

PeopleSoft Pivot Grid Wizard

Data services



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Course Goal

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

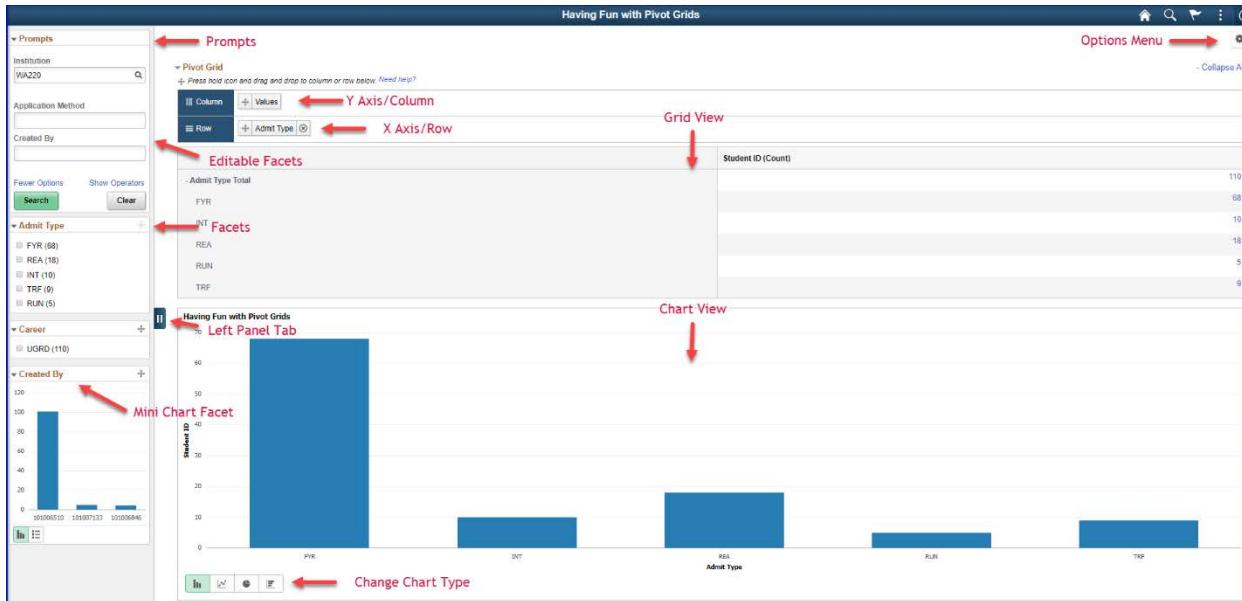
Course Learning Objectives

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:

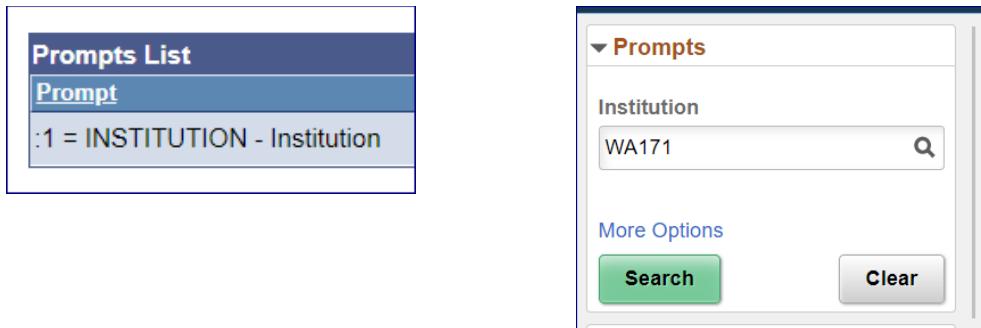
Before beginning in pivot grid wizard it is extremely important to learn how to select or create queries to use in conjunction with pivot grid wizard. There are certain aspects to take into consideration, as well as certain limitations that must be paid attention to when creating or selecting a query 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

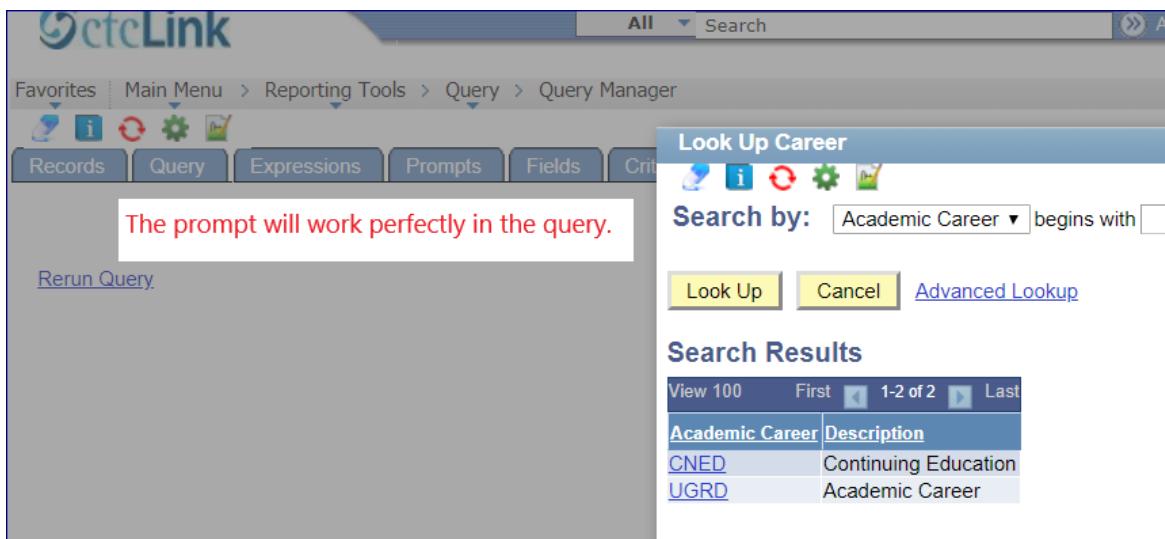
When creating a query to use with a pivot grid, keep in mind that:

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.

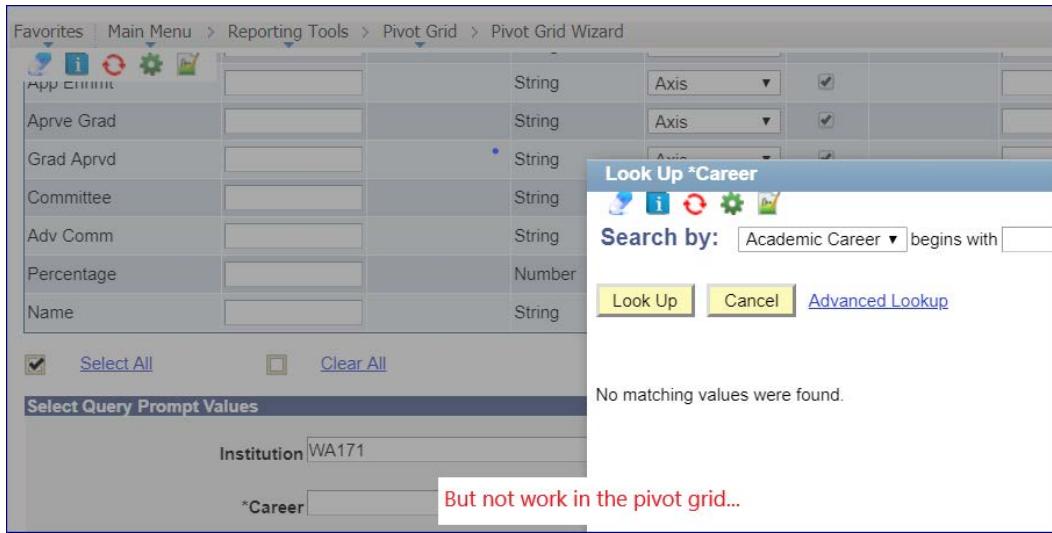
- The institution prompt created in PS Query will display as a filter in Pivot Grid



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.



Academic Career	Description
CNED	Continuing Education
UGRD	Academic Career



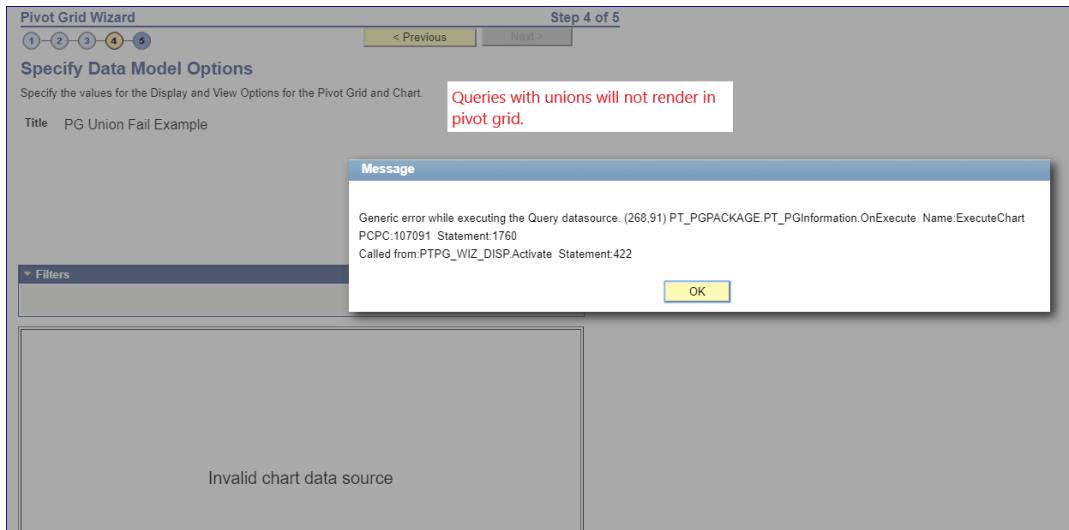
The screenshot shows a 'Pivot Grid Wizard' interface. On the left, there's a grid with columns labeled 'Name', 'Type', and 'Axis'. The rows contain items like 'Aprve Grad', 'Grad Aprvd', 'Committee', 'Adv Comm', 'Percentage', and 'Name'. Below the grid are 'Select All' and 'Clear All' buttons. A 'Select Query Prompt Values' section has 'Institution WA171' and '*Career' listed. To the right, a 'Look Up *Career' dialog box is open, showing a search field with 'Academic Career begins with' and a dropdown menu. Buttons for 'Look Up', 'Cancel', and 'Advanced Lookup' are at the bottom. A message 'No matching values were found.' is displayed.

But not work in the pivot grid...

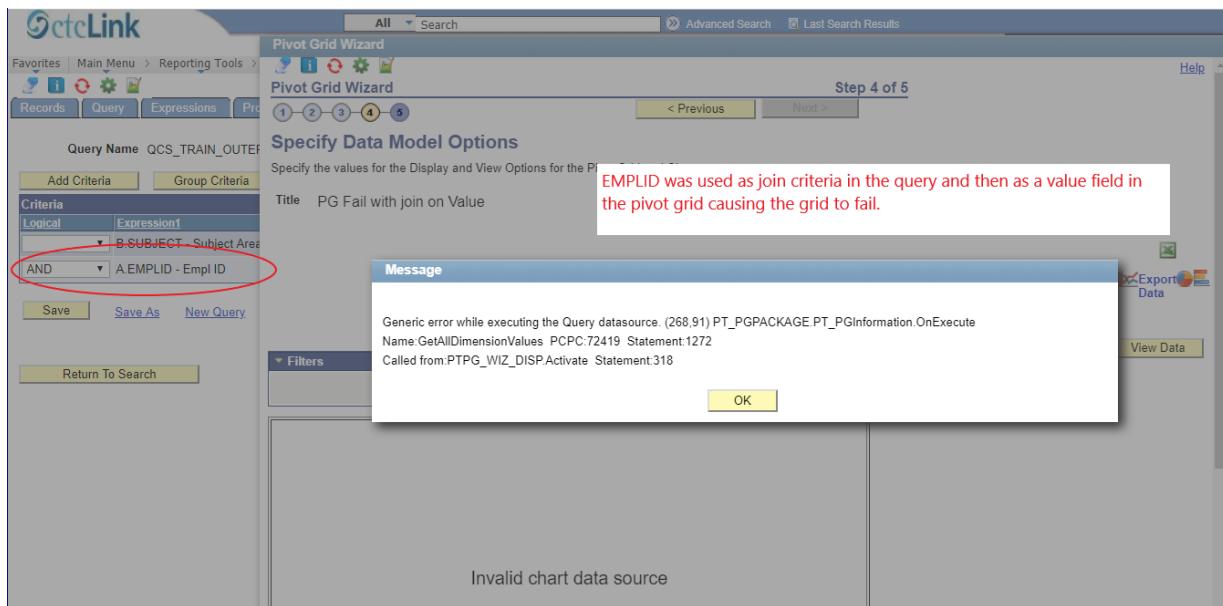
- The query will be executed to render data on the grid and the chart, so users should consider these two points when constructing a query for a pivot grid model:
 - Query should be conducive to manipulation.
 - Query performance should be efficient enough to quickly render on the grid and on the chart. An inefficient query will cause pivot grid to render very, very slowly.
- Alternatives to Complex Queries
 - Request a SQL View to be created by Data Services

Limitations

- Query with UNION Clauses.
 - 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



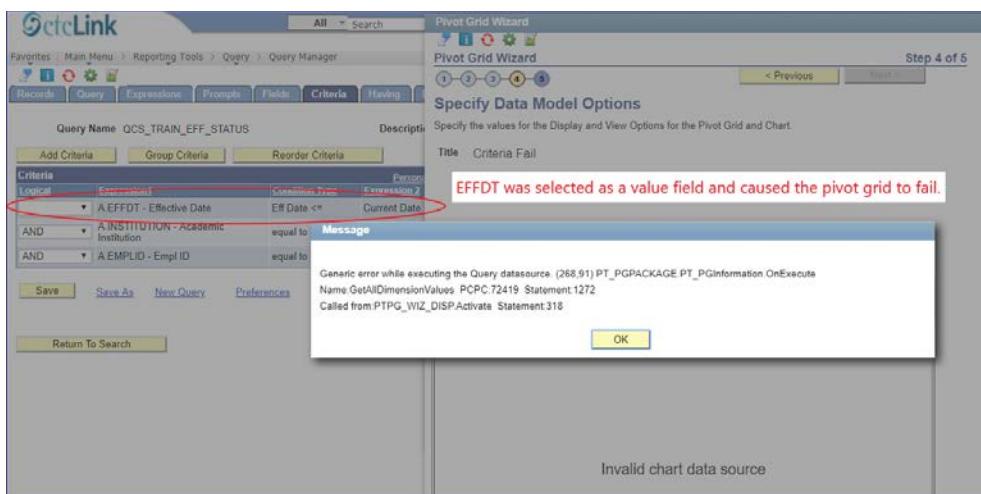
- Query with JOINS on the Value Fields.
 - Query with the JOINS on value fields receive an error in pivot grid because pivot grid performs aggregation on the value fields and the same aggregation is used for the JOIN field. This will cause the query to fail syntactically while executing on the database.
 - Recommendation: use different fields for Values and Join criteria.



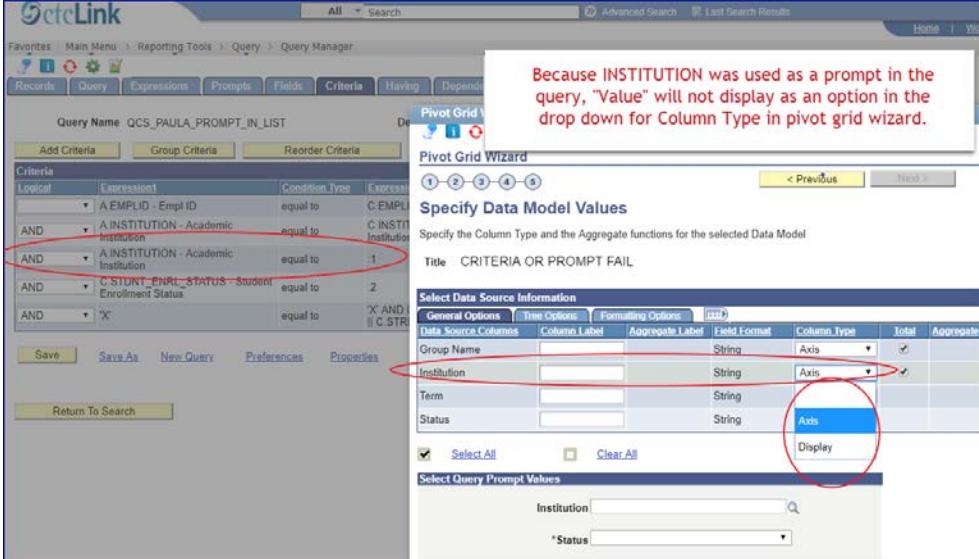
- Query with Underlying Record Views Selecting the Same Field.
 - A query built on an underlying View that selects the same field more than once will fail when used as a data source for pivot grid if these fields are used as the axis columns in the pivot grid model. This is because the pivot grid uses 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
 - 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.



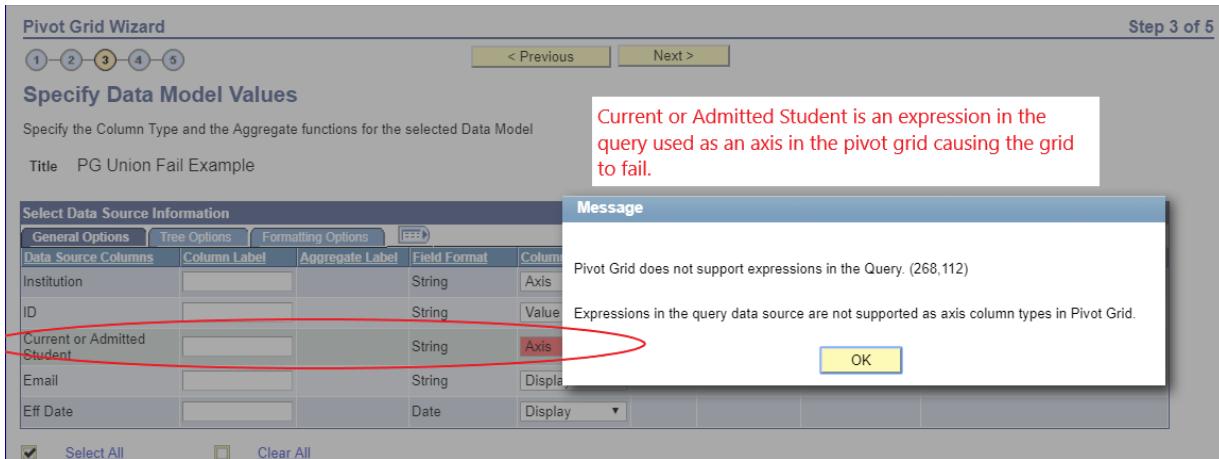
- Query with Value Fields Used as a Prompt
 - Value fields that are used as a prompt in the query are also not supported.
 - Recommendation: use two fields, one representing the value column in the pivot grid and the other used as criteria.



Because INSTITUTION was used as a prompt in the query, "Value" will not display as an option in the drop down for Column Type in pivot grid wizard.

Pivot Grid Wizard
 Step 3 of 5
 Specify Data Model Values
 Select Data Source Information
 General Options Tree Options Formatting Options
 Data Source Columns Column Label Aggregate Label Field Format Column Type Total Aggregate
 Group Name String Axis ✓
 Institution String Axis ✓
 Term String Axis
 Status String Axis
 Select All Clear All
 Select Query Prompt Values
 Institution
 *Status

- Query with Expressions that are used as Axis Fields in the Pivot Grid Model.
 - 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.



Pivot Grid Wizard
 Step 3 of 5
 Specify Data Model Values
 Title PG Union Fail Example
 Select Data Source Information
 General Options Tree Options Formatting Options
 Data Source Columns Column Label Aggregate Label Field Format Column Type Total Aggregate
 Institution String Axis ✓
 ID String Value
 Current or Admitted Student String Axis
 Email String Display
 Eff Date Date Display
 Select All Clear All

Message
 Pivot Grid does not support expressions in the Query. (268,112)
 Expressions in the query data source are not supported as axis column types in Pivot Grid.
 OK

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.

Favorites | Main Menu > Reporting Tools > Pivot Grid > Pivot Grid Wizard



Pivot Grid Wizard

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Search by: Pivot Grid Name begins with

[Search](#) [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

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 Wizard

[Find an Existing Value](#) [Add a New Value](#)

Pivot Grid Name:

[Add](#)

Pivot Grid Naming Convention

The pivot grid naming convention is:

PGXX_XXXXXXXXXX.

- Example: PGCS_FTE_SUMMARY

PG/Pillar Description

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

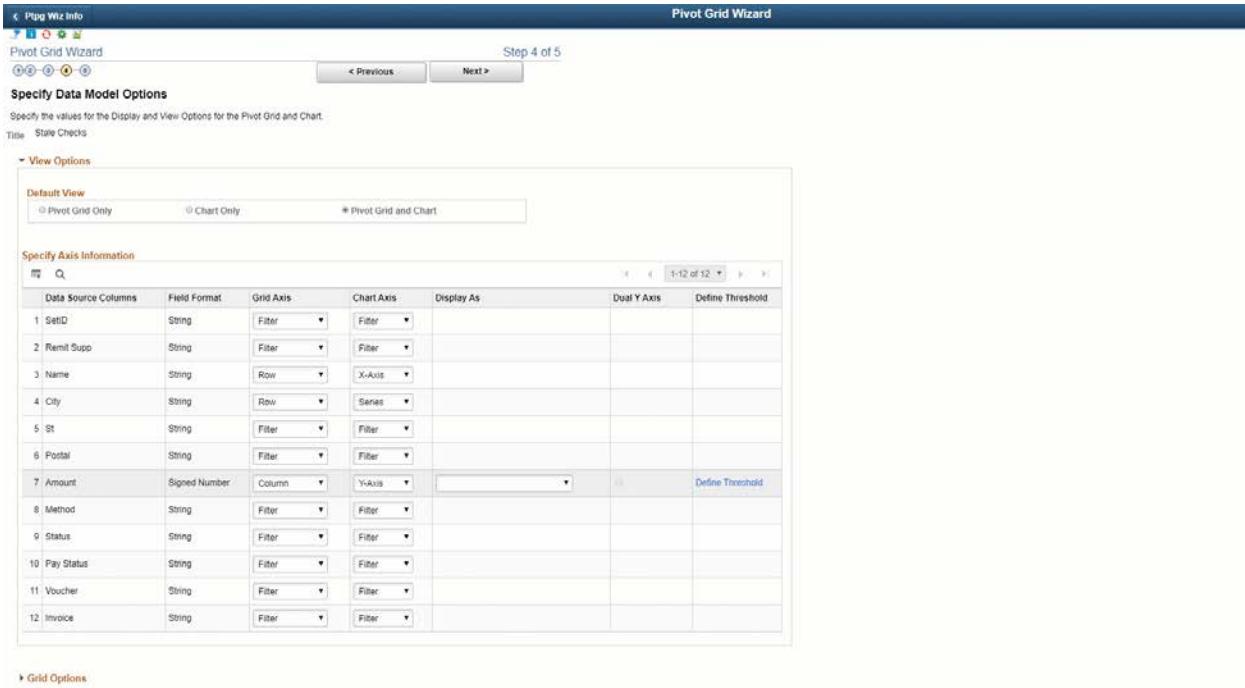
Pivot Grid Viewer Display Screenshots will be denoted with:



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.



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: State Checks

View Options

Pivot Grid Only Chart Only Pivot Grid and Chart

Specify Axis Information

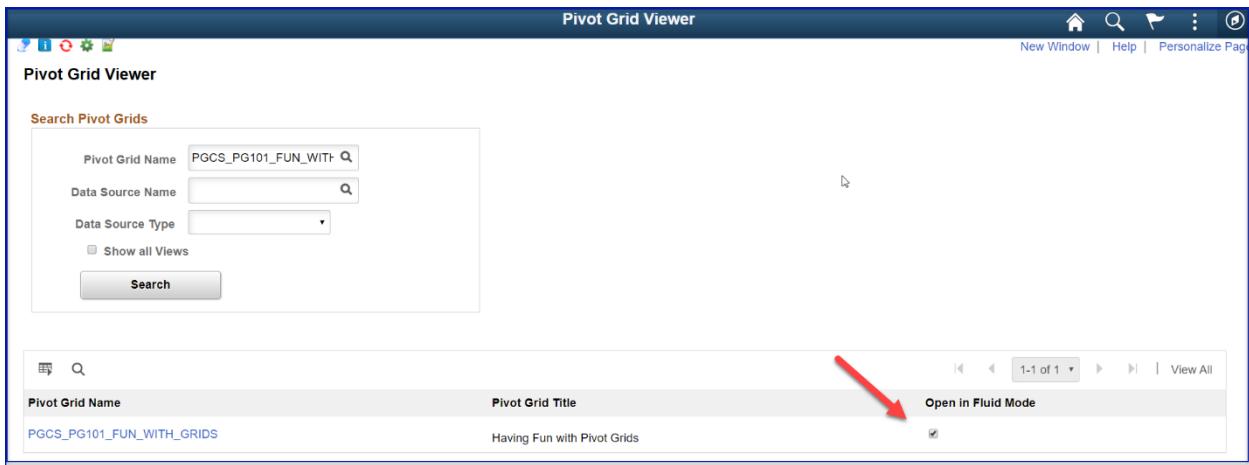
Data Source Columns	Field Format	Grid Axis	Chart Axis	Display As	Dual Y Axis	Define Threshold
1 SetID	String	Filter	Filter			
2 Remit Supp	String	Filter	Filter			
3 Name	String	Row	X-Axis			
4 City	String	Row	Series			
5 St	String	Filter	Filter			
6 Postal	String	Filter	Filter			
7 Amount	Signed Number	Column	Y-Axis			Define Threshold
8 Method	String	Filter	Filter			
9 Status	String	Filter	Filter			
10 Pay Status	String	Filter	Filter			
11 Voucher	String	Filter	Filter			
12 Invoice	String	Filter	Filter			

[Grid Options](#)

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.



The screenshot shows the Pivot Grid Viewer application. At the top, there's a navigation bar with icons for file operations, a magnifying glass for search, and other standard window controls. Below the bar, the title "Pivot Grid Viewer" is displayed. On the left, a sidebar titled "Pivot Grid Viewer" contains a "Search Pivot Grids" section with fields for "Pivot Grid Name" (set to "PGCS_PG101_FUN_WITH_GRIDS"), "Data Source Name", "Data Source Type", and a "Show all Views" checkbox. A "Search" button is located below these fields. To the right of the sidebar is a main content area. At the top of this area, there's a search bar with a magnifying glass icon. Below the search bar is a table header row with columns for "Pivot Grid Name", "Pivot Grid Title", and "Open in Fluid Mode". The first row of the table displays the values "PGCS_PG101_FUN_WITH_GRIDS" and "Having Fun with Pivot Grids" under the respective columns. The "Open in Fluid Mode" column contains a checkbox, which is checked and highlighted with a red arrow pointing to it from the bottom right. At the bottom of the table, there are navigation buttons for "View All", "1-1 of 1", and arrows for navigating through the results.

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 1 of 5

1 2 3 4 5 Next >

Specify Pivot Grid Properties

The following information will be used to identify and categorize your Pivot Grid.

Pivot Grid Information

Pivot Grid Name	PGCS_PG101_FUN_WITH_GRIDS
*Pivot Grid Title	Having Fun with Pivot Grids
Description	Pivot Grid Training 890: pmcdaniel@sbctc.edu Paula McDaniel 01/28/2020
Pivot Grid Type	Public
Owner	PeopleTools

Save **Notify**

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



Select Data Source

Select the Data Source Type and the Columns for the Pivot Grid

Title Having Fun with Pivot Grids

Data Source Type PS Query ▾

Data Source

*Query Name QCS_TRAIN_PG101_PG 

Select Columns

	Select	Data Source Columns	Base Query	Field Format
1	<input type="checkbox"/>	Institution		String
2	<input checked="" type="checkbox"/>	ID		String
3	<input checked="" type="checkbox"/>	Career		String
4	<input checked="" type="checkbox"/>	Admit Type		String
5	<input type="checkbox"/>	Complete		String
6	<input checked="" type="checkbox"/>	Appl Meth		String
7	<input checked="" type="checkbox"/>	Acad Level		String
8	<input type="checkbox"/>	Status		String
9	<input checked="" type="checkbox"/>	Appl Dt		Date

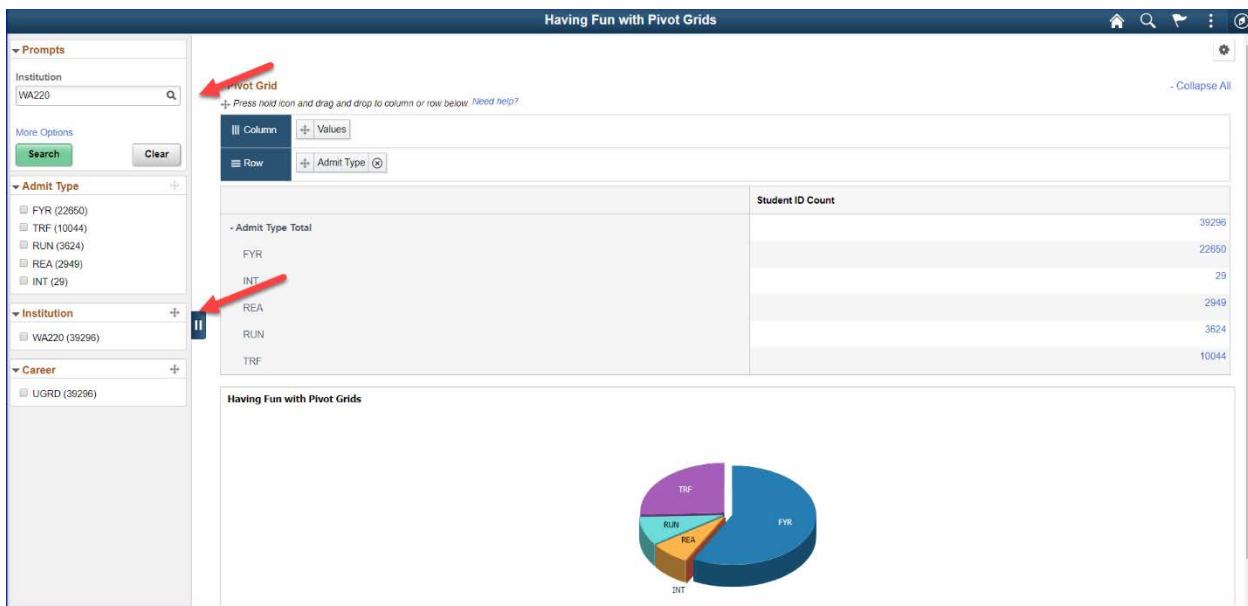
Select All Clear All

Save **Notify**

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 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



Specify Data Model Values

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

Title: Having Fun with Pivot Grids

Select Data Source Information

General Options Tree Options Formatting Options

Data Source Columns	Column Label	Aggregate Label	Field Format	Column Type	Total	Aggregate	Total Name	Editable Facet (Only Fluid)
ID	Student ID		String	Value		Count		
Career			String	Axis	<input checked="" type="checkbox"/>		Career Total	
Admit Type			String	Axis	<input checked="" type="checkbox"/>		Admit Type Total	<input checked="" type="checkbox"/>
App Meth	Application Methc		String	Axis	<input checked="" type="checkbox"/>		App Method Total	<input checked="" type="checkbox"/>
Acad Level			String	Axis	<input checked="" type="checkbox"/>		Level Total	<input checked="" type="checkbox"/>
Appl Dt	Application Date		Date	Display				

Select All Clear All

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.

Pivot Grid Wizard Set Up



Specify Data Model Values

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

Title Having Fun with Pivot Grids

Select Data Source Information

Data Source Columns		Column Label	Aggregate Label	Field Format	Column Type	Total	Aggregate	Total Name	Editable Facet (Only Fluid)
ID	Student ID			String	Value ▾		Count ▾		<input type="checkbox"/>
Career				String	Axis ▾	<input checked="" type="checkbox"/>		Career Total	<input type="checkbox"/>
Admit Type				String	Axis ▾	<input checked="" type="checkbox"/>		Admit Type Total	<input checked="" type="checkbox"/>
Appl Meth	Application Methc			String	Axis ▾	<input checked="" type="checkbox"/>		App Method Total	<input checked="" type="checkbox"/>
Acad Level				String	Axis ▾	<input checked="" type="checkbox"/>		Level Total	<input checked="" type="checkbox"/>
Appl Dt	Application Date			Date	Display ▾				

Select All Clear All

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

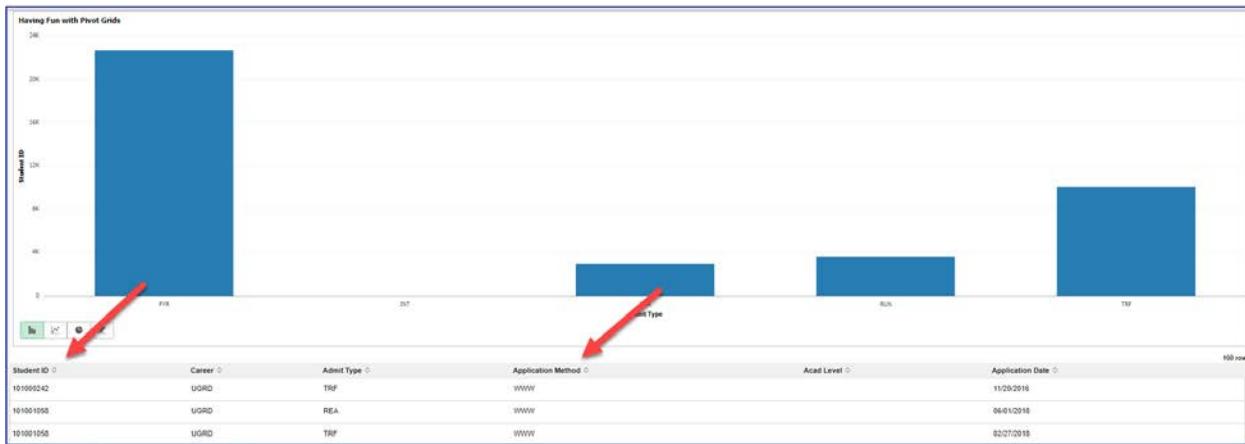


General Options		Tree Options	Formatting Options
Data Source Columns	Column Label	Aggregate Label	
ID	Student ID		
Career			
Admit Type			
Appl Meth	Application Methc		

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

Pivot Grid Viewer Display

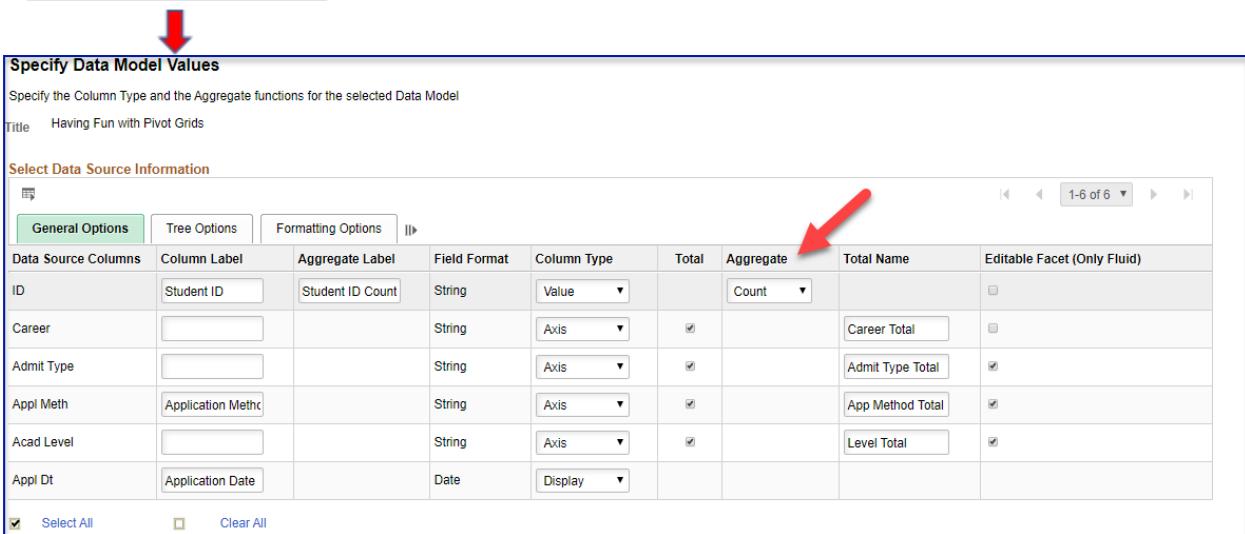




Aggregate Label

- 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



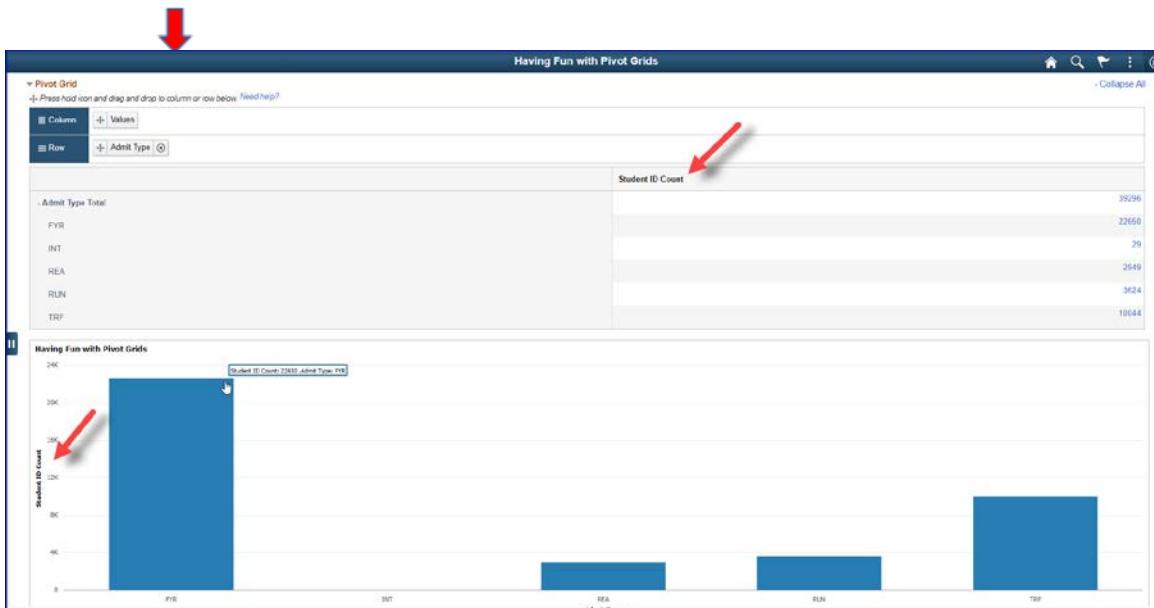
The screenshot shows the "Specify Data Model Values" step of the Pivot Grid Wizard. It displays a table for "Select Data Source Information" with columns for "Data Source Columns", "Column Label", "Aggregate Label", "Field Format", "Column Type", "Total", "Aggregate", "Total Name", and "Editable Facet (Only Fluid)". A red arrow points to the "Aggregate" column. The "Aggregate" column for the "ID" row is set to "Count". The "Total Name" column for the "ID" row is "Student ID Count". Other rows show "Career", "Admit Type", "Appl Meth", "Acad Level", and "Appl Dt" with their respective settings.

Data Source Columns	Column Label	Aggregate Label	Field Format	Column Type	Total	Aggregate	Total Name	Editable Facet (Only Fluid)
ID	Student ID	Student ID Count	String	Value		Count		
Career			String	Axis	<input checked="" type="checkbox"/>		Career Total	
Admit Type			String	Axis	<input checked="" type="checkbox"/>		Admit Type Total	<input checked="" type="checkbox"/>
Appl Meth	Application Methc		String	Axis	<input checked="" type="checkbox"/>		App Method Total	<input checked="" type="checkbox"/>
Acad Level			String	Axis	<input checked="" type="checkbox"/>		Level Total	<input checked="" type="checkbox"/>
Appl Dt	Application Date		Date	Display				

Select All Clear All

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

Pivot Grid Viewer Display



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 Wizard Set Up



Specify Data Model Values

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

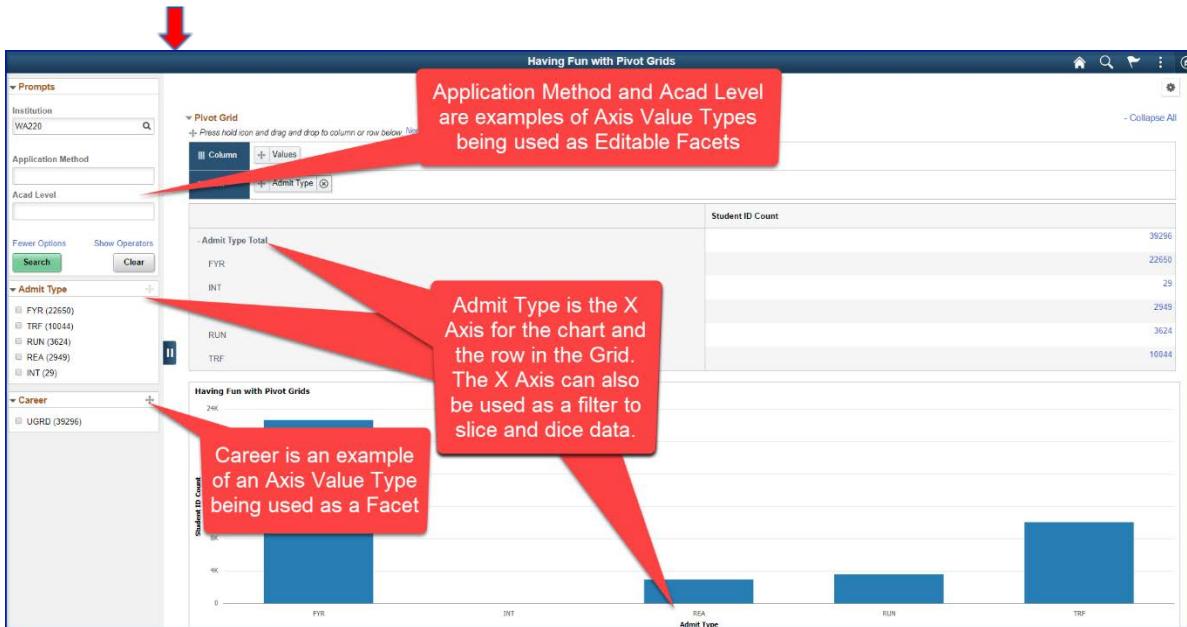
Title Having Fun with Pivot Grids

Select Data Source Information

Select Data Source Information								
	General Options	Tree Options	Formatting Options	1-6 of 6				
Data Source Columns	Column Label	Aggregate Label	Field Format	Column Type	Total	Aggregate	Total Name	Editable Facet (Only Fluid)
ID	Student ID	Student ID Count	String	Value ▾		Count ▾		<input type="checkbox"/>
Career			String	Axis ▾	<input checked="" type="checkbox"/>		Career Total	<input type="checkbox"/>
Admit Type			String	Axis ▾	<input checked="" type="checkbox"/>		Admit Type Total	<input checked="" type="checkbox"/>
Appl Meth	Application Meth		String	Axis ▾	<input checked="" type="checkbox"/>		App Method Total	<input checked="" type="checkbox"/>
Acad Level			String	Axis ▾	<input checked="" type="checkbox"/>		Level Total	<input checked="" type="checkbox"/>
Appl Dt	Application Date		Date	Display ▾				

Select All Clear All

Pivot Grid Viewer Display



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.

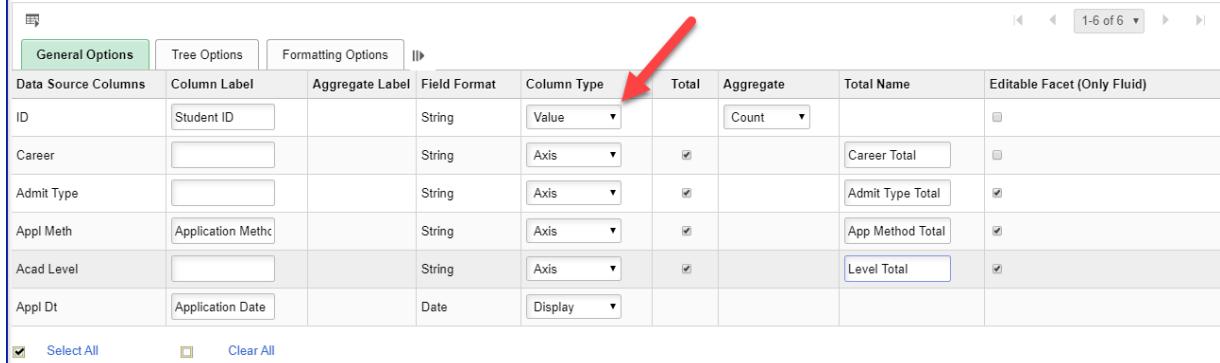
Pivot Grid Wizard Set Up

Specify Data Model Values

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

Title Having Fun with Pivot Grids

Select Data Source Information



Data Source Columns	Column Label	Aggregate Label	Field Format	Column Type	Total	Aggregate	Total Name	Editable Facet (Only Fluid)
ID	Student ID		String	Value ▾		Count ▾		
Career			String	Axis ▾	☒		Career Total	
Admit Type			String	Axis ▾	☒		Admit Type Total	
Appl Meth	Application Meth		String	Axis ▾	☒		App Method Total	
Acad Level			String	Axis ▾	☒		Level Total	
Appl Dt	Application Date		Date	Display ▾				

Select All Clear All

Pivot Grid Viewer Display



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.

Pivot Grid Wizard Set Up



Specify Data Model Values

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

Title Having Fun with Pivot Grids

Select Data Source Information

General Options		Tree Options		Formatting Options					
Data Source Columns	Column Label	Aggregate Label	Field Format	Column Type	Total	Aggregate	Total Name	Editable Facet (Only Fluid)	
ID	Student ID		String	Value ▾		Count ▾		<input type="checkbox"/>	
Career			String	Axis ▾	<input checked="" type="checkbox"/>		Career Total	<input type="checkbox"/>	
Admit Type			String	Axis ▾	<input checked="" type="checkbox"/>		Admit Type Total	<input checked="" type="checkbox"/>	
Appl Meth	Application Methc		String	Axis ▾	<input checked="" type="checkbox"/>		App Method Total	<input checked="" type="checkbox"/>	
Acad Level			String	Axis ▾			Level Total	<input checked="" type="checkbox"/>	
Appl Dt	Application Date		Date	Display ▾					

Select All Clear All

Pivot Grid Viewer Display



Having Fun with Pivot Grids

Student ID	Career	Admit Type	Application Method	Acad Level	Application Date
101005611	UGRD	FYR	WWW		08/02/2016
101005833	UGRD	FYR	WWW		12/10/2018
101000131	UGRD	FYR	WWW		12/10/2018
101000253	UGRD	FYR	WWW		03/27/2018
101000287	UGRD	FYR	WWW		03/25/2018
101007151	UGRD	FYR	WWW		09/10/2018
101007236	UGRD	FYR	WWW		10/30/2015
101007421	UGRD	FYR	WWW		08/18/2015

Total

- 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.

Pivot Grid Wizard Set Up



Specify Data Model Values

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

Title: Having Fun with Pivot Grids

Select Data Source Information

General Options		Tree Options	Formatting Options			Total	Aggregate	Total Name	Editable Facet (Only Fluid)
Data Source Columns	Column Label	Aggregate Label	Field Format	Column Type					
ID	Student ID	Student ID Count	String	Value		Count			
Career			String	Axis	<input checked="" type="checkbox"/>		Career Total		
Admit Type			String	Axis	<input checked="" type="checkbox"/>		Admit Type Total		
Appl Meth	Application Meth		String	Axis	<input checked="" type="checkbox"/>		App Method Total		
Acad Level			String	Axis	<input checked="" type="checkbox"/>		Level Total		
Appl Dt	Application Date		Date	Display					

Select All Clear All

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

Pivot Grid

+ Press hold icon and drag and drop to column or row below. [Need help?](#)

Column **Row** **Values**

Admit Type **Career** **Acad Level**

FYR

	Student ID Count
UORD	+ Level Total
INT	UGRD
REA	UGRD
RUN	UGRD
TRF	UGRD

22650
29
2949
3624
10044

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



Specify Data Model Values

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

Title Having Fun with Pivot Grids

Select Data Source Information

Data Source Columns		Column Label	Aggregate Label	Field Format	Column Type	Total	Aggregate	Total Name	Editable Facet (Only Fluid)
ID	Student ID	Student ID Count	String	Value			Count		
Career			String	Axis	<input checked="" type="checkbox"/>		Career Total		
Admit Type			String	Axis	<input checked="" type="checkbox"/>		Admit Type Total	<input checked="" type="checkbox"/>	
Appl Meth	Application Metho		String	Axis	<input checked="" type="checkbox"/>		App Method Total	<input checked="" type="checkbox"/>	
Acad Level			String	Axis	<input checked="" type="checkbox"/>		Level Total	<input checked="" type="checkbox"/>	
Appl Dt	Application Date		Date	Display					

Select All Clear All

Pivot Grid Viewer Display



Having Fun with Pivot Grids

- Pivot Grid
+ Press hold icon and drag and drop to column or row below. [Need help?](#)

☰ Column + Values

☰ Row + Admit Type

		Student ID Count
- Admit Type Total		39296
FYR		22650
INT		29
REA		2949
RUN		3624
TRF		10044

The Aggregated Total will display in Pivot Grid Viewer

Having Fun with Pivot Grids

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

Specify Data Model Values

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

Title Having Fun with Pivot Grids

Select Data Source Information

Data Source Columns		Column Label	Aggregate Label	Field Format	Column Type	Total	Aggregate	Total Name	Editable Facet (Only Fluid)
ID	Student ID	Student ID Count	String	Value		Count			<input type="checkbox"/>
Career			String	Axis	<input checked="" type="checkbox"/>		Career Total		<input type="checkbox"/>
Admit Type			String	Axis	<input checked="" type="checkbox"/>		Admit Type Total		<input checked="" type="checkbox"/>
Appl Meth	Application Methc		String	Axis	<input checked="" type="checkbox"/>		App Method Total		<input checked="" type="checkbox"/>
Acad Level			String	Axis	<input checked="" type="checkbox"/>		Level Total		<input checked="" type="checkbox"/>
Appl Dt	Application Date		Date	Display					

Select All Clear All

Pivot Grid Viewer Display

+ Pivot Grid

+ Press hold icon and drag and drop to column or row below. Need help?

Column **Values**

Row **+ Admit Type** **+ Career** **+ Acad Level**

		Student ID Count
FYR	UGRD	
	+ Level Total	2285
INT	UGRD	
	+ Level Total	21
REA	UGRD	
	+ Level Total	294
RUN	UGRD	
	+ Level Total	362
TRF	UGRD	
	+ Level Total	1004

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



Pivot Grid Wizard

Step 3 of 5

Specify Data Model Values

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

Title: Having Fun with Pivot Grids

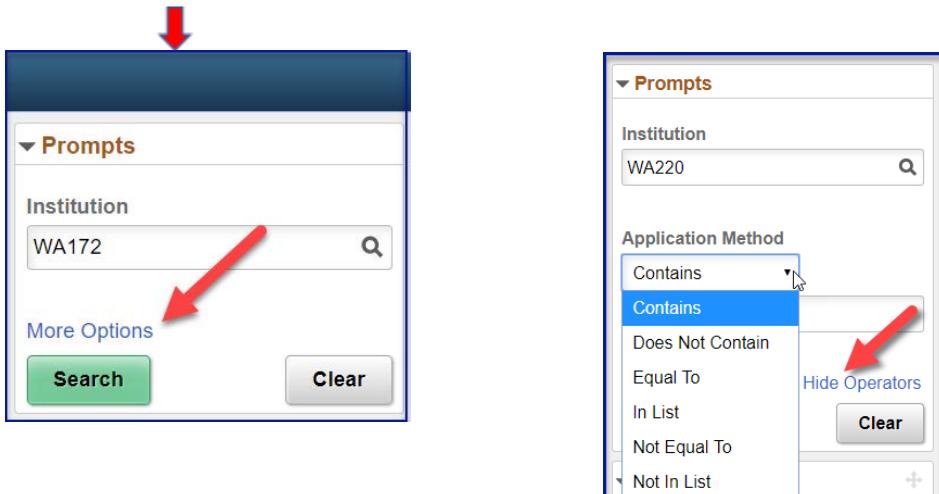
Select Data Source Information

General Options Tree Options Formatting Options

Data Source Columns	Column Label	Aggregate Label	Field Format	Column Type	Total	Aggregate	Total Name	Editable Facet (Only Fluid)
ID	Student ID	Student ID Count	String	Value		Count	Career Total	<input type="checkbox"/>
Career			String	Axis	<input checked="" type="checkbox"/>		Admit Type Total	<input checked="" type="checkbox"/>
Admit Type			String	Axis	<input checked="" type="checkbox"/>		App Method Total	<input checked="" type="checkbox"/>
Acad Level			String	Axis	<input checked="" type="checkbox"/>		Level Total	<input checked="" type="checkbox"/>
Appl Dt	Application Date		Date	Display				

Select All Clear All

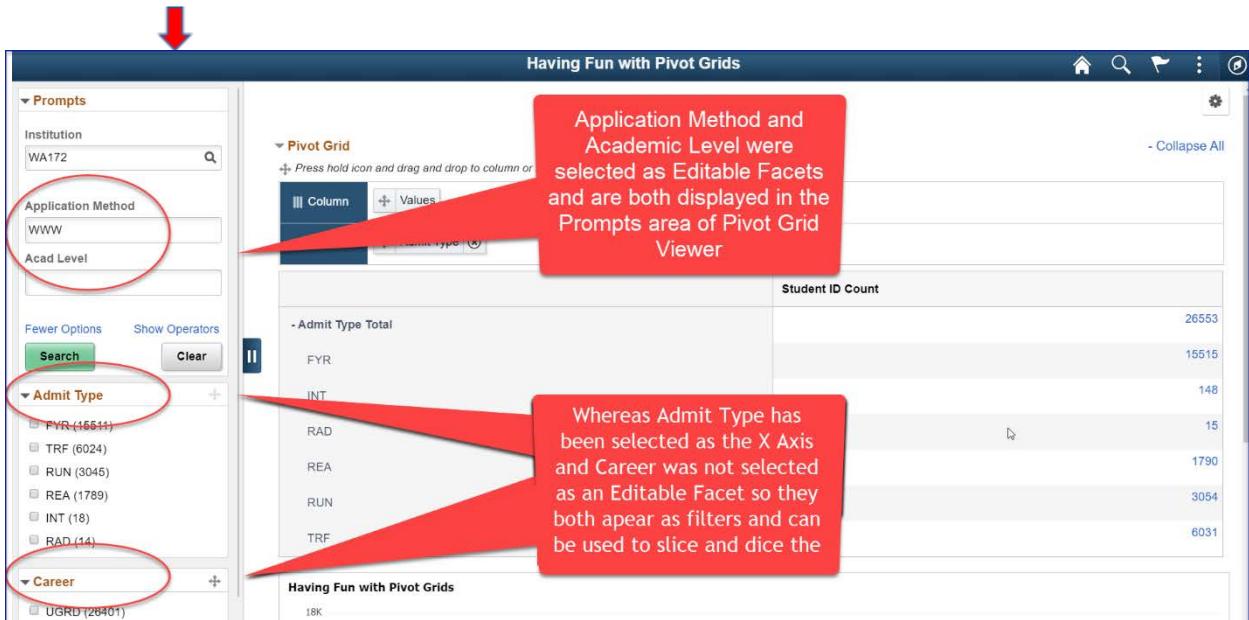
Pivot Grid Viewer Display



The screenshot shows the 'Prompts' section of the Pivot Grid Viewer. In the 'Institution' field, 'WA172' is entered. Below it, a 'More Options' link is highlighted with a red arrow. A dropdown menu for 'Application Method' operators is open, showing 'Contains' (which is selected and highlighted in blue), 'Does Not Contain', 'Equal To', 'In List', 'Not Equal To', and 'Not In List'. A second red arrow points from the 'Contains' option to a 'Hide Operators' button.

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.

Pivot Grid Viewer Display



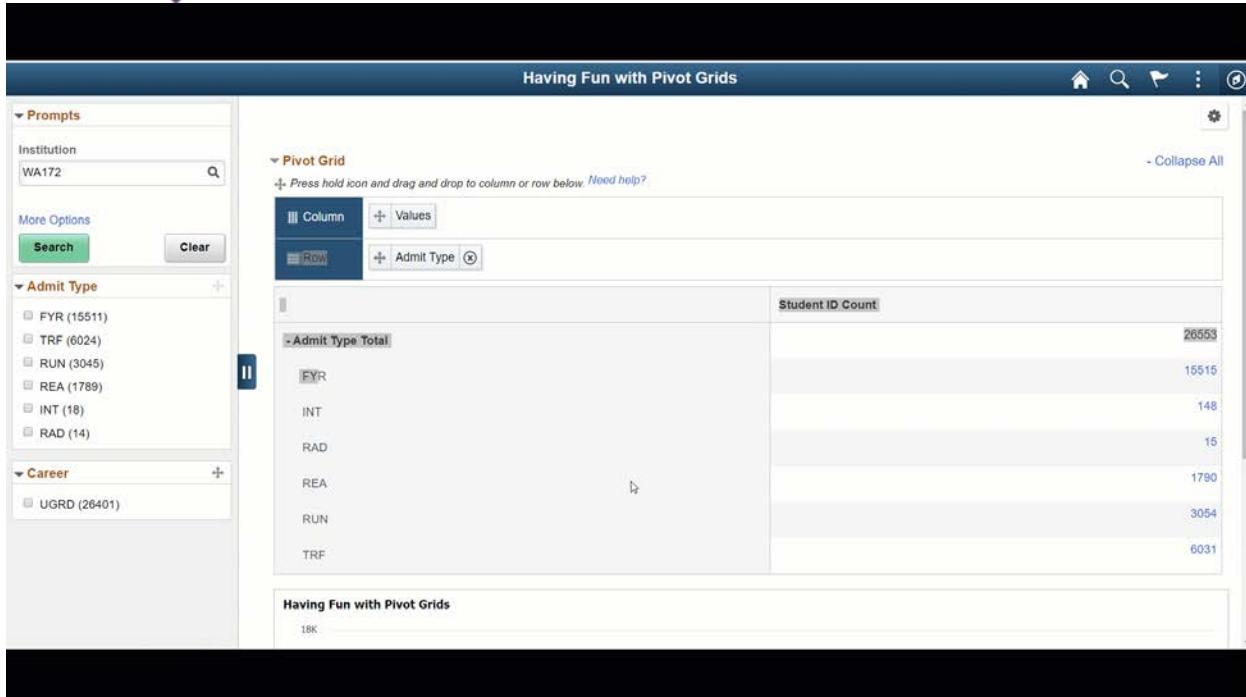
The screenshot shows the 'Having Fun with Pivot Grids' application. In the 'Prompts' panel, 'WA172' is in the 'Institution' field. The 'Application Method' and 'Acad Level' fields are circled with red ovals. The 'Admit Type' section is also circled with a red oval, and its contents (FYR, INT, RAD, REA, RUN, TRF) are listed. The 'Career' section is also circled with a red oval. A large red callout box points to the 'Application Method' and 'Acad Level' fields with the text: 'Application Method and Academic Level were selected as Editable Facets and are both displayed in the Prompts area of Pivot Grid Viewer'. Another red callout box points to the 'Admit Type' section with the text: 'Whereas Admit Type has been selected as the X Axis and Career was not selected as an Editable Facet so they both appear as filters and can be used to slice and dice the'. The main grid area shows a table with columns 'Admit Type Total' and 'Student ID Count', containing data for FYR, INT, RAD, REA, RUN, and TRF.

Admit Type Total	Student ID Count
FYR	26553
INT	15515
RAD	148
REA	15
RUN	1790
TRF	3054
	6031

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

		Student ID Count
-Admit Type Total-		26553
	FYR	15515
	INT	148
	RAD	15
	REA	1790
	RUN	3054
	TRF	6031

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



Select Query Prompt Values

Institution WA220

Configure Visible Prompts

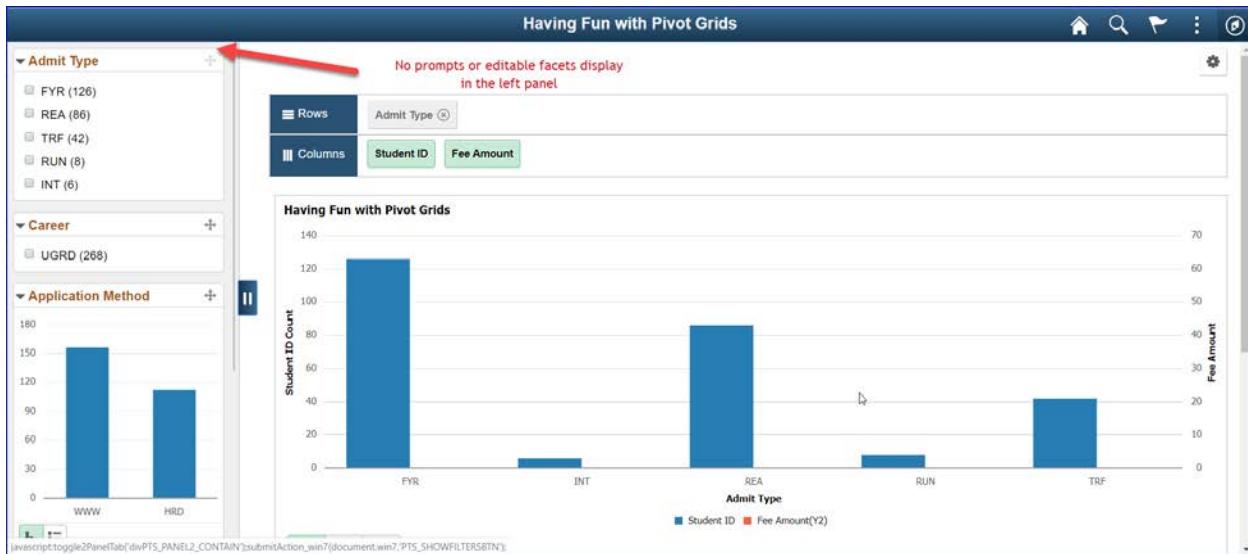
Query Prompt Name	Visible Prompt
Institution	<input checked="" type="checkbox"/>

Save **Notify**

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



Pivot Grid Wizard

Step 4 of 5

Pivot Grid Wizard

Having Fun with Pivot Grids

< Previous Next >

Specify Data Model Options

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

Title Having Fun with Pivot Grids

View Options

Grid Options

Chart Options

Display Options

Fluid Mode Options

Save Notify

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.

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 Having Fun with Pivot Grids

View Options

Default View

Pivot Grid Only Chart Only Pivot Grid and Chart

Specify Axis Information

Data Source Columns	Field Format	Grid Axis	Chart Axis	Display As	Dual Y Axis	Define Threshold
1 ID	String	Column ▾	Y-Axis ▾	▼	<input type="checkbox"/>	Define Threshold
2 Career	String	Filter ▾	Filter ▾			
3 Admit Type	String	Row ▾	X-Axis ▾			
4 Appl Meth	String	Filter ▾	Filter ▾			
5 Created By	String	Filter ▾	Filter ▾			

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

Default View

The default view can be:

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

▼ View Options

Default View

Pivot Grid Only Chart Only Pivot Grid and Chart

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

↓

Pivot Grid Wizard

Pivot Grid Wizard

Step 4 of 5

1 2 3 4 5

< Previous Next >

Specify Data Model Options

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

Title Having Fun with Pivot Grids

▼ View Options

Default View

Pivot Grid Only Chart Only Pivot Grid and Chart

Pivot Grid Viewer Display



Having Fun with Pivot Grids

Prompts

Institution: WA220

More Options: Search, Clear

Admit Type:

- FYR (68)
- REA (18)
- INT (10)
- TRF (9)
- RUN (5)

Career:

- UGRD (110)

Pivot Grid

Press hold icon and drag and drop to column or row below. Need help?

- Collapse All

	Student ID (Count)
- Admit Type Total	110
FYR	68
INT	10
REA	18
RUN	5
TRF	9

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



Having Fun with Pivot Grids

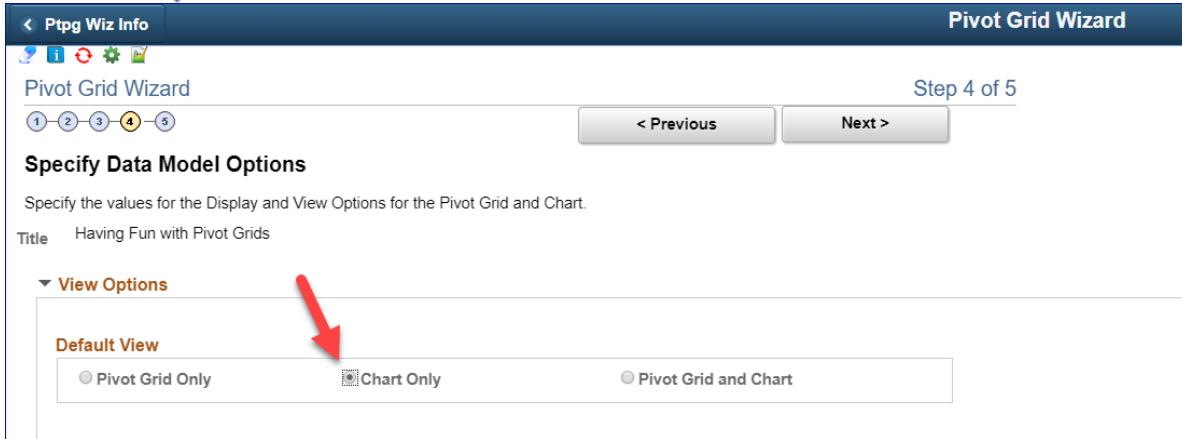
Having Fun with Pivot Grids

Student ID	Career	Admit Type	Application Method	Application Date	Created By
201282872	UGRD	FYR	HRD	01/19/2016	101006510
201284894	UGRD	FYR	HRD	02/08/2016	101006510
201168252	UGRD	REA	HRD	02/02/2016	101006510
201284892	UGRD	FYR	HRD	02/11/2016	101006510
201284897	UGRD	FYR	HRD	02/09/2016	101006510
201284115	UGRD	FYR	HRD	02/03/2016	101006510
201285473	UGRD	REA	HRD	02/16/2016	101006510
201232897	UGRD	REA	HRD	02/08/2016	101006510
201285266	UGRD	FYR	HRD	02/16/2016	101006510
201284256	UGRD	RUN	HRD	02/02/2016	101006510
201284129	UGRD	FYR	WWW	02/01/2016	101006510
201284240	UGRD	FYR	HRD	02/02/2016	101006510
201284890	UGRD	FYR	HRD	02/09/2016	101006510
201163991	UGRD	REA	HRD	02/03/2016	101006510

Chart Only

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

Pivot Grid Wizard Set Up

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 Having Fun with Pivot Grids

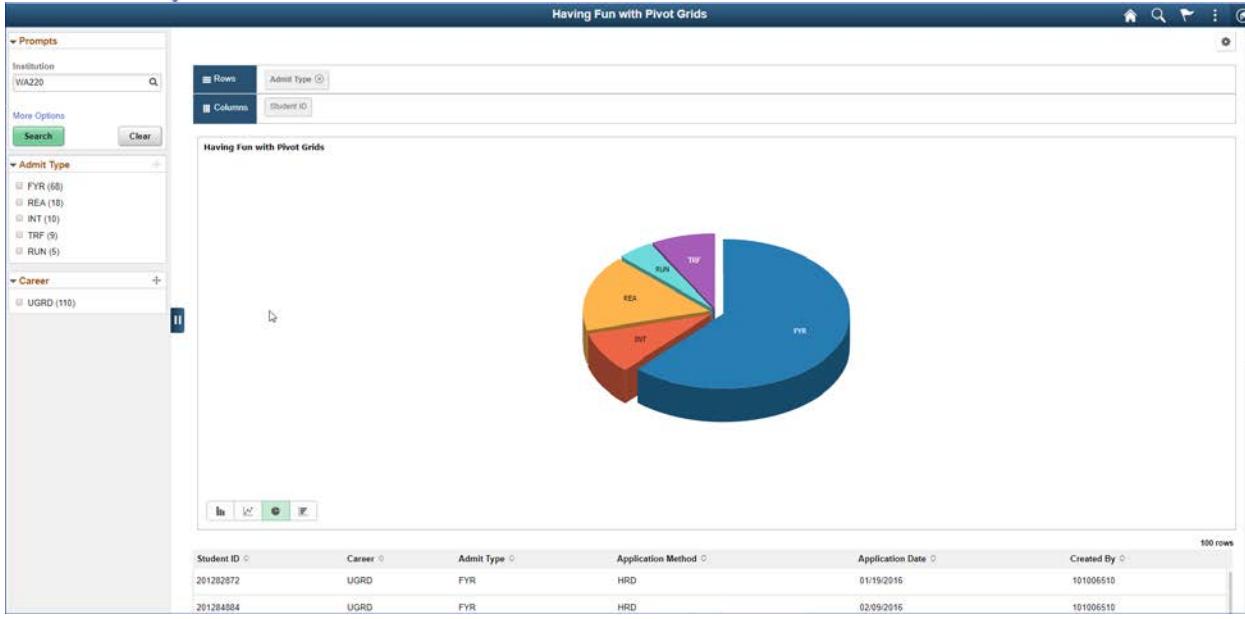
View Options

Default View

Pivot Grid Only **Chart Only** Pivot Grid and Chart

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

Having Fun with Pivot Grids

Prompts

- Institution: WA220
- More Options: Search, Clear
- Admit Type: FYR (68), REA (18), INT (10), THP (9), RUN (5)
- Career: UGRD (110)

Having Fun with Pivot Grids

Chart:

Category	Value
FYR	68
REA	18
INT	10
TIP	9
RUN	5

Table:

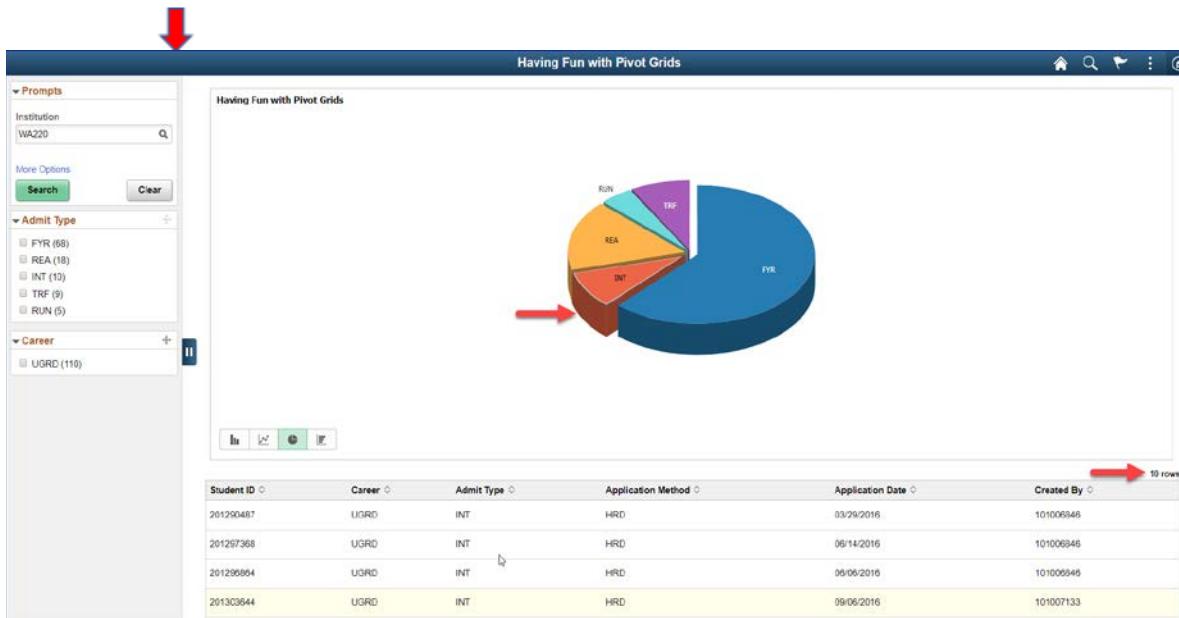
Student ID	Career	Admit Type	Application Method	Application Date	Created By
201282872	UGRD	FYR	HRD	01/19/2016	101006510
201284884	UGRD	FYR	HRD	02/09/2016	101006510

100 rows

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.

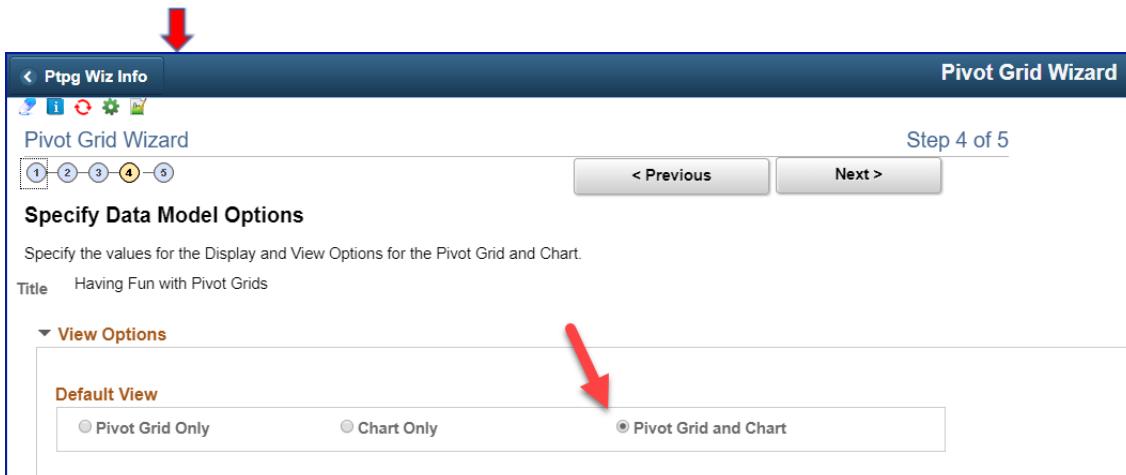
Pivot Grid Viewer Display



Pivot Grid and Chart

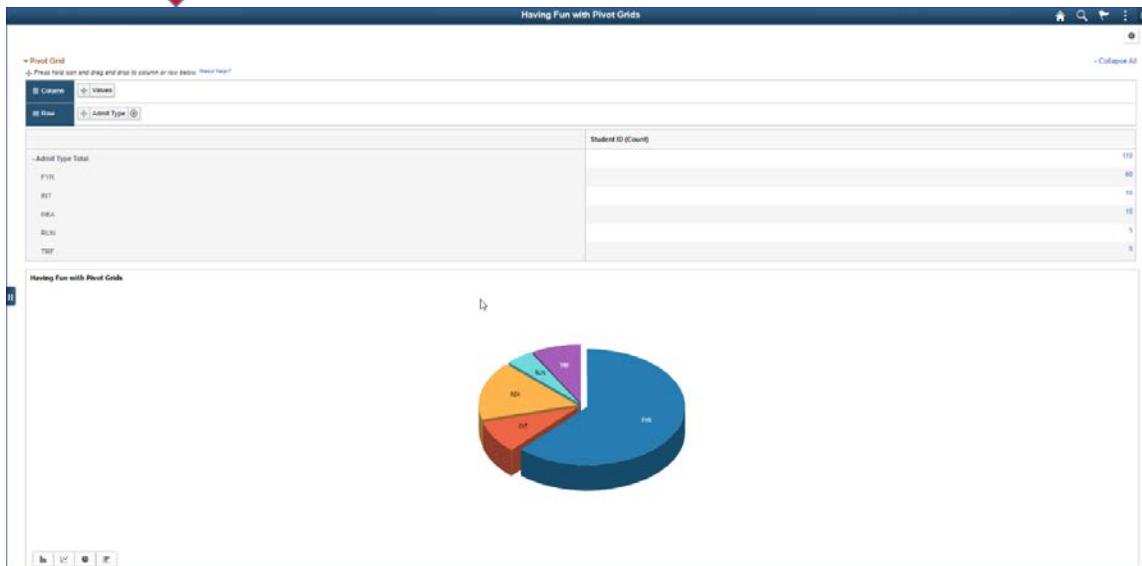
The Pivot Grid and Chart view will display both the chart and the pivot grid with the grid being at the top of the page and the chart at the bottom.

Pivot Grid Wizard Set Up



The screenshot shows the "Pivot Grid Wizard" step 4 of 5. At the top, there are navigation buttons: "Ptg Wiz Info" (back), "Pivot Grid Wizard" (title), and "Step 4 of 5". Below that is a progress bar with steps 1 through 5, where step 4 is highlighted. There are "Previous" and "Next >" buttons. The main area is titled "Specify Data Model Options" and contains a note: "Specify the values for the Display and View Options for the Pivot Grid and Chart." It shows the title "Having Fun with Pivot Grids". Under "View Options", there is a section titled "Default View" with three radio button options: "Pivot Grid Only" (unchecked), "Chart Only" (unchecked), and "Pivot Grid and Chart" (checked). A red arrow points to the "Pivot Grid and Chart" radio button.

Pivot Grid Viewer Display



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



Having Fun with Pivot Grids

Having Fun with Pivot Grids

50 rows

Student ID	Career	Admit Type	Application Method	Application Date	Created By
201282372	UGRD	FYR	HRD	01/19/2016	101006510
201284984	UGRD	FYR	HRD	02/09/2016	101006510
201284982	UGRD	FYR	HRD	02/11/2016	101006510
201284987	UGRD	FYR	HRD	02/09/2016	101006510
201284115	UGRD	FYR	HRD	02/03/2016	101006510
201285200	UGRD	FYR	HRD	02/16/2016	101006510
201284129	UGRD	FYR	WWW	02/01/2016	101006510
201284240	UGRD	FYR	HRD	02/02/2016	101006510
201284390	UGRD	FYR	HRD	02/09/2016	101006510
201114883	UGRD	FYR	HRD	02/10/2016	101006510
201284898	UGRD	FYR	HRD	02/09/2016	101006510
201284114	UGRD	FYR	HRD	02/03/2016	101006510
201287369	UGRD	FYR	WWW	03/02/2016	101006510
201223379	UGRD	FYR	HRD	06/01/2016	101006510
201265919	UGRD	FYR	HRD	05/25/2016	101006510
201265940	UGRD	FYR	WWW	05/25/2016	101006510

Specify Axis Information

Specify Axis Information					Personalize	Find	First	1-8 of 8	Last
Data Source Columns	Field Format	Grid Axis	Chart Axis	Display As		Dual Y Axis	Define Threshold		
1 ID	String	Column ▾	Y-Axis ▾		▼	<input type="checkbox"/>	Define Threshold		
2 Acad Year	String	Filter ▾	Filter ▾						
3 Item Type	String	Filter ▾	Filter ▾						
4 Amt	Signed Number	Column ▾	Y-Axis ▾		▼	<input checked="" type="checkbox"/>	Define Threshold		
5 Descr	String	Filter ▾	Filter ▾						
6 Short Desc	String	Row ▾	X-Axis ▾						
7 Group Name	String	Filter ▾	Filter ▾						
8 Institution	String	Filter ▾	Filter ▾						

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.

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 Having Fun with Pivot Grids

View Options

Default View							
<input type="radio"/> Pivot Grid Only	<input checked="" type="radio"/> Chart Only	<input type="checkbox"/> Pivot Grid and Chart					
Specify Axis Information							
<input type="button" value="New"/> <input type="button" value="Delete"/> <input type="button" value="Search"/> 1-5 of 5							
Data Source Columns		Field Format	Grid Axis	Chart Axis	Display As	Dual Y Axis	Define Threshold
1 ID	String	Column	Y-Axis	Filter	Filter	<input type="checkbox"/>	Define Threshold
2 Career	String	Filter	Filter	Filter	Filter	<input type="checkbox"/>	Define Threshold
3 Admit Type	String	Row	X-Axis	Filter	Filter	<input type="checkbox"/>	Define Threshold
4 Appl Meth	String	Filter	Filter	Filter	Filter	<input type="checkbox"/>	Define Threshold
5 Created By	String	Filter	Filter	Filter	Filter	<input type="checkbox"/>	Define Threshold

Field Format

Details whether the field is string, number, ect.

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 Having Fun with Pivot Grids

View Options

Default View							
<input type="radio"/> Pivot Grid Only	<input checked="" type="radio"/> Chart Only	<input type="checkbox"/> Pivot Grid and Chart					
Specify Axis Information							
<input type="button" value="New"/> <input type="button" value="Delete"/> <input type="button" value="Search"/> 1-5 of 5							
Data Source Columns		Field Format	Grid Axis	Chart Axis	Display As	Dual Y Axis	Define Threshold
1 ID	String	Column	Y-Axis	Filter	Filter	<input type="checkbox"/>	Define Threshold
2 Career	String	Filter	Filter	Filter	Filter	<input type="checkbox"/>	Define Threshold
3 Admit Type	String	Row	X-Axis	Filter	Filter	<input type="checkbox"/>	Define Threshold
4 Appl Meth	String	Filter	Filter	Filter	Filter	<input type="checkbox"/>	Define Threshold
5 Created By	String	Filter	Filter	Filter	Filter	<input type="checkbox"/>	Define Threshold

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



Pivot Wiz Model

Pivot Grid Wizard Step 4 of 5

Specify Data Model Options

Title: Having Fun with Pivot Grids

View Options

Default View: Pivot Grid Only Pivot Grid and Chart

Specify Axis Information

Data Source Columns	Field Format	Grid Axis	Chart Axis	Display As	Dual Y Axis	Define Threshold
1 ID	String	Column	Y-Axis	Percentage Grand Total	<input type="checkbox"/>	<input type="checkbox"/> Define Threshold
2 Career	String	Filter	Filter			
3 Admit Type	String	Row	X-Axis			
4 Appl Meth	String	Filter	Filter			
5 Created By	String	Filter	Filter			
6 Fee Amount	Signed Number	Column				<input type="checkbox"/> Define Threshold

Grid Options

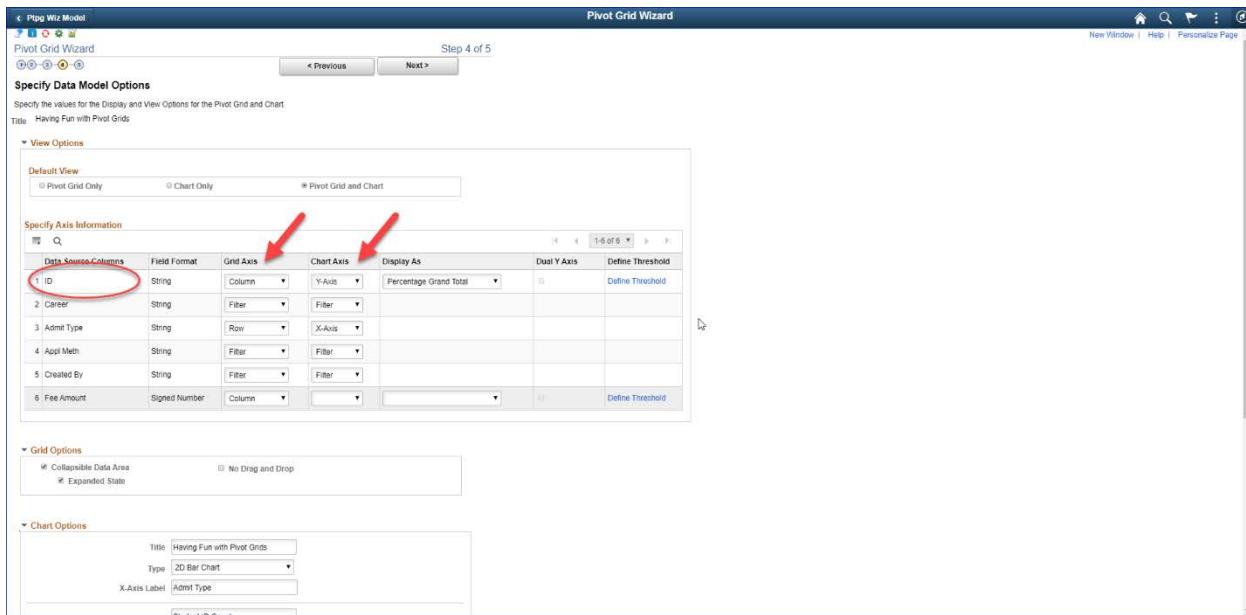
Collapsible Data Area Expanded State

Chart Options

Title: Having Fun with Pivot Grids

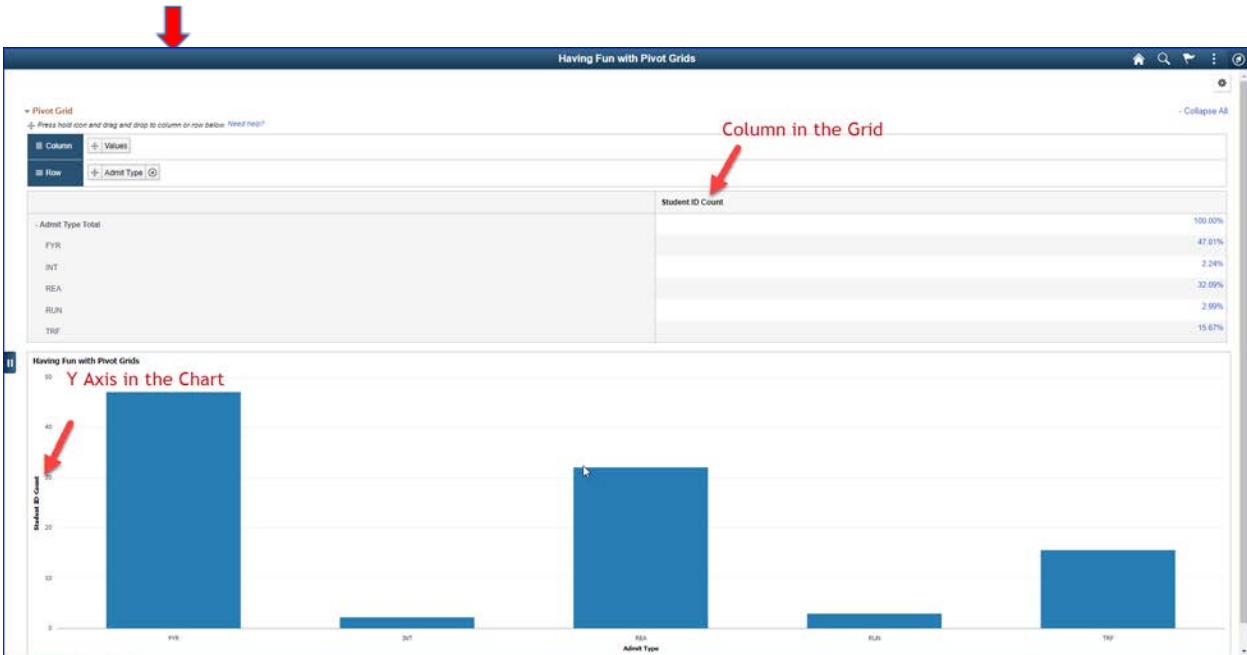
Type: 2D Bar Chart

X-Axis Label: Admit Type



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



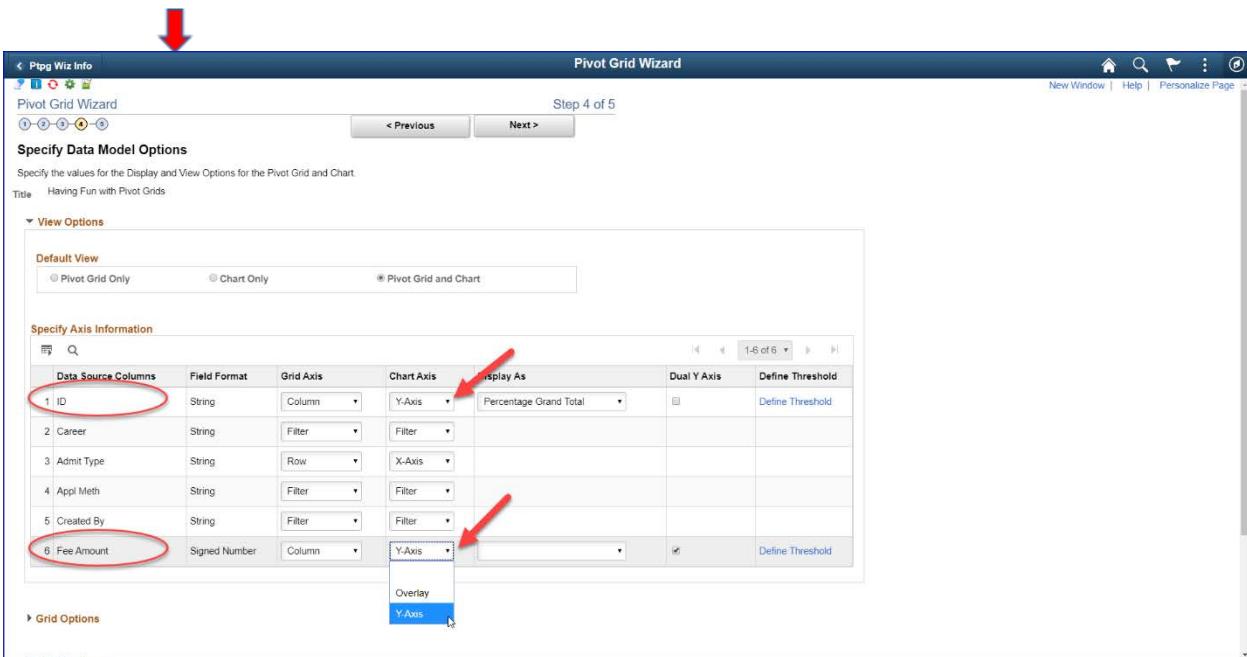
The screenshot shows a web-based application titled "Having Fun with Pivot Grids". On the left, there's a "Pivot Grid" configuration pane with "Column" and "Row" sections. Below it is a "Admit Type Total" table. To the right is a chart titled "Y Axis in the Chart" showing bar heights for Admit Types FYR, INT, FFA, FNU, and TIF. A red arrow points from the text "Column in the Grid" to the chart area.

Admit Type	Total
FYR	47.01%
INT	2.24%
FFA	32.09%
FNU	2.99%
TIF	15.67%

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

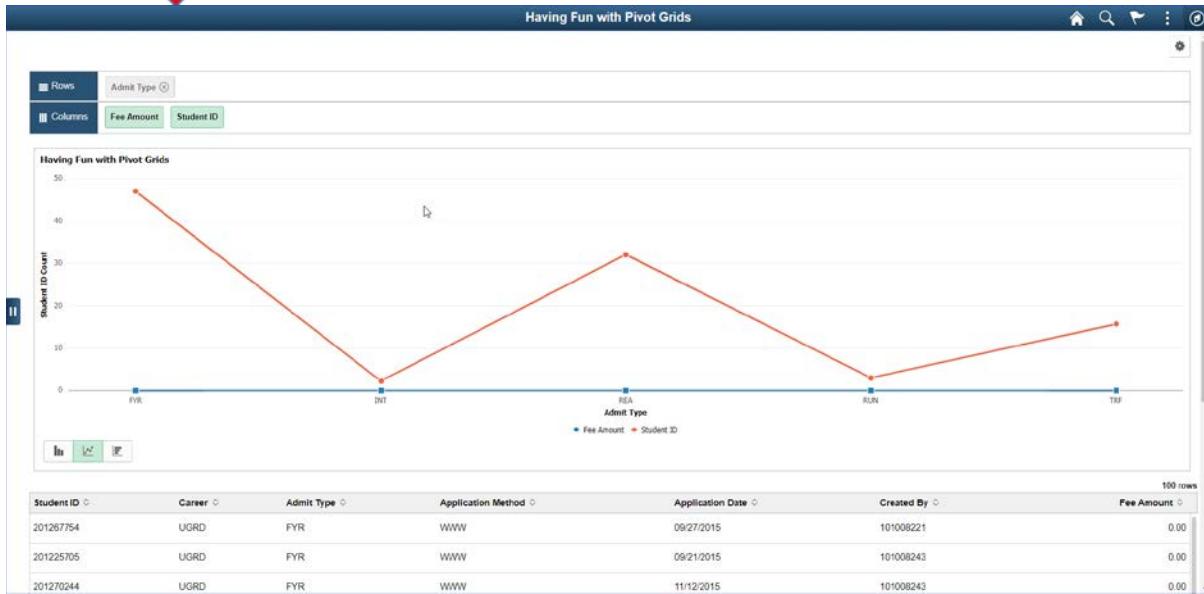


The screenshot shows the "Pivot Grid Wizard" in "Step 4 of 5". It has tabs for "Pivot Wiz Info", "Pivot Grid Wizard", and "Personalize Page". The main area is titled "Specify Data Model Options" and shows "View Options" with "Default View" set to "Pivot Grid and Chart". The "Specify Axis Information" table lists six data source columns: ID, Career, Admit Type, Appl Meth, Created By, and Fee Amount. Red circles highlight the first and last rows. Red arrows point to dropdown menus for "Display As" under "Chart Axis" for both rows, which are set to "Y-Axis".

Data Source Columns	Field Format	Grid Axis	Chart Axis	Display As	Dual Y Axis	Define Threshold
1 ID	String	Column	Y-Axis	Percentage Grand Total		Define Threshold
2 Career	String	Filter	Filter	Filter		
3 Admit Type	String	Row	X-Axis	Filter		
4 Appl Meth	String	Filter	Filter	Filter		
5 Created By	String	Filter	Filter	Filter		
6 Fee Amount	Signed Number	Column	Y-Axis	Y-Axis		Define Threshold

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.

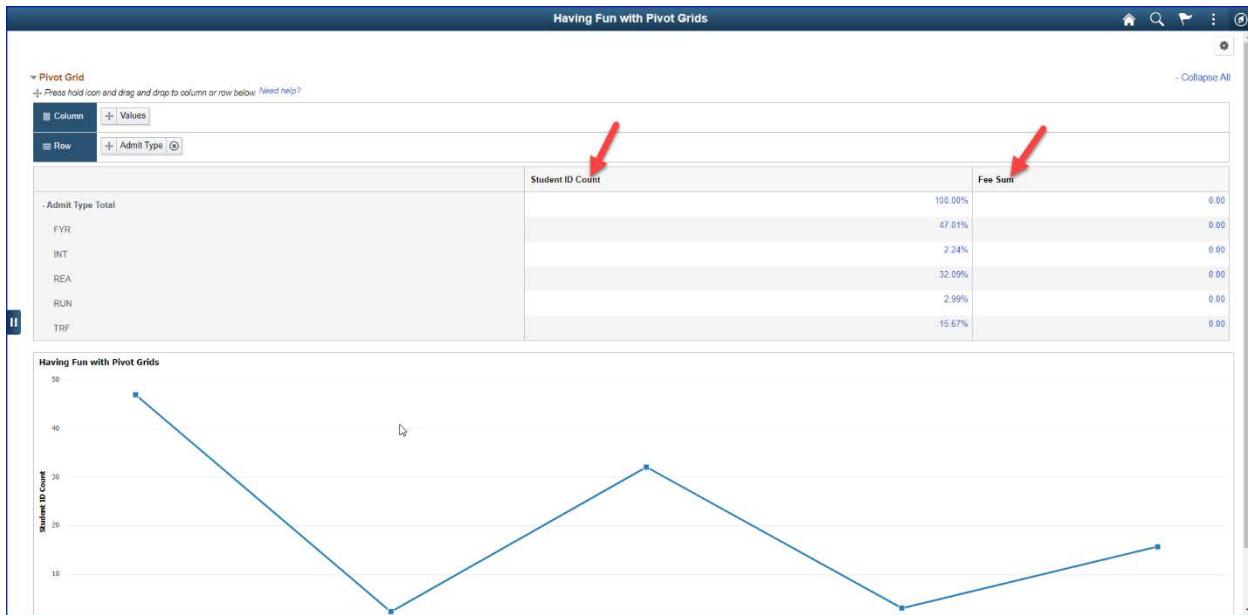
Pivot Grid Viewer Display



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

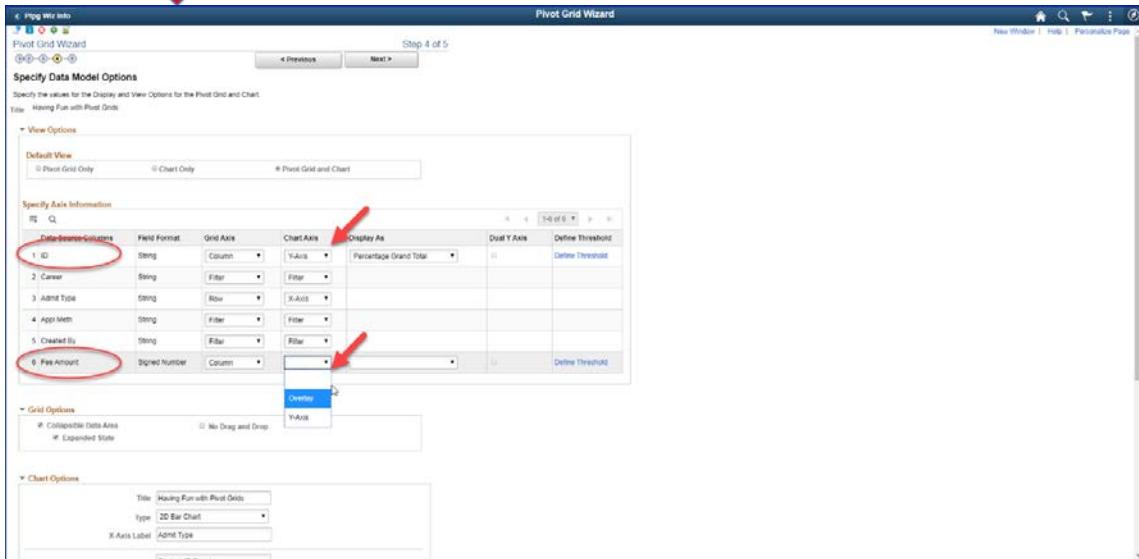




COLUMN/Y AXIS AND COLUMN OVERLAY

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.

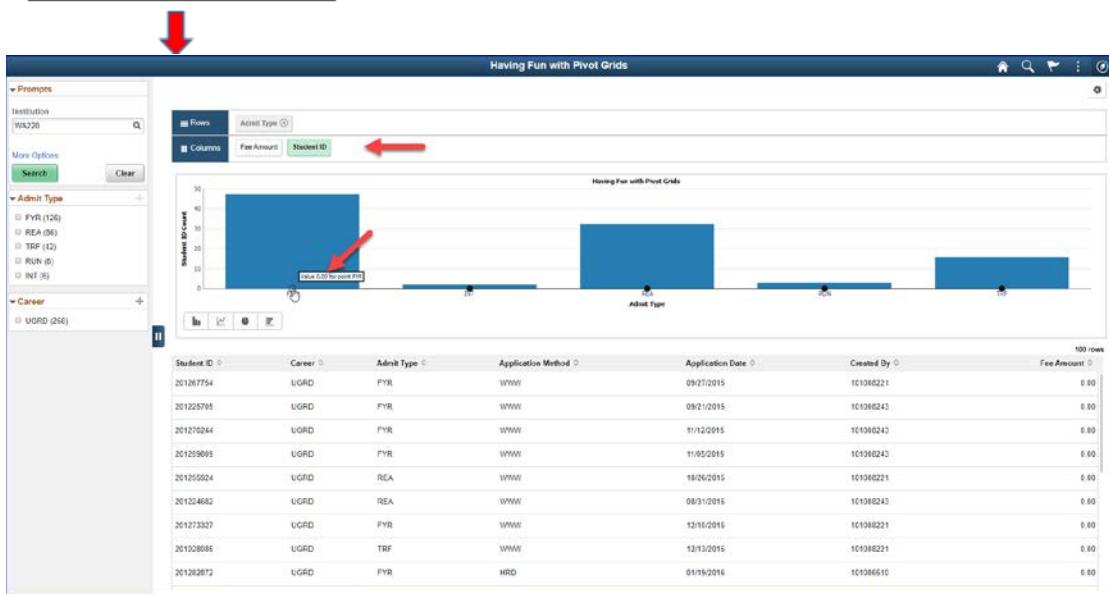
Pivot Grid Wizard Set Up

The screenshot shows the "Pivot Grid Wizard" Step 4 of 5: "Specify Data Model Options". The "Default View" section has "Pivot Grid Only" selected. The "Specify Axis Information" section shows a list of fields: 1. ID, 2. Career, 3. Admit Type, 4. Appr Mem, 5. Created By, and 6. Fee Amount. The "Display As" dropdown for "ID" is set to "Y-Axis", and the "Display As" dropdown for "Fee Amount" is set to "Y-Axis". Red circles highlight the "ID" and "Fee Amount" fields, and red arrows point to their respective "Display As" dropdowns. The "Chart Options" section at the bottom includes fields for Title, Type (2D Bar Chart), and X-Axis Label (Admit Type).

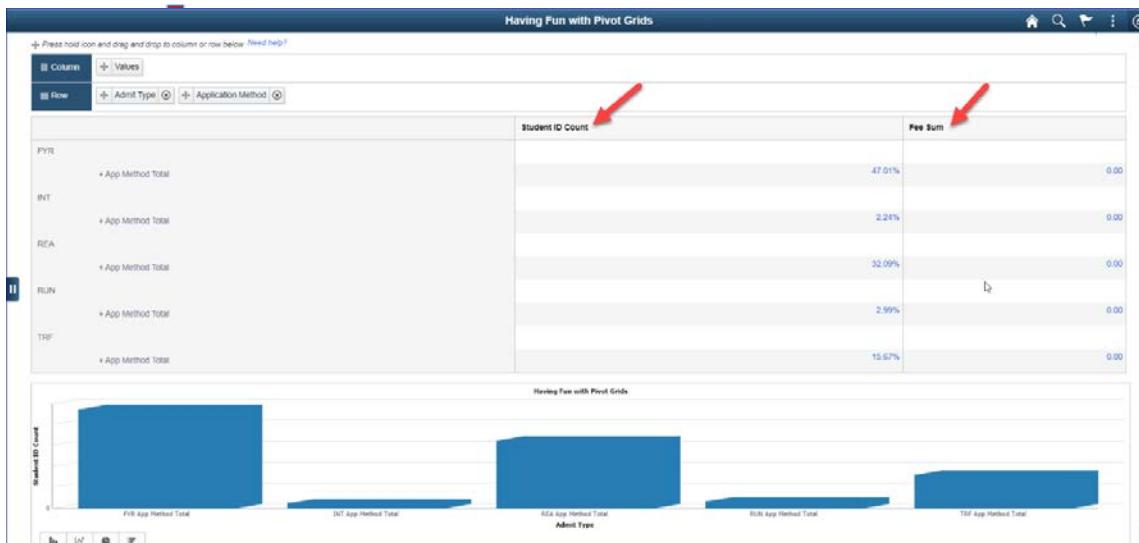
If two fields were selected as Column/Y Axis and Column/Overlay, Pivot Grid Viewer will display the field selected as Column/Y Axis as the Y Axis in the chart section and the field selected as Column/Overlay as the Overlay IF the Default View Chart Only was selected. No other default views will display the overlay.

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



Grid Axis Selection of Row

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

- X Axis

- Series

ROW/X AXIS

Pivot Grid Wizard Set Up



Specify Data Model Options

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

Title: Having Fun with Pivot Grids

View Options

Default View: Pivot Grid Only Chart Only Pivot Grid and Chart

Specify Axis Information

	Data Source Columns	Field Format	Grid Axis	Chart Axis	Display As	Dual Y Axis	Define Threshold
1	ID	String	Column	Y-Axis	Percentage Grand Total		
2	Career	String	Filter	Filter			
3	Admit Type	String	Row	X-Axis			
4	Appl Meth	String	Filter	Filter			
5	Created By	String	Filter	Series			
6	Fee Amount	Signed Number	Column	X-Axis			

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



Pivot Grid

Having Fun with Pivot Grids

Press hold icon and drag and drop to column or row below. Need help?

Column Values
 Row Admit Type

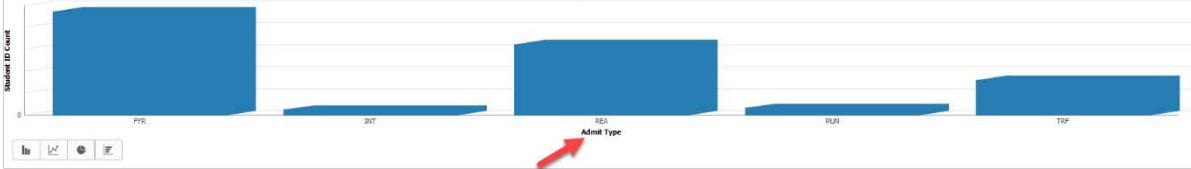
		Student ID Count	Fee Sum
- Admit Type Total			100.00%
FYR			47.01%
INT			2.24%
REA			32.09%
RUN			2.59%
TRF			15.67%

Having Fun with Pivot Grids

Student ID Count

FYR INT REA RUN TRF

Admit Type



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



Ptg Wiz Info **Pivot Grid Wizard**

< Previous Next >

Specify Data Model Options

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

Title Having Fun with Pivot Grids

View Options

Default View

Pivot Grid Only Chart Only Pivot Grid and Chart

Specify Axis Information

Data Source Columns	Field Format	Grid Axis	Chart Axis	Display As	Dual Y Axis	Define Threshold
1 ID	String	Column	Y-Axis	Percentage Grand Total		Define Threshold
2 Career	String	Filter	Filter			
3 Admit Type	String	Row	X-Axis			
4 Appl Meth	String	Row	Series			
5 Created By	String	Filter	Filter			
6 Fee Amount	Signed Number	Column	X-Axis			Define Threshold

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



Having Fun with Pivot Grids

Rows: Admit Type, Application Method
Columns: Fee Amount, Student ID

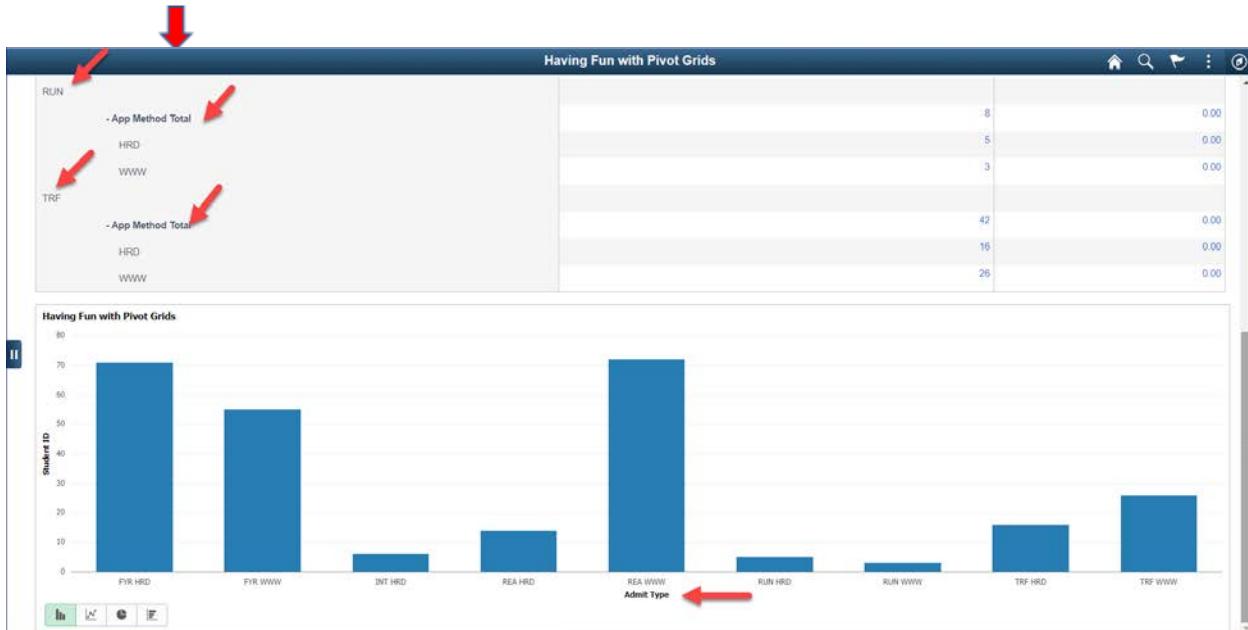
Having Fun with Pivot Grids

Stacked Bar Chart showing Student ID Count by Admit Type (FYR, REA, RUE, TRF) and Application Method (WWW, HRD).

Student ID	Career	Admit Type	Application Method	Application Date	Created By	Fee Amount
201267754	UGRD	FYR	WWW	09/27/2015	101008221	0.00
201225765	UGRD	FYR	WWW	09/21/2015	101008243	0.00
201270244	UGRD	FYR	WWW	11/12/2015	101008243	0.00
201255809	UGRD	FYR	WWW	11/05/2015	101008243	0.00
201255924	UGRD	REA	WWW	10/26/2015	101008221	0.00
201224682	UGRD	REA	WWW	08/31/2015	101008243	0.00
201273327	UGRD	FYR	WWW	12/10/2015	101008221	0.00
201028085	UGRD	TRF	WWW	12/13/2015	101008221	0.00
201262072	UGRD	FYR	HRD	01/19/2016	101006519	0.00

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



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

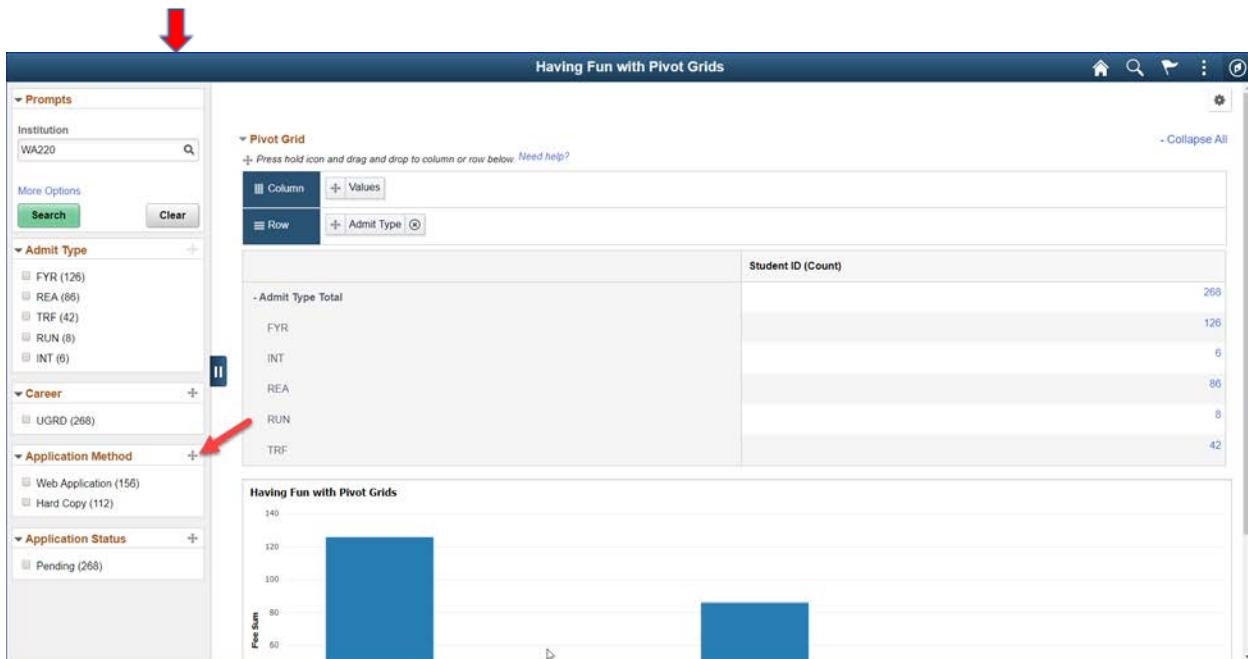
Specify Axis Information

Data Source Columns	Field Format	Grid Axis	Chart Axis	Display As	Dual Y Axis	Define Threshold
1 ID	String	Column	Y-Axis			Define Threshold
2 Career	String	Filter	Filter			
3 Admit Type	String	Row	X-Axis			
4 Appl Meth	String	Filter	Filter			
5 Status	String	Filter	Filter			
6 Created By	String	Filter	Series			
7 Fee Amount	Signed Number	Column	X-Axis			Define Threshold

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.

Pivot Grid Viewer Display

Having Fun with Pivot Grids



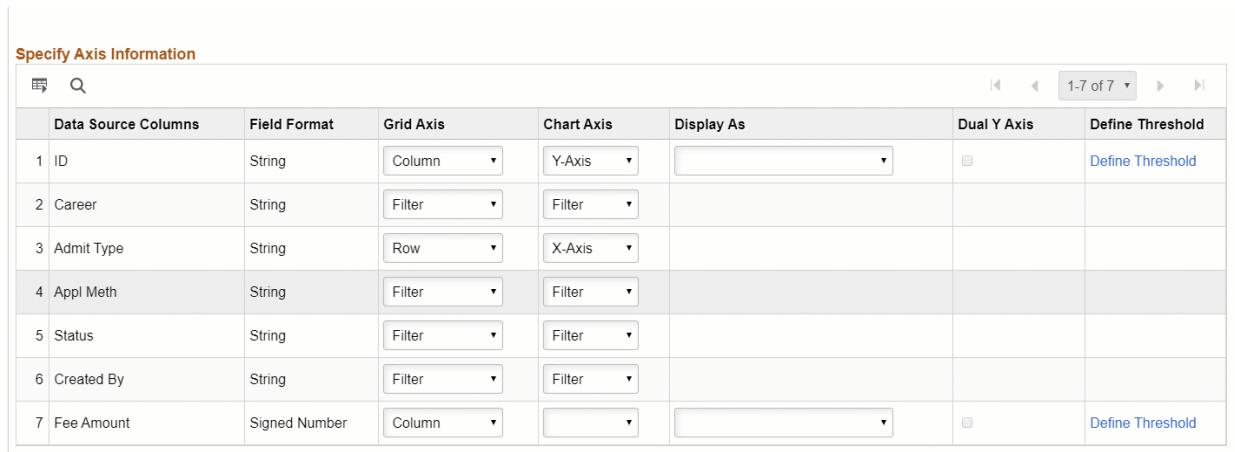
The screenshot shows a 'Pivot Grid' interface titled 'Having Fun with Pivot Grids'. On the left, there's a sidebar with 'Prompts' containing a search bar for 'Institution' (WA220) and dropdown menus for 'Admit Type', 'Career', 'Application Method', and 'Application Status'. The main area has a 'Pivot Grid' section with 'Column' and 'Row' headers. A red arrow points to the 'Application Method' dropdown in the sidebar. Below the grid is a chart titled 'Having Fun with Pivot Grids' showing two blue bars with values of 140 and 80 on the 'Fee Sum' axis.

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.

Pivot Grid Wizard Set Up

Specify Axis Information



This is a screenshot of the 'Specify Axis Information' step in the Pivot Grid Wizard. It shows a table with 7 rows and 7 columns. The columns are: Data Source Columns, Field Format, Grid Axis, Chart Axis, Display As, Dual Y Axis, and Define Threshold. The 'Display As' column contains dropdown menus. The 'Dual Y Axis' and 'Define Threshold' columns have checkboxes. The last row (Fee Amount) has a different background color. A red arrow points to the 'Display As' dropdown in the first row.

	Data Source Columns	Field Format	Grid Axis	Chart Axis	Display As	Dual Y Axis	Define Threshold
1	ID	String	Column	Y-Axis		<input type="checkbox"/>	Define Threshold
2	Career	String	Filter	Filter		<input type="checkbox"/>	
3	Admit Type	String	Row	X-Axis		<input type="checkbox"/>	
4	Appl Meth	String	Filter	Filter		<input type="checkbox"/>	
5	Status	String	Filter	Filter		<input type="checkbox"/>	
6	Created By	String	Filter	Filter		<input type="checkbox"/>	
7	Fee Amount	Signed Number	Column			<input type="checkbox"/>	Define Threshold

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 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 Having Fun with Pivot Grids

View Options

Default View

Pivot Grid Only Chart Only Pivot Grid and Chart

Specify Axis Information

Data Source Columns	Field Format	Grid Axis	Chart Axis	Display As	Dual Y Axis	Define Threshold
1 ID	String	Column	Y-Axis	Percentage Grand Total		Define Threshold
2 Career	String	Filter	Filter	Percentage		
3 Admit Type	String	Row	X-Axis	Percentage Grand Total		
4 Appl Meth	String	Filter	Filter			
5 Status	String	Filter	Filter			
6 Created By	String	Filter	Filter			

A red arrow points to the "Display As" dropdown menu for the "Admit Type" column, which is currently set to "Percentage Grand Total".

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

Pivot Grid Viewer Display

Having Fun with Pivot Grids

Prompts

Institution: WA220

More Options Search Clear

Admit Type

- FYR (126)
- REA (86)
- TRF (42)
- RUN (8)
- INT (6)

Career

- UGRD (268)

Application Method

- Web Application (156)
- Hard Copy (112)

Application Status

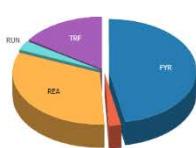
- Pending (268)

Pivot Grid

Press hold icon and drag and drop to column or row below. Need help?

Column	Values	
Row	Admit Type	
		- Collapse All
		- Admit Type Total
	FYR	100.00%
	INT	47.01%
	REA	2.24%
	RUN	32.09%
	TRF	2.99%
		15.67%

Having Fun with Pivot Grids



Admit Type	Percentage
FYR	47.01%
INT	2.24%
REA	2.09%
RUN	32.09%
TRF	15.67%

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



Pivot Grid Wizard
Step 4 of 5

< Previous Next >

Specify Data Model Options

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

Title: Having Fun with Pivot Grids

View Options

Default View

(Pivot Grid Only) (Chart Only) (Pivot Grid and Chart)

Specify Axis Information

	Data Source Columns	Field Format	Grid Axis	Chart Axis	Display As	Dual Y Axis	Define Threshold
1	ID	String	Column	Y-Axis	Percentage Grand Total	<input type="checkbox"/>	Define Threshold
2	Career	String	Filter	Filter			
3	Admit Type	String	Row	X-Axis			
4	Appl Meth	String	Filter	Filter			
5	Status	String	Filter	Filter			
6	Created By	String	Filter	Filter			
7	Fee Amount	Signed Number	Column	Y-Axis		<input checked="" type="checkbox"/>	Define Threshold

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.

Pivot Grid Viewer Display



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

DISTINCT THRESHOLD

Pivot Grid Wizard Set Up



Configure Thresholds

Help

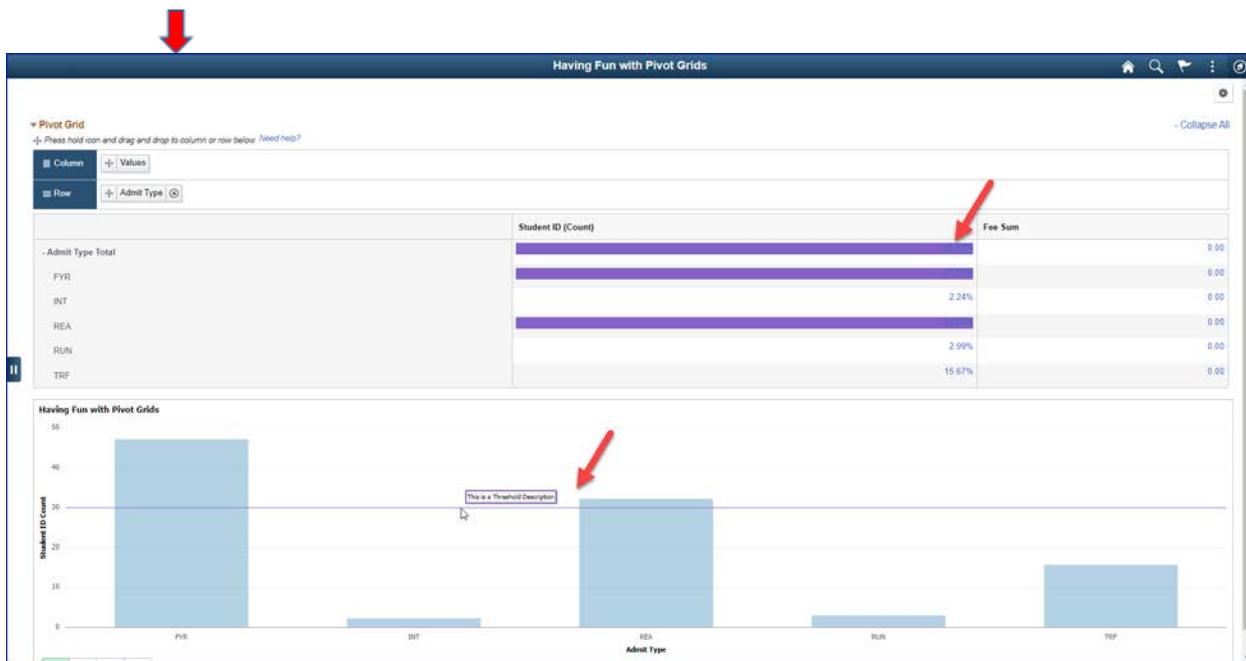
Data Source Column	ID
Threshold Type	Distinct
Threshold Value	30
Threshold Color	Purple
Threshold Description	This is a Threshold Description

OK Cancel

Return

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

Data Source Column: ID

Threshold Type: Range

Lower Limit: 20 Higher Limit: 40

Threshold Color: Purple

Threshold Description: This is a Threshold Description

OK Cancel

Return

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



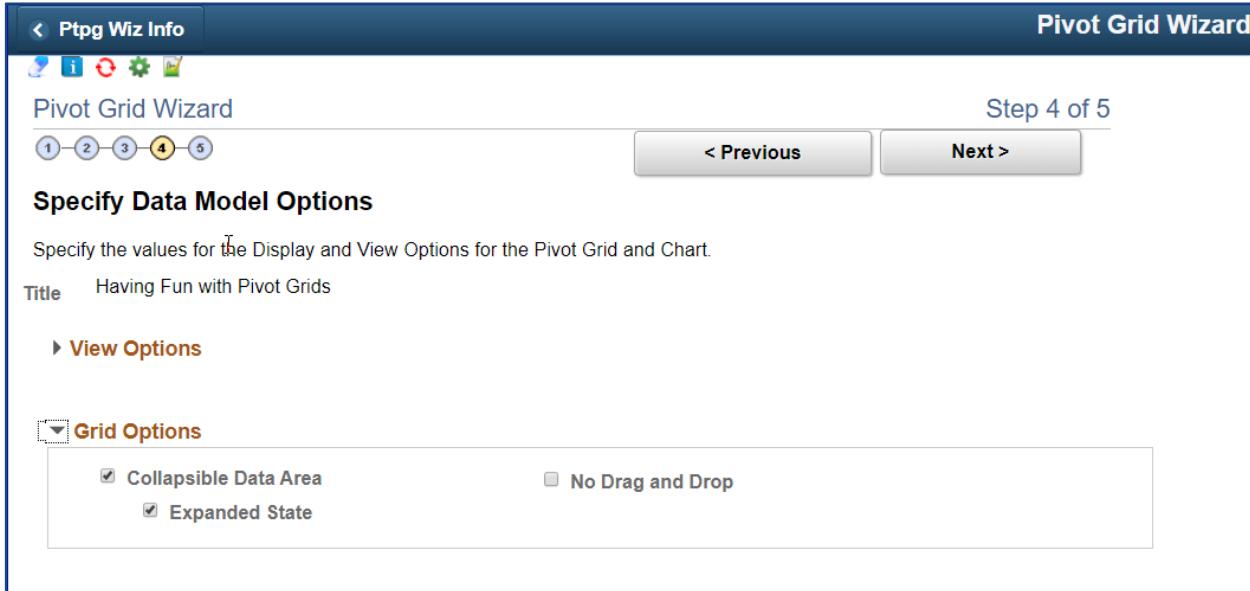


Grid Options

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



The screenshot shows the "Pivot Grid Wizard" interface at "Step 4 of 5". The title bar includes icons for back, forward, search, and help. Below the title, it says "Pivot Grid Wizard" and shows a progress bar with steps 1 through 5, where step 4 is highlighted. On the right, there are "Previous" and "Next" buttons. The main content area is titled "Specify Data Model Options" and contains a note: "Specify the values for the Display and View Options for the Pivot Grid and Chart." A "Title" field is set to "Having Fun with Pivot Grids". A "View Options" link is present. A "Grid Options" section is expanded, showing three checkboxes: "Collapsible Data Area" (checked), "No Drag and Drop" (unchecked), and "Expanded State" (checked). The "Grid Options" section has a dropdown arrow icon.

COLLAPSIBLE AREA AND EXPANDED STATE

Pivot Grid Wizard Set Up



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 Having Fun with Pivot Grids

View Options

Grid Options

Collapsible Data Area No Drag and Drop
 Expanded State



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.

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 the X Axis

View Options

Default View

Pivot Grid Only Chart Only Pivot Grid and Chart

Specify Axis Information

Field Name	Field Format	Grid Axis	Chart Axis	Display As	Personalize	Find	First	Last
1 Acad Year	String	Row	Series	Row			1-4 of 4	Last
2 Item Type	String	Filter	Filter	Row				
3 Amt	Signed Number	Column	Y-Axis	Row				
4 Short Desc	String	Row	X-Axis	Row				

Grid Options

Collapsible Data Area No Drag and Drop
 Expanded State

Chart Options

Display Options

Fluid Mode Options

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.

Pivot Grid Wizard Set Up



Specify Data Model Options

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

Title Having Fun with Pivot Grids

 **View Options**

▼ Grid Options

Collapsible Data Area

No Drag and Drop

Expanded State



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.

Pivot Grid Viewer Display



▼ Application Method



Web Application (156)

Hard Copy (112)



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.

Pivot Grid Viewer Display



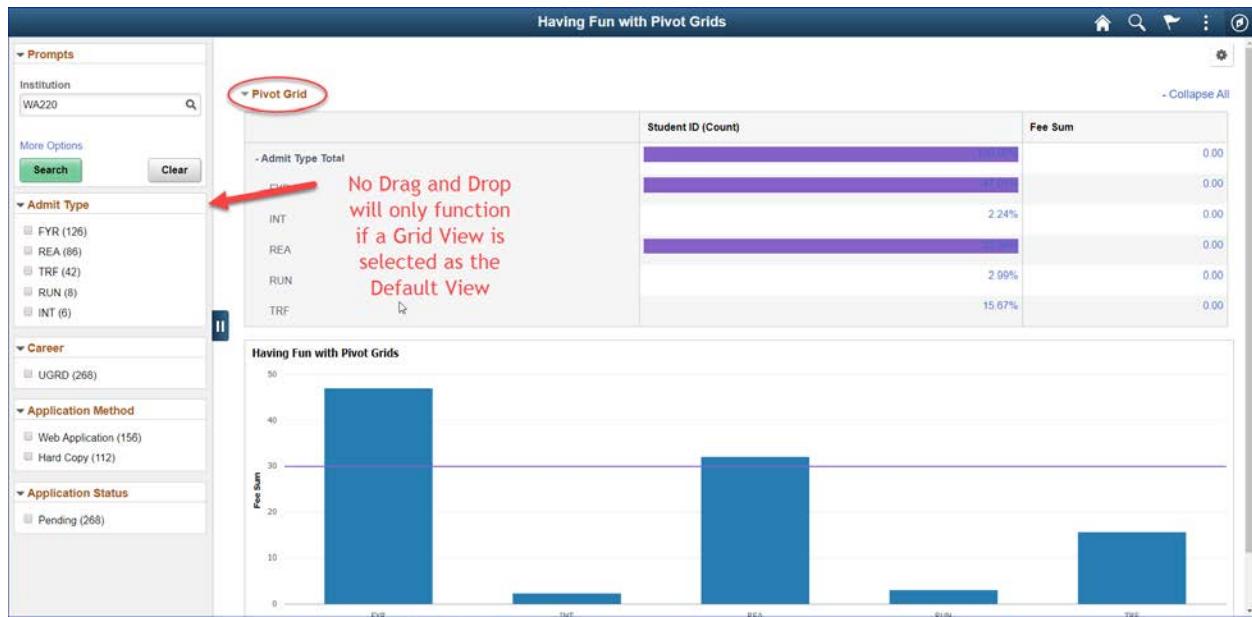


Chart Options

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.

Ptg Wiz Info

Pivot Grid Wizard

Step 4 of 5

1 2 3 4 5

< Previous Next >

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**

Title	Fun with the XYZ Axis
Type	2D Bar Chart
X-Axis Label	Residency Type Chart Option
Y-Axis Label	Student ID

Advanced Options

Legend	Bottom
Height	[empty]
Width	[empty]
Subtitle	This is a Chart subtitle
Footer	This is a Chart Footer
Y-Axis Precision	[empty]
<input type="checkbox"/> Exploded Pie	

Chart Options

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

▼ **Chart Options**

Title	Fun with the XYZ Axis
Type	2D Bar Chart ▾
X-Axis Label	Residency Type Chart Option
Y-Axis Label	Student ID

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

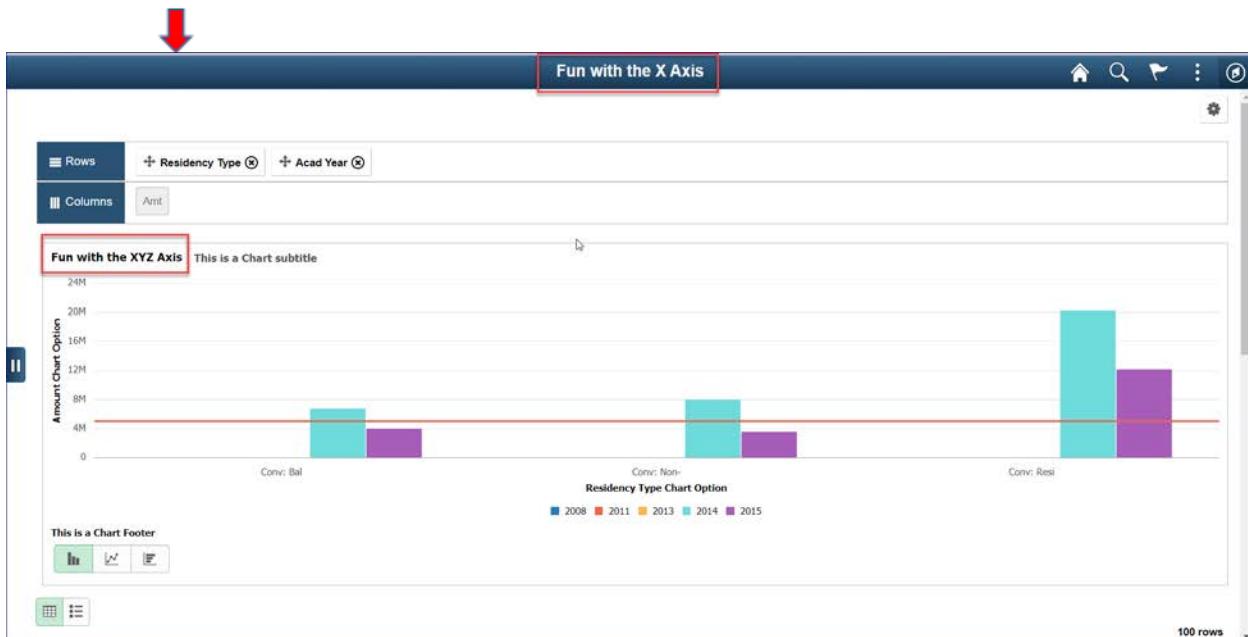


▼ **Chart Options**

Title	Fun with the XYZ Axis
Type	2D Bar Chart ▾
X-Axis Label	Residency Type Chart Option
Y-Axis Label	Amount Chart Option

"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.

Pivot Grid Viewer Display



TYPE

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

Title	Fun with the XYZ Axis
Type	2D Bar Chart
X-Axis Label	Residency Type Chart Option
Y-Axis Label	Amount Chart Option

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



Fun with the X Axis

Rows: Residency Type, Acad Year

Columns: Amt

Fun with the XYZ Axis This is a Chart subtitle



This is a Chart Footer

100 rows

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.

Advanced Options

Legend	<input type="button" value="Bottom ▾"/>
Height	<input type="text"/>
Width	<input type="text"/>
Subtitle	<input type="text" value="This is a Chart subtitle"/>
Footer	<input type="text" value="This is a Chart Footer"/>
Y-Axis Precision	<input type="text"/> <input type="checkbox"/> Exploded Pie

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

Height

Width

Subtitle

Footer

Y-Axis Precision Exploded Pie

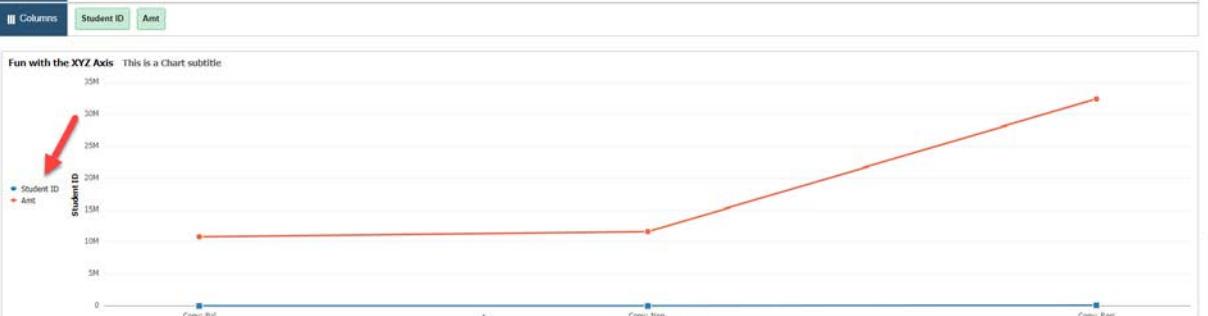
Pivot Grid Viewer Display

↓

Fun with Pivot Grids

Rows: Residency Type
 Columns: Student ID Amt

Fun with the XYZ Axis - This is a Chart subtitle



Student ID

This is a Chart Footer

Student ID	Acad Year	Item Type	Amt	Description	Residency Type
20127662	2008	001000000000	83.68	Conv: Bal Fwd 1098T Elig	Conv: Bal
201112622	2011	001000000000	50.00	Conv: Bal Fwd 1098T Elig	Conv: Bal

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



Advanced Options

Legend	Left
Height	500
Width	500
Subtitle	This is a Chart subtitle
Footer	This is a Chart Footer
Y-Axis Precision	<input type="button"/> <input checked="" type="checkbox"/> Exploded Pie

Pivot Grid Viewer Display

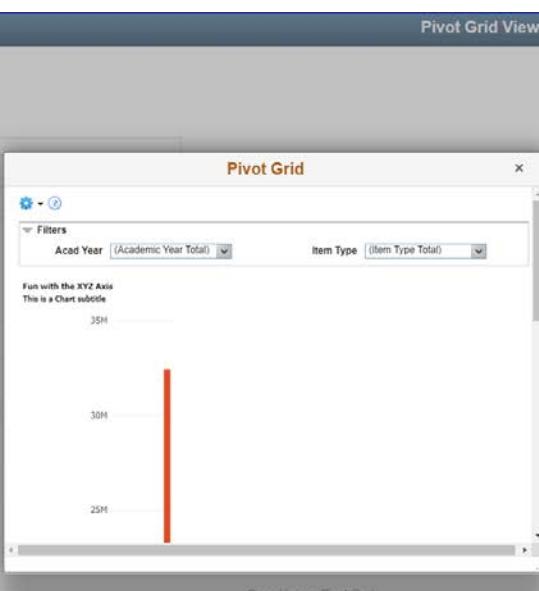


Pivot Grid Viewer

Pivot Grid

Filters: Acad Year (Academic Year Total) Item Type (Item Type Total)

Fun with the XYZ Axis This is a Chart subtitle



Open in Fluid Mode

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	<input type="text"/> <input type="checkbox"/> Exploded Pie

Pivot Grid Viewer Display



Pivot Grid Viewer

Search Pivot Grids

Pivot Grid Name: Q.

Data Source Name:

Data Source Type:

Show all Views:

Search:

Pivot Grid Name:

- CTC_SR_STD_FTE_FALL
- CTC_SR_STD_FTE_SUMMER
- CTC_SR_STD_FTE_WINTER
- EODP_CTCGRY_DTLS_FL
- PGCS_FUN_WITH_PIVOT_GRIDS
- PGCS_FUN_WITH_Y_AXIS
- PGCS_PG101_FUN_WITH_GRIDS
- PGCS_PG101_FUN_WITH_GRIDS_2
- PGCS_PG101_TRAINING
- PTIASP_DB_APPLIED_BUG_BY_LAG

Pivot Grid

Filters: Acad Year (Academic Year Total) Item Type (Item Type Total)

Fun with the XYZ Axis - This is a Chart subtitle

Student ID: Ant:

Open in Fluid Mode

View All

1-20 of 28

Fun with Pivot Grids: Having Fun with Pivot Grids Having Fun with Pivot Grids Fun with Pivot Grids Applied Runs by Imagine

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

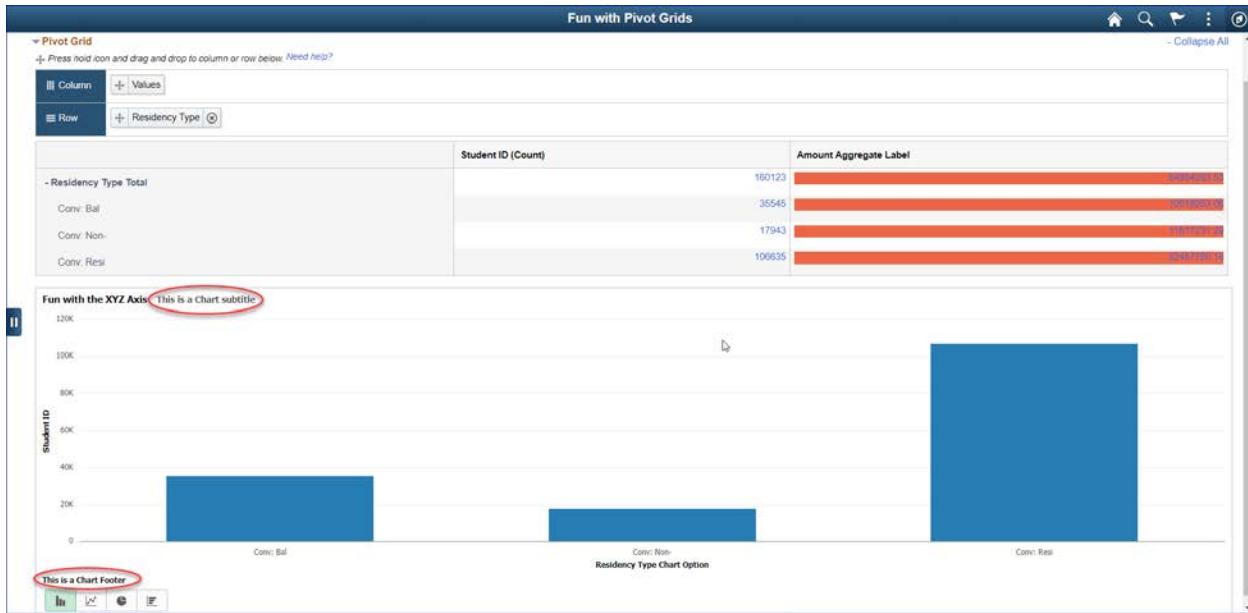


Advanced Options	
Legend	Left ▾
Height	500
Width	500
Subtitle	This is a Chart subtitle
Footer	This is a Chart Footer
Y-Axis Precision	<input type="text"/> <input type="checkbox"/> Exploded Pie



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

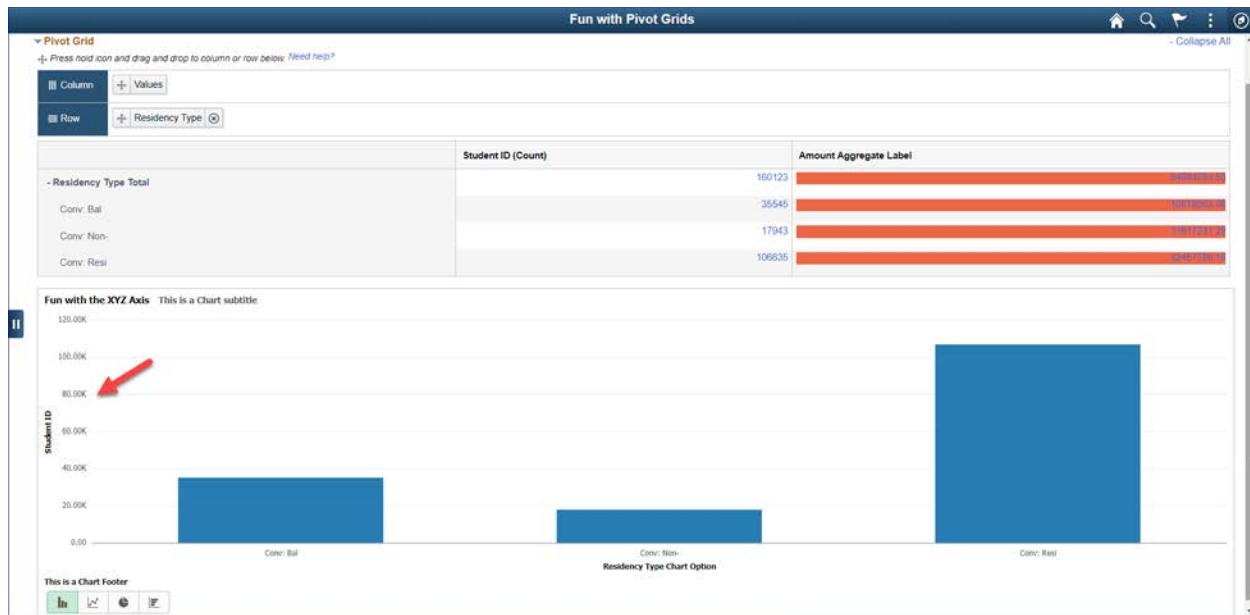
Footer This is a Chart Footer

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



Advanced Options

Legend Left ▾

Height 500

Width 500

Subtitle This is a Chart subtitle

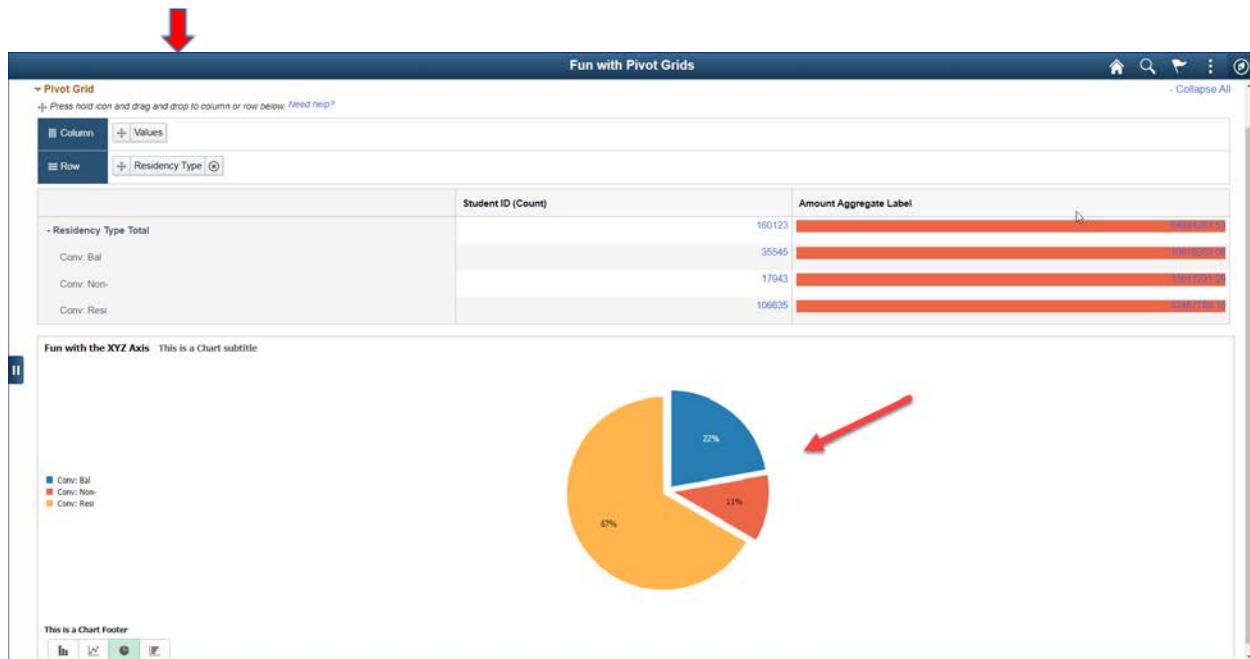
Footer This is a Chart Footer

Y-Axis Precision

Exploded Pie



Pivot Grid Viewer Display



Display Options

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

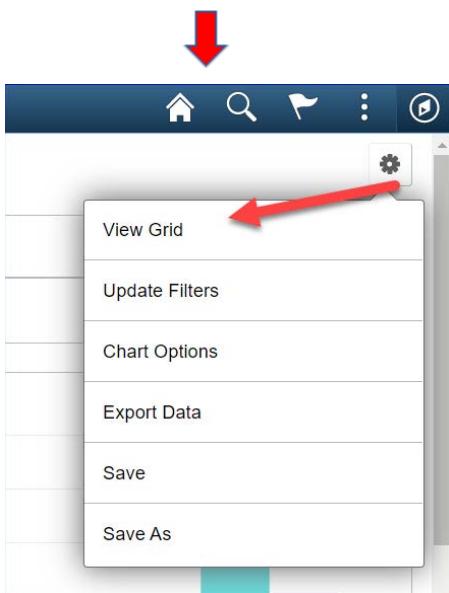
Display Options

<input checked="" type="checkbox"/> View Grid	<input checked="" type="checkbox"/> Bar Chart	<input checked="" type="checkbox"/> Save As
<input checked="" type="checkbox"/> Export Data	<input checked="" type="checkbox"/> Line Chart	
<input checked="" type="checkbox"/> Chart Options	<input checked="" type="checkbox"/> Pie Chart	
<input checked="" type="checkbox"/> Hide Chart	<input checked="" type="checkbox"/> Horizontal Bar Chart	
<input checked="" type="checkbox"/> Reset	<input checked="" type="checkbox"/> Update Filters	
<input checked="" type="checkbox"/> Save	<input checked="" type="checkbox"/> Show Help	

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



Fun with Pivot Grids

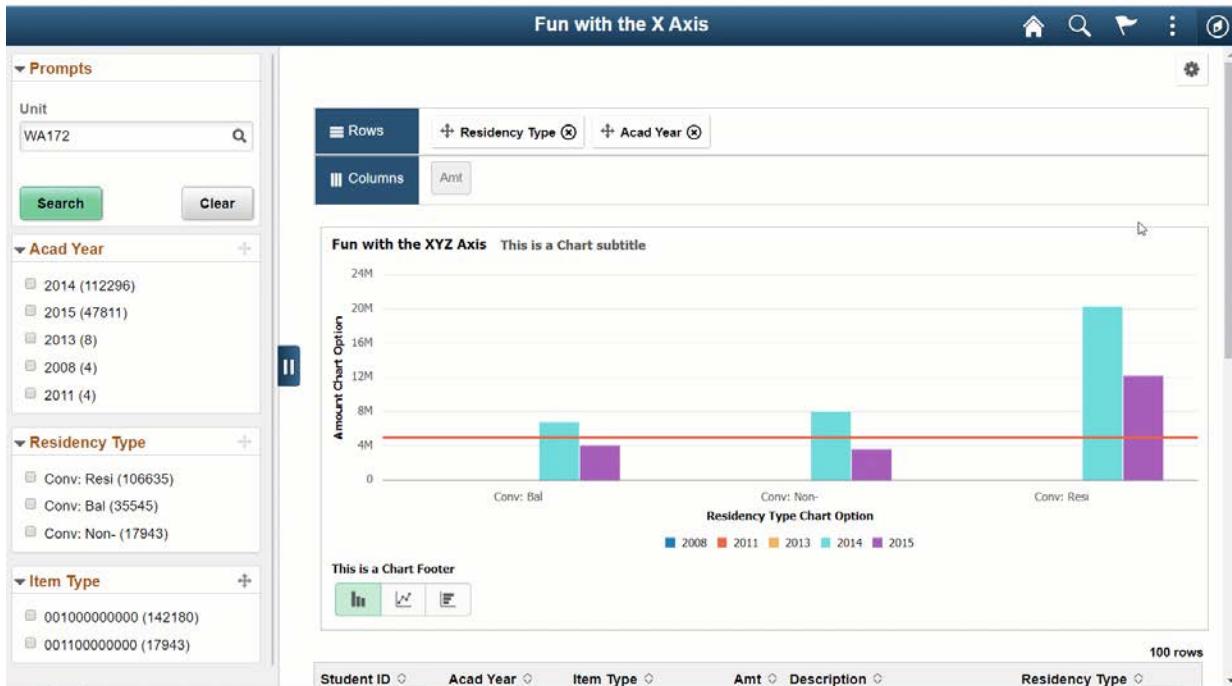
Pivot Grid
+ Press hold icon and drag and drop to column or row below Need help?

	Student ID (Count)	Amount Aggregate Label
- Residency Type Total		160123
Conv: Bal		35545
Conv: Non-		17943
Conv: Resi		106635

Cancel Apply - Collapse All

201112622 2011 001000000000 50.00 Conv: Bal Fndd 1008T Elg Conv: Bal

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

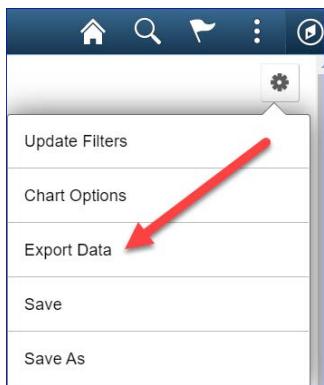
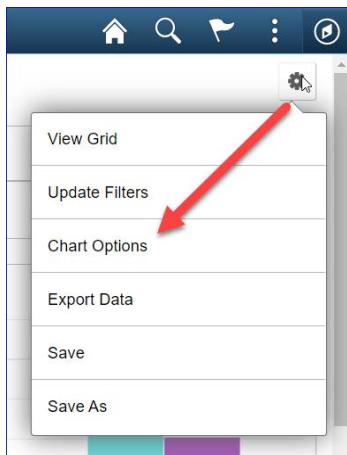


Chart Options

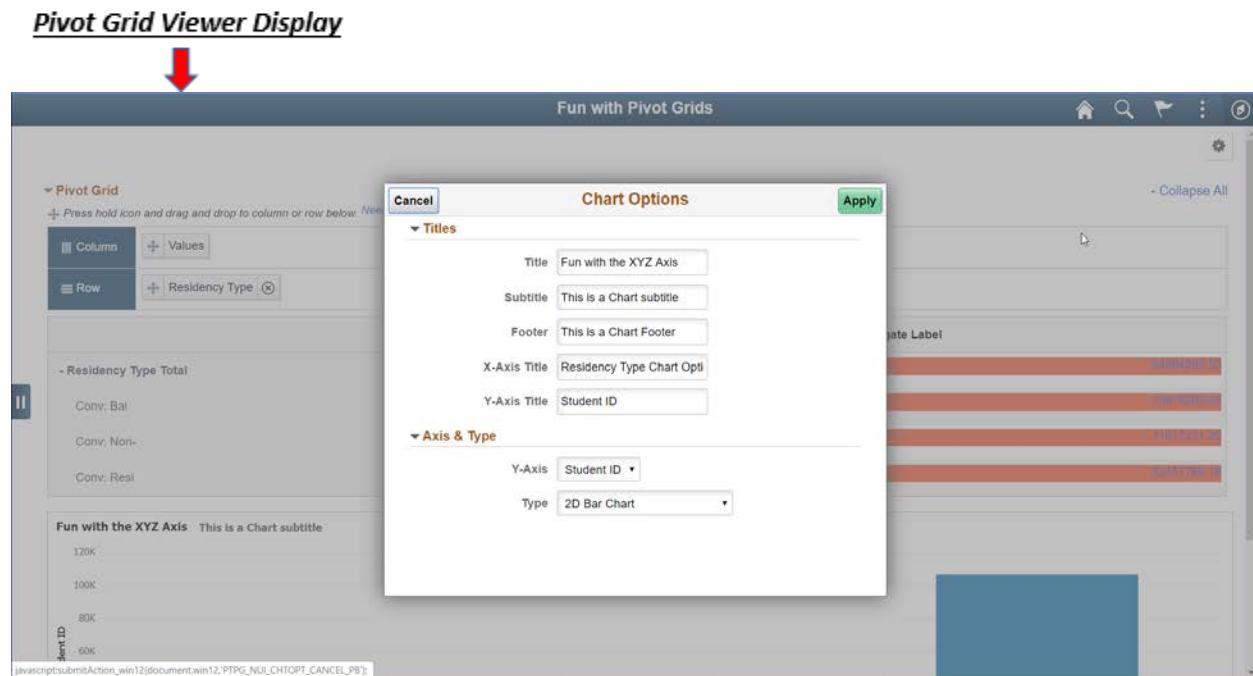
If checked then end users can change the chart layout, chart axis, and filters. If the checkbox is not selected the option will not appear in the Options Menu in Pivot Grid Viewer. This option will also not display if the Pivot Grid Only Default View has been selected.

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

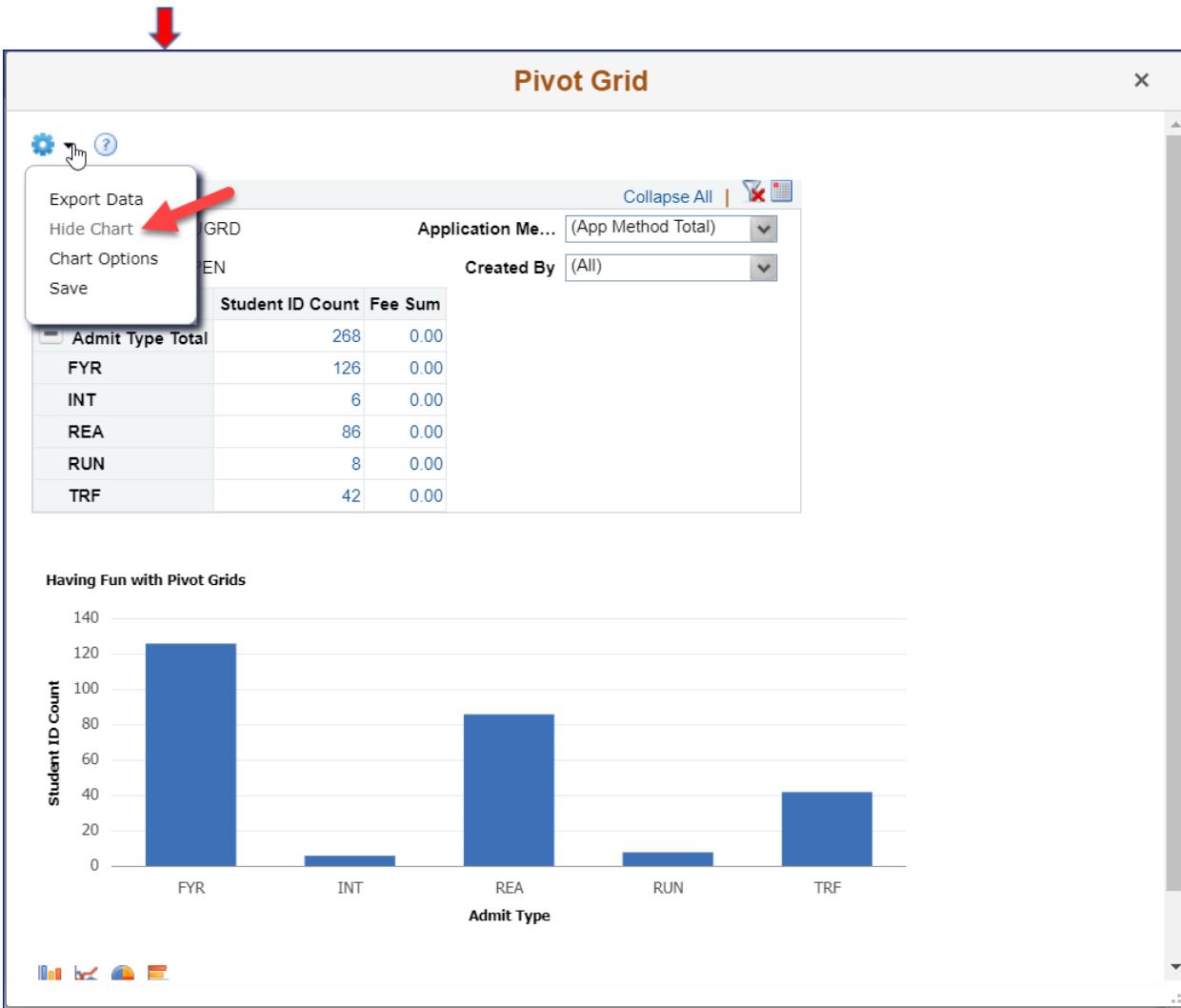


A screenshot of a web-based application titled "Fun with Pivot Grids". On the left, there is a "Pivot Grid" interface with columns for "Values" and rows for "Residency Type" (with categories "Conv; Bal", "Conv; Non-", and "Conv; Resi"). A red arrow points down to a modal dialog box titled "Chart Options". The "Titles" section contains fields for "Title" (set to "Fun with the XYZ Axis"), "Subtitle" (set to "This is a Chart subtitle"), "Footer" (set to "This is a Chart Footer"), "X-Axis Title" (set to "Residency Type Chart Opti"), and "Y-Axis Title" (set to "Student ID"). The "Axis & Type" section shows "Y-Axis" set to "Student ID" and "Type" set to "2D Bar Chart". In the background, there is a bar chart with four bars corresponding to the residency types. The chart has a title "Fun with the XYZ Axis" and a subtitle "This is a Chart subtitle". The Y-axis ranges from 60K to 120K.

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



A screenshot of the Pivot Grid Viewer interface. At the top, there's a title bar with the text "Pivot Grid". Below the title bar is a toolbar with several icons: a gear, a hand cursor, a question mark, and a refresh symbol. To the right of the toolbar are dropdown menus for "Application Me..." (set to "App Method Total") and "Created By" (set to "(All)"). On the far left, there's a vertical sidebar with buttons for "Export Data", "Hide Chart" (which has a red arrow pointing to it), "Chart Options", and "Save". The main area contains a table with columns "Student ID Count" and "Fee Sum". The table data is as follows:

	Student ID Count	Fee Sum
Admit Type Total	268	0.00
FYR	126	0.00
INT	6	0.00
REA	86	0.00
RUN	8	0.00
TRF	42	0.00

Below the table, there's a chart titled "Having Fun with Pivot Grids". The chart is a bar chart with "Admit Type" on the x-axis and "Student ID Count" on the y-axis. The data points correspond to the table above:

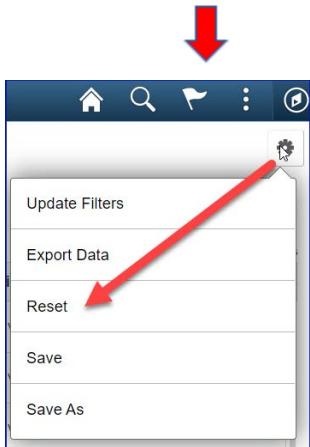
- FYR: Count ~126
- INT: Count ~6
- REA: Count ~86
- RUN: Count ~8
- TRF: Count ~42

At the bottom of the chart area, there are several small icons for chart-related functions.

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.

Pivot Grid Viewer Options Menu

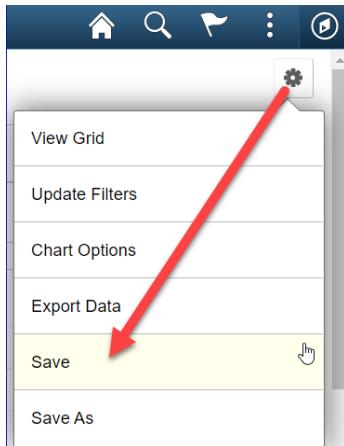


Save

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.

Pivot Grid Viewer Options Menu

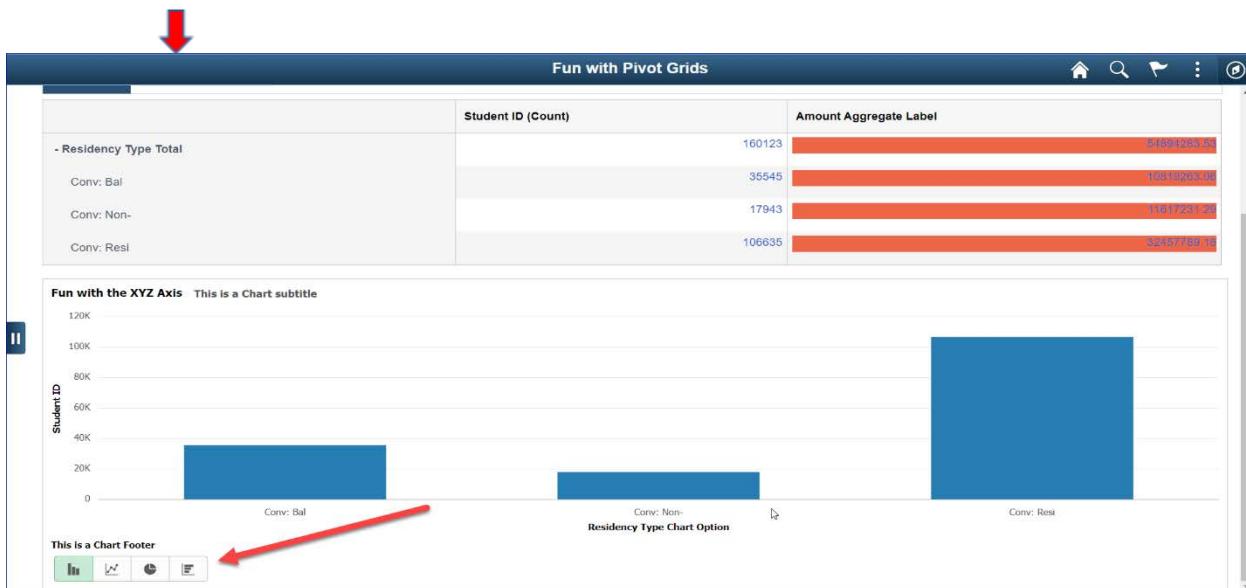




Bar Chart/Line Chart/Pie Chart/Horizontal Bar Chart

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.

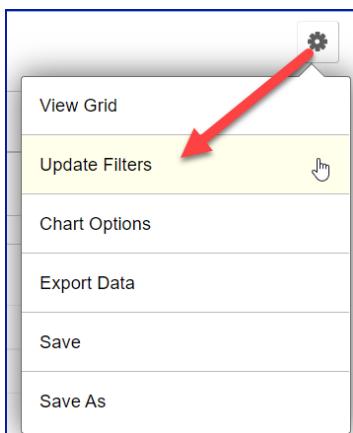
Pivot Grid Viewer Display



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



The screenshot shows the 'Fun with Pivot Grids' application interface. On the left, there are filter prompts for 'Unit' and 'Residency Type'. The 'Residency Type' section includes checkboxes for 'Conv. Resi (106635)', 'Conv. Bal (35545)', and 'Conv. Non- (17943)'. Below these are two main data displays:

- Pivot Grid:** A table titled 'Residency Type Total' with columns 'Student ID (Count)' and 'Amount Aggregate Label'. The data rows are:

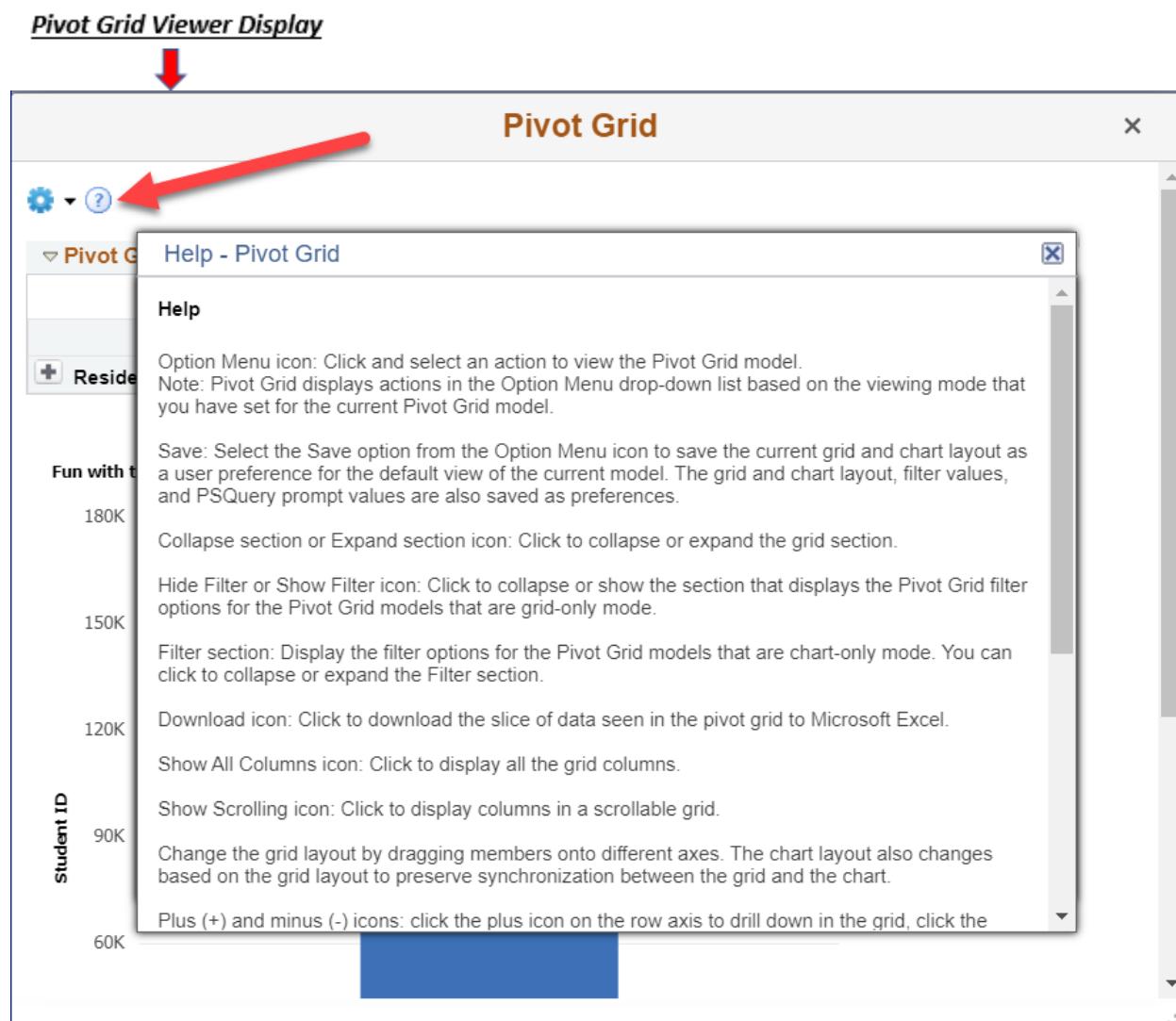
	Student ID (Count)	Amount Aggregate Label
- Residency Type Total	160123	160123.00
Conv. Bal	35545	1681020.00
Conv. Non-	17943	1001771.00
Conv. Resi	106635	5337770.00
- Fun with the XYZ Axis:** A chart with a subtitle 'This is a Chart subtitle'. The Y-axis is labeled 'Student ID' with values 20K, 40K, 60K, 80K, and 120K. The X-axis has three categories represented by blue bars.

Show Help

Displays the help icon on the pivot grid model in Classic Mode Pivot Grid Viewer. Does not affect Fluid Mode view. If checked the Help Message icon will appear in Pivot Grid Wizard when displayed in Classic Mode.

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



Pivot Grid

Help - Pivot Grid

Help

Option Menu icon: Click and select an action to view the Pivot Grid model.
 Note: Pivot Grid displays actions in the Option Menu drop-down list based on the viewing mode that you have set for the current Pivot Grid model.

Save: Select the Save option from the Option Menu icon to save the current grid and chart layout as a user preference for the default view of the current model. The grid and chart layout, filter values, and PSQuery prompt values are also saved as preferences.

Collapse section or Expand section icon: Click to collapse or expand the grid section.

Hide Filter or Show Filter icon: Click to collapse or show the section that displays the Pivot Grid filter options for the Pivot Grid models that are grid-only mode.

Filter section: Display the filter options for the Pivot Grid models that are chart-only mode. You can click to collapse or expand the Filter section.

Download icon: Click to download the slice of data seen in the pivot grid to Microsoft Excel.

Show All Columns icon: Click to display all the grid columns.

Show Scrolling icon: Click to display columns in a scrollable grid.

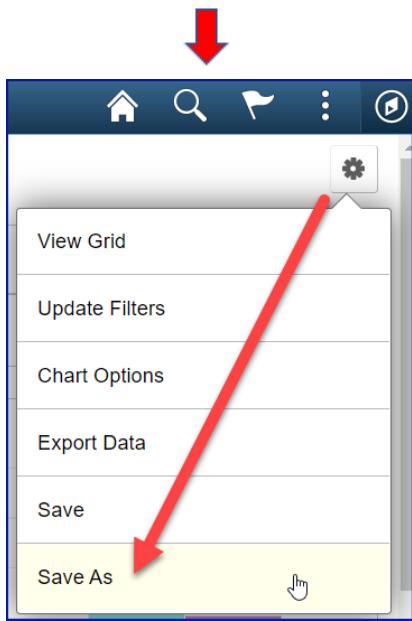
Change the grid layout by dragging members onto different axes. The chart layout also changes based on the grid layout to preserve synchronization between the grid and the chart.

Plus (+) and minus (-) icons: click the plus icon on the row axis to drill down in the grid, click the

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



Pivot Grid Viewer

New Window | Help | Personalize Page

Pivot Grid Viewer

Search Pivot Grids

Pivot Grid Name	PGCS_PG101_FUN_WITH_GRIDS	<input type="button" value="Search"/>
Data Source Name		<input type="button" value="Search"/>
Data Source Type		
<input checked="" type="checkbox"/> Show all Views	<input type="button" value="Search"/>	

1-2 of 2 View All

Pivot Grid Name	Pivot Grid Title	View Name	View Description	Open in Fluid Mode
PGCS_PG101_FUN_WITH_GRIDS	Having Fun with Pivot Grids	PGCS_PG101_FUN_WITH_GRIDS.View	Having Fun with Pivot Grids	<input checked="" type="checkbox"/>
PGCS_PG101_FUN_WITH_GRIDS_2	Having Fun with Pivot Grids	PGCS_PG101_FUN_WITH_GRIDS_2.View	Having Fun with Pivot Grids	<input checked="" type="checkbox"/>

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.

Pivot Grid Wizard

Ptg Wiz Info

Viewer Options

Result View Grid

Allow Multiple Y Axes

Result View Columns

	Select Column	Data Source Columns
1	<input checked="" type="checkbox"/>	ID
2	<input checked="" type="checkbox"/>	Career
3	<input checked="" type="checkbox"/>	Admit Type
4	<input checked="" type="checkbox"/>	Complete
5	<input checked="" type="checkbox"/>	Appl Meth
6	<input checked="" type="checkbox"/>	Status
7	<input checked="" type="checkbox"/>	Appl Dt
8	<input type="checkbox"/>	Created By
9	<input checked="" type="checkbox"/>	Fee Amount

Select All Clear All

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



Pivot Grid Wizard

PtPg Wiz Info

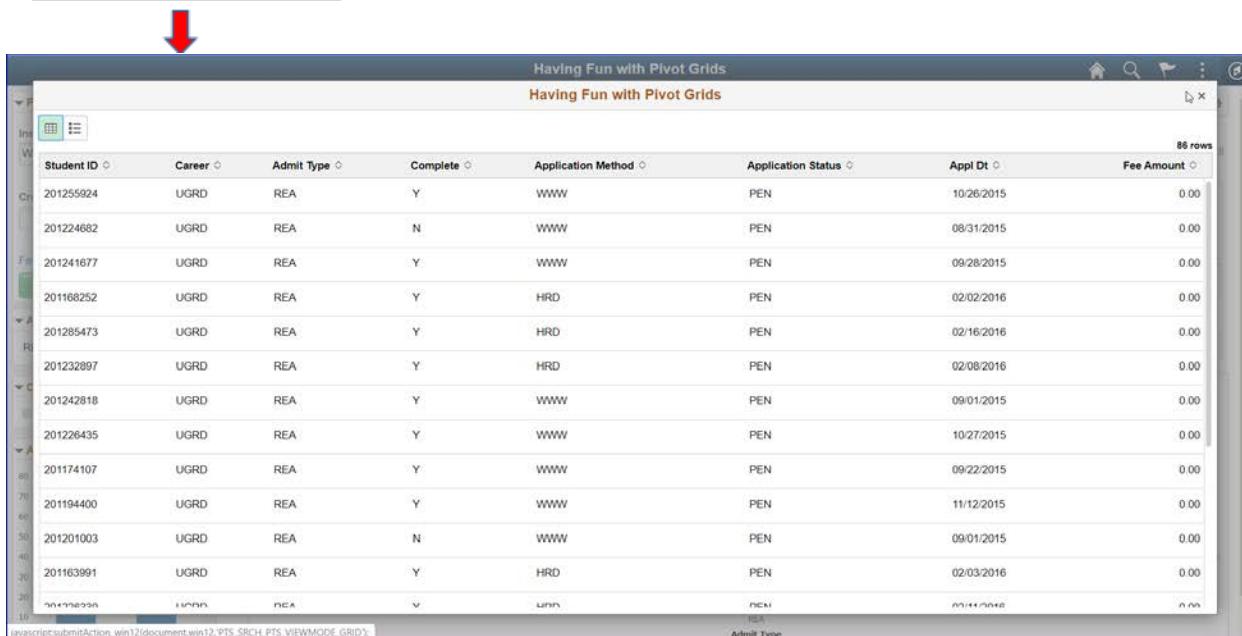
Viewer Options

Result View Grid ▾

Allow Multiple Y Axes

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



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

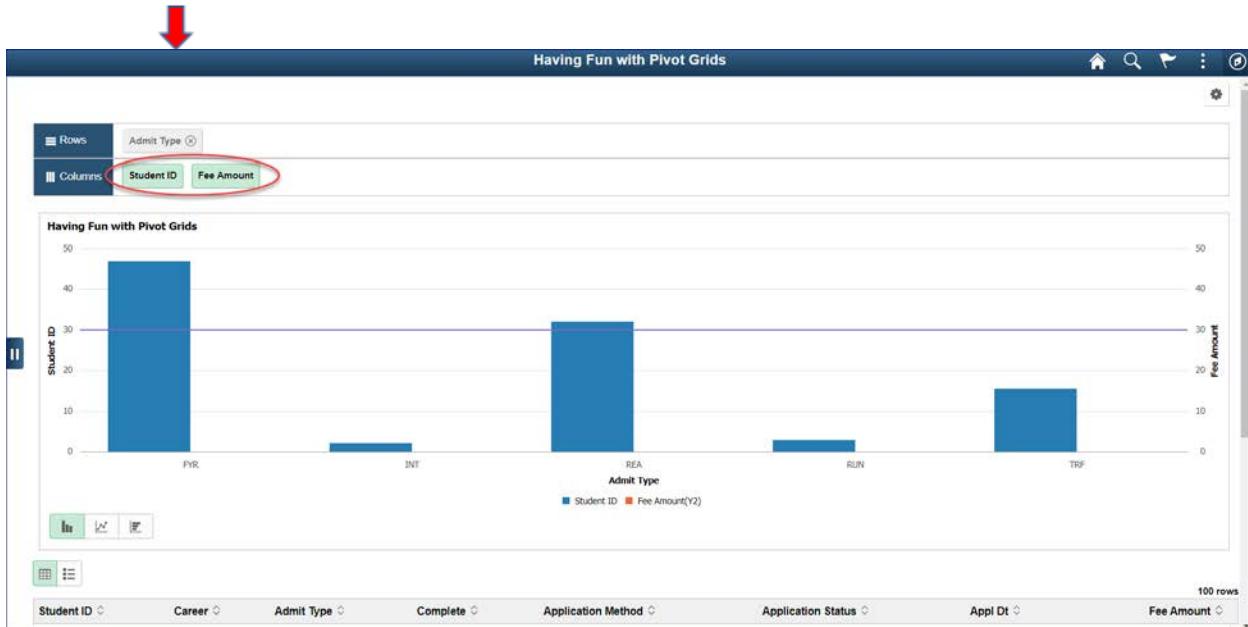
< Ptpg Wiz Info

Result View: Grid

Allow Multiple Y Axes



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

Result View Columns

	Select Column	Data Source Columns
1	<input checked="" type="checkbox"/>	ID
2	<input checked="" type="checkbox"/>	Career
3	<input checked="" type="checkbox"/>	Admit Type
4	<input checked="" type="checkbox"/>	Complete
5	<input checked="" type="checkbox"/>	Appl Meth
6	<input checked="" type="checkbox"/>	Status
7	<input checked="" type="checkbox"/>	Appl Dt
8	<input type="checkbox"/>	Created By
9	<input checked="" type="checkbox"/>	Fee Amount

Select All Clear All

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

Pivot Grid Viewer Display



Having Fun with Pivot Grids

Having Fun with Pivot Grids

Created By does not appear in the Result View

Student ID	Career	Admit Type	Complete	Application Method	Application Status	Appl Dt	Fee Amount
201255924	UGRD	REA	Y	WWW	PEN	10/26/2015	0.00
201224682	UGRD	REA	N	WWW	PEN	08/31/2015	0.00
201241677	UGRD	REA	Y	WWW	PEN	09/28/2015	0.00
201168252	UGRD	REA	Y	HRD	PEN	02/02/2016	0.00
201285473	UGRD	REA	Y	HRD	PEN	02/15/2016	0.00
201232897	UGRD	REA	Y	HRD	PEN	02/08/2016	0.00
201242818	UGRD	REA	Y	WWW	PEN	09/01/2015	0.00
201226435	UGRD	REA	Y	WWW	PEN	10/27/2015	0.00
201174107	UGRD	REA	Y	WWW	PEN	09/22/2015	0.00
201194400	UGRD	REA	Y	WWW	PEN	11/12/2015	0.00
201201003	UGRD	REA	N	WWW	PEN	09/01/2015	0.00
201163991	UGRD	REA	Y	HRD	PEN	02/03/2016	0.00
201206330	UGRD	REA	Y	HRD	PEN	02/11/2016	0.00
101006237	UGRD	REA	Y	WWW	PEN	01/22/2016	0.00

Facet Selection

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

Facet selection				
	Allow Multiselect	Show as Chart	Chart Type	Facets
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Career
2	<input type="checkbox"/>	<input type="checkbox"/>		Admit Type
3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bar Chart ▾	Appl Meth
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Status
5	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Created By

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



Facet selection				
	Allow Multiselect	Show as Chart	Chart Type	Facets
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Career
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Admit Type
3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bar Chart ▾	Appl Meth
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Status
5	<input type="checkbox"/>	<input type="checkbox"/>		Created By

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.

Pivot Grid Viewer Display

Having Fun with Pivot Grids

Prompts

Institution: WA220

Admit Type

- FYR (126)
- REA (86)
- TRF (42)
- RUN (8)
- INT (6)

Career

- UGRD (268)

Application Method

- WWW (180)
- HHD (110)

Application Status

- Pending (268)

Created By

- 101000510 (101)
- 101000243 (92)
- 101000221 (55)

Pivot Grid

Check boxes allow users to select more than a single facet

	Student ID (Count)	Fee Sum
- Admit Type Total		0.00
FYR		0.00
INT		2.24%
REA		0.00
RUN		2.59%
TRF		15.67%

If de-selected in Facet Selection the end user will have to choose a single facet

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.

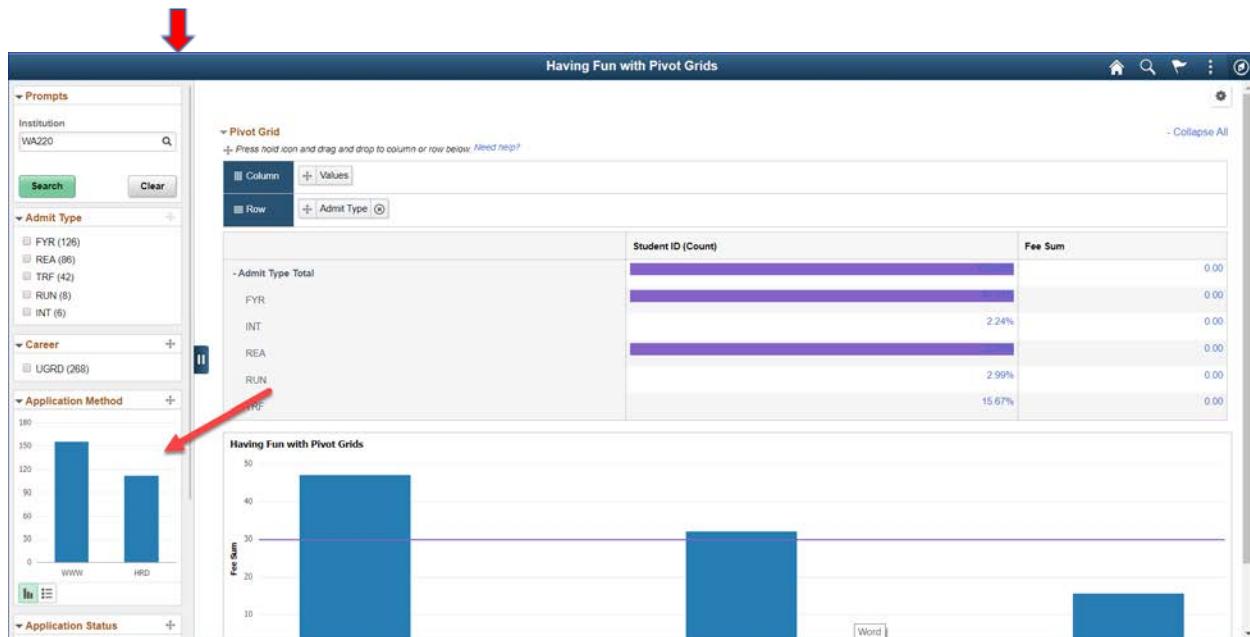
Pivot Grid Wizard Set Up

Facet selection

	Allow Multiselect	Show as Chart	Chart Type	Facets
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Career
2	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Admit Type
3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bar Chart ▾	Appl Meth
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Status
5	<input type="checkbox"/>	<input type="checkbox"/>		Created By

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

Pivot Grid Viewer Display



Facets

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

Facet selection				
	Allow Multiselect	Show as Chart	Chart Type	Facets
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Career
2	<input type="checkbox"/>	<input type="checkbox"/>		Admit Type
3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bar Chart ▾	Appl Meth
4	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Status
5	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Created By

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.

Pivot Grid Wizard

Step 5 of 5

Pivot Grid Display

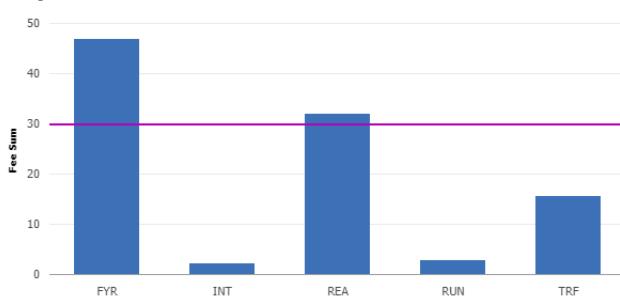
Display Page for the Pivot Grid and Chart

Title Having Fun with Pivot Grids

Pivot Grid

Career UGRD		Application Me... (App Method Total)	
Application Sta... PEN		Created By (All)	
	Student ID (Count)	Fee Sum	
Admit Type Total	100.00%	0.00	
FYR	47.01%	0.00	
INT	2.24%	0.00	
REA	32.09%	0.00	
RUN	2.99%	0.00	
TRF	15.67%	0.00	

Having Fun with Pivot Grids



Fee Sum

Admit Type

Having Fun with Pivot Grids

Export Data | Chart Options | Refresh | Print | Help

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.

Pivot Grid Display

Display Page for the Pivot Grid and Chart

Title Having Fun with Pivot Grids

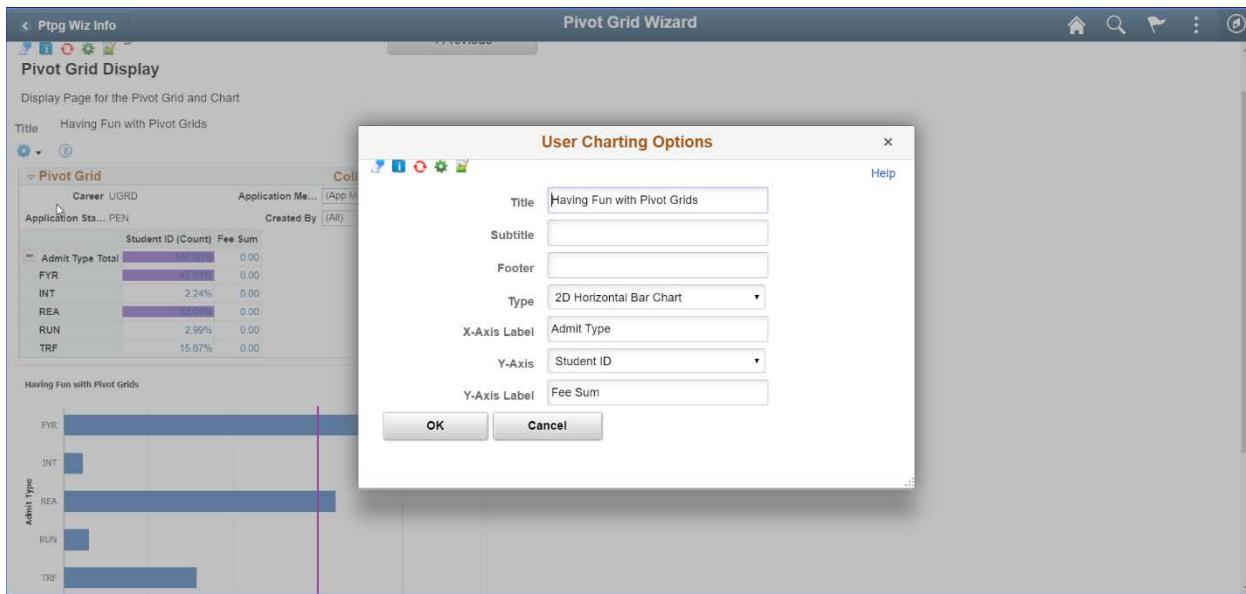
Export Data | Chart Options | Refresh | Print | Help

Export Data

Chart Options

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.

Pivot Grid Wizard

Help - Pivot Grid

Help

Option Menu icon: Click and select an action to view the Pivot Grid model.

Note: Pivot Grid displays actions in the Option Menu drop-down list based on the viewing mode that you have set for the current Pivot Grid model.

Save: Select the Save option from the Option Menu icon to save the current grid and chart layout as a user preference for the default view of the current model. The grid and chart layout, filter values, and PSQuery prompt values are also saved as preferences.

Collapse section or Expand section icon: Click to collapse or expand the grid section.

Hide Filter or Show Filter icon: Click to collapse or show the section that displays the Pivot Grid filter options for the Pivot Grid models that are grid-only mode.

Filter section: Display the filter options for the Pivot Grid models that are chart-only mode. You can click to collapse or expand the Filter section.

Download icon: Click to download the slice of data seen in the pivot grid to Microsoft Excel.

Show All Columns icon: Click to display all the grid columns.

Show Scrolling icon: Click to display columns in a scrollable grid.

Having Fun with Pivot Grid icon: Change the grid layout by dragging members onto different axes. The chart layout also changes based on the grid layout to preserve synchronization between the grid and the chart.

Plus (+) and minus (-) icons: click the plus icon on the row axis to drill down in the grid, click the minus icon on the row axis to drill out in the grid.

Admit Type	FYR	INT	REA	RUN	TRF
FYR					
INT					
REA					
RUN					
TRF					

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.

Pivot Grid Display

Display Page for the Pivot Grid and Chart

Title Having Fun with Pivot Grids



Pivot Grid

Career UGRD	Application Me... (App Method Total)
Application Sta... PEN	Created By (All)
	Student ID (Count) Fee Sum

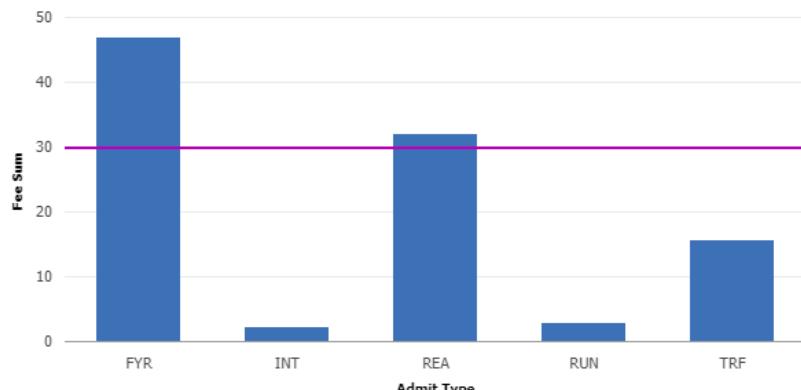
Collapse All



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.

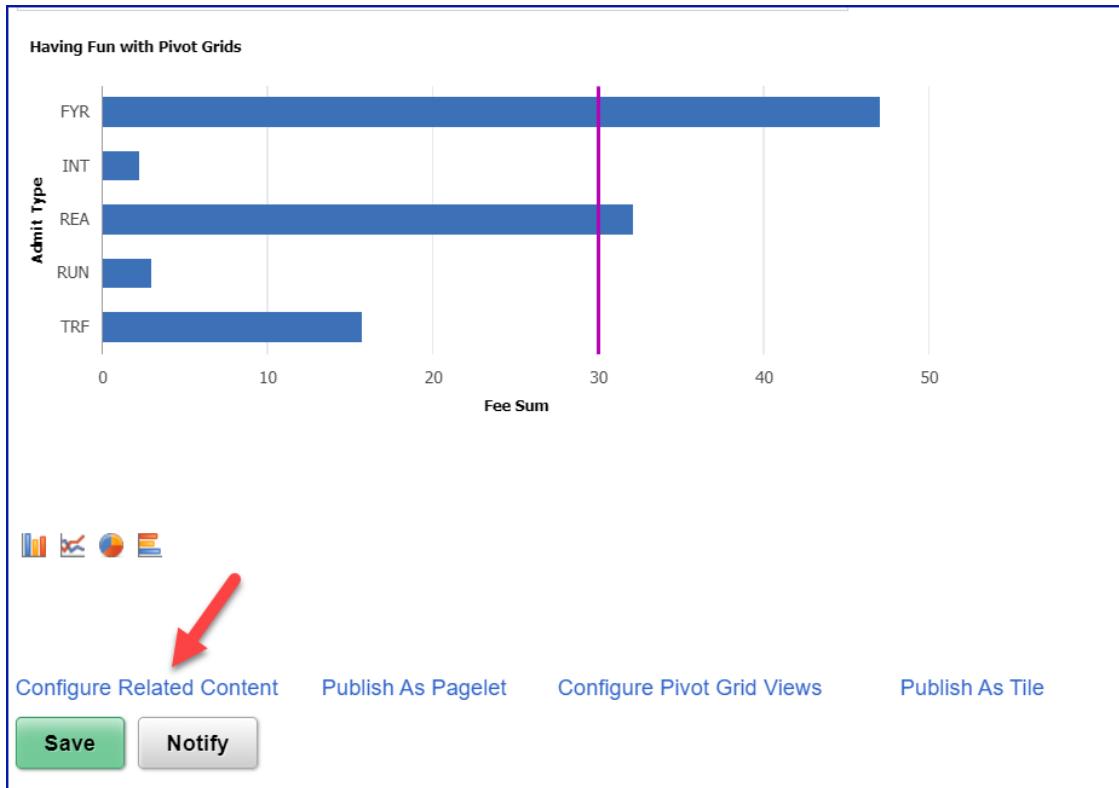
Having Fun with Pivot Grids



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.



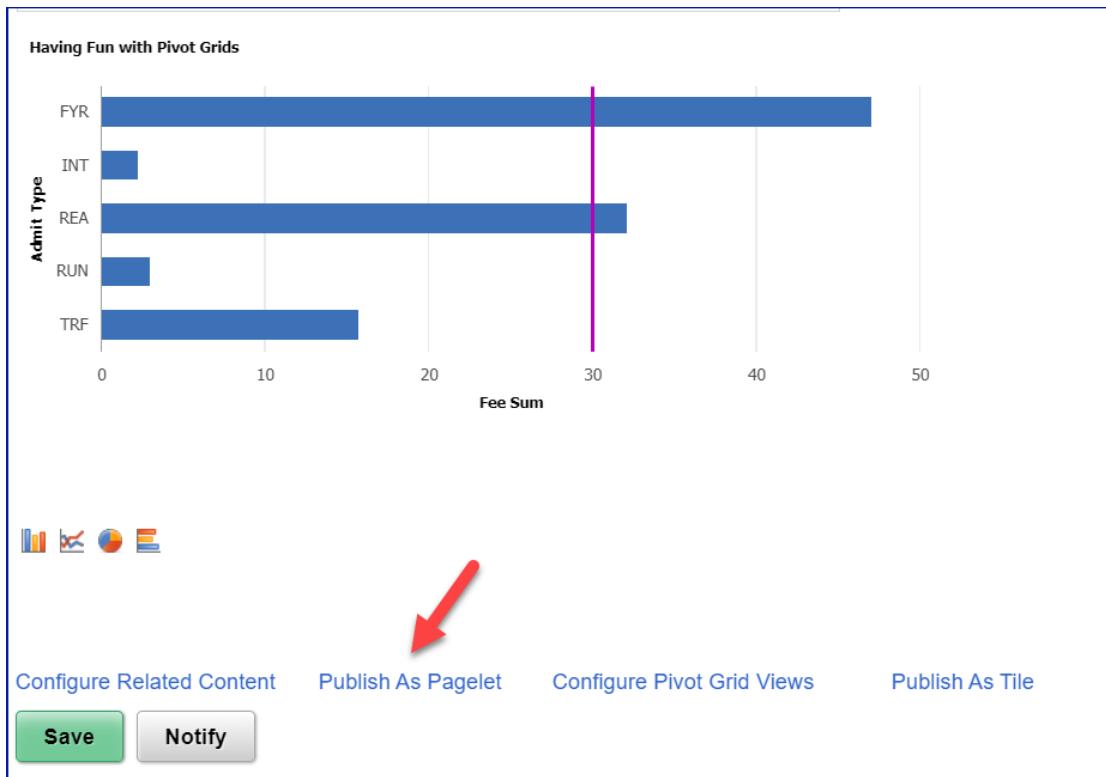
Publish as Pagelet

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.

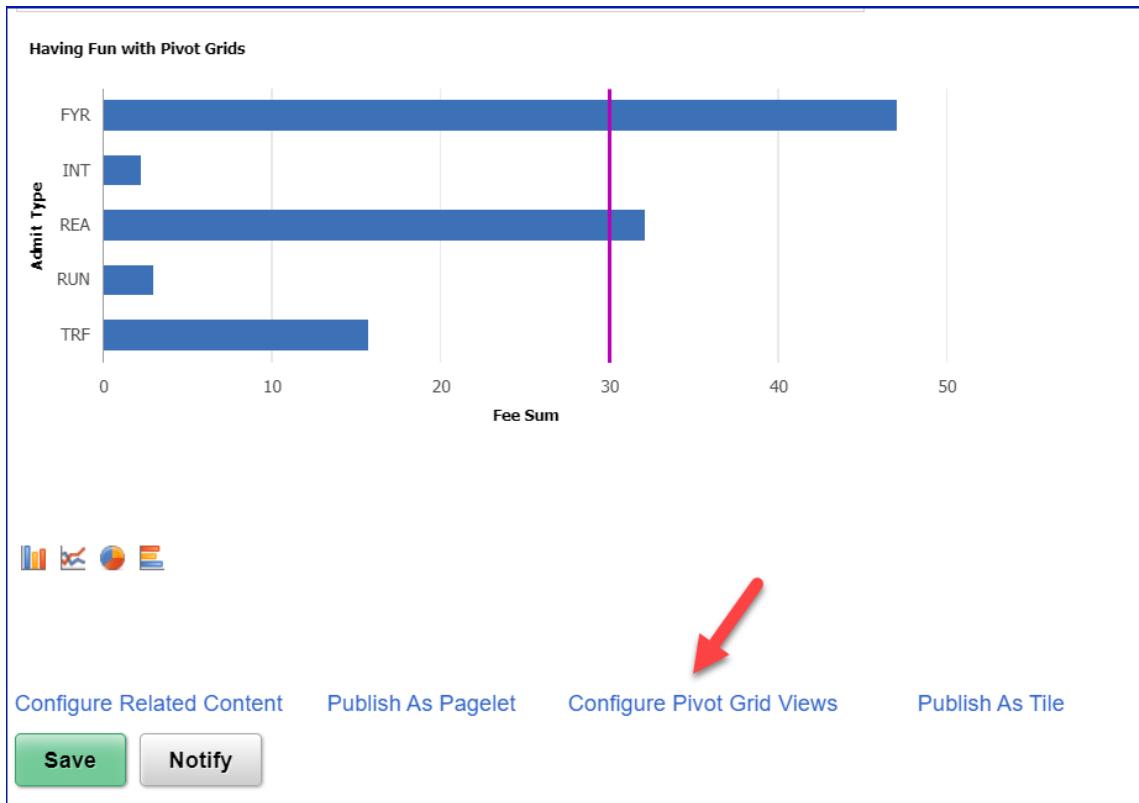
The pivot grid must first be saved before being able to publish as a pagelet.

This topic will be covered in more depth in upcoming pivot grid courses.

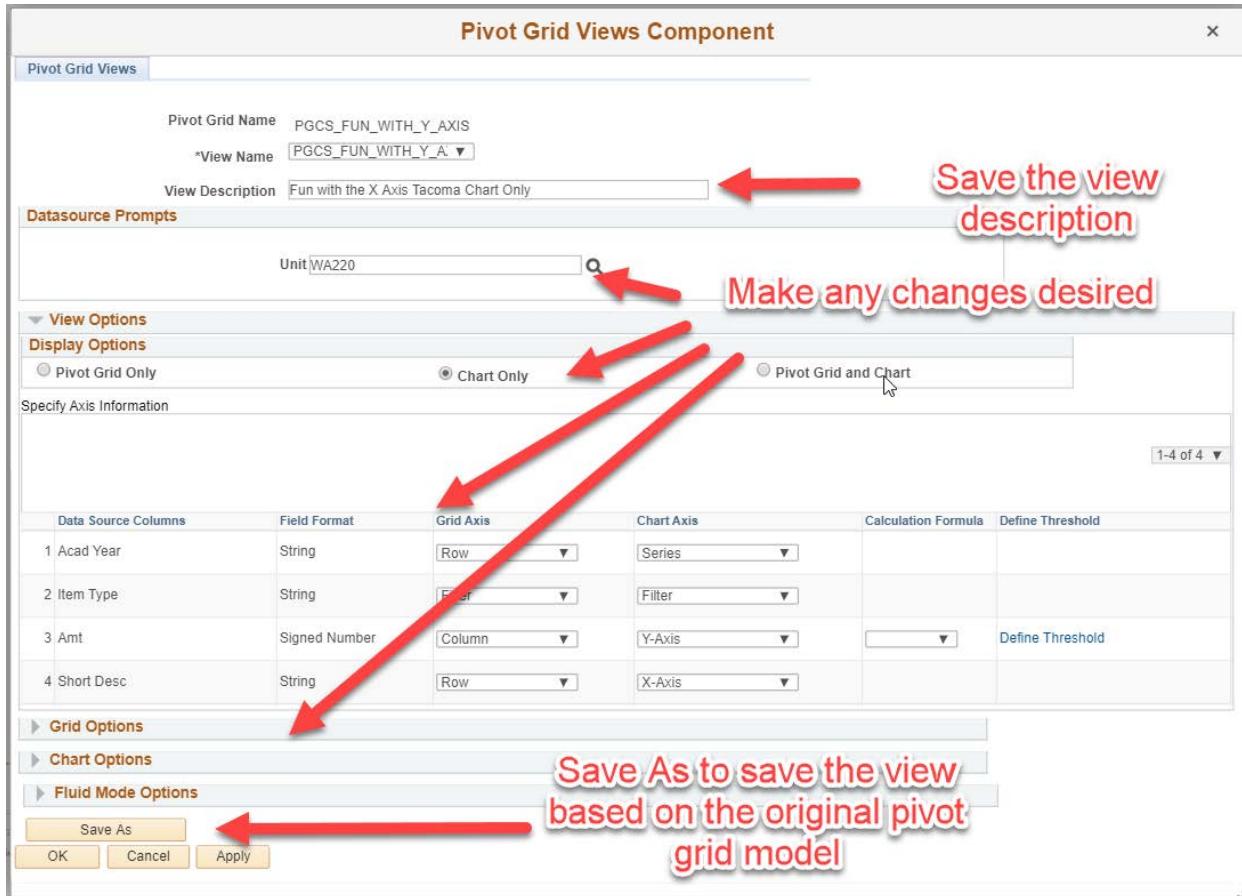


Configure Pivot Grid View

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.

Pivot Grid Viewer

Search Pivot Grids

Pivot Grid Name	<input type="text"/>	<input type="button" value="Q"/>
Data Source Name	<input type="text"/>	<input type="button" value="Q"/>
Data Source Type	<input type="text"/>	<input type="button" value="▼"/>
<input checked="" type="checkbox"/> Show all Views 		
<input type="button" value="Search"/>		

Search Results:

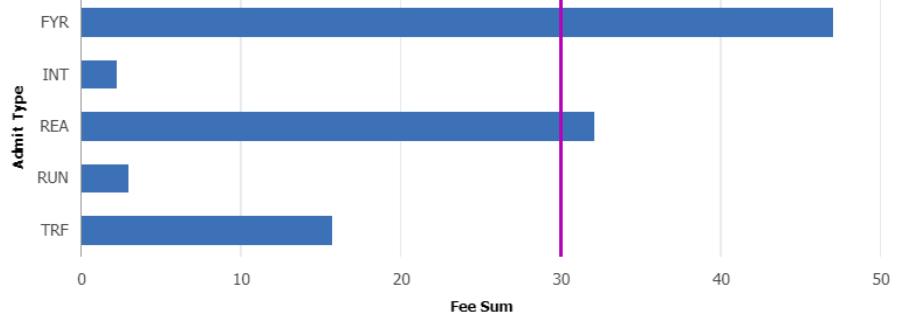
Pivot Grid Name	Pivot Grid Title	View Name	View Description	Open i
CTC_SR_STD_FTE_FALL	FTES Summary for Fall	CTC_SR_STD_FTE_FALL.View	FTES Summary for Fall	<input checked="" type="checkbox"/>
CTC_SR_STD_FTE_SUMMER	FTES Summary for Summer	CTC_SR_STD_FTE_SUMMER.View	FTES Summary for Summer	<input checked="" type="checkbox"/>
CTC_SR_STD_FTE_WINTER	FTES Summary for Winter	CTC_SR_STD_FTE_WINTER.View	FTES Summary for Winter	<input checked="" type="checkbox"/>
EODP_CTCGRY_DTLS_FL	Maintain Category	EODP_CTCGRY_DTLS_FL.View	Maintain Category	<input checked="" type="checkbox"/>
PGCS_FUN_WITH_PIVOT_GRIDS	Once Upon a Pivot Grid	PGCS_FUN_WITH_PIVOT_GRIDS.View	Once Upon a Pivot Grid	<input checked="" type="checkbox"/>
PGCS_FUN_WITH_Y_AXIS	Fun with the X Axis	PGCS_FUN_WITH_Y_AXIS.View	Fun with the X Axis	<input checked="" type="checkbox"/>
PGCS_FUN_WITH_Y_AXIS	Fun with the X Axis	PGCS_Fun_With_X_Axis_WA220	Fun with the X Axis Tacoma Chart Only View	<input checked="" type="checkbox"/>

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.

Having Fun with Pivot Grids



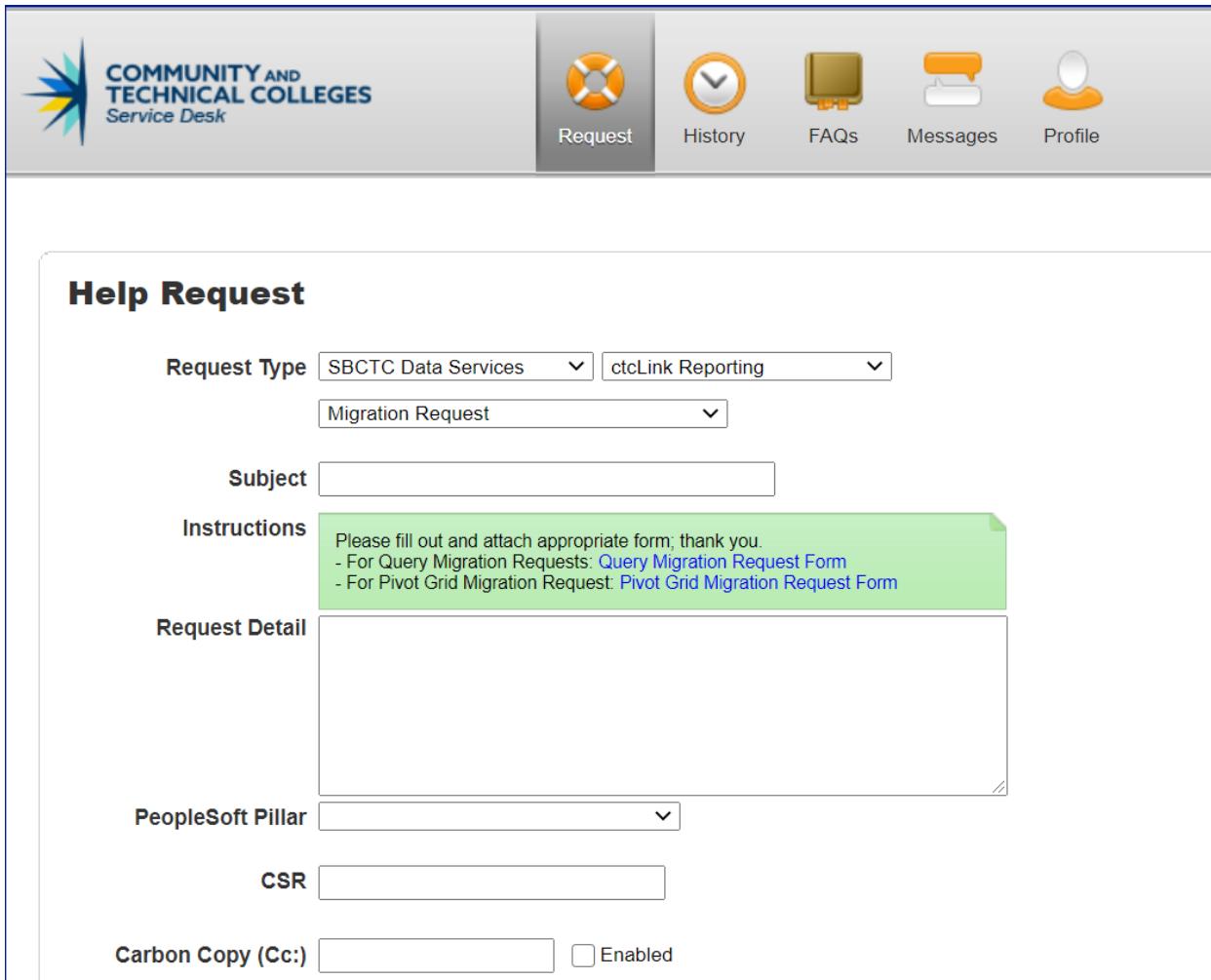
Admit Type	Fee Sum
FYR	~47
INT	~2
REA	~32
RUN	~3
TRF	~15

Configure Related Content Publish As Pagelet Configure Pivot Grid Views **Publish As Tile**

Save **Notify**



Submit a Pivot Grid Migration Request



The screenshot shows the SBCTC Service Desk interface. At the top, there's a navigation bar with icons for Request, History, FAQs, Messages, and Profile. Below this is a section titled "Help Request". The "Request Type" dropdown is set to "SBCTC Data Services" and has a nested dropdown showing "Migration Request". The "Subject" field is empty. The "Instructions" field contains a note: "Please fill out and attach appropriate form; thank you." followed by links to "Query Migration Request Form" and "Pivot Grid Migration Request Form". The "Request Detail" area is a large empty text box. Below it are fields for "PeopleSoft Pillar" (dropdown), "CSR" (dropdown), and "Carbon Copy (Cc:)". A checkbox labeled "Enabled" is checked.

Help Request

Request Type SBCTC Data Services ▾ ctcLink Reporting ▾
Migration Request ▾

Subject

Instructions Please fill out and attach appropriate form; thank you.
- For Query Migration Requests: [Query Migration Request Form](#)
- For Pivot Grid Migration Request: [Pivot Grid Migration Request Form](#)

Request Detail

PeopleSoft Pillar ▾

CSR

Carbon Copy (Cc:) Enabled

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 to 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.