wizard Set Up**

Pivot Grid Viewer will display the chart and grid as selected. In the example below it is displayed as percentage of grand total.
Dual Y Axis

Allows for a secondary Y Axis to be used; each on their own axis.

- Only available for the Default View of Chart Only and for columns that are set to a Chart Axis type of Y Axis.
- Only one additional column can be used as a Dual Y Axis
- If a Dual Y Axis is selected, Series or other axis values can't be used in the chart.
**Pivot Grid Wizard Set Up**

By selecting two fields to be a Y Axis and then selecting one of those fields to be a Dual Y instead of acting as an overlay where both fields share the same axis, one field will be the left Y Axis and the other will be the right Y Axis in the Pivot Grid Viewer display. Both axes will only display if the Chart Only Default View is selected. If any other Default View is selected only the first Y Axis will display in the chart.
Define Threshold

Allows for a threshold line or range to display. A threshold can only be set on Value fields and will not display if an Overlay or Dual Y Axis is used, however it will display if a Series is selected on the X Axis.

There are two Threshold Types that can be selected.

- Distinct
- Range
If Distinct is selected the query developer can enter in a single number which will be the threshold marker which will display in both the grid and the chart in Pivot Grid Viewer. Additionally, the query developer can choose the color of the threshold line as well as a description which will display when the mouse is hovered over the threshold line in Pivot Grid Viewer.

**Pivot Grid Viewer Display**
**RANGE THRESHOLD**

**Pivot Grid Wizard Set Up**

![Configure Thresholds](image)

If Range is selected the query developer can enter in a range which will be the threshold marker which will display in both the grid and the chart in Pivot Grid Viewer. Additionally, the query developer can choose the color of the threshold line as well as a description which will display when the mouse is hovered over the threshold line in Pivot Grid Viewer.

**Pivot Grid Viewer Display**
Grid Options

The Grid Options allow the developer to select how the grid portion of the pivot grid will behave for the end user.

The three options are:

- Collapsible Area
- Expanded State
- No Drag and Drop

**COLLAPSIBLE AREA AND EXPANDED STATE**

*Pivot Grid Wizard Set Up*
These two options work together to allow the grid portion of the pivot grid to have the option to collapse or expand and to be expanded automatically when initially viewed in Pivot Grid Viewer.

**NO DRAG AND DROP**

If No Drag and Drop is selected the end user will not have the option to drag and drop facets to change the pivot grid. The pivot grid Column and Row area, as shown below, will not display which means that only the rows and columns selected by the developer will display.
No Drag and Drop will only affect the model display if the developer has selected a Default View which includes grid. If Chart Only is selected this setting will have no effect.

If No Drag and Drop is not selected then the facets in the left hand panel will appear in Pivot Grid Viewer with a drag and drop icon in their upper right corner that allow end users to use these facets to slice and dice the data.

If No Drag and Drop has been selected and Chart Only is not the Default View then the drag and drop icons will not appear in Pivot Grid Viewer so the data may not be sliced and diced.
**Chart Options**

In the same way that Grid Options define how the grid will display and behave, the Chart Options define how the chart portion of the pivot grid will display. Chart Options has two sections: Chart Options and Advanced Options.
Pivot Grid Wizard

Step 4 of 5

Specify Data Model Options

Specify the values for the Display and View Options for the Pivot Grid and Chart.

Title: Fun with Pivot Grids

View Options

Grid Options

Chart Options

<table>
<thead>
<tr>
<th>Title</th>
<th>Fun with the XYZ Axis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>2D Bar Chart</td>
</tr>
<tr>
<td>X-Axis Label</td>
<td>Residency Type Chart Option</td>
</tr>
<tr>
<td>Y-Axis Label</td>
<td>Student ID</td>
</tr>
</tbody>
</table>

Advanced Options

- Legend: Bottom
- Height: 
- Width: 
- Subtitle: This is a Chart subtitle
- Footer: This is a Chart Footer
- Y-Axis Precision: Exploded Pie
**Chart Options**

- Title
- Type
- X-Axis Label
- Y-Axis Label

**TITLE**

The Title selected in the Chart Options section will overwrite the title for the chart only. Below we see the overall title of the pivot grid model remains the same while the chart title has been updated based on the Chart Options title.

**Pivot Grid Wizard Set Up**

“Fun with the X Axis” is the original title of both the pivot grid and the chart however in Chart Options we selected “Fun with the XYZ Axis” as the chart title.
The type of chart that can be selected can depend on whether a series, dual Y or overlay has been selected. However, many of the standard types of charts are available. They are:

- 2D Bar Chart
- 2D Histogram Chart
- 2D Horizontal Bar Chart
- 2D Horizontal Percent Chart
- 2D Line Chart
- 2D Percent Bar Chart
- 2D Pie Chart
- 2D Stacked Bar Chart
- 2D Stacked Horizontal Bar
- 3D Bar Chart
- 3D Percent Bar Chart
- 3D Pie Chart
- 3D Stacked Bar Chart
- Bubble Chart
- Scatter Chart
**X-AXIS AND Y-AXIS LABEL**

The X-Axis and Y-Axis labels will override the Column Label selected in Select Data Source Information in Step 3.

**Pivot Grid Wizard Set Up**

![Chart Options](image)

The labels previously selected or that come from the query if no label is selected in Step 3 are overwritten and the new labels selected in Chart Options now display.

**Pivot Grid Viewer Display**

![Chart Preview](image)
Advanced Chart Options

The Advanced Chart Options subset allow the developer to select additional display options for the chart.

- Legend - select a legend for the chart
  - Available options are:
    - bottom
    - left
    - none
    - right
    - top
- Height - select a specific height for the chart
- Width - select a specific width for the chart
- Subtitle - add a subtitle to the chart
- Footer - add a footer to the chart
- Y-Axis Precision - enter the number of decimal places for Y Axis values
- Exploded Pie - only available for pie charts.

LEGEND

Will display a legend for the chart in Pivot Grid Viewer in the area selected by the query developer if Chart Only is selected as the Default View.
**Pivot Grid Wizard Set Up**

**Advanced Options**

- **Legend** [Left]
- **Height**
- **Width**
- **Subtitle**
  - This is a Chart subtitle
- **Footer**
  - This is a Chart Footer
- **Y-Axis Precision**
  - [Exploded Pie]

**Pivot Grid Viewer Display**

**HEIGHT/WIDTH**

These options don’t affect the pivot grid model if it is opened in Fluid Mode but if the end user opens the model in Classic Mode the developer can determine the size of the chart.
Below are two examples of the set up in Pivot Grid Wizard and the view of the chart in Classic Mode.

**Pivot Grid Wizard Set Up**

**Pivot Grid Viewer Display**
**Pivot Grid Wizard Set Up**

**Advanced Options**

- **Legend**: Left
- **Height**: 1000
- **Width**: 200
- **Subtitle**: This is a Chart subtitle
- **Footer**: This is a Chart Footer
- **Y-Axis Precision**: Off
- **Exploded Pie**: Off

---

**Pivot Grid Viewer Display**
**Subtitle/Footer**

The Subtitle will display next to the Chart Title and the Footer above the Chart Type icons in both Chart Only and Pivot Grid and Chart default views.

---

**Pivot Grid Wizard Set Up**

Advanced Options

- **Legend**: Left
- **Height**: 500
- **Width**: 500
- **Subtitle**: This is a Chart subtitle
- **Footer**: This is a Chart Footer
- **Y-Axis Precision**: Exploded Pie

---

**Pivot Grid Viewer Display**
**Y AXIS PRECISION**

Enter the number of decimal places in the Y-axis values. For example, when the Y-Axis Precision has a value of 2, the Y-axis in the chart has two decimal values.

