

PeopleTools 8.53: PeopleSoft Pivot Grid

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ORACLE[®]

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for fulltext searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

Application Fundamentals

• Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

Typographical Convention	Description
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
(ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

The following table describes the typographical conventions that are used in the online help.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

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Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help acessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

PeopleTools Related Links

Oracle's PeopleSoft PeopleTools 8.53 Documentation Home Page [ID 1494462.1]

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Getting Started with PeopleSoft Pivot Grid

PeopleSoft Pivot Grid Overview

Pivot Grid supports operational dashboard reporting within the PeopleTools framework to provide a pivot table and chart representation of data using PSQuery data source. The framework also enables users to see different views of the data as in an Microsoft Excel pivot table, and the same data is also available in a chart view.

Note: PeopleSoft Pivot Grid supports only PSQuery data source.

Using Pivot Grid, users can view data in these different visualizations:

• Grid only.

Users are able to view the operational reporting data in a grid, where data pivoting, slicing, and dicing is possible.

• Chart only.

Users are able to view the operational reporting data in a chart. In addition, user can display the grid from a chart-only view and then perform various actions—such as pivoting data, dragging and dropping, and slicing and filtering data—to change the grid layout. After the layout is satisfactory, you can synchronize the chart with the grid view.

• Grid and chart.

Users are able to view the operational reporting data in both a grid and a chart. The data between the grid and the chart is synchronized for an accurate view.

PeopleSoft Pivot Grid Implementation

The following table lists the steps involved in implementing pivot grids.

Step	Reference
Create a query to extract the data you want to use for your pivot data analysis.	See Query Design Considerations.
Create a pivot grid model with default display preferences.	See Pivot Grid Wizard Overview.
View pivot grids.	See Pivot Grid Viewer Overview.
Create pivot grid pagelets.	See Creating a New Pivot Grid Pagelet Using the Pagelet Wizard.

Understanding PeopleSoft Pivot Grid

Pivot Grid Terms

This section defines terminology that is specific to Pivot Grid.

Axis and Values	Axis 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.
	• Values are the metric that business users use to make business decisions. Generally, Values are numbers except when the aggregate function COUNT is used.
	For example, in an expense report scenario, incurred expenses is the Value; whereas attributes such as Employee, Department, Business Unit, and Expense Type, the expense qualifiers, form the Axis members.
	In a scenario showing Product Sales, Actual Sales, Number of Units Sold, and Cost of Each Unit, these items could be Values; whereas attributes such as Region, Product Name, and Date Range for the sales, the Value qualifiers, would form the Axis members.
	In an organization chart, the Count of Employees could be a Value, and the axis members could be Departments, Job Codes, Pay Grade, and so on.
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 the user in both the chart and the Pivot Grid.
	If the PSQuery data source uses prompt values, they are automatically added as filters. Users can customize query prompt values when viewing the pivot grid. When you create a Pivot Grid model, you can select additional columns to use as filters.
Aggregates	Aggregate functions include SUM, MIN, MAX, AVG, and COUNT.

Pivot Grid	A Pure Internet Architecture component that provides a multidimensional presentation of data.
Pivot	A change of the dimensional orientation of a report inside Pivot Grid.
Overlay	Two charts with the same X axis but different Y axes that are plotted and then one is superimposed over the other.
Multi Select Filter	A drop-down list that enables you to select multiple items to filter data, which appears in grids and charts.

High-Level Overview and Flow Diagram for PeopleSoft Pivot Grid

PeopleSoft Pivot Grid provides the overall functionality of storing Pivot Grid metadata, generating queries at runtime, and rendering display for the pivot grid and chart. Pivot Grid uses PSQuery as the data source, with Pivot Grid grids and PeopleSoft charts as the visualization options. Pivot Grid can pivot and filter data, which enables business analysts to have different views of the same data. PeopleSoft charts provide different visual representation of the same data. If users select the display option *Grid and Chart*,

the data in the chart is always a subset of the data in the grid, and the synchronization between the grid and the chart is unidirectional only. Users' actions on the grid change the chart visualization as well.

Image: High-level flow diagram for PeopleSoft Pivot Grid

This diagram illustrates the high-level flow for PeopleSoft Pivot Grid.



When using Pivot Grid, note that:

- PeopleSoft Pivot Grid supports only PSQuery as the data source.
- All user actions on the Pivot Grid grid and the chart are driven through PSQuery. No data is cached for viewing. Every user action that requires fresh data will result in a new set of PSQuery

modifications at runtime, and the ad hoc set of modified PSQuery is run against the database to fetch data.

• Supported aggregate functions—MAX, MIN, COUNT, AVG, and SUM—are computed at database level, and the results appear in grids and charts. In addition, an All (Total) attribute can be defined for axis members that calculates subtotals based on the aggregate function defined for the Values.

Note: Only a single level of subtotal (that is, the innermost level) is supported in PeopleSoft Pivot Grid.

Image: Example of supporting subtotal for the axis immediately above the innermost Value

If the Values are at the innermost level, then subtotal is also supported for the axis immediately above the innermost Value level, as shown in this example.

▼ Sale	e Information Mod	lel	🗜 🖥	2
Month	(All)		*	
	All / Immedia	ate Axis above t	he innermost lev	/el for Values
	Unit Cost (Sum)	Sales (Sum)	Prd Sales (S	um)
■ All	120201.99	67823	25627454	4.11

- If users select the *Grid and Chart* display option, then the filtering operation on the grid (changing the report filter values) filters on the chart as well.
- If an All attribute is defined for the axis members, then a drilldown operation on the grid indicates the user's action of clicking the + icon associated with the label.

If users select the *Grid and Chart* display option, then the drilldown operation on the grid drills down on the chart as well.

- If users select the *Chart Only* display option, then the drilldown operation for a chart indicates the user's action of clicking the chart to display a detailed level of data.
- To drill down on the Pivot Grid charts, you must enter an authentication domain either when you set up the PeopleSoft Pure Internet Architecture or in the Web Profile page. See "Configuring General Portal Properties" in "Configuring Web Profiles" (PeopleTools 8.53: Portal Technology).
- Pivot Grid supports all PeopleSoft chart types that are related to bar, pie, and line charts.
- Pivot Grid assigns one field from the Grid Row Axis to the X axis and one field from the column axis to the Y axis of the chart. In addition, you can select an overlay field and a data series (to display one level of drilldown) for the chart.

Note: If the display option is Chart Only, you are able to select the series and overlay values for the charts. If the display option is Grid and Chart, series values are automatically calculated based on the grid layout, but overlay are not supported.

For example, a query was built on a record that stores the number of product units sold and product sales for a set of regions and products by month:

Unit Cost	Product Sales	Region (Key)	Product (Key)	Month (Key)	No. of Units Sold

If Region were selected on the X axis and Product Sales were selected on the Y axis, then a user could select No. of Units Sold as an overlay field.

- 1. If No. of Units Sold were selected as an overlay field, then two separate charts would be plotted, one chart with Product Sales on the Y axis and the other with No. of Units Sold on the Y axis. One chart would be superimposed over the other chart. For overlay fields, the supported chart type is a Line Chart.
- 2. If Product were selected as a data series, then the chart would group the sales for each product for each region and then plot the data.
- The synchronization between the chart and the grid is unidirectional and is always driven by a user action on the grid.
- To support unidirectional synchronization between a chart and a grid, which is always driven by an action performed on the grid, the data in the chart must always be a subset of the data shown in the grid.
- Logging is available; by enabling the log application, developers or customer developers can analyze errors or debug any products they build using this technology.

Pivot Grid Components

This section provides an overview of Pivot Grid components and discusses:

- Pivot Grid data source engine component.
- Pivot Grid user interface component.
- Grid-display component.
- Chart-display component.

Pivot Grid Components Overview

Pivot Grid has these main components:

• Pivot Grid Data Source Engine component.

This component is the back-end component of Pivot Grid. It provides the necessary framework support for runtime manipulation and generation of PSQueries to render the grid and chart display. This component also provides interfaces that can be used by the Pivot Grid User Interface component, the Grid-display component, and the Chart-display component to perform the required PSQuery manipulations for rendering the controls on the Pure Internet Architecture page.

• Pivot Grid User Interface component.

You use this component to create and update Pivot Grid models using the Pivot Grid wizard, to view the Pivot Grid models in the Pivot Grid Viewer, and to create different views for the same Pivot Grid model.

• Grid-display component.

This component is primarily responsible for rendering data in the Pivot Grid grids. Its functionality "understands" the current grid layout and invokes the interfaces of the Data Source Engine component to run queries. It also interprets various actions in the grid and subsequently invokes the engine component for running the PSQuery again.

• Chart-display component.

This component is primarily responsible for rendering data in the Pivot Grid chart. Its functionality "understands" the current chart layout and invokes the interfaces of the Data Source Engine component to run queries. It also interprets various actions in the chart and subsequently invokes the engine component for running the PSQuery again.

Pivot Grid Data Source Engine Component

The Pivot Grid Data Source Engine component is responsible for runtime PSQuery manipulation to retrieve the data required for a grid and chart. Any events in the grid and chart will result in a PSQuery modification and its being rerun, which are handled by the data source engine. The Pivot Grid Data Source Engine component enables you to:

• Set Pivot Grid metadata.

Pivot Grid metadata includes axis members, Value members, total attribute, total name, column label, aggregate functions for Value members, and Pivot Grid viewing options.

- Retrieve Pivot Grid metadata from the database.
- Return a result set for a chart, a result set for a grid, unique values for axis members, unique values for filters, and drilldown values for detailed view.

Pivot Grid User Interface Component

The Pivot Grid User Interface component enables you to create new Pivot Grid models and to update existing Pivot Grid models. This component is a step-by-step wizard with user-friendly mechanism for creating and updating Pivot Grid models. The last step of the wizard enables you to preview the models that you created.

You can define two parts of a Pivot Grid model using the Pivot Grid User Interface component:

• Pivot Grid core.

Based on the PSQuery definition, this core defines which PSQuery columns and aggregation functions are used and which totals and subtotals appear. You cannot change the Pivot Grid core at runtime.

See Pivot Grid Wizard Overview.

• Pivot Grid model default view options.

This part displays the Pivot Grid model and defines the default values for the runtime prompts that are associated with PSQuery data source, grid and chart axis information, grid and chart display preferences, and so on. One set of default view options is associated with the Pivot Grid model whenever it is created. These view options are the preferences used to render the display when the Pivot Grid appears initially. You can customize the display and save your personalizations for the Pivot Grid model. These preferences take precedence when the system displays a Pivot Grid model for you.

See Pivot Grid Viewer Overview.

Grid-display Component

The Pivot Grid Grid-display component is based on the existing PeopleSoft analytic grid. This component enables users to leverage the different functionality of the analytic grid, like multi-level display and the drag-and-drop operation. However, unlike the analytic grid, the grid in a Pivot Grid does not require the analytic server to run; it can function as a standalone Pure Internet Architecture component. As with the analytic grid, the grid in a Pivot Grid has three axes—row, column, and filter. You can place the axis and value members on any of these axes to provide different views of the same data.

The Grid-display component provides the following functionality:

• Uses the Pivot Grid Data Source Engine interfaces to execute the PSQuery at runtime to render data in a grid. The grid does not cache any data. Any layout modification will result in a new PSQuery running to retrieve the data.

Note: Query modifications are not saved; Pivot Grid runs the query in an adhoc way to retrieve information.

• Responses to users' filtering, pivoting, and drilldown actions from within the grid. Each of these actions will result in the PSQuery being modified and rerun to retrieve the rowsets again.

• Exports the current slice of data visible in the grid to Microsoft Excel.

Image: Process flow of the Grid-display component

This diagram illustrates the process flow of the Grid-display component.



Note: While you are dragging and dropping values, a move icon with a visible label indicates axis and values that can be dragged, and the droppable locations are indicated with a grey back ground for labels.

Image: Visible Labels in Grid Display component

This example illustrates the axis value that is labeled Product and the drop zone that is labeled Unit Cost (Sum).



Chart-display Component

The Pivot Grid Chart-display component also uses the Pivot Grid Data Source Engine component to retrieve PSQuery data. It provides the following functionality:

• Invokes the Pivot Grid Data Source Engine interfaces to modify the PSQuery at runtime to retrieve data.

If the display option is *chart only*, a single PSQuery modification and run suffices for retrieving the relevant charting data; extra modifications are required to get filter values. If the display option is *grid and chart*, Pivot Grid uses the resultset that was retrieved while populating the grid for chart display.

- Calls the appropriate PeopleCode charting APIs for generating and rendering the chart control on the page.
- If the display option is *chart only*, users can drill down on the chart by clicking the data points of the chart to display details.

After drilling down, a drillout option is available as a locator link at the top of the chart. Clicking the drillout link restores the chart to its earlier state.

Note: There are no limitations on the number of drilldowns that can be performed on a chart-only view. If you perform the fifth drilldown, Pivot Grid resets the drilldown links and restarts from the first position.

• All the pivoting, drilldown, and filtering operations on the grid result in an appropriate synchronization action on the chart if the display option is *grid and chart*.

Image: Process flow of the Chart-display component

This diagram shows the processes of the Pivot Grid Chart-display component.



Pivot Grid Security

Various layers of security are available for users who access Pivot Grid:

• Query security is the first layer.

If a user has access to run and modify a query, that user can create a new Pivot Grid model or view an existing Pivot Grid model based on the selected query data source.

• Pivot Grid model type security is the second layer.

Any Pivot Grid model can be published as a private or public model. Private Pivot Grid models are available only to the user or users who created the models. Public models are available to administrators and power users for updates.

• Pivot Grid roles is the third layer.

Three primary roles are available for Pivot Grid users. PeopleSoft delivers the roles PivotGridAdmin and PivotGridSuperUser. Users not assigned to one of these roles will be Pivot Grid end users.

Pivot Grid Administrator Role

Users with the role PivotGridAdmin are granted access to:

- Use the Pivot Grid wizard to create new Pivot Grid models or update existing Pivot Grid models.
- Update and view all models that were created by all other users.
- Define how a Pivot Grid will be viewed by end users by specifying the axes and values.
- Select the aggregate functions for values and All members of the axes members.
- Select the initial PSQuery prompt values for the PSQuery runtime prompts.
- Define the initial view layout, which includes view options for the grid and the chart.
- Publish the Pivot Grid models as public or private.
- Define whether the selected model is valid.
- Use the Pivot Grid Administration component to administer Pivot Grid models, views, and user personalization.

Pivot Grid Super User Role

Users with the role PivotGridSuperUser are granted access to:

• Use the Pivot Grid wizard to create new models or update existing public Pivot Grid models.

For the models that are accessible to super users, the tasks are the same as for the Pivot Grid administrator.

• View all public Pivot Grid models and perform pivoting, filtering, or dicing on the initial view to set their own user preferences.

Note: Users can save these preferences.

Pivot Grid End User Role

Users with the role Pivot Grid end user are granted access to:

• Create new Pivot Grid models and publish them as public or private.

For models created by a Pivot Grid end user, the tasks are the same as for the Pivot Grid administrator.

Note: Pivot Grid end users cannot update Pivot Grid models created by other users.

- View public Pivot Grid models that were created by other users and perform all operations on accessible models.
- Save public models as user preferences.

Limitations of PeopleSoft Chart and PeopleSoft Pivot Grid

This section discusses:

- PeopleSoft Chart limitations.
- PeopleSoft Pivot Grid limitations.

PeopleSoft Chart Limitations

PeopleSoft Chart has these limitations:

- Users can only assign Value fields to the Y axis because they are numerical.
- If users select *Chart only* as a display option, then only one level of detail can appear in the chart, and users can have one field on the X axis and one field as a data series to group the data.

If users drill down on the chart, they can select an overlay field to display two fields on the Y axis. If an overlay field is selected, then two charts are plotted and one is superimposed over the other.

Note: From PeopleTools 8.53, the Chart Only view does not limit the number of filters.

• If users select *Grid and Chart* as a display option, then the chart can use one Y axis for plotting one of the Value members, and all the other axes are automatically determined based on the current grid layout.

Note: In PeopleSoft Pivot Grid, overlay fields for a Grid and Chart display option are not supported.

PeopleSoft Pivot Grid Limitations

PeopleSoft Pivot Grid has these limitations:

- It does not have a vertical scroll bar for viewing data, but it displays all possible rows based on the current layout.
- Pagination is not available.
- Pivot Grid supports up to 75 axes and values; the character limit for each is 30.

Related Links

"Understanding WSRP" (PeopleTools 8.53: Portal Technology)

Chapter 3

Using PSQuery as a Data Source for Pivot Grid

Pivot Grid Model Overview

The grid and chart event listener captures grid events and constructs an appropriate PSQuery using the row and column labels and filters. Each user action results in an appropriate event for the chart, so that both the chart and the grid are synchronized. Pivot Grid enables users to move the fields between the row, the column, and the report filter. Each of these actions result in a different view of the same data.

The chart event listener captures chart events and constructs an appropriate PSQuery using the chart axis and filter information.

Data Synchronization Between the Grid and the Chart

If users select *Grid and Chart* as the display option, the data that appears in the controls is synchronized. Synchronization is achieved using the following two mechanisms:

• Unidirectional synchronization.

The flow between the chart and the grid is maintained in a single channel, unidirectional. Only an event or a user action on the grid will result in the chart being regenerated.