---

**Pivot Grid Wizard Set Up**

---

**Advanced Options**

- **Legend**: Left
- **Height**: 500
- **Width**: 500
- **Subtitle**: This is a Chart subtitle
- **Footer**: This is a Chart Footer
- **Y-Axis Precision**: 2
- **Exploded Pie**

---

**Pivot Grid Viewer Display**
**EXPLODED PIE**

If Exploded Pie is checked when the end user chooses a 2D or 3D pie chart as the display option for the chart the pie will appear in its exploded view.

**Pivot Grid Wizard Set Up**

```plaintext
Advanced Options

Legend: Left
Height: 500
Width: 500
Subtitle: This is a Chart subtitle
Footer: This is a Chart Footer
Y-Axis Precision: Exploded Pie
```
**Pivot Grid Viewer Display**

Display options allow the developer to give or take away display options to the chart end user.
**View Grid**

The View Grid checkbox allows the end user to view the Grid even if the Chart Only Default View has been selected. Within the Options Menu in Pivot Grid Viewer an option of View Grid will appear if the checkbox has been selected. If the checkbox is not selected or any other Default View has been chosen, the option will not appear in the Options Menu in Pivot Grid Viewer.

*Pivot Grid Viewer Options Menu*

When selected a modal window (pop up window) will appear displaying the Grid.

*Pivot Grid Viewer Display*
The modal window has many of the same options as the fluid view, such as prompts and facet values to slice, dice and analyze the data. If the Apply button in the top right of the modal is clicked the end user goes back to the chart view but it will be refreshed based on the selections made in the modal window. Otherwise, if the Cancel button in the top left of the modal window is clicked, the modal window closes the chart layout is not changed.
Export Data

Select to export the underlying data to Excel.

Pivot Grid Viewer Options Menu

Chart Options

If checked then end users can change the chart layout, chart axis, and filters. If the checkbox is not selected the option will not appear in the Options Menu in Pivot Grid Viewer. This option will also not display if the Pivot Grid Only Default View has been selected.

Pivot Grid Viewer Options Menu
The end user will now have the option to overwrite the query developer's default Title, Subtitle, Footer, etc.

**Pivot Grid Viewer Display**
Hide Chart

The Hide Chart checkbox only works in Classic mode of Pivot Grid Viewer. When it is selected the end user can choose to hide the chart, if de-selected the option to hide the chart is grayed out and unusable.

*Pivot Grid Viewer Display*
Reset

If a model has been personalized, the user is able to select to reset the pivot grid model to its original display. If the model has not been personalized, this option will not show in the Menu Options of Pivot Grid Viewer.

Save

Allows the end user to save the current model layout as a default view of the current model. The model layout, filter values, and prompt values are also saved as preferences.
Bar Chart/Line Chart/Pie Chart/Horizontal Bar Chart

This is the only display option that is part of the chart itself and not part of the Options Menu in Pivot Grid Viewer. If checked the end user will have the option to change the chart display in Pivot Grid Viewer. If one type is de-selected that chart type will not be an available selection for the end user in Pivot Grid Viewer.

*Pivot Grid Viewer Display*
Update Filters

Select to display the Update Filters dialog box in Pivot Grid Viewer, which enables the end user to add or remove filters for a model.

Pivot Grid Viewer Options Menu

Pivot Grid Viewer Display
Show Help


Configure message text using PeopleSoft pre-configured Message Set Number and Message Number. The message description shows when you roll over the Help button. This message will only display in Classic Mode of Pivot Grid Viewer.

Pivot Grid Viewer Display
Save As

Select to display the Save As dialog box in Pivot Grid Viewer, which enables end users to save the changes they have made to the default model as a new and separate model view.

*Pivot Grid Viewer Options Menu*

If a separate model view is saved then users have the option to select and open either view of the model.

*Pivot Grid Viewer Display*
**Fluid Options**

Fluid Options give the developer options that will affect only the fluid view of the pivot grid model. It is broken down into three sections:

- List View Options
- Viewer Options
- Facet Selection

For the purpose of this course we will review Viewer Options and Facet Selection only. List View Options will be covered in a later course.

**Viewer Options**

Viewer Options affect the display of the pivot grid model in Pivot Grid Viewer only when viewed in fluid mode.
Result View

Result View determines how the Detailed View (or Result View) is displayed. There are 3 options for how they can display.

- Grid
- List
- Grid and List

We only will be discussing the Grid view in this course as the List View uses List View Options which will be covered in a later course.

*Pivot Grid Wizard Set Up*
When Grid is the selected Result View the results will display as a grid in Pivot Grid Viewer when any Detailed View hyperlink is clicked.

**Pivot Grid Viewer Display**

![Pivot Grid Viewer Display](image)

**Allow Multiple Y Axis**

Select this option to allow users to select multiple Y Axes on the chart. If this option is deselected, any change to the Y axis will result in a single Y axis being plotted on the chart.

**Pivot Grid Wizard Set Up**

![Pivot Grid Wizard Set Up](image)
**Pivot Grid Viewer Display**

**Result View Columns**

These are the columns that will display in the Result View (or Detail View) when the detail view hyperlink is clicked on the chart or grid in Pivot Grid Viewer. As with all Fluid Mode Options, this selection affects on the fluid mode display not the classic mode.

**Pivot Grid Wizard Set Up**
If one of the columns is deselected it will not display in the Result View in Pivot Grid Viewer.

**Pivot Grid Viewer Display**

Facet Selection

The Facet Selection area of Fluid Mode Options allows developers to determine how facets will behave and display in Pivot Grid Viewer.
The columns available are:

- Allow Multi-select
- Show as Chart
- Chart Type
- Facets

**Allow Multi-select**

Gives the developer the option to either allow end users to select multiple facets or only a single facet in Pivot Grid Viewer.

*Pivot Grid Wizard Set Up*

If the multi-select option is deselected then in Pivot Grid Viewer the end user will only have the option to select one facet at a time, not the checkbox which allows for multiple facets to be selected.
Show as Chart/Chart Type

Show as Chart and Chart Type work together to display the facet as a chart in the Left Panel in Pivot Grid Viewer. Show as Charts allows for the display as a chart and Chart Type is where the developer selects the type of chart which will display.

Pivot Grid Wizard Set Up

If setup then the facet will display as a chart in the Left Panel in Pivot Grid Viewer.
**Facets**

This is the list of facets available based on the fields selected as X Axes in Pivot Grid Wizard.
Pivot Grid Wizard - Step 5

Pivot Grid Display

The pivot grid model will display in classic mode in Step 5.

Step 5 of the Pivot Grid Wizard allows the developer to ensure that the model will display as intended. It also allows the developer to make any final design changes to the chart and save them. Step 5 also allows for the developer to Save As so the developer can save the model in a different view which we will see a bit further on.

Note: a pivot grid model can be saved at any of the five steps during creation so the entire model does not have to be designed at one time.

If the grid and/or chart does not display then the developer will need to go back and ensure that the query used meets all of the requirements for use with pivot grid and/or that the model has been set up correctly.

It is necessary to note that if the developer wants to really get into the weeds with the pivot grid and test out ALL grid functionality - Pivot Grid Viewer is the place to do it. Step 5 of the Pivot Grid Wizard does not give the developer access to all capabilities of the grid. In fact, it is quite limited.
Options Menu

Use the Option Menu icon to select the actions for viewing the Pivot Grid model.

- Export Data: Select to export the underlying data to Microsoft Excel.

- Chart Option: Select to open the Options Menu (the same menu that appears to the end user in Pivot Grid Viewer where changes to the chart can be made), where developers can change the chart layout, chart axes, and filters.
Note: If the Default View is Chart Only or Pivot Grid and Chart, the available options are Export Data and Chart Option. If the Default View is Pivot Grid Only the only option is Export Data.

The options Prompts, Reset, Save, View Grid, Display Chart, and Hide Chart are not available in the Pivot Grid Wizard because these options are viewer-only options.

Help Icon

Click the Help icon to display the Help - Pivot Grid dialog box, where help information that may have been defined for all actions for this Pivot Grid model can be viewed.
Expand All and Collapse All

The Expand All or Collapse All link appears when the Pivot Grid model contains totaled values. These links are not available for the Pivot Grid models that have no totals defined.

- Click the Expand All link to expand all the positions on the grid row and column; the Collapse All link appears.
- Click the Collapse All link to collapse all the positions on the grid row and column; the Expand All link appears.
Chart Type Icons

- Click the Bar icon to display data in a bar chart.
- Click the Line icon to display data in a line chart.
- Click the Pie icon to display data in a pie chart.
- Click the Horizontal Bar Chart icon to display data in a horizontal bar chart.
Configure Related Content

Click to access the Assign Related Actions page, where services to be used as Related Actions can be assigned, select the service target to determine where the service will be displayed, and define the parameter mappings and options for the service.

Note: The Configure Related Content link is available only after the Pivot Grid model has been saved.
Publish as Pagelet

Click to access the Review Pagelets dialog box, where users can view a list of pagelets that are using the current Pivot Grid model and where they can create a home page and template to use the Pivot Grid pagelets without having to navigate to the pagelet wizard.

Developers can also add new, delete, or update existing pagelets that are based on the specific Pivot Grid model.

The pivot grid must first be saved before being able to publish as a pagelet.

This topic will be covered in more depth in upcoming pivot grid courses.
Configure Pivot Grid View

Click to access the Pivot Grid Views Component dialog box. This allows the developer to use the model just created as a basis for different views of that same model. Users can create or edit existing views here. For example, if a particular person wants to see the data in a chart only format and save a particular college code for their view they can do so here. The pivot grid must first be saved before being able to configure the pivot grid view.
To save a model view click on the hyperlink Configure Pivot Grid View at the bottom of the page. A pop up window will appear where the developer can make changes to the setup and display for the specific view they would like to create.

Once Save As is clicked on the developer can name the new view and add a description.
Now, if end users select to search available views of pivot grid models they will appear in the list of search results.
Publish as Tile

Click to enable the Pivot Grid model to be published as a tile and included in the landing pages. The tile can contain the Pivot Grid chart as the dynamic tile content.

This topic will be covered in more depth in upcoming pivot grid courses.
Submit a Pivot Grid Migration Request

To submit a pivot grid migration request follow the steps below:

- Log in into SBCTC Service Desk
- If not prompted into the Request screen, click in the “Request” icon.
- On Request Type select “ERP Support”, this will bring a second drop-down list.
- Select “Data & Reporting”, this will bring a third drop-down list.
- Select “Migration Request”.
- Fill in the “Subject” field.
- Describe the request with as much detail as possible.
- Choose the PeopleSoft Pillar from the drop-down list.
- From the “Instructions” field, click on the link “Pivot Grid Migration Request Form” to open the form.
- Click “Enable Editing” button and completely fill out the form.
• Source Environment is normally PCD
• Target Environment is normally PRD
• Fill out the Pivot Grid Migration Request form completely.
• Click “Save As” to save the form the users’ PC (the completed form needs to be attached in the Migration Request)

The Next step is to attach the Pivot Grid Migration Request Form to the Migration Request:

• Click “Add File” button
• Click “Browse” to find the file
• Once found click “Open”
• Click “Upload”, once done the file name should be seen below the “Add File” button
• Location stays as SBCTC.
• Finally click “Save”

The Pivot Grid Migration Request form is used by Data Services and helps ensure that the Query Developer has reviewed their query for compliance and performance before submitting for migration. This form can also be used as a guide during development work to make sure the standards described in this course are being adhered to.