• Semi-intelligent chart axis.

Pivot Grid determines the chart axis information intelligently based on the grid layout and maintains synchronized data between the grid and the chart. Therefore; the data in the chart is always a subset of the data in the grid.

Pivot Grid is able to set the chart axis information correctly so that the chart always displays a subset of the grid data. Pivot Grid always sets the field at the highest level on the row axis of the grid as the X axis for the chart. When you change the grid layout, the X axis for the chart keeps changing based on the grid layout. You can choose the Y axis in all scenarios except when any values are dragged to the filter axis on the grid. In this case, the value selected on the filter of the grid will be the Y axis for the chart as well.

This table describes various actions you can perform on the grid and the corresponding actions on the chart that maintain synchronization.

Action in Grid	Action in Chart
Drilling down in the grid by clicking the plus (+) icon on the row axis	This grid action will result in a drilldown in the chart as well. Earlier, the chart would have displayed the All member for the axis field, but now the chart also shows the relevant details.
Note: In PeopleSoft Pivot Grid, this action is available only at the lowest level of the row axis in the grid.	The Y axis does not change.

Action in Grid	Action in Chart	
Moving a row to the report filter	This grid action will result in:	
	• The filter also being added to the chart.	
	• The highest level field on the row axis being selected as the X axis for the chart.	
	• All of the lower levels on the row axis of the grid also being part of the X axis.	
	• The Y axis of chart not changing except when the Value columns are on the filter axis.	
Moving a row to the column	This grid action will result in:	
	• A series (grouping) field being added to the chart.	
	• The highest level field on the row axis being selected as the X axis.	
	All of the lower levels on the row axis of the grid also being part of the X axis.	
	• The Y axis of the chart not changing.	
Moving a column to the report filter	This grid action will result in:	
	• The filter also being added to the chart.	
	• The X axis remaining the same.	
	• The Y axis of the chart not changing except when the Value columns are on the filter axis.	
Moving a column to the row	This grid action will result in:	
	• The highest level field on the row axis being selected as the X axis.	
	• All of the lower levels on the row axis of the grid also being part of the X axis.	
	• The Y axis of the chart not changing.	
Moving values to the report filter	This grid action will result in:	
	• The highest level field on the row axis being selected as the X axis.	
	• All of the lower levels on the row axis of the grid also being part of the X axis.	
	• The value selected on the report filter of the grid becoming the Y axis for the grid.	
Moving values to the row axis	This grid action is essentially the same representation of data as comparing values on the column axis except that the data view is vertical rather than horizontal. Therefore, no change will appear in the chart.	

Ability to Save Grid and Chart Layouts as User Preferences

Based on the associated security level, you can perform various actions on grids and charts. On a grid, you can slice and dice to have different data representations. On a chart, you can select different chart types, chart axes, and display options. You can also select different PSQuery runtime prompt values.

You can save grid and chart layouts as user preferences, which you can then apply to Pivot Grid views (grid and chart) the next time you open the saved model. You can apply these preferences per model per view.

Query Design Considerations

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

- Any prompt values for the query will be used for the Pivot Grid filter.
- A number of PSQueries may be executed to render data on the grid and the chart, so you should consider these two points when constructing a PSQuery for a Pivot Grid model:
 - PSQuery should be conducive to manipulation.
 - PSQuery performance should be efficient enough to quickly render on the grid and on the chart.

For example, if you want to plot organization data attributes, such as Employee Information, Department Information, Location Information, Country Information, and so on, in a pivot grid. The base database table for this information contains the codes EMPLID, DEPT_ID, LOCATION_ID, and so on, but the descriptions for all these attributes are in different tables. When a PSQuery is created, all these tables are joined. Additionally, the related language tables, security records, effective date, and so on are relevant. As a result, the PSQuery is very complex and its performance may not be efficient. This kind of PSQuery is not suitable for creating a Pivot Grid model. In this case, when table indexes are not defined properly, you have two options:

- Define a fact table that contains all the data and use it to create a Pivot Grid model.
- Define a SQL view that joins all these tables and provides a simple view of the data.

You can then use this view as a source for the PSQuery. However, creating a SQL View on top of multipe tables using joins might cause performance degradation.

For both options, you should consider effective date criteria, related language tables, and security records.

Note: If the query used in the Pivot Grid model is changed after the Pivot Grid model is created, you need to modify and save the Pivot Grid model to ensure all changes are properly displayed in the Pivot Grid Viewer and Pivot Grid pagelets.

Query Limitation for Pivot Grid

Pivot Grid uses PSQuery as the data source and the aggregated results of the query are displayed in a grid and chart. While displaying the results, Pivot Grid does an ad-hoc runtime manipulation of the query to get the desired results. Pivot Grid executes different types of queries at run time for various uses.

For example, Pivot Grid executes a:

- Query with a GROUP BY clause and multiple fields to retrieve a unique list of values for the filters and axis fields.
- Query with a GROUP BY clause, ROLLUP clause, GROUPING clause, and multiple fields to retrieve data to be displayed on a grid in Pivot Grid.
- Query with a GROUP BY clause and the chart axis fields to retrieve the data to be displayed on a chart in Pivot Grid.
- Query with a DISTINCT clause and a single field to retrieve a unique list of values for a primary filter that was last saved by the user.

Given these manipulations being done by Pivot Grid on the query and the complexity of PSQuery itself, there are some limitations on the query that is used as a data source for Pivot Grid. The limitations are:

1. Query with the UNION clauses.

Query with the UNION clauses are 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.

2. Query with the JOINS on the value (fact) fields.

Query with the JOINS on the value (fact) 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.

For example, consider a query where the resulting SQL looks like this:

```
SELECT TO CHAR(A.ST DT, 'YYYY-MM-DD'),
  A.ST ID NUM,
  A.CRSPD_CUST ID,
  A.REMIT_ADDRESS1,
  A.REMIT ADDRESS2,
 A.CUST ID
FROM PS AR32001 TMP A,
  PS RUN CNTL AR B,
  PS_COUNTRY_TBL C,
  PS COUNTRY TBL D,
  PS CUSTOMER E,
 PS STATE TBL F
WHERE (B.OPRID = 'VP1'
  AND (A.ST ID TYPE = 'O'
  AND A.DRAFT FLG <> 'Y'
  AND A.ST ID NUM = B.ST ID NUM
  AND B.RUN \overline{CNTL} ID = :1
  AND B.OPRID = :2
  AND A.AG_PRINT_FLAG <> 'Y'
  AND C.COUNTRY = A.COUNTRY
  AND D.COUNTRY = A.REMIT COUNTRY
  AND A.CRSPD SETID = E.C\overline{R}SPD SETID
  AND A.CRSPD CUST ID = E.CRSPD CUST ID
  AND A.CUST ID = E.CUST ID
  AND A.CUST ID LIKE :3
  AND F.COUNTRY = A.COUNTRY
  AND F.STATE = A.STATE ) )
ORDER BY 3, 50, 36, 35, 57, 37, 38, 54, 52 DESC, 51
```

Note: A.CUST_ID is in the SELECT statement and A.CUST_ID = E.CUST_ID is in the WHERE statement.

Suppose that a Pivot Grid model is built using this query and the field A.CUST_ID is selected as a value type of field in the Pivot Grid model with an aggregation function of COUNT. This SQL will fail at runtime because the aggregation COUNT will be applied to both the SELECT field and the JOIN criterion.

In this case, you should use separate fields as the SELECT fields and the JOIN criterion.

3. 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 comment on the same field more than once.

For example, consider a view that has the following SQL:

```
SELECT A.HRS PERSON ID
 , A.HRS RCMNT ID
 , A.HRS PROFILE SEQ
 , A.OPRID
 , %DatePart(A.HRS SUBMITTED DTTM)
 , A.HRS JOB OPENING ID
 , A.POSTING TITLE
 , A.STATUS CODE
 , B.DESCR
 , B.DESCR
 , Z.RECRUITER ID
 , Z.MANAGER ID
 , Z.JOB FAMILY
 , Z.BUSINESS UNIT
 , Z.DEPTID
 , Z.HRS PRM LOCATION
 , %DateNull
 , %DateNull
ING_ID = Z.HRS_JOB_OPENING_ID, PS_HRS_STS_REC_I B , PS_HRS_RCMNT C
WHERE B.STATUS_CODE = A.STATUS_CODE
AND B.STATUS_AREA = '3'
  AND A.HRS PERSON ID = C.HRS PERSON ID
  AND A.HRS RCMNT ID = C.HRS RCMNT ID
```

In this view, the same field B. DESCR is selected twice exactly in the same way. This view was used in a query with both fields in the SELECT list of the query. If a Pivot Grid model was built using this query and again both these fields are selected as the axis type of fields in the Pivot Grid model, the model will fail and not return the results.

In this case, you should use different fields in the view creation. If the same field has to be used, one of them can be used with functions such as UPPER, TRUNCATE, and so on.

4. Query with *value* fields used as a criterion or a run time prompt.

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 in a criterion in the query, the query will fail and the Pivot Grid model will not render. This is because when rendering the Pivot Grid model, aggregation functions are applied on the value fields and the same aggregation will be applied on the criterion. This issue does not only result in a wrong criterion, but the query will also fail syntactically because there is an aggregation in the WHERE clause and a normal criterion will not work. Note that you need a HAVING clause for the aggregation.

For example, consider a query like this:

```
SELECT DISTINCT A.SETID
 , A.VENDOR ID
 , A.VENDOR NAME SHORT
 , A.BUSINESS UNIT GL
 , A.NET BALANCE AP
 , A.TXN CURRENCY CD
 , A.NET BALANCE AP * B.RATE MULT/ B.RATE DIV, B.TO CUR
FROM PS \overline{AP} DB VN\overline{DBAL} VW A, PS RT DFLT VW \overline{B}
WHERE (B.EFFDT =
  (SELECT MAX(B ED.EFFDT)
   FROM PS RT DFLT VW B ED
   WHERE B.FROM CUR = B_ED.FROM_CUR
     AND B.TO \overline{CUR} = \overline{B} = \overline{D}.TO \overline{CUR}
     AND B.RT TYPE = B ED.RT TYPE
     AND B ED.EFFDT <= SYSDATE)
     AND B.RT TYPE = 'CRRNT'
     AND A.TXN CURRENCY CD = B.FROM_CUR
     AND A.SETID = :1
     AND B.TO CUR = :2
     AND A.NET BALANCE AP * B.RATE MULT/ B.RATE DIV >= :3 )
```

The expression A.NET_BALANCE_AP * B.RATE_MULT/ B.RATE_DIV is used as a value field in the Pivot Grid model. The query after aggregation will apply the aggregation function in the SELECT list as well as in the criterion. These issues cause a failure.

In these cases, you should have two fields, one representing the value column in the Pivot Grid model and the other one is used in the criterion.

5. Query with the expressions that are used as axis fields in the Pivot Grid model.

If a query has expressions and these expressions are used as the axis fields in a Pivot Grid model, 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.

In this case, you should build a view on top of the query SQL with expressions, and then use this view in the Pivot Grid model.

6. Limitations in Microsoft SQL server.

Microsoft SQL server database platform supports ROLLUP and CUBE with a compatibility mode of 100 or more. If the compatibility mode in the database is set to a value that is less than 100, then all the queries associated with Pivot Grid models will fail.

This table summarizes the different query scenarios, results, and recommendations.

Query Scenario	Result	Recommendation
Query with UNION clauses.	An error message appears to indicate that the query execution has failed.	Build a view on top of the query SQL with UNION clauses, and then use this view in the Pivot Grid model.
Query with JOINS on value (fact) fields.	An error message appears to indicate that the query execution has failed.	Use separate fields as the SELECT fields and JOIN criterion.

Query Scenario	Result	Recommendation
Query with underlying Record Views selecting the same field.	Usually, an error message appears to indicate that the query execution has failed. Occasionally, the Pivot Grid model will incorrectly display the results.	Use different fields in the view creation. If the same field must be used, use one of them with functions like UPPER, TRUNCATE, and so on.
Query with value fields used as a criterion.	An error message appears to indicate that the query execution has failed.	Use two fields, one as the value column in the Pivot Grid model and the other one in the criterion.
Query with expressions used as the axis fields in Pivot Grid model.	An error message appears to inform users that expressions are not allowed.	Build a view on top of the query SQL with expressions, and then use this view in the Pivot Grid model.
Microsoft SQL server database with a compatibility setting of less than 100.	An error message appears while rendering the Pivot Grid model.	Set the compatibility mode for the Microsoft SQL server database to a value of 100 or greater.

Displaying Grid in a Chart Only View

You can display the grid from a chart-only view and then perform various actions—such as pivoting data, dragging and dropping, and slicing and filtering data—to change the grid layout. After the layout is satisfactory, you can synchronize the chart with the grid view.

Because the chart can show a maximum of two values on the X-axis (X-axis value and series) and one value on the Y-axis (Selected Fact), the grid displays various types of mapping, as listed in the following table.

Chart Axis	Grid Axis (Initial View)
X-axis value.	Highest level on the row of the grid.
Facts: one of them is selected as a Y-axis.	All the facts are initially plotted on the column of the grid.
Series value.	Highest level on the column of the grid.
Filters on the chart.	Filter values on the grid are the same filter values that were selected on the chart.
All other dimensions that are selected in the model and have a valid grid axis associated with them.	All the dimensions that are selected in the model will be plotted in the row hierarchy.

Note that:

- Because only one X-axis and series can be plotted as dimensions, only the selected X-axis and series can be directly plotted on the grid.
- After the grid is displayed, you can perform all these usual actions on the grid:
 - Data slicing and filtering.

- Dragging and dropping to change the layout.
- Expanding or collapsing values in the rows and columns.

After the grid layout is satisfactory, you can synchronize the chart with the grid view. When the chart is refreshed, the reverse mapping is completed, as list in the following table.

Grid Axis	Chart Axis (Initial View)		
Highest level on the row of the grid.	X-axis value.		
All the facts (whether in row or column).	Facts: the first fact is selected as the Y-axis.		
Facts on filter.	The selected fact filter value is selected as the Y-axis.		
Highest level in the column of the grid.	Series value.		
Filter values in the grid are the same filter values that were selected in the chart.	Filter values in the chart are the same filter values that are selected in the grid.		

Note that:

- Because only one X-axis and series is available to be plotted on the chart in the models that have a chart-only mode, only the highest level dimensions in the rows and columns of the grid are plotted in the chart. The remaining dimensions are ignored and are not plotted in the chart.
- The layout change of the grid is temporary; layout can only be used to synchronize the chart and is not saved in the database.

Viewing a Grid with Only X-axis and Y-axis Values in the Chart

To view a grid with only X and Y axis values in the chart:

1. Create a Pivot Grid model with a chart-only view.

The chart has only one X-axis and one Y-axis, and no filter.

- 2. View the model in the Pivot Grid Viewer.
- 3. Click the View Grid button.

The Pivot Grid appears in a modal window. The value on the X-axis of the chart is in the row of the grid. All the facts are in the column axis of the grid. The remaining dimensions are in the row axis of the grid.

4. Change the settings of the grid layout and click the Refresh Chart button.

The chart refreshes. The highest level dimension in the grid is the X-axis. The Y-axis value remains the same. The grid filters are also maintained as chart filters.

Viewing a Grid with X-axis, Y-axis, and Series Values in the Chart

To view a grid with X-axis, Y-axis, and Series values in the chart:

1. Create a Pivot Grid model with a chart-only view.

The chart has one X-axis, one series value, and one Y-axis in the chart, and no filters.

- 2. View the model in the Pivot Grid Viewer.
- 3. Click the View Grid button.

The Pivot Grid appears in a modal window. The value on the X-axis of the chart is in the row of the grid. All the facts and the series value are in the column axis of the grid. The remaining dimensions are in the row axis.

4. Change the settings of the grid layout, and click the Refresh Chart button.

The chart refreshes. The highest level dimension in the grid is the X-axis. The Y-axis value remains the same. The grid filters are also maintained as chart filters.

Example: Using PSQuery as a Data Source for Pivot Grid

Suppose that a PSQuery were built on the PS_QE_BAM_FACT_TBL record that stores Unit Sales, Unit Cost, and Product Sales for a set of regions and products, monthly, as shown in the following table.

Region (Key)	Product (Key)	Month (Key)	Unit Sales	Unit Cost	Product Sales
QE_BAM_	QE_BAM_	QE_BAM_	QE_BAM_UNIT_	QE_BAM_SALES	QE_BAM_
REGION_FLD	PRODUCT_FLD	MONTH_FLD	FLD	_FLD	PRDSALES_FL

Consider a Pivot Grid model built for this PSQuery with the following initial metadata.

- Model:
 - Region, Product, and Month are axis columns.
 - Region and Product have *All* members defined.
 - Unit Cost, Unit Sales, and Product Sales are Value columns.
 - All the Value columns have the aggregate function *Sum* defined for them.
- Grid:
 - Region and Product are on the row axis.
 - Month is on the Filter axis.
 - Values for No. of Units Sold, Unit Cost, and Product Sales are on the column axis.
- Chart:
 - Region is on the X axis.
 - Unit Cost is on the Y axis.

• Month is on the Filter axis.

This section discusses:

- User Actions Listener when the display option is Grid and Chart.
- User Actions Listener when the display option is Chart Only.

User Actions Listener When the Display Option is Grid and Chart

This section discusses how to:

- Display the grid and chart based on the Pivot Grid model.
- Perform drilldown on a grid.
- Move the report filter to the column axis.
- Move the report filter to the row axis.
- Change the level of dimensions.
- Move a row to a column.
- Move a row to the report filter.
- Select a value for the report filter.
- Move a column to the report filter.

Displaying the Grid and Chart Based on the Pivot Grid Model

You perform the following actions on the grid:

- Retrieve the axis information for the selected model.
- Execute the PSQuery to retrieve (1) the unique list of all axis columns values (including Region, Product, and Month) and (2) the Totals of Aggregate values for products for each region for the selected month.
- Use the axis information and the rowset to set the initial grid layout.
- Use the layout information and the PSQuery output to render the grid.

You perform the following actions on the chart:

- Retrieve axis information for the selected model.
- Use the output data from running the grid PSQuery.
- Set the X axis of the chart to the Region field and the Y axis of the chart to the Units Cost field.
• Plot the chart.

Image: Example of pivot grid and chart based on the Pivot Grid model

This example displays the pivot grid and chart based on the Pivot Grid model.



Performing Drilldown on a Grid

To drill down on the grid, you click the + (plus) icon. You drill down on the grid based on the row axis members. In this example, the user clicks the + icon under EAST COAST. The following actions are performed:

- Execute the PSQuery to retrieve (1) the unique list of all the axis columns values (including Region, Product, and Month), (2) the Totals of Aggregate values for products for each region for the selected month, and (3) individual product information for the region that you are drilling down into.
- Use the axis information and the rowset to set the initial grid layout.
- Use the layout information and the PSQuery output to render the grid.

The following action is performed for the chart:

- Retrieve the axis information for the selected model.
- Use the output data from running the grid PSQuery.
- Set the X axis of the chart to the Region field and the Y axis of the chart to the Unit Cost field.

• Plot the chart.

Image: Example of grid and chart after performing drilldown on region EAST COAST

This example displays the grid and chart drilldown based on the Pivot Grid model.



Performing Drilldown on Aggregate Values

If you view aggregate data—for example, SUM, AVG, COUNT, and so on—you can drill down to view the data that comprise the aggregate value displayed in the grid and chart by clicking a value in the grid or chart.

While performing drilldown on the aggregate values, note that:

- To drill down on the Pivot Grid charts, you must enter an authentication domain either when you set up the PeopleSoft Pure Internet Architecture or in the Web Profile page. See "Configuring General Portal Properties" in "Configuring Web Profiles" (PeopleTools 8.53: Portal Technology).
- When you move the mouse over the value numbers, they appear as underlined links.

Image: Example of Drilldown on Aggregate Values

In this example, the grid displays the value numbers as links when you move the mouse over the number.

Ö •				
▼ Sales Informa	ation Model			🏴 🕌 ?
Month	01/01/2	004 🗸		
		Unit Cost (Sum)	Sales (Sum)	Prd Sales (Sum)
EAST_COAST				
= All		4270.11	1982.00	681894.67
BULLNC	OSE_XL244	747.45	110.00	82219.50
ES_700)	1119.19	41.00	45886.99
FX-S800	0	2115.63	211.00	446397.93
MALIBU	_X44	15.59	1300.00	202 0.25
PREMIE	R_PRO	272.25	320.00	8712 Regi 4463
HAWAII				
■ All		4270.11	4015.00	1354178.92
MIDWEST				
■ All		4270.11	815.00	827281.86
WEST_COAST				
■ All		4270.11	2877.00	775259.10
			Sales Informat	ion Model
			E	AST_COAST BULLN
	1	WEST_COAST AII		EAST_COA
				EAS
				E
				E
		MIDWEST AII		HAWAII
In 📈 🏔 🖡	-			
🛄 🗠 👅 🖡				

If there is no data returned for a particular intersection, 0 is displayed as a non-link text and you cannot perform drilldown on that 0.

• You can perform a drilldown on the aggregate values using either the Pivot Grid Viewer page or the Pivot Grid Wizard – Pivot Grid Displays page.

• If related actions are *not* configured for the aggregate view, clicking the value number links on the grid enables you to directly access the detailed view.

• If related actions are configured for the aggregate view, clicking the value number links on the grid populates a context menu with two options: *Detailed View* and *Actions*. You can click the *Detailed View* option to access the detailed view.

Image: Drilldown on Aggregate Values - Context Menu

This example shows a populated context menu that appears after you click a value link on the grid when the related actions are configured for the aggregate view.



Image: Detailed View - Drilldown on Aggregate Values

This example shows the results of drilldown on aggregate values.

Q -									
▼ Sale Information	ion Mod	iel		₽ # 8					
Month	01/0	1/2004	*						
u	Jnit Cos	st (Sum) Sales (S	Sum) Prd Sal	les (Sum)					
EAST_COAST									
* All		Pivot Grid Dril	ldown						×
HAWAII		Detailed Data		Person	alize Fied View All	2. 🔛 👘		Last	
+ All		Month	Actions	Region	Product	Unit Cost	<u>Sales</u>	Prd Sales	
MIDWEST		1 01/01/2004	→ Actions	WEST_COAST	PREMIER_PRO	272.25	577.00	157088.25	
All WEST COAST		2 01/01/2004	→ Actions	WEST_COAST	MALIBU_X44	15.59	1800.00	28066.50	
		3 01/01/2004		WEST_COAST	FX-S800	2115.63	150.00	317344.50	
		4 01/01/2004		WEST_COAST	ES_700	1119.19	30.00	33575.85	
		5 01/01/2004	→ Actions	WEST_COAST	BULLNOSE_XL244	747.45	320.00	239184.00	
		Poturo			·				
		Retuin							
	L		,						.::
		MIDWERT AU		HAN	NAU AU				
		MIDWEST AII		HAU	WAII AII				
🔟 🖂 🧶 🖺									

See Using and Configuring the Related Actions Menu.

To perform a drilldown on aggregate values using the Pivot Grid Viewer page:

- 1. Select Reporting Tools, Pivot Grid, Pivot Grid Viewer.
- 2. Search for and open a Pivot Grid model.
- 3. Hover over number value to convert it to a link.
- 4. If related actions are configured, click the link to generate a PSQuery.

In the PSQuery, no aggregation functions are added to the facts. Also, the dimension values corresponding to the fact column are added as a filter to the PSQuery using the WHERE clause.

5. View the result set of the PSQuery in a modal window.

You can also drill down on aggregate values in charts if the Pivot Grid model is set to chart-only view. You can view the detailed data that represents the chart data point by clicking the data point; for example, a bar, a pie section, a line chart data point, and so on. If related actions are configured for the aggregate view, clicking the data point on the charts populates a context menu with three options: *Detailed View*, *Drilldown To*, and *Actions*.

Image: Drilldown To option

This example shows the Drilldown To option that enables you to select the axis value used to drill down.



Image: Detailed data of the aggregate values after you select the Detailed View option

This example illustrates the detailed data that represents the aggregate after you select the *Detailed View* option.



To drill down on the aggregate values in a GRID when related actions are *not* configured for the Pivot Grid model:

- 1. Select Reporting Tools, Pivot Grid, Pivot Grid Viewer.
- 2. Search for and select a Pivot Grid model to view.
- 3. Move the mouse over a value number in the grid.

The value number changes to an underlined link.

4. Click the number value link.

The grid displays a page showing data that corresponds to the number value link that you clicked.

5. Click the Return button to close the page that contains the grid.

To drill down on the aggregate values in a GRID when related actions are configured for the Pivot Grid model:

- 1. Select Reporting Tools, Pivot Grid, Pivot Grid Viewer.
- 2. Search for and select a Pivot Grid model to view.

3. Move the mouse over a value number in the grid.

The value number changes to an underlined link.

4. Click the number value link.

Pivot Grid populates a context menu with two options: Detailed View and Actions.

5. Click the Detailed View option.

The grid displays a page showing data that corresponds to the number value link that you clicked.

6. Click the Return button to close the page that contains the grid.

To drill down on the aggregate values on a CHART when related actions are configured for the Pivot Grid model:

- 1. Access either the Pivot Grid Wizard or Pivot Grid Viewer page.
- 2. Open a Pivot Grid model that has the Chart Only view.
- 3. Click the chart data point.

Pivot Grid populates a context menu with three options: Detailed View, Drilldown To, and Actions.

4. Click the Detailed View option.

A window appears displaying all the values that correspond to the selected aggregation.

To drill down on aggregate values on a CHART when related actions are *not* configured for the pivot grid model:

- 1. Access either the Pivot Grid Wizard or Pivot Grid Viewer page.
- 2. Open a Pivot Grid model that has the Chart Only view.
- 3. Click the chart data point.

Pivot Grid populates a context menu with two options: Detailed View and Drilldown To.

4. Click the Detailed View option.

A window appears displaying all the values that correspond to the selected aggregation.

Moving the Report Filter to the Column Axis

Image: Example of dragging the Month filter to column

To move the Month field to the column axis, click the Month and drag it to the column axis.



- Execute the PSQuery to retrieve (1) a unique list of all the axis columns values (including Region, Product, and Month) and (2) the Totals of Aggregate values for products for each region for all of the months.
- Use the axis information and the rowset to set the initial grid layout.
- Use the layout information and the PSQuery output to render the grid.

The following actions are performed on the chart:

- Retrieve the axis information for the selected model.
- Use the output data from running the grid PSQuery.
- Set the X axis of the chart to the Region field and the Y axis of the chart to the Unit Cost field.

• Set the chart series axis to the Month field.

Image: Example of report filter on the column axis

This example shows the report filter moved to the column axis.



Moving the Report Filter to the Row Axis

Image: Example of dragging a report filter to the row axis

This example shows how to move the Month field to a row axis by clicking the Month and drag it to the X axis.

▼ Sale Informa	ation Model		🕂 🕌 🕼	
Month	01/01/2004	*		
Month	Unit Cost (Sum)	Sales (Sum) P	rd Sales (Sum)	
EAST_COAST				
■ All	4270.11	1982	681894.67	·
HAWAII				
■ All	4270.11	4015	1354178.92	2
MIDWEST				
■ All N	4270.11	815	827281.86	
WEST_COAST	1			
■ All	4270.11	2877	775259.1	
	 Sale Informa 	tion Model		🌵 🕌 🖬
	 Sale Informa Month 	tion Model 01/01/2004	¥	1 1
	 ✓ Sale Informa Month 	tion Model 01/01/2004 Unit Cost (Sum)	Sales (Sum)	Prd Sales (Sum)
	Sale Informa Month EAST_COAST	tion Model 01/01/2004 Unit Cost (Sum)	V Sales (Sum)	🏴 🕌 🖬 Prd Sales (Sum)
	 Sale Informa Month EAST_COAST ⊕ ↓ 	tion Model 01/01/2004 Unit Cost (Sum) 4270.11	✓ Sales (Sum) 1982	Prd Sales (Sum) 681894.67
	Sale Informa	tion Model 01/01/2004 Unit Cost (Sum) 4270.11	 ✓ Sales (Sum) 1982 	Prd Sales (Sum) 681894.67
	Sale Informa	tion Model 01/01/2004 Unit Cost (Sum) 4270.11 4270.11	 ✓ Sales (Sum) 1982 4015 	Prd Sales (Sum) 681894.67 1354178.92
	Sale Informa	tion Model 01/01/2004 Unit Cost (Sum) 4270.11 4270.11	 ✓ Sales (Sum) 1982 4015 	Prd Sales (Sum) 681894.67 1354178.92
	Sale Informa	tion Model 01/01/2004 Unit Cost (Sum) 4270.11 4270.11	 Sales (Sum) 1982 4015 815 	Prd Sales (Sum) 681894.67 1354178.92 827281.86
	Sale Informa	tion Model 01/01/2004 Unit Cost (Sum) 4270.11 4270.11	 Sales (Sum) 1982 4015 815 	Prd Sales (Sum) 681894.67 1354178.92 827281.86

Because the Month field does not have the All member associated with it, the grid plots all the values.

- Execute the PSQuery to retrieve (1) a unique list of all the axis column values (including Region, Product, and Month) and (2) aggregate values for all the region, product, and month values.
- Use the axis information and the rowset to set the initial grid layout.

• Use the layout information and the PSQuery output to render the grid.

Image: Example of report filter in a grid moved to the row axis

This example shows a portion of the grid view when the report filter is moved to the row axis.

🔅 🔻			
▼ Sale Information Mod	lel		🏴 🥌 🖪
	Drag item here to	filter.	
	Unit Cost (Sum)	Sales (Sum)	Prd Sales (Sum)
EAST_COAST			
BULLNOSE_XL240			
02/01/2004	732.35	110	80558.5
BULLNOSE_XL244			
01/01/2004	747.45	110	82219.5
CLASSIC_LIMITED			
06/01/2004	762.55	110	83880.5
CLASSIC_PRO_XL			
07/04/2004	755	110	83050
DNA_BIOLITE_37			
05/01/2004	299.75	320	95920
07/04/2004	275	320	88000
DNA_BIOLITE_44			
06/01/2004	277.75	320	88880
ES_400			
02/01/2004	1096.58	41	44959.98
ES_700			
01/01/2004	1119.19	41	45886.99
FX-R700			
07/04/2004	2137	211	450907
FX-S800			
01/01/2004	2115.63	211	446397.93

The following actions are performed for the chart:

- Retrieve the axis information for the selected model.
- Use the output data from running the grid PSQuery.

BULLNOSE_XL

.×. 43

🔟 📈

EAST_COAST FX-T140 02/01/2004

EAST_COAST MAUI_BODYBOARD 06/01/2004

EAST_COAST XLT_1200 03/01/2004

HAWAII ES_400 02/01/2004

Set the X axis of the chart to the Region field and the Y axis of the chart to the Unit Cost field. ٠

Image: Example of the result of moving the report filter in a chart to the row axis

Sale Information Model 2,800 2,400 2,000 Unit Cost 1,600

HAWAII LIMITED_CUSTOM 04/01/2004

HAWAII XLT-LTD_12 05/01/2004

1250

Region

MIDWEST ES_400 02/01/2004

MIDWEST LIMITED_CUSTOM 05/01/2004

MIDWEST SUPERLITE_ 02/01/2004

× ቆ

WEST_COAST DNA_BIOLITE_37 07/04/2004

WEST_COAST KZ-1250 03/01/2004

WEST_COAST SUPERLITE_X4 03/01/2004

ž

This example shows the result of moving the report filter in a chart to the row axis.



Changing the Level of Dimensions

Image: Example showing how to change the dimension level

In this example, Month is changed to the highest dimension level by dragging the month up on the X axis.



The following actions are performed on the grid:

- Execute the PSQuery to retrieve (1) a unique list of all the axis columns values (including Region, Product, and Month); (2) the totals of aggregate values for each month, for all the regions, for all the products because the grid is collapsed initially; and (3) the list of Unit Cost Values for each month and region for all the products, which if the grid is expanded requires an additional PSQuery.
- Use the axis information and the rowset to set the initial grid layout.

• Use the layout information and the PSQuery output to render the grid.

Image: Example grid displaying new dimensions

This example shows a portion of the grid after changing the dimension level.

0 -			
▼ Sale Informat	ion Model		🏴 🥌 🖪
	Drag item her	e to filter.	
	Unit Cost (Sum)	Sales (Sum)	Prd Sales (Sum)
01/01/2004			
EAST_COAST			
■ All	4270.11	1982	681894.67
HAWAII			
■ All	4270.11	4015	1354178.92
MIDWEST			
■ All	4270.11	815	827281.86
WEST_COAST			
■ All	4270.11	2877	775259.1
02/01/2004			
EAST_COAST			
■ All	4183.84	1982	668119.02
HAWAII			
■ All	4183.84	4015	1326821.77
MIDWEST			
■ All	4183.84	815	810569.1
WEST_COAST			
■ All	4183.84	2877	759597.3

The following actions are performed for the chart:

- Retrieve the axis information for the selected model.
- Use the output data from running the grid PSQuery.

• Set the X axis of the chart to the Month field and the Y axis of the chart to the Unit Cost field.

Image: Example chart display after changing the dimension level

This example shows the entire chart after changing the dimension level.



Moving a Row to a Column

Image: Example of how to drag rows to columns

In this example, the Region and Product fields have All (Total) enabled. The Region and Product fields were moved to columns.



- Execute the PSQuery to retrieve (1) a unique list of all the axis columns values (including Region, Product, and Month); (2) the totals of aggregate values for each month, for all the regions, for all the products because the grid is collapsed initially; and (3) the list of Unit Cost Values for each month and region for all the products, which requires an additional PSQuery if the grid is expanded.
- Use the axis information and the rowset to set the initial grid layout.

• Use the layout information and the PSQuery output to render the grid.

The following actions are performed for the chart:

- Retrieve the axis information for the selected model.
- Use the output data from running the grid PSQuery.
- Set the X axis of the chart to the Month field and the Y axis of the chart to the Unit Cost field.
- Add a combination of the Region and Product fields as a chart series.

Image: Example of grid and chart after moving rows to a column

This example displays the initial grid and chart after moving the rows to a column.



Moving a Row to the Report Filter

In this example, using the initial layout, we move both the Month and the Product fields from a row to the report filter. If the Product and Month fields are moved to the report filter, then data is additionally filtered based on the Product and Month fields.

- Run the PSQuery to retrieve (1) a unique list of all the axis columns values (including Region, Product, and Month) and (2) the aggregate values for each region based on the selected month and product values.
- Use the axis information and the rowset to set the initial grid layout.
- Use the layout information and the PSQuery output to render the grid.

The following actions are performed on the chart:

- Retrieve the axis information for the selected model.
- Use the output data from running the grid PSQuery.

• Set the X axis of the chart to the Region field and the Y axis of the chart to the Unit Cost field.

Image: Example grid and chart based on month and product filters

This example shows the grid and chart with values displayed. The values are based on the grid filter, which is the unit cost for all product for 01/01/2004 by region.



Selecting a Value for the Report Filter

Changing the report filter value will result in filtering of the data in the grid. The following actions are performed for the grid:

- Execute the PSQuery to retrieve (1) totals of aggregate values for all the products for each region for the selected month and (2) the unique list of all the axis values, including Region, Product, and Month.
- Use the axis information and the rowset to set the initial grid layout.
- Use the layout information and the PSQuery output to render the grid.

The following actions are performed to display the chart:

• Retrieve the axis information for the selected model.

- Use the output data from running the grid PSQuery.
- Set the X axis of the chart to the Region field and the Y axis of the chart is automatically set to the Unit Cost field.

Image: Example grid and chart displayed with new values based on filters

This example displays the grid and chart for the filtered month and product. The Month filter has only one value and appears as a non-selectable value because Progressive Filtering is applied.



Selecting Multiple Filter Options

You are able to select multiple filter values in grids and in charts. Note that:

- If all items in the filter drop-down list are selected, either the *(All)* label or the value in the Total Name column that you specified in the Pivot Grid Wizard Specify Data Model Values page is shown.
- If some items in the filter drop-down list are selected, the (Multiple items) label is shown.

- If only one item in the filter drop-down list is selected, the label of the selected item is shown; for example, 01/01/2004.
- If NULL values or empty values are in the table, the (Blanks) label is shown.

Image: Multiple filter options in grid

This example illustrates the filter drop-down list in the grid with multiple options.

▼ Sale Information	Model				1
Month	(Multiple items) 🗸 🗸	Prod	uct [(Multiple items)	*
	📃 (Select All)	Sum)	Prd Sales (Su	ım)	
■ All	01/01/2004	5944	2969516	.65	
EAST_COAS		860	34918	9.5	
HAWAII		2350	15034	455	
MIDWEST	01/04/2004	940	30445	57.4	
WEST_COAS		1794	812414	.75	
	OK Cancel				

Image: Multiple filter options in chart

This example illustrates the filter drop-down list in the chart showing multiple options.



Note that:

• When the Total option is selected for the Axis Column Type, Select All is listed as the first option in the filter drop-down list and the distinct values for the filter are listed following the Select All option.

The default selected value when you first use the filter is Select All.

• When the Total option is not selected for the Axis Column Type; Select All is listed as the first option in the filter drop-down list, and the distinct values for the filter are listed after the Select All option.

The default selected value when you first use the filter is the first value following the Select all option

• The text Multiple Items appears when more than one filter value was previously selected or when the Total—for example, Select All—was previously selected.

If only one value was previously selected, then that value appears.

- If the selected filter has only one value in the list, then that value is shown in the filter instead of the text Multiple Items. The filter drop-down list is not displayed when only one item is available.
- Selecting the Select All option selects all the values in the filter drop-down list.

Deselecting the Select All option deselects all the values in the filter drop-down list.

• Clicking the OK button applies all changes that were made in the filter drop-down list and closes it.

The Pivot Grid is refreshed to indicate the data that corresponds to the selected filter values.

• Clicking the Cancel button cancels all changes that were made in the filter drop-down list and closes it.

The grid is not refreshed.

- When none of the values is selected in the filter drop-down list, clicking the OK button makes no changes.
- The filter drop-down list in the Pivot Grid Viewer page and the Pivot Grid Wizard Pivot Grid Display pages behave in a similar fashion.
- The Chart Only view does not limit the number of filters.
- When the filter name or the selected filter value is too long, they are truncated with ellipses.

You can hover over the filter name or filter value to view the full description as tool tip.

To select multiple filter values in a grid:

- 1. Select Reporting Tools, Pivot Grid, Pivot Grid Viewer.
- 2. Search for and select a Pivot Grid model for viewing.
- 3. Drag and drop a dimension to the filter area in the grid.

The selected filter text can be Values or Multiple Items based on your previous selection.

4. Click the filter drop-down list to view the filter values.

Each of the filter values has a corresponding check box, and each filter has a Select All option.

5. Select the Select All option to select all distinct items in the filter drop-down list.

Alternatively, select multiple values in the filter drop-down list.

6. Click the OK button to apply the filter changes, close the filter drop-down list, and refresh the grid so that it displays the data that corresponds to the selected filter values.

Alternatively, click the Cancel button to cancel the filter, close the filter drop-down list, and not refresh the data in the grid.

To select multiple filter values in a chart:

- 1. Access either Pivot Grid Wizard or Pivot Grid Viewer.
- 2. Open a Pivot Grid model that has the Chart Only view and one or more filter values.
- 3. Click the filter drop-down list and select the filter values.
- 4. Click the OK button to enable Pivot Grid to run the data.

The system renders the chart, which displays data based on the selected filter values.

Applying Progressive Filter Option

Pivot Grid Progressive Filtering is functionality provided in the Pivot Grid where the selected filter values are updated in the list of values available for the filters after each filter is applied. When you perform filtering on a pivot grid or chart, the list of available filter values are progressively filtered based on your selections. This feature enables you to retrieve only relevant values for the filters so that they can be selected appropriately. For example, a selection of a particular geographical location filter value returns departments that are valid only for that location. Selecting a department will then return the list of employees that are valid for that department only.

Salient features of the Progressive Filter option are:

- The filter values are progressively filtered, resulting in valid values for each filter that you can select.
- The user-selected filter values are almost never changed, except when prompts are altered, resulting in a consistent user experience.
- The filtering is consistent irrespective of whether totals are defined for the filter fields.
- The behavior of Progressive Filtering is the same in the grid and in the chart.

The Progressive Filtering is reset when:

- The Pivot Grid model is displayed for the first time without any user personalization.
- Users change the prompt values or the prompt values are changed using IWC.

The following examples show the process of applying progressive filtering in drilling down on a chart:

1. Open the Headcount Profile model in Pivot Grid Viewer or Pivot Grid Wizard.

Image: Initial view of the Headcount Profile model

This example shows the initial view of the Headcount Profile model.



2. Select the California Location option in the Location filter.

All other filters are refreshed and the data are fetched based on the selected location.

Image: Filter option is applied

In this example, the Headcount Profile chart displays the data based on the selected location, *California Location*.

	HR Statue	(AID)	~	C 1	monvisor	(AID)		~
	Deporte To		*	51	leboode			*
	Reports To		•	D	Jobcode			*
	Position	(AII)	~	De	partment	(All)		*
	Location	California Location	*					
			Current	Headcount Profil	e			
24	ю							
20	0							
	-							
16	0							
12	0				_			
8								
4	ю		_					
	。							
		gent orker		oyee			on of erest	
		ontin W		Empl			Persi	
		0						

3. Click the Employee bar, select the Drill To option, and select the Age Group option.

Image: Results of drilling down on the field Age Group from the Employee bar

This example shows the results of drilling down on the field Age Group from the Employee bar.



The following table lists various use cases, expected behaviors, and exception scenarios for the Progressive Filtering feature.

Use Case	Expected Behavior	Exception Scenarios
Grid is rendered with no user personalization.	Filter values are retrieved as is. No primary filter criteria are applied.	None
Grid is rendered with user personalization. (User has saved the layout.)	Filter values are retrieved based on the primary filter value that is saved by the user. The primary filter values are retrieved using a separate query.	If the primary filter value, which is saved by the user, is invalid, the primary filter is ignored and the value is retrieved, assuming no primary filters are in place.

Use Case	Expected Behavior	Exception Scenarios
User changes filter value in the grid.	The changed filter value becomes the primary filter. All other filter values are retrieved based on the primary filter values.	None
User changes an additional filter value in the grid.	The previous primary filter value is discarded. The current filter becomes the primary filter. User-selected filter values are retained. The list of selectable filter values are retrieved based on all user-selected filter values, including the primary filter.	None
User changes prompt values.	The current primary filter, if any, is discarded and the filter values are retrieved as is. No primary filter criteria are applied.	None
User changes chart options to add new settings (for example, dimensions, filters, and so on) in a chart.	The current primary filter, if any, is discarded only if it is removed or if it is added as an axis. The filter values are retrieved as is. No primary filter criteria are applied.	None
User drags and drops dimensions on the grid.	If the primary filter is moved from the filter to the row or column, it is discarded. Otherwise, the primary filter criteria are used to retrieve the other filter values.	None
User saves the layout.	The primary filter value is the last selected filter and is saved.	If the user performed an action that discarded the primary filter (for example, changing prompts or dragging the primary filter to the row or column), then the primary filter is not saved.
Grid is rendered using Related Actions.	The primary filter value, if any, is discarded (because user provided multiple filters using bind parameters as related action parameters, thus complicating the process of determining a primary filter).	None

Use Case	Expected Behavior	Exception Scenarios
Grid filter values are changed using Inter Window Communication (IWC).	Similar to a filter change, the current filter being changed by IWC becomes the primary filter and other filter values are retrieved using the current primary filter value.	If the user previously used the grid to perform different filter actions (because the current filter value comes from IWC is invalid), then the filter value is ignored.
Pivot Grid prompt values are changed using IWC.	The current primary filter, if any, is discarded and the filter values is retrieved as is. No primary filter criteria are applied.	None

Moving a Column to the Report Filter

If you make a value field a filter, then you need to select the value that appears in the grid. This example uses the Unit Sales field as the selected value.

Image: Example of dragging a column to a report filter

 Sale Information M 	lodel			🏴 🕌 🛛	
Month 0	1/01/2004	✓ Product	(All)	*	
	Unit Cost (Spin) Sa	les (Sum) Prd Sa	les (Sum)		
= All	17080 Unit C	ost (Sum) 36	38614.55		
EAST_COAST	4270.11	1982 6	81894.67		
HAWAII	4270.11	4015 13	54178.92		
MIDWEST	4270.11	815 8	27281.86		
WEST_COAST	4270.11	2877	775259.1		
	 Sale Information 	Model			🏴 🛗 🕄
	Month	01/01/2004	Produc	ct (All)	*
		Unit Cost (Sum) Sales (Sinit Co	st (Sum) Sum)	
	= All	17080.4	4 9689	3638614.55	
	EAST_COAST	4270.1	1 1982	681894.67	
	HAWAII	4270.1	1 4015	1354178.92	
	MIDWEST	4270.1	1 815	827281.86	
	WEST_COAS	T 4270.1	1 2877	775259.1	

This example illustrates dragging a column to a report filter.

- Execute the PSQuery to retrieve (1) a unique list of all the axis columns values (including Region, Product, and Month) and (2) aggregate values for each region for all the products based on the selected month values.
- Use the axis information and the rowset to set the initial grid layout.
- Use the layout information and the PSQuery output to render the grid.

The following actions are performed to produce the chart:

• Retrieve the axis information for the selected model.

- Use the output data from running the grid PSQuery.
- Set the X axis of the chart to the Region field and the Y axis of the chart is automatically set to the Unit Sales field.

Image: Example grid and chart displaying unit sales

This example shows the grid and chart for unit sales.

Ģ •				
▼ Sale Informat	tion Model			받 🕌 🖬
Month	01/01/2004	✓ Product	(AII)	*
Values	Sales (Sum)	*		
= All	9689			
EAST_CO	AST 1982			
HAWAII	4015			
MIDWEST	815			
WEST_CO	DAST 2877			
4,000 3,500 3,000		-		
មួ 2,500		-		
۳ 2,000 1,500 1,000	Sales: 1982 , Region: 1	AST_COAST		
500		Hawall	MIDWEST	WEST
E	-A31_00A31	nawau	Region	WEST_
II k. 🚗 💻				
🛄 🌿 💗 🗮	2			

User Actions Listener When the Display Option is Chart Only

This section discusses how to:

- Display a chart based on the initial chart layout.
- Drill down in a chart.
- Drill out in a chart.
- Add a series to the chart.
- Add an overlay option to the chart.

• Add a chart filter to the chart.

Displaying a Chart Based on the Initial Chart Layout

When you create a Pivot Grid model, you also define its initial layout. The initial layout used in the following example is based on the layout described at the beginning of this section. The following actions are performed:

- Retrieve axis information for the selected model.
- Execute the PSQuery to retrieve (1) totals of aggregate values for the Unit Cost member for each region for the selected month and (2) the unique list of all the Filter Values Month.
- Set the X axis of the chart to the Region field and the Y axis of the chart to the Unit Cost field.
- Plot the chart.

Image: Example chart using initial layout

This example displays the chart using the initial layout.



Drilling Down on a Chart

In the following example, you drill down on the Region, and the Drilldown Field selected is *Product*. The following actions are performed:

- Execute the PSQuery to retrieve (1) totals of aggregate values for the Unit Cost member for each product for the selected region and month and (2) the unique list of all the Filter Values Month and Region.
- Set the X axis of the chart to the Product field and the Y axis of the chart to the Unit Cost field.
- Plot the chart.

• The chart includes locator links from the drilldown.

Image: Drilldown To menu

When you click the bar, the Drilldown To menu appears as shown in this example.



Image: Chart showing drilldown on Product

When you select a value in the Drilldown Field drop-down list, the drilldown appears with locator links to drill out.



Drilling Out on a Chart

To drill out, you click the locator links at the top left of the chart. In this example, drillout is performed by clicking on the locator link Region above the chart. The following actions are performed:

- Retrieve the axis information for the selected model.
- Execute the PSQuery to retrieve (1) totals of aggregate values for the Unit Cost member for each product for the month and (2) the unique list of all the Filter Values Month.
- Set the X axis of the chart to the Region field and the Y axis of the chart to the Unit Cost field.

• Plot the chart.

Image: Chart returned to initial state after drilling out

This chart is restored to the original display.



Adding a Series to the Chart

In this example, the Product field is defined as a Series in the data model. The following actions are performed:

- Retrieve the axis information for the selected model.
- Execute the PSQuery to retrieve (1) totals of aggregate values for the Unit Cost member for each region and product for the selected month and (2) the unique list of all the filter values for Month.
- Set the X axis of the chart to the Region field and the Y axis of the chart to the Unit Cost field.
• Plot the chart.

Image: Example chart displaying Product as a series

This example illustrates a chart with Product as a series.



Adding an Overlay Option to the Chart

In this example, the Unit Sales field is defined as an Overlay in the data model. The following actions are performed:

- Retrieve the axis information for the selected model.
- Execute the PSQuery to retrieve (1) totals of aggregate values for the Unit Sales member for each region for the selected month, (2) totals of aggregate values for the Unit Cost member for each region for the selected month for overlay, and (3) the unique list of all the filter values for Month.
- Set the X axis of the chart to the Region field and the Y axis of the chart to the Unit Sales field.

• Plot the chart.

Image: Example chart with Unit Cost as an overlay

🔅 – **Filters** Month 01/01/2004 ¥ Sales Information Model 4,500 4,000 3,500 Cost 3,000 Sum) Unit 2,500 2,000 1,500 1,000 500 0 HAWAII EAST COAST MIDWEST WEST_COAST Region 📗 🖂 🥥

This example displays a chart with Unit Cost as an overlay.

Note: Overlay fields are only supported for the bar charts. All other chart types do not work properly if overlay fields are selected.

Adding a Chart Filter to the Chart

In this example, Product is added as a second filter in the data model. The following actions are performed:

- Retrieve the axis information for the selected model.
- Execute the PSQuery to retrieve (1) totals of aggregate values for the Unit Cost member for each region for the selected month and product and (2) the unique list of all the filter values Month and Product.
- Set the X axis of the chart to the Region field and the Y axis of the chart to the Unit Cost field.

• Plot the chart.

Image: Example chart with filters on Month and Product

This example displays a chart with two filters.



Using Pivot Grid Wizard

Pivot Grid Wizard Overview

You use the Pivot Grid wizard to create and maintain Pivot Grid models. The wizard consists of five steps that lead you through the process of defining the core of the grid (data, values, and axes) and initial

pivot display (chart type and viewing options). Users with the appropriate security also use the Pivot Grid wizard to update existing models.

Image: Flowchart for creating and updating a Pivot Grid model

This diagram illustrates the processes of creating and updating a Pivot Grid model.



Creating a Pivot Grid Model Using the Pivot Grid Wizard

This section discusses how to:

- Specify Pivot Grid properties.
- Select a data source.
- Specify data model values.
- Specify data model options.
- View Pivot Grid displays.

Specifying Pivot Grid Properties

Use the Specify Pivot Grid Properties page (PTPG_WIZ_INFO) to identify and categorize the data model for the pivot grid.

Navigation

Access the Specify Pivot Grid Properties page by selecting Reporting Tools, Pivot Grid, Pivot Grid Wizard.

Image: Specify Pivot Grid Properties page

This example illustrates the fields and controls on the Specify Pivot Grid Properties page. Definitions for the fields and controls appear following the example.

	Pivot Grid Wizard					Ste	ep 1 of 5
	1-2-3-4-5				Next >		
	Specify Pivot Grid Properties						
	The following information will be u	sed to identify	and	categorize your Pivot Grid.			
I	Pivot Grid Information						
	Pivot Grid Name	PVG_SALES					
	*Pivot Grid Title	Sale Informati	on N	lodel			
	Description						
	Pivot Grid Type	Public		~			
	Owner	PeopleTools		~			
Pi	vot Grid Title		En	ter a title for the pivot grid. This	s field is re	equi	red.
D '			C		11' D·	1	D 11:
ľ	vot Grid Type		Se	lect whether the Pivot Grid moc	iel is <i>Prive</i>	ite o	or <i>Public</i> .
			•	Private models are only availa the model and the users who h	ble to the ave the Pi	user votC	s who cre GridAdmi
			•	Public models are available to users for updating, and they ar viewing.	administra e accessib	ators le to	s and pow all users

Next

Note: The Next button is available after you enter the title of the pivot grid in the Pivot Grid Title field and move to any other field.

Click to advance the wizard to the next page.

Selecting a Data Source

Use the Select Data Source (PTPG_WIZ_DATASRC) page to select the PSQuery and output columns from the PSQuery for the data model.

Navigation

Access the Select Data Source page by selecting the Next button on the Specify Pivot Grid Properties page.

Image: Select Data Source page

This example illustrates the fields and controls on the Select Data Source page. Definitions for the fields and controls appear following the example.

ivot Grid Wiza	ra				
1-2-3-4	-(5)	< Previous	Next >		
Select Data	Source				
elect the Data Sou	rce Type and the Columns for the Pivot Grid				
Title Sale Inform	nation Model				
(Data Source Type PS Query	~			
Data Source					
*	Query Name QE_PIVOT_GRID	٩			
*elect Columns	Query Name QE_PIVOT_GRID	Q	First 1-7 of 7 Last		
elect Columns	Query Name QE_PIVOT_GRID Per	Sonalize Find 🖾 🛗	First 🚺 1-7 of 7 💟 Last rmat		
elect Columns Select 1	Query Name QE_PIVOT_GRID Per- Per- Data Source Columns Instance	Sonalize Find 🗖 🗰 Field Fo String	First 🚺 1-7 of 7 💟 Last		
elect Columns Select 1 2	Query Name QE_PIVOT_GRID Per- Per- Pata Source Columns Instance Month	sonalize Find 🖾 👬 Field Fo String String	First 🚺 1-7 of 7 💟 Last rmat		
elect Columns Select 1 2 3	Query Name QE_PIVOT_GRID Per: Data Source Columns Instance Month Region	Sonalize Find 🔎 🗰 Field Fo String String String String	First 🚺 1-7 of 7 🚺 Last rmat		
elect Columns Select 1 2 V 3 V 4 V	Query Name QE_PIVOT_GRID Per- Per- Per- Para Source Columns Instance Month Region Product	Sonalize Find 2 1 2 1 2 1 2 1 2 1 2 2	First 🚺 1-7 of 7 💟 Last		
* elect Columns Select Select Select	Query Name QE_PIVOT_GRID Per	Sonalize Find I I I Field Fo Field Fo String String String String Number	First 🚺 1-7 of 7 🚺 Last rmat		
elect Columns Select 1 □ 2 ♥ 3 ♥ 4 ♥ 5 ♥ 6 ♥	Query Name QE_PIVOT_GRID Per Data Source Columns Instance Month Region Product Unit Cost Sales	Sonalize Find 2 1 Field Fo String String String String Number Number	First 1-7 of 7 Last		

Data Source Type

Select a data source type.

	Note: PeopleSoft Pivot Grid supports only PSQuery as a data source.
Query Name	Click the search icon to select a query from the list of existing queries.
	Note: Only one query can be associated with one Pivot Grid model as a data source.
Select Columns	Select the output columns to be plotted on the Pivot Grid model.
	Note: The Select Column section is available after you select an existing query in the Query Name field using the search icon or after you enter a valid query name and tab out of the Query Name field.
	You must select at least two PSQuery output columns.
Next	Click to advance the wizard to the next page.
	Note: The Next button is available after you select at least two columns in the Select Columns section.

Specifying Data Model Values

Use the Specify Data Model Values page (PTPG_WIZ_MODEL) to define the column type and aggregate functions for the selected data model.

Navigation

Access the Specify Data Model Values page by selecting the Next button on the Select Data Source page.

Image: Specify Data Model Values page

This example illustrates the fields and controls on the Specify Data Model Values page. Definitions for the fields and controls appear following the example.

Pivot Grid Wizard Step 3 of 5					3 of 5				
1-2-3-4-5	(1-(2)-(3)-(4)-(5)			< [revious		Next >		
Specify Data M	lodel Value	20	-						
Specify the Column Tune and the Aggregate functions for the colorted Date Model									
Specily the Column Type	and the Aggrega	le functions for	the selected D	ata wot	IEI				
Title Sale Information	Title Sale Information Model								
Select Data Source Infor	mation					1 ¹	First 🚺 1-	6 of 6 🚺 Last	
Data Source Columns	<u>Column Label</u>	Field Format	Column T	<u>vpe</u>	<u>Total</u>	Aggreg	<u>ate T</u>	otal Name	
Month		String	Axis	*			L		
Region		String	Axis	~					
Product		String	Axis	*					
Unit Cost		Number	Value	*		Sum	*		
Sales		Number	Value	*		Sum	*		
Prd Sales		Number	Value	*		Sum	*		
Select All	Clear	All							
The Note colur Column Type Defin Selec detai			ote: Colum lumns can efine the ax elect the Di tailed-data	in labo have kis, va splay view	els have the sam lue, or option of the g	e to be ne label display to enal grid an	unique. v memb ble the c d the ch	No two data ers for a colu column to ap nart.	asource umn. opear in the
Total		No ca Pi Se en	ote: At leas n also select vot Grid m elect which abled. ote: This co	st one et this odel i Axis	Axis ar column n the do membe	nd one n as a r etailed rs have	<i>Value</i> n related a -data vi- e the To only for	nember are reaction param ew. tal (All) attri the data sou	equired. You eter for a ibute rce column
Aggregate Define the a Available of			type 2 ggrega otions	<i>4xis.</i> ite func are <i>Avg</i>	tions for g, <i>Cour</i>	or the <i>V</i>	<i>alue</i> type me <i>Min,</i> and <i>Su</i>	embers. <i>um</i> .	

	Note: This column is only available for the data source column with column type <i>Value</i> . Value members of type <i>Number</i> and <i>Signed Number</i> can be associated with any of the aggregate functions. Value members of any other type can only be associated with the Count aggregate function.
Total Name	Optionally, specify the total names, which override the default All string.
Next	Click this button to advance the wizard to the next page.

Example: Setting Labels for Columns and Total Names

Image: Setting Labels on the Specify Data Model Values page

This example illustrates the fields and controls on the Specify Data Model Values page with column labels.

Pivot Grid Wizard Step 3 of 5									
1-2-3-4-5 									
Specify Data M	lodel Value	s							
Specify the Column Type	and the Aggregat	e functions for the	selected [Data Mod	lel				
Title Sale Informati	on Model								
Select Data Source Info	rmation					112	First 1		
Data Source Columns	Column Label	Field Format	Column 1	Гуре	<u>Total</u>	Aqqree	qate	Total Name	
Month	Time	String	Axis	*					
Region	Location	String	Axis	~	\checkmark]
Product	Item	String	Axis	~]
Unit Cost	Cost	Number	Value	*		Sum	~		
Sales	Sale	Number	Value	*		Sum	~		
Prd Sales	Product Sales	Number	Value	*		Sum	*		
Select All	Clear	All							

Image: Labels in Pivot Grid's grid

This example illustrates the labels in Pivot Grid's grid.

¢ →						
Sale Information Model Item (All) (All)						
	Cost (Sum)	Sale (Sum)	Product Sales (S	🔽 (Select All)		
all all	120201.99	67823	25627454.11	BULLNOSE_XL240		
01/01/2004	17080.44	9689	3638614.55	BULLNOSE_XL244		
02/01/2004	16735.36	9689	3565107.19			
03/01/2004	16694.92	9689	3556495.73			
04/01/2004	16724.35	9689	3634315.47			
05/01/2004	18288.44	9689	3845431			
06/01/2004	17425.48	9689	3712121.92	OK Cancel		
07/04/2004	17253	9689	3675368.25			

Image: Labels in Pivot Grid's chart

This example illustrates the labels in Pivot Grid's chart.



Selecting and Configuring Prompts

If the selected query has prompts attached, the Select Query Prompt Values and Configure Visible Prompts sections appear in the Specify Data Model Values page.

Image: Specify Data Model Values page with the prompt sections

This example shows the Specify Data Model Values page with the Select Query Prompt Values and the Configure Visible Prompts sections.

Specify Data Model Values Specify the Column Type and the Aggregate functions for the selected Data Model Title Salary Analysis						
Select Data Source Infor	mation	E. LE.	a . . .	<u>ار</u>	진 First 🚺 1-1	2 of 12 🕑 Last
Data Source Columns	Column Label	String	Column Type Display	lotal	Aggregate	<u>l otal Name</u>
טו		ourig	Display •			
Employee Name	Employee	String	Axis •			
Department		String	Axis •	V		
Current Annual Salary		Number	Value •	•	Average 🔹	
Minimum Annual Salary		Number	Value 🔻	•	Average 👻	
Currency		String	Axis 🔻	v		
Proposed % Increase		Number	Value -	•	Average 👻	
Reporting		String	Axis 🔻	-		
Select All Clear All Select Query Prompt Values Budget ID HXCMPMSS5 *Start Dt 01/01/2551 TreeNd Num						
Configure Visible Dromot	200000					
Query Prompt Name	S	Vis	ible Prompt	🛩 1-4 of 4 🕊	Last	
Budget ID						
Start Dt						
TreeNd Num						
TreeNd End						

Select Query Prompt Values

Enter the default values for the PSQuery runtime prompts.

	Note: This section is only available when the selected query has prompts attached. The default value in the Select Query Prompt Values section is blank and you are able to define your prompt values. If the required prompt fields are blank or if the format of data entered is incorrect, Pivot Grid Wizard displays a validation error.
Configure Visible Prompts	Select the Visible Prompt check box for the query prompts that will be visible to the viewers. Otherwise, clear the Visible Prompt check box for the query prompts that will be hidden from the viewers. If all prompts are set to be invisible, the Prompts option won't be displayed under the Options Menu in Pivot Grid Viewer.

Specifying Data Model Options

Use the Specify Data Model Options (PTPG_WIZ_OPT) page to define the initial layout of the grid and the chart.

Navigation

Access the Specify Data Model Options page by selecting the Next button on the Specify Data Model Values page.

Image: Specify Data Model Options page

This example illustrates the fields and controls on the Specify Data Model Options page. Definitions for the fields and controls appear following the example.

Pivot Grid Wizard			Step 4 of 5
1-2-3-4-5		< Previous	Next >
Specify Data Model C	Options		
Specify the values for the Display a	nd View Options for the Pivot Grid :	and Chart.	
Title Sale Information Mode	4		
➡ Grid and Chart View Options			
Default View			
O Grid Only	O Chart Only	Orid and Characteristics	art
Specify Axis Information		Personalize Find 🗖	First 🚺 1-6 of 6 ▶ Last
Data Source Columns	Field Format	Grid Axis	Chart Axis
1 Month	String	Row 🗸	X-Axis 💌
2 Region	String	Filter 🗸	Filter 🖌
3 Product	String	Filter 💌	Filter 💌
4 Unit Cost	Number	Column 🗸	Y-Axis 💌
5 Sales	Number	Column 💌	~
6 Prd Sales	Number	Column 🖌	~
Grid Options			
Chart Options			
Viewer Options			

This page has four main sections: Grid and Chart View Options, Grid Options, Chart Options, and Viewer Options. Each section can be expanded or collapsed.

Grid and Chart View Options

Expand to display the view options.

Default View

Define Pivot Grid view options for the grid and the chart.

Available options are:

- Grid Only
- Chart Only
- Grid and Chart

Specify Axis Information	Select the initial grid and chart layout. Note that:
	• Both grid and chart axes must be selected, irrespective of the display option selected. Both grid and chart have the same filters. All the Value type columns lie on one axis on the pivot grid.
	• For the chart, Axis type members can be selected as X axis and Series, whereas the Value type members can be selected as Y axis and Overlay.
	• You can select only one X axis, Y Axis, Series, or Overlay member.
Next	Click to advance the wizard to the next page

to advance the wizard to the next page.

Grid Options

Use the Grid Options section to define Pivot Grid view options for the grid and the chart.

Image: Grid Options section

This example illustrates the fields and controls on the Specify Data Model Options page - Grid Options section. Definitions for the fields and controls appear following the example.

➡ Grid Options	
 Collapsible Data Area Expanded State 	No Drag and Drop
Collapsible Data Area	Select to allow viewers to collapse the data area.
Expanded State	Select to have the initial view expanded.
No Drag and Drop	Select if you do not want users to have the ability to drag a drop filters, rows, and column axes.

Chart Options

Expand the Chart Options section to enter additional chart options.

Image: Chart Options section

This example illustrates the fields and controls on the Specify Data Model Options page - Chart Options section. Definitions for the fields and controls appear following the example.

·		
	Title Sale In	formation Model
	Type 2D Ba	r Chart
	X-Axis Label Month	
	Y-Axis Label Unit Co	ost
	Advanced Options	
	Legend None	▼
	Height	
	Width	
	Subtitle	
	Footer	
	Y-Axis Precision	Exploded Pie
T	itle	Enter a title for your chart. By default, the Pivot Grid model name is used.
Ţ	ype	All PeopleSoft chart types are supported.
X	-Axis Label	Enter a label for the X axis. By default, the field name for the X axis is used.
Y	-Axis Label	Enter a label for the Y axis. By default, the field name for the Y axis is used.
A	dvanced Options	Define display options for the chart, including chart legend, and height and width of the chart.
L	egend	Select a legend for the chart. The available options are <i>Bottom</i> , <i>Left</i> , <i>None</i> , <i>Right</i> , and <i>Left</i> .
		By default, the None option is selected.
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.
E	xploded Pie	Select to view the 2D or 3D charts with exploded sectors.

Viewer Options

Use the Viewer Options section to hide chart icon shortcuts and to disable menu options in the Pivot Grid display. This configuration is at the model level and is applicable for all views.

For example, if the Hide Chart, Pie Chart, and Horizontal Bar Chart options are deselected in the Viewer Options section, then in the Pivot Grid display, the Hide Chart option in the Option Menu drop-down list is disabled, and the Pie Chart and the Horizontal Bar Chart icons are invisible.

Image: Viewer Options section

This example illustrates the fields and controls on the Specify Data Model Options page - Viewer Options section with the Hide Chart, Pie Chart, and Horizontal Bar Chart options deselected.

 Viewer Options 		
	 ✓ View Grid ✓ Export Data ✓ Chart Options 	 ✓ Bar Chart ✓ Line Chart ☐ Pie Chart
	☐ Hide Chart ✓ Save	Horizontal Bar Chart

Note: If no view option is selected in the Viewer Options section and if all prompts are set to invisible, then the Options Menu is invisible in Pivot Grid Viewer.

Irrespective of how you set the View Grid option in the Viewer Options section, the View Grid option is always available in the Options Menu for the chart-only models in accessibility mode.

Image: Pivot Grid display without some viewer options

This example illustrates the Pivot Grid display with the Hide Chart option in the Option Menu drop-down list is disabled, and the Pie Chart and the Horizontal Bar Chart icons are invisible.



Note: You can selectively show and hide prompts using the Select Query Prompt Values section in the Pivot Grid Wizard – Specify Data Model Values page.

Viewing Pivot Grid Displays

Use the Pivot Grid Display page (PTPG_WIZ_DISP) to review the Pivot Grid model based on the display option and layout selected. Optionally, you can modify the Pivot Grid model to finalize the design and then click the Save button to save it. Pivot Grid model metadata is saved to the database.

Note that, Pivot Grid displays the value θ (zero) in the grid cell if:

• There is no data for the grid intersection point.

In this case, Pivot Grid displays θ as a text and you cannot drill down to details from this text.

• Aggregate function returns 0 for the grid intersection. A common use case could be +ve and -ve values adding up to 0 for the Sum aggregate.

In this case, Pivot Grid displays 0 as a link and you can drill down to details from this link.

• In PeopleTools 8.53, the Pivot Grid Display page displays up to 100 characters of the long character fields.

Navigation

Access the Pivot Grid Display page by selecting the Next button on the Specify Data Model Options page.

Image: Pivot Grid Display page

This example illustrates the fields and controls on the Pivot Grid Display page. Definitions for the fields and controls appear following the example.



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

• Chart Option: Select to open the User Charting Options dialog box, where you can change the chart layout, chart axes, and filters.

Note: To drill down on the chart, click the chart data points. To drill out on the chart, click the drillout link, which appears as a locator link at the top of the chart.

If the Pivot Grid model is in the Chart Only mode or in the Grid and Chart mode, the available options are Export Data and Chart Option.

If the Pivot Grid model is in the Grid Only mode, the available option is Export Data.

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

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.

Click to access the Assign Related Actions page, where you can assign services to be used as Related Actions, 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 after you save the Pivot Grid model.

See Using and Configuring the Related Actions Menu.

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

You can also add new, delete, or update existing pagelets that are based on the specific Pivot Grid model that you edited in the wizard.

Note: The Publish as Pagelet link is available after you save the Pivot Grid model.



Configure Related Content

Publish as Pagelet

See <u>Publishing Pivot Grid Models as Pagelets Using the Pivot</u> <u>Grid Wizard</u>.

Note: When working with the Pivot Grid wizard, you can modify your previous selections at any step by clicking the step number icons. Changes to your selections could change the Pivot Grid model.

Publishing Pivot Grid Models as Pagelets Using the Pivot Grid Wizard

Use the Review Pagelets page (PTPG_PGLT_LST) and the Publish as Pagelet page (PTPG_PUBASPGLT) to view a list of pagelets that are using the current Pivot Grid model and where you can create home page and template Pivot Grid pagelets without navigating to the pagelet wizard. You can also add new, delete, or update existing pagelets that are based on the specific Pivot Grid model that you edited in the pagelet wizard.

To publish a Pivot Grid model as a pagelet using the Pivot Grid Wizard:

- 1. Access the Pivot Grid Wizard by selecting Reporting Tools, Pivot Grid, Pivot Grid Wizard.
- 2. In Pivot Grid Wizard, select step 5 to access the Pivot Grid Display page.
- 3. Click the Publish as Pagelet link to display the Publish as Pagelet page.

Note: The Publish as Pagelet link is available after you save the Pivot Grid model.

Image: Publish as Pagelet page

This example illustrates the fields and controls in the Publish as Pagelet page after you click the Publish as Pagelet link in the Pivot Grid Display page or the Edit button in the Review Pagelets page.

Add new Pagelet	×
Publish as Pagelet	<u>Help</u>
Publish the Pivot Grid model as a Pagelet	
Data Source	
*Pagelet Title Sale Information Model	
Description Sales information for demo	
Pagelet Type	
✓ Homepage	
Embeddable	
Pagelet Security	
Publish as Public	
O Publish with Security Roles	
Publish Cancel	

4. Define the data source, pagelet type, and pagelet security options.

5. Click the Publish button.

Image: Review Pagelets page

This example illustrates the fields and controls in the Review Pagelets page after you click the Publish button on the Publish as Pagelet page.

Review Pagelets								
	Help							
Review Pagelets								
Add, edit or delete Pagelets for the Pivot Grid model								
Personalize Find View All 🗖 🛗 First 🚺	1 of 1 🕨 Last							
Pagelet Title	Edit							
Sale Information Model	Edit							
Add New Delete Selected Return								

6. Optionally, you can add new, delete, or update existing pagelets that are based on the current Pivot Grid model.

Related Links

Publishing Pivot Grid Models as Pagelets Using the Pivot Grid Wizard Creating a New Pivot Grid Pagelet Using the Pagelet Wizard

Using and Configuring the Related Actions Menu

In the Pivot Grid wizard - Specify Data Model Values page, you can select the Display option to enable the column to appear in the detailed-data view of the grid and the chart. You can also select this column as a related action parameter for a Pivot Grid model in the detailed-data view.

In Pivot Grid models, you can configure the related action at the cell level in the grid. Each cell in the Pivot Grid model represents an aggregate fact value. For each fact, the combination of different dimensions is defined for each related action service. Clicking the fact value number populates a related action menu, which is a combination of all the related actions that were configured for that fact.

Note: If related actions are not configured for the Pivot Grid model, then clicking the fact value number opens the Detailed View page.

To drill down on the Pivot Grid charts, you must enter an authentication domain either when you set up the PeopleSoft Pure Internet Architecture or in the Web Profile page. See "Configuring General Portal Properties" in "Configuring Web Profiles" (PeopleTools 8.53: Portal Technology) and "Setting Up the PeopleSoft Pure Internet Architecture" in the Installation Guide.

To configure Related Actions from Pivot Grid Wizard:

- 1. Select Reporting Tools, Pivot Grid, Pivot Grid Wizard.
- 2. Open an existing Pivot Grid model, and access Step 5 Pivot Grid Display page.

3. Click the Configure Related Content link.

The Assign Related Actions page appears.

4. Define the values for Service ID, Service Label, and Service Target.

Image: Assign Related Actions page

This example illustrates the fields and controls on the Assign Related Actions page.

Configure Related Actions	Confi	gure <u>L</u> ayout								
Assign Related Actions										
Assign services to be used as Related Actions. Select the service target to determine where the service will be displayed. Use the Configure link to define the parameter mappings and options for the service.										
Pivot Grid Related Actions	Sales	Information Model								
Assign Related Actions to the	Pivot G	srid.								
				Personalize Find Viev	v All 🚺 🛛 First 🚺 1 of 1 🖸 Last					
Enable Service Type	Enable Service Type Select Service ID Service Label *Service Target Configure									
Service 🔻	Q	QE_GOOGLE	Region	New Window 💌	Configure + -					

- 5. Click the Configure button.
- 6. Set the Mapping Type to Data Column.
- 7. Click the search icon in the Select column to select an appropriate Pivot Grid data column.
- 8. In the Menu Options section:
 - Select the Detail View option to display the related actions menu only in the Detailed View grid.
 - Select the Aggregate View option to display the related action menu in both grid and chart.

• Select the data columns on which you want to show the menu.

Image: Configure Service page

This example illustrates the Configure Service page.

C	Configure Service										
(Configure Service										
	Service ID QE_GOOGLE Service Label Region										
Map Parameters 🕜 Personalize Find View All 🗖 First 🚺 1								🚺 1-2 of 2 🚺 L	.ast		
		Paramete <u>Name</u>	er <u>Parameter</u> Label	<u>Required</u> <u>Flaq</u>	Mapping	<u>і Түре</u>	Select	Mapping Data	Mappir	nq Details	
	1	q	query		Data C	olumn 💌	Q	Region	A.QE_E	BAM_REGION_	FLD
	2	display flag	page field to display field			•					
	•	Menu Op	tions								
		🔽 Detai	l View								
		🗹 Aggre	egate View								
					Pers	onalize Find	_ا هر	First 🚺 1-3 of 3	Last		
			Data Column		Da	ta Source Co	lumns	Column Type			
			A.QE_BAM_F	RDSALES	_FL Pr	d Sales		Value			
			A.QE_BAM_S	ALES_FLE) Sa	lles		Value			
			A.QE_BAM_U	JNIT_FLD	Un	nit Cost		Value			

9. Click the OK button to exist the Configure Service page, and click the OK button again to exist the Assign Related Actions page.

10. Save your settings.

Image: Related Actions menu in a chart-only model

This example illustrates a chart-only model with the related action menu opened in chart. Note that, in a chart view, clicking the chart displays the related actions for the fact being plotted on the Y axis. The related actions are a combination of all the related actions that were configured for the fact.



Image: Related Action menu in the Detailed View of a chart-only model

This example illustrates a related action menu that is opened in the Detailed View of a chart-only model. Note that, in the Detailed View, a related action widget aggregates all the related actions for all the facts and dimensions for a row.

Det	ailed Data		Pe	rsonalize Find View	First 🚺 1-5 of 5 🚺 Last		
	<u>Month</u>		Region	Product	<u>Unit Cost</u>	<u>Sales</u>	Prd Sales
1	01/01/2004	 Actions 	HAWAII	PREMIER_PRO	272.25	550	149737.5
2	01/01/2004	Physica	WAII	MALIBU_X44	15.59	2300	35862.75
3	01/01/2004		WAII	FX-S800	2115.63	200	423126
4	01/01/2004	 Actions 	HAWAII	ES_700	1119.19	65	72747.67
5	01/01/2004	▼ Actions	HAWAII	BULLNOSE_XL244	747.45	900	672705

Image: Related Action menu in the grid area of a Grid and Chart model

This example illustrates a grid-and-chart model with the related action menu opened in grid.



Image: Related Action menu in the Detailed View of a Grid and Chart model

This example illustrates a related action menu that is opened in the Detailed View of a grid-and-chart model.

Det	ailed Data		Person	alize Find View All	First 🚺 1-20 of 20 🚺 Last		
	<u>Month</u>		Region	Product	<u>Unit Cost</u>	Sales	Prd Sales
1	01/01/2004	 Actions 	WEST_COAST	PREMIER_PRO	272.25	577	157088.25
2	01/01/2004	Region	EST_COAST	MALIBU_X44	15.59	1800	28066.5
3	01/01/2004		EST_COAST	FX-S800	2115.63	150	317344.5
4	01/01/2004	 Actions 	WEST_COAST	ES_700	1119.19	30	33575.85
5	01/01/2004	 Actions 	WEST_COAST	BULLNOSE_XL244	747.45	320	239184
6	01/01/2004	 Actions 	MIDWEST	PREMIER_PRO	272.25	433	117884.25
7	01/01/2004	 Actions 	MIDWEST	MALIBU_X44	15.59	3	46.77
8	01/01/2004	 Actions 	MIDWEST	FX-S800	2115.63	300	634689
9	01/01/2004	 Actions 	MIDWEST	ES_700	1119.19	42	47006.19
10	01/01/2004	 Actions 	MIDWEST	BULLNOSE_XL244	747.45	37	27655.65
11	01/01/2004	 Actions 	HAWAII	PREMIER_PRO	272.25	550	149737.5
12	01/01/2004	 Actions 	HAWAII	MALIBU_X44	15.59	2300	35862.75
13	01/01/2004	 Actions 	HAWAII	FX-S800	2115.63	200	423126
14	01/01/2004	 Actions 	HAWAII	ES_700	1119.19	65	72747.67
15	01/01/2004	 Actions 	HAWAII	BULLNOSE_XL244	747.45	900	672705
16	01/01/2004	 Actions 	EAST_COAST	PREMIER_PRO	272.25	320	87120
17	01/01/2004	 Actions 	EAST_COAST	MALIBU_X44	15.59	1300	20270.25
18	01/01/2004	 Actions 	EAST_COAST	FX-S800	2115.63	211	446397.93
19	01/01/2004	 Actions 	EAST_COAST	ES_700	1119.19	41	45886.99
20	01/01/2004	 Actions 	EAST_COAST	BULLNOSE_XL244	747.45	110	82219.5

Related Links

"Defining Related Content Services" (PeopleTools 8.53: Portal Technology)

Specifying Data Model Options

The way you define the data model determines the actions that are available in the pivot grid, as well as the initial view. This section provides some examples of data sources designed to:

- Use a filter.
- Use multiple filters.
- Use a series.
- Use an overlay.

Using a Filter

Image: All axis columns have Total selected

In this example, all the axis columns have Total enabled.

Select Data Source Infor	elect Data Source Information								
Data Source Columns	Column Label	Field Format	Column Type		<u>Total</u>	<u>Aqqreqate</u>		<u>Total Name</u>	
Month	Time	String	Axis	*					
Region	Location	String	Axis	*	✓				
Product	Item	String	Axis	*	✓				
Unit Cost	Cost	Number	Value	*		Sum	*		
Sales	Sale	Number	Value	*		Sum	~		
Prd Sales	Product Sales	Number	Value	*		Sum	*		

Image: Example of filtering on Month

On the Data Source page, Month is defined as a filter.

← Grid and Chart View Options										
Default View										
🔘 Gri	id Only O C	hart Only	Orid and	Chart						
Specify Axis Information Personalize Find 🗖 🗰 First 💶 1-6 of 6 🕨										
Da	ata Source Columns	Field Format	Grid Axis	Chart Axis						
1 Mc	onth	String	Filter	Y Filter Y						
2 R6	egion	String	Row	V X-Axis V						
3 Pr	oduct	String	Row	v						
4 Ur	nit Cost	Number	Column	Y-Axis V						
5 Sa	ales	Number	Column	v]					
6 Pr	d Sales	Number	Column	× ×						

Image: Example of a Pivot Grid model when the display option is Grid and Chart

This example shows the view of a Pivot Grid model when the display option is Grid and Chart.



Note that:

• You can change the grid layout at runtime by dragging members onto a different axis.

The chart layout also changes based on the grid layout to preserve synchronization between the grid and the chart.

• Select the Chart Options option from the Option Menu icon to change the chart type and the Y axis of the chart.

Drilling Down on a Region

The Pivot Grid displays detailed data based on the region on which a drilldown is performed. For the chart, the same data appears for the selected Value column. You can select the chart type and change the Y axis by selecting a different Value column to be plotted.

Image: Example of a Pivot Grid model when the display option is Grid and Chart and the user drilled down on a region

This example shows a Pivot Grid model when the display option is Grid and Chart and the user drilled down on a region.



Using Multiple Filters

Image: Data model with multiple filters

In this example, Product and Month are defined as filters.

✓ Grid and Chart View Options											
Default View											
Chart Only	Orid and Chart										
Field Format	Grid Axis	Chart Axis									
String	Filter 💌	Filter 🗸									
String	Row 🗸	X-Axis 🗸									
String	Filter 🗸	Filter 🗸									
Number	Column 🗸	×									
Number	Column 🗸	Y-Axis 🗸									
Number	Column 🗸	~									
	Chart Only Field Format Field Format String String String Number Number Number	Chart Only Orid and Chart Personalize Find ♥ ₩ Field Format Grid Axis String Filter String Row String Filter Number Column Number Column Number Column V									

Image: Example of Pivot Grid with Month and Product fields as report filters

These same filter values also drive the chart. The X axis of the chart is preselected based on the grid layout. You can select the chart type and the Y axis.


Using a Series

Series value is automatically determined for the chart when the display option is *Grid and Chart*. The automation is dependent on the grid layout; if any dimension (axis type) is selected on the column, then it is automatically selected as a series for the chart.

Image: Using Month for a series

In this example, all the axis columns have All (Total) enabled. On the Data Source page, Month is defined as column axis and used as a series.

Grid and Chart View Opt	ions		
Default View			
Grid Only	Chart Only	Orid and Char	t
Specify Axis Information		Personalize Find 🗖 🏙	First 🚺 1-6 of 6 🕨 Last
Data Source Column	ns Field Format	Grid Axis	Chart Axis
1 Month	String	Column 🔽	Series 🔽
2 Region	String	Row 💌	X-Axis 🗸
3 Product	String	Row 💌	~
4 Unit Cost	Number	Column 💌	Y-Axis 💌
5 Sales	Number	Column 💌	~
6 Prd Sales	Number	Column 💌	~

Image: Months displayed as a series on a chart



This example shows the chart with detailed data based on the Month field.

Using an Overlay

Note: Chart overlay is available when the display option is *Chart Only* and the data is displayed in bar charts.

Image: Example of using overlay

If the display option is *Chart Only*, selecting a column as an overlay field results in plotting multiple charts based on the Y axis and the overlay field. In this example, Unit Cost is used as an overlay field.

✓ Grid and Chart View Options									
Default View									
O Grid Only O	Chart Only	O Grid and Char	t						
Specify Axis Information		Personalize Find 💷 🛗	First 🚺 1-6 of 6 🚺 Last						
Data Source Columns	Field Format	Grid Axis	<u>Chart Axis</u>						
1 Month	String	Filter	Filter 👻						
2 Region	String	Row	X-Axis 🗸						
3 Product	String	Row	×						
4 Unit Cost	Number	Column	Overlay 🗸						
5 Sales	Number	Column 🔽	Y-Axis 💌						
6 Prd Sales	Number	Column 🗸	¥						
Title Type X-Axis Label Y-Axis Label	Sale Information Model 2D Line Chart Region Sales								
Advanced Options	None 🗸								
Height									
Width									
Subtitle									
Footer Y-Axis Precision	Explode	d Pie							

Image: Initial display for overlay

The chart is plotted with Region as the X axis and Unit Sales as the Y axis. The second chart is plotted with Region as the X axis and Unit Cost as the Y axis.



Note: You can change the overlay field using fields in the Specify Data Model Options page, Chart Options section.

Updating a Pivot Grid Model Using the Pivot Grid Wizard

This section discusses how to update a Pivot Grid model using the Pivot Grid wizard.

Steps Used to Update a Pivot Grid Model Using the Pivot Grid Wizard

To update a Pivot Grid model using the Pivot Grid wizard:

- 1. Select Reporting Tools, Pivot Grid, Pivot Grid Wizard.
- 2. Search for and select an existing Pivot Grid model to update.
- 3. Modify the Pivot Grid model.

- 4. Preview the changes on the last page of the wizard.
- 5. Save the Pivot Grid model.

The Pivot Grid model metadata is saved to the database.

Using Pivot Grid Viewer

Pivot Grid Viewer Overview

Pivot Grid Viewer is the component that Pagelet Wizard, applications, and so on use to view Pivot Grid models. Pivot Grid Viewer parses the pivot grid attributes (Pivot Grid name, PSQuery runtime prompt values, grid axis information, grid view options, chart type information, and display options) and renders the display on the page. This component enables user to:

- View the pivot grid in the browser.
- Change the layout of the grid and the chart to view the data differently.
- Drill down on the grid and chart to get detailed views of the data.

If the display option is Chart Only, drilldown can be performed by clicking the chart. If the display option is Grid and Chart, drilldown is performed based on the All members that were defined for the axis type columns.

- Flip the display of the Pivot Grid chart.
- Export the original PSQuery data to Microsoft Excel.
- Change the PSQuery runtime prompt values.
- Export the slice of data seen in the grid to Microsoft Excel.
- Change the chart types to either bar, line, or pie.
- Change the chart options—chart axes, chart title, axis labels, and so on—using the User Charting Options dialog box.
- Save user preferences in addition to the initial options set for the Pivot Grid View.

You can save the grid and chart layouts based on the filtering and dicing done on the grid and chart. When rendering the Pivot Grid display, these user preferences have a higher priority than the default view options.

The following table lists the attributes that can be view options and that can be customized by users.

Attribute	View Option	User Preference				
Pivot Grid core (including axis, values, aggregation functions, and All members).	No	No				
Pivot Grid display option (including Grid, Chart, or Grid and Chart).	Yes	No				

Attribute	View Option	User Preference
Grid Display Options (including Collapsible Data Area, expanded or collapsed Initial Grid View, drag-and- drop operations on the grid, and so on).	Yes	No
Grid axis information.	Yes	Yes
Grid report filter values.	No	Yes
Chart type information.	Yes	Yes
Chart axis information.	Yes	Yes
Other chart display options, such as legends, chart title, and so on.	Yes	Yes
PSQuery runtime prompt values.	Yes	Yes

Note: If the query used in the Pivot Grid model is changed after the Pivot Grid model is created, you need to modify and save the Pivot Grid model to ensure all changes are properly displayed in the Pivot Grid Viewer.

Viewing Pivot Grid Options

Pivot Grid View Options is the component that facilitates creating new views and updating existing ones for a Pivot Grid model. This component provides a framework to save the Pivot Grid View Name along with all the view options. It enables Pagelet Wizard or applications to pass just the Pivot Grid View Name

instead of the whole list of Pivot Grid display preferences as content reference attributes. You can create multiple Pivot Grid View Names and associate them with a single Pivot Grid model.

Image: Pivot Grid view options

This diagram shows Pivot Grid view options.



Note: Whenever a new Pivot Grid model is created, it is always associated with a default view. The default view name is *<Pivot Grid Model Name>.View*.

The Pivot Grid Viewer component is not fully accessible using a screen reader, for example, JAWS (Job Access With Speech).

Dynamically Passing Prompt and Filter Values Into Pivot Grid Model

The Pivot Grid Viewer component is able to accept dynamic parameters to generate data—by creating Pivot Grid pagelets—for Pivot Grid models and the specified views using these dynamic parameters:

• Pivot Grid Model Name

Parameter Name: PGNAME

• Pivot Grid View Name

Parameter Name: VIEWNAME

In addition, the Pivot Grid Viewer component uses these parameter types and their values to pass prompt values dynamically to render the Pivot Grid models in a Related Content frame or to use Related Actions to render a Pivot Grid model:

• Pivot Grid PSQuery Prompt Values

Parameter Name: Unique name for the prompt in PSQuery.

• Pivot Grid PSQuery Filter Values

Parameter Name: Unique name for the corresponding field in PSQuery.

Suppose that you are required to view the compensation allocation. You are going to use a Pivot Grid model that has the budget ID prompt, map the parameters, view the compensation allocation, and analyze data that is related to compensation across departments. You use the following steps to pass the dynamic parameter values in the Pivot Grid model and display the requested data:

1. Use the Define Related Content Service page to create a related content service that contains a prompt —in this case, Budget ID—as a parameter.

Note that the Budget ID parameter in the Pivot Grid model, which is also a prompt, was added as a service parameter; the Budget ID parameter name must exactly match the unique field name in

the query because the Pivot Grid Viewer component uses this unique name to understand what this parameter means for the pivot grid.

Image: Define Related Content Service page

This example illustrates the fields and controls on the Define Related Content Service page with the Budget ID prompt as a parameter.

Define Related Content Service									
Service Information 📀									
Service ID WCS_PIVOT_SERVICE									
*Service Name Pivot Service		Object Owner ID	<u></u>						
Description		Ŕ							
*URL Type Peoplesoft Component	*	Write help text	Copy Service Definition						
*Node Name LOCAL_N	NODE	٩							
Component Parameters									
*Menu Name PTPG_WIZ_MENU	Q	*Market GBL 🔍							
*Component Name PTPGVIEWER	Q	Page Name PTPG_PGVI	EWER						
Post mapping definition data									
Post mapping deminuon data									
note, parameter names are case-sensitive.									
Service URL Parameters			First 🚺 1-3 of 3 🗋 La	ist					
Service URL Parameters *Parameter Name	Required Flag	*Description	First 🚺 1-3 of 3 💟 La	ist					
Service URL Parameters Parameter Name BIND1	Required Flag	*Description Budget ID	First 1-3 of 3 La	ist					
Service URL Parameters *Parameter Name 1 BIND1 2 PGNAME	Required Flag	*Description Budget ID Pivot Grid Name	First 1-3 of 3 La						
Service URL Parameters	Required Flag	*Description Budget ID Pivot Grid Name PG View Name	First 1-3 of 3 La						
Service URL Parameters *Parameter Name 1 BIND1 2 PGNAME 3 VIEWNAME		*Description Budget ID Pivot Grid Name PG View Name <u>Test Related Content Servic</u>	E						
Service URL Parameters		*Description Budget ID Pivot Grid Name PG View Name <u>Test Related Content Servic</u>	E						
Service URL Parameters *Parameter Name 1 BIND1 2 PGNAME 3 VIEWNAME Show Formed URI Display Options Image: Provide the service of th		Description Budget ID Pivot Grid Name PG View Name <u>Test Related Content Servic</u>	J2 First 1-3 of 3 La Image: state						
Service URL Parameters *Parameter Name 1 BIND1 2 PGNAME 3 VIEWNAME Show Formed URI Display Options Image: Refresh		*Description Budget ID Pivot Grid Name PG View Name <u>Test Related Content Servic</u>	Image: Pirst						
Service URL Parameters *Parameter Name 1 BIND1 2 PGNAME 3 VIEWNAME Show Formed URI Display Options Image: Refresh		Description Budget ID Pivot Grid Name PG View Name <u>Test Related Content Servic</u>	J ² First 1-3 of 3 La	est					
Service URL Parameters *Parameter Name 1 BIND1 2 PGNAME 3 VIEWNAME Show Formed URI Display Options ✓ Refresh New Window Select Security Options ✓ Public Access	Required Flag		First 1-3 of 3 La						

Note: If the VIEWNAME is not set in the Service URL Parameters section, then the default view will be invoked.

2. Use the Assign Related Actions page to associate the related content service with a component.

Image: Assign Related Actions page

This example illustrates the fields and controls on the Assign Related Actions page that is used to associate the related content service with a component.

onfigure	e Related <u>C</u> ontent (Configure	Relate	d Actions Configure	Layout					
ssigr	n Related Actio	ns								
sign se iere the appings	ervices to be used as R service will be display and options for the se Portal Nan Content Reference	elated Ac ed. Use th rvice. ne EMPL ce Upda	tions. S ne Conf .OYEE te Com	elect the service target to igure link to define the pa pensation Proposals) determine arameter					
ompon	ent Level Related Act	ions								
ssign (Component Level Rela	ted Action	s to be	added to the Drop-down	menu					
and Sea	arch Actions menu.				Pers	onalize Find View All	First	1 of 1 🕑 Last		
nable	Service Type S	elect Ser	vice ID	Service Labe	el *Se	ervice Target	Configure	- TOTT - Edat		
V	Service -	۹.			Та	rget Content 🛛 👻	Configure	÷ =		
age Le	vel Related Actions									
Assian	Page Level Related Ac	tions to b	e adder	to a field level contextua	al menu					
						Personalize Find	View All	First 🕙 1-2 of	2 🕑	Las
Enable	Page	Service Type	Select	Service ID	Service Label	Service Target	Page Field Menu	Configure		
V	WCS_ECM_MSS_SUI	M Service		WCS_PIVOT_SERVICE	Peer Analysis Pivot	Modal Window	 Actions Linked 	Configure	+	-
V	WCS_ECM_MSS_SU	M Service		WCS_PIVOT_SERVICE	Salary Increase by P	e Modal Window	 Actions Linked 	Configure	+	-

3. Use the Configure Service page to map parameters.

In this example, use the following values to map the parameters:

- Budget ID is the prompt, which is mapped to a page field.
- Pivot Grid Name is a fixed value and is mapped to the Pivot Grid Model Name.
- Pivot Grid View Name is a fixed value and is mapped to the Pivot Grid View Name.

This parameter is optional and can be ignored. If this parameter is not provided, the Pivot Grid Viewer component will use the default view for the Pivot Grid model.

Image: Configure Service page

This example illustrates the fields and controls on the Configure Service page showing Budget ID is mapped to a page field, Pivot Grid Name is mapped to the Pivot Grid Model Name, and Pivot Grid View Name is mapped to the Pivot Grid View Name.

Fa Co Co	vorites - nfigure Se Dnfigure Page Na Service Service La	Main Menu ervice Service me WCS_EC e ID WCS_PIV abel Peer Ana	 Peopl M_MSS_SI /OT_SERVI Iysis Pivot 	eTools ▼>Portal JM CE	→Related	I Content Service ▼ >I	Manage Rela	ated Content	Service
M	ap Paramet	ers 🕜		Perso	nalize Fin	d View All 🖉 🛛 F	irst 🕚 1-3 of	3 🕑 Last	
	Parameter Name	Parameter Label	Required Flag	Mapping Type	Select	Mapping Data	Mapping Details	Display in field menu	
1	BIND1	Budget Id		Key Field	- 🔍	Budget ID			
2	PGNAME	Pivot Grid Name		Fixed Value	-	WCS_PG_PEER]		
3	VIEWNAME	PG View Name		Fixed Value	•	WCS_PG_PEER.View			
N	Page I	s (?) Field Menu Act	ions Linke Select	1					
s S	Service Filter (?) Package Path Class ID Q Select Security Options								
	Public Ac OK	Cancel							

4. View the compensation allocation in the Manage Self Service component.

Image: Manage Self Service component

This example illustrates the fields and controls on the Manage Self Service component with the Compensation Analytics drop-down list (Related Actions menu).

Favorites - N	1ain Menu	· ▼ >Mana	ger Self Ser	vice •>Compe	nsation and Sto	ock ->Allocate	Compensat	tion						
											Data La	inguage:	English 💌	Print New Window
Betty Locherty Currer	nt Role Su	ıbmitter												
Instructions														
You are viewing P or drill into each e	resident & mployee's	Ceo organi data separa	zation's plan ately.	data for the 2007	7 KUV ANNUAL I	MERIT with Com	pleted status	. Please review th	e information	below and make reco	mmendati	ons. You i	may make upda	ites here
Save for Late	r	Discard (`hanges	Submit	Push Back					Planning C	urrency L	JSD (US Dollar	
Gave for Late		Distaru C	/nungco	Gabrinit	1 GSIT Dack					*Display Indivdua	I Data In F	Paid Curre	incy .	•
ADMINIDEES											e	Co	Salary Increase	alytics
ADMINPRES													Peer Analysis	Pivot
Organization Sum	mary Dat	a 🕐										_		
Organizational S	ummary	My Direct	Reports [)										
Plan		т	otal Eligible	Employees Tota	al Eligible Salari	ies	Total Funde	ed Amount	Total P	roposed Amount	E	Balance		
Salary Increases				172		10,218,345.94		306,55	50.28	30	6,550.28			0.00
Discretionary Bonu	s			172		10,218,345.94	5.94 102,183.37			10	2,183.37			0.00
NQ Stock Option				84		6,038,000.00		42,00	00.00	4	2,000.00			0.00
RSA Stock Award				21		2,693,073.13		39,90	00.00	3	9,900.00			0.00
2007 Merit Adius	t Disc	retionary Bor	nus NQ S	Stock Option	RSA Stock Awar	1								
Direct Reports	2)								Personal	ize Find View All	2	First (1)	1 of 1 🛞 Last	
Name	Add Notes	Exclude	Employee ID	Current Salary	Currency	Funded Amount	Funded Percent	Change Amount	Proposed Percent	Other Changes	Funding B	Balance	Full/Part	
Smith,Harriet			KUV001	204,000.0	0 USD	6,120.00	3.00	6,120.00	3.00	0.00		0.00	0 Full-Time	
Indirect Reports	3								Personalize	Find View All)	First 🕙 1	1-5 of 7 🕑 Las	t
Department	Name	9		Group Status	Balance	Total Eligit Salaries	ole	Total Funded Amount	Funded Percent	Total Proposed Amount	Propos	ed Sta	atus Date	

5. Use the Peer Analysis Pivot option from the Compensation Analytics drop-down list to populate the Pivot Grid model with the Budget ID option selected for that budget cycle.

Image: Salary Analysis model

This example illustrates the Salary Analysis model.

Favorites - Main	Menu -	> Ma	nager Self Servi	ce 🔻 > Compe	ensation	and St	ock 🔻	> Alloca	ate Comp	ensatio										
ORACLE [.]			All - Sear	ch			» A	dvanced	Search	O Last	Search F	tesults	Hon	ne V	Vorklist	MultiCl	hannel Co	onsole	Add to Favorites	Sign o
																		1		D
Allegate Carry		tion																New	Window Personalize	Page 📖
Allocate Com	bensa	uon																		
Betty Locherty Current R	ole Subi	mitter																		
Instructions																				
You are viewing Betty or drill into each emp	Locherty loyee's d	organi: lata sep	zation's plan data arately.	for the Focal 20	11 Sala	ry and B	onus wi	ith Calcul	lated stat	us. Plea	se review	the inforn	nation bel	ow and n	nake recoi	mmenda	tions. You	u may m	nake updates here	
					Salar	y Analy	/sis											×	lar	
Save for Later		Discar	d Changes	Submit	•															
						Filters														
						Depar	rtment	(All)		`	*		Currency	USD					on Analytics	
KU0007_000						10	cation	Corpora	ation Hea	dauada			Job Code	e (All)			~			
Organization Summa	ry Data					Rep	ortina	(All)	auonnea	uquarte.	,									
Organizational Sum	тагу	My Dire	ct Reports				-													
Analytics	Pla	an		Total Eligible Er		001/					Salary	Analysis								
- Analytics	Me	erit Incre	ase		Salary	70K													708.00	
- Analytics	Bo	onus Pla	an		Inual	50K													4,972.00	
Merit Pay Bonus	Plan				age Ar	30K -														
Direct Reports 👔					Avera	10K													1 🕑 Last	
Name	Excl	ude	Current Salary	Funded Amou		UK C	sanna	punup	renton	ee.Mei	Russell	Shawn	P. Daryl	Steve	Christ	oanna	n,Vicki	-	ting	
Channing,Rosanna			72,800.00	5,09			ng.Ro	ue, Ec	\$00 B	2	arker,	ligan,	Rees	igioso	0'uosu	l, yakı	ШZ			
Indirect Reports 🕜							hann	Donal	Franci		۵.	Duil		Rel	Stevel	Stru			Last	
Empl ID and Record	Name			Group Status			0					Employee								
KU0046_000	Rosann	a Chani	ning	In Progress		<u>×</u> 🧉													01PM	
Return to Message &	Alerts																			
																		.:		

Image: Salary Analysis model with the Budget ID prompt

This example illustrates the Salary Analysis model with the Budget ID prompt.



Note: Similarly, related actions can also be configured for Pivot Grid filters based on the unique field names for the Pivot Grid Filter fields in the query.

Creating a Related Content Service with Dynamic Parameter Values for Prompts

To create a related content service with dynamic parameter values for prompts:

- 1. Create a Pivot Grid model that has one or more data source prompts.
- 2. Create a related content service for the Pivot Grid Viewer component.
- 3. Use the following parameters for the related content service:
 - The Pivot Grid Name; parameter name is PGNAME.
 - The prompt; parameter name is the unique name for the corresponding prompt in PSQuery.
- 4. Associate this related content service with an existing component.

The Pivot Grid Name is a fixed value parameter, and the prompt is associated with a page field.

5. Open the component and perform the related action.

Creating a Related Content Service with Dynamic Parameter Values for Filters

To create a related content service with dynamic parameter values for filters:

- 1. Create a Pivot Grid model that has one or more filters.
- 2. Create a related content service for the Pivot Grid Viewer component.
- 3. Use the following parameters for the related content service:
 - The Pivot Grid Name; parameter name is PGNAME.
 - The filter; parameter name is the unique name for the corresponding field in PSQuery.
- 4. Associate this related content service with an existing component.

The Pivot Grid Name is a fixed value parameter, and the filter is associated with a page field.

5. Open the component and perform the related action.

Viewing a Pivot Grid Model Using the Pivot Grid Viewer

Use the Pivot Grid Viewer page (PTPG_PSPGVIEWER) to view the Pivot Grid model with different display options: Grid and Chart, Grid Only, or Chart Only.

Note: If the display option is Grid Only, Pivot Grid displays the grid without the chart. Pivot Grid displays number θ (zero) in the grid cell if the value on the grid cell is equal to θ .

To view a Pivot Grid model using Pivot Grid Viewer page:

1. Select Reporting Tools, Pivot Grid, Pivot Grid Viewer.

The Pivot Grid Viewer page appears with three filter options: Pivot Grid Name, Pivot Grid Data Source Name, and Pivot Grid Data Source Type.

2. Optionally, enter the filter options and perform the search.

All the available and accessible Pivot Grid models are listed. Invalid Pivot Grid models are not listed for this search.

Note: Pivot Grid supports only PSQuery data source and PSQuery type.

- 3. Select a Pivot Grid model for viewing.
- 4. On the Pivot Grid Viewer page, view the Pivot Grid model with different options.

The Pivot Grid model appears with the grid, chart, or both based on the display option selected.

Image: Pivot Grid Viewer page displaying chart only

This example illustrates the fields and controls on the Pivot Grid Viewer page with the default display of Chart Only.



¢,

Image: Pivot Grid Viewer displaying grid only

This example illustrates the fields and controls on the Pivot Grid Viewer page with the default display of Grid Only. Definitions for the fields and controls appear following the example.

🔅 -											
▼ Sale Informa	✓ Sale Information Model										
Month	(AII)	*									
	Unit Cost (Sum)	Sales (Sum)	Prd Sales (Sum)								
EAST_COAST											
■ All	29923.78	13874	4778536.68								
HAWAII											
■ All	30355.1	28105	9626511.87								
MIDWEST											
■ All	29751.56	5705	5746079.73								
WEST_COAST											
■ All	30171.55	20139	5476325.83								

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

- Prompts: Select to open the Datasource Prompts dialog box, where you can change the values for query prompts.
- View Grid: Select to view the grid layout.
- Export Data: Select to export the underlying PSQuery data to Microsoft Excel.
- Chart Option: Select to open the User Charting Options dialog box, where you can change the chart layout, chart axis, and filters.

Note: To drill down on the chart, click the chart data points. To drill out on the chart, click the drillout link, which appears as a locator link at the top of the chart.

- Hide Chart: Select to hide the Pivot Grid chart.
- Display Chart: Select to view the Pivot Grid chart.
- Save: Select 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.

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

<pivot grid="" name=""></pivot>	In the grid section, you can change the grid layout at runtime by dragging members to a different axis.
u¶∎.	Click the Hide Filter icon to collapse the section that displays the Pivot Grid filter options for the Pivot Grid models that have the grid-only mode.
†	Click the Show Filter icon to expand the section that displays the Pivot Grid filter options for the Pivot Grid models that have the grid-only mode.
Filter	Displays the Pivot Grid filter options for the Pivot Grid models that have the chart-only mode.
	You can click to collapse or expand the section. The default setting is the expanded state.
1	Click the Download icon to download the slice of data seen in the pivot grid to Microsoft Excel.
	Click the Show All Columns icon to display all the grid columns.
	Click the Show Scrolling icon to display columns in a scrollable grid.
?	Click the Help for Drag and Drop icon to display the Help for Drag and Drop dialog box, where you can view the help information for drag-and-drop functionality in Pivot Grid.
	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.
<chart></chart>	Click the chart to open the Pivot Grid Chart Data dialog box, where you can view the data that is being plotted.
	Note: You can change PSQuery runtime prompt values.
Return	Click the Return button to close the Pivot Grid viewing and return to the Pivot Grid Viewer page.

Using the Chart Options

Use the User Charting Options dialog box to change the chart layout, chart axis, filters, and so on. In the Advanced Options section, you can specify the chart default dimensions, 3D angle, exploded pie chart, Y-axis precision, and legend positioning.

Navigation

Open the User Charting Options dialog box by selecting the Chart Options option from the Option Menu icon on the Pivot Grid Viewer page.

Image: User Charting Options dialog box

This example illustrates the fields and controls on the User Charting Options dialog box.

User Charting Options						
Title	Sales					
Subtitle						
Footer						
Туре	2D Bar Chart 🗸 🗸 🗸					
X-Axis	Region 🗸					
X-Axis Label	Region					
Y-Axis Field	Unit Cost 🗸 🗸					
Y-Axis Label	Y-Axis Label Unit Cost					
Series	×					
Overlay Field	~					
Chart Filters *Filter	Personalize Find 🖾 🛗 Chart Filter	1-2 of 2 Last				
1 Month		÷ =				
2 Product		+ -				
▼ Advanced Options						
Default Dimensions	Default Y Axis Precision	Exploded Pie				
Height 265	Decimals					
Width 625	Legend None 🗸					

Note: The X Axis, Y-Axis Series, Overlay Field, and Chart Filters fields in the User Charting Options dialog box are not editable if the display option is *Grid and Chart*.

Examples: Viewing a Pivot Grid Model Using Pivot Grid Viewer

Suppose that a PSQuery was built on the record PS_QE_BAM_FACT_TBL, which stores the number of product units sold, unit cost, and product sales for a set of regions and products by month, as shown in the following table.

Region (Key)	Product (Key)	Month (Key)	No. of Units Sold (Units Sold Cube)	Unit Cost (Unit Cost Cube)	Product Sales (Product Sales Cube)
QE_BAM_	QE_BAM_	QE_BAM_	QE_BAM_UNIT_	QE_BAM_SALES	QE_BAM_
REGION_FLD	PRODUCT_FLD	MONTH_FLD	FLD	_FLD	PRDSALES_FL

Viewing a Pivot Grid Model When the Display Option is Grid and Chart

If the display option is Grid and Chart:

- The model for this example shows the sales information for various products for different regions across different months.
- The axis columns are Region, Product, and Month.

All the axis columns have the All Member enabled.

• The Value columns are Unit Cost, Unit Sales, and Product Sales.

Note: If the display option is Grid Only, Pivot Grid displays the grid without the chart.

The initial grid layout has:

- Row axis is Region and Product.
- Column axis is Unit Sales, Unit Cost, and Product Sales.
- Report Filter Field is Month.

The initial chart view has:

- X axis is Region field.
- Y axis is Unit Sales fields.

• Report Filter Field is Month.

Image: Example of a Pivot Grid model when the display option is Grid and Chart

This example shows the view of a Pivot Grid model when the display option is Grid and Chart.



Note: You can change the grid layout at runtime 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. You can change the chart type and the Y axis of the chart.

Drilling Down on a Region

The Pivot Grid displays detailed data based on the region on which the drilldown is performed. For the chart, the same data appears for the selected Value column. You can select the chart type and change the Y axis by selecting a different Value column to be plotted.

The pivot grid has:

• Row axis is Region and Product.

- Column axis is Unit Sales, Unit Cost, and Product Sales.
- Report Filter Field is Month.

The chart has:

- X axis is Region.
- Y axis is Unit Sales.

• Series field is Product.

Image: Example of a Pivot Grid model when the display option is Grid and Chart and drilldown was on a region

This example shows a Pivot Grid model when the display option is Grid and Chart and drilldown was on a region.

÷	•				
	Sale In	formation Model			i i i i i i i i i i i i i i i i i i i
0.0	onth	01/01/2	004		+
- M	onui	01/01/2	004		
			Unit Cost (Sum)	Sales (Sum)	Prd Sales (Sum)
EA	ST_CO	DAST			
	ali =		4270.11	1982	681894.67
	В	ULLNOSE_XL244	747.45	110	82219.5
	E	S_700	1119.19	41	45886.99
	E	X-S800	2115.63	211	446397.93
	N	IALIBU_X44	15.59	1300	20270.25
	P	REMIER_PRO	272.25	320	87120
HA	WAII				
6	ŧ All		4270.11	4015	1354178.92
МІ	DWEST	г			
E	* All		4270.11	815	827281.86
w	EST_C	OAST			
E	ŧ All		4270.11	2877	775259.1
				Sale Information	Model
	4,000				
ţ	3,000				
it Co	2.000				
5	1.000				

EAST_COAST PREMIER_PRO

Region

MIDWEST All

WEST_COAST All

HAWAII AII

EAST_COAST MALIBU_X44

EAST_COAST FX-S800

EAST_COAST ES_700

0

🔟 🖂 🌘

EAST_COAST BULLNOSE_XL244

Changing Chart Options

Use the User Charting Options dialog box to change the chart type or Y axis.

Image: User Charting Options dialog box

This example illustrates the fields and controls on the User Charting Options dialog box.

User Charting Options		
Title	Sales	
Subtitle		
Footer		
Туре	2D Bar Chart 🗸 🗸	
X-Axis	Region 🗸	
X-Axis Label	Region	
Y-Axis Field	Unit Cost 🗸 🗸	
Y-Axis Label	Unit Cost	
Series	×	
Overlay Field	~	
Chart Filters	Personalize Find 🗖 🛗 Chart Filter	1-2 of 2 Last
*Filter		
1 Monun		
2 Product		± =
→ Advanced Options		
Default Dimensions	Default Y Axis Precision	Exploded Pie
Height 265	Decimals	
Width 625	Legend None 🗸	

Changing Filters

To add a filter at runtime, place the cursor on the field in the left side of the grid and drag it to the top part of the grid.

To remove a filter, place the cursor on the filter listed on the top part of the grid and drag it to back to the left-hand column.

Viewing a Pivot Grid Model When the Display Option is Chart Only

This example of Pivot Grid model was defined using Chart Only. The chart initial view has:

• X axis is Region.

• Y axis is Unit Sales.

• Report filter is Month.

Image: Initial view of a Pivot Grid model in bar chart format when the display option is Chart Only

This example shows the initial view of a Pivot Grid model in bar chart format when the display option is Chart Only.



Image: Initial view of a Pivot Grid model in line chart format when the display option is Chart Only

This example shows the initial view of a Pivot Grid model in line chart format when the display option is Chart Only.



Image: Initial view of a Pivot Grid model in pie chart format when the display option is Chart Only

This example shows the initial view of a Pivot Grid model in pie chart format when the display option is Chart Only.



Image: Initial view of a Pivot Grid model in horizontal bar chart format when the display option is Chart Only

This example shows the initial view of a Pivot Grid model in horizontal bar chart format when the display option is Chart Only.



Drilling Down on a Region

Suppose you are drilling down on the chart for the HAWAII region. Click the HAWAII bar (for a bar chart; click the HAWAII slice for a pie chart, click the line for a line chart, or click the horizontal bar for a horizontal bar chart). Select the *Product* value for the Drilldown Field field; the chart now has:

- X axis is Product.
- Y axis is Unit Sales.
- Report filter 1 is Month, and that value is 01/01/2004.
- Report filter 2 is Region, and that value is *EAST_COAST*.

Image: Chart with drilldown for Product and locator link for Region

This example shows a Pivot Grid model when the display option is Chart Only and drilldown was on a Region.



Selecting a Series

In this example, the data model specifies Chart Only and is set up as follows:

- X axis is Region.
- Y axis is Unit Sales.
- Chart series is Product.

• Report filter is Month, and this value is 01/01/2004.

Image: Chart display using a series on the Product field

This example shows the chart displaying each product with a legend.



Selecting an Overlay Field

You can select an overlay field that plots multiple charts based on the Y axis and the overlay field. If the Unit Cost field is selected as the overlay field, then the first chart is plotted with the Region field as the X axis and the Unit Sales field as the Y axis. The second chart is plotted with the Region field as the X axis and the Unit Cost field as the Y axis.

The chart has:

- X axis is Region.
- Y axis is Unit Sales.

• Overlay field is Unit Cost.

Image: Example chart with the Region field as the X axis, the Unit Sales field as the Y axis, and Unit Cost as the overlay field

This example shows the chart with the Region field as the X axis, the Unit Sales field as the Y axis, and the Unit Cost field as the overlay field.



Note: Whenever you select an overlay field, the chart type is limited to Line chart; however, you are still able to select Bar and Pie charts, but these chart types do not display valid data.

Creating and Viewing a Pivot Grid Pagelet Using the Pagelet Wizard

Pivot Grid Pagelet Overview

PeopleSoft Pivot Grid functionality is currently used by Pagelet Wizard. Pagelet Wizard uses the Pivot Grid Viewer component and publishes the pivot grid as a pagelet. During pagelet creation using the Pagelet Wizard, the system stores all the parameters that were required for the Pivot Grid Viewer component—Pivot Grid Name and Pivot Grid View Name. When the pagelet is invoked, these parameters are passed to the component, which parses them and renders the display.

Note: If the query used in the Pivot Grid model is changed after the Pivot Grid pagelet is created, you need to modify and save the Pivot Grid model to ensure all changes are properly displayed in the Pivot Grid Viewer and Pivot Grid pagelets.

Pagelet Creation

Image: Pagelet creation process flow

This diagram shows the pagelet creation process flow.



In the Pagelet Wizard, you are able to:

- Select the data source type of Pivot Grid.
- Select the Pivot Grid model to use.
- Select the Pivot Grid view.

• Publish the pagelet.

Pagelet Viewing

Image: Pagelet viewing process flow

This diagram shows the flow for viewing a Pivot Grid pagelet.



When you open a pagelet that contains a pivot grid, all of the registered parameters are passed to the Pivot Grid Viewer. From the pagelet, you can perform all of the tasks that can be performed directly from the Pivot Grid Viewer.

Note: Pagelet Wizard is not supported in WSRP; therefore, Pivot Grid pagelets that were created using Pagelet Wizard are not usable is WSRP.

See "Understanding WSRP" (PeopleTools 8.53: Portal Technology).

Pivot Grid as a Subscriber

Pivot Grid subscribes to Inter Window Communication (IWC) publications from transaction pages and other pivot grids and charts. The subscription can only happen on the filters and prompts, and then pivot grids are refreshed with the subscribed values. When subscribing to publications from another pivot grid or chart filter, the subscription supports the multi-select option in filters. When subscribing from a transaction page, the values in publication should be separated by semi-colons (;) to support multi-select filter values.

The IWC configuration for subscription contains the following values:

• Event Name: Enter the named configuration for this subscription.

This name matches the publication configuration event name that runs the publication.

- Message Event Type: Sub.
- Field Event Type: Change.
- HTML Field Name: PVGSUB
- Message data: Enter the prompts and filters in the following format:
 - Filter: SUB_FLR-<*Query field name*>
 - Prompt: SUB PRMT-<*Unique query prompt name*> (available in query definition)

Image: Content Reference Message Events page with IWC configuration for subscription

This example illustrates the Content Reference Message Events page with IWC configuration for subscription.

IWC Message Even	s				
Content Reference	e Message Event	ts			
	Portal Name EM	PLOYEE			
Portal	Object Name ADI	MN APPLICANT COU	JNT BY RECRUI		
				Personalize Find 🖾 🗎 First 🕚 1 of	1 🕑 Last
Event Name	Message Event Type	Field Event Type	HTML Field Name	Message Data	
				SUB_FLR-A.NAME,SUB_FLR-A.HRS_BU_DESCR,SUB_FLR-A.JOB_DESCR,SUB_FLR-	
1 PVGIWC	1 PVGIWC Sub - Change	 Change 	 PVGSUB 	A.DEPT_DESCR,SUB_PRMT-FROM_DT,SUB_PRMT-TO_DT	+ -

If subscription is in multiple prompts and filters, the message data separates prompts and filters using commas. A corresponding publication configuration exists with a list of corresponding publication fields that are separated by commas. The publication is from transaction pages or from other pivot grids and charts.

Pivot Grid as a Publisher

Pivot grid also publishes the changes in prompts and filter values for which IWC is configured. The subscriber for this publication is another pivot grid.

The IWC configuration for publications contains the following values:

• Event Name: Enter the named configuration for this subscription.

This name matches the subscription configuration event name that subscribes to the publication.

- Message Event Type: Pub
- Field Event Type: Click
- HTML Field Name: PVGPUB
- Message data: Enter the prompts and filters in the following format:
 - Filter: PUB_FLR-<*Query field name*>

• Prompt: PUB_PRMT-<*Unique query prompt name*> (available in query definition)

Image: Content Reference Message Events page with IWC configuration for publication

This example illustrates the Content Reference Message Events page with IWC configuration for publication.

IWC Message Even	ts				
Content Reference	e Message Even	ts			
Porta	Portal Name EM	IPLOYEE MN_APPLICANTS_C	OUNT_BY_LOCAT		
Event Name	Message Event Type	Field Event Type	HTML Field Name	Personalize Find 622 100 First 10 1 of 1 10 Las	st
1 PVGIWC	Pub •	Click	▼ PVGPUB	PUB_FLR-ANAME_PUB_FLR-AHRS_BU_DESCR,PUB_FLR-AJOB_DESCR,PUB_FLR-ADEPT_DESCR,PUB_PRMT- FROM_DT,PUB_PRMT-TO_DT	-

In the previous example, note that:

- Pagelet names are ADMN_APPLICANTS_COUNT_BY_RECRUI and ADMN_APPLICANTS_COUNT_BY_LOCAT.
- The publishing and subscribing filter query fields are A.NAME, A.HRS_BU_DESCR, A.JOB_DESCR, and A.DEPT_DESCR.
- The publishing and subscribing prompt unique field names are FROM_DT and TO_DT.
- The subscriber and publishing fields need not be the same.

There is one to one mapping between the comma separated publisher and subscriber fields.

If publication involves multiple prompts and filters, the message data separates prompts and filter using commas. A corresponding subscription configuration exists with a list of corresponding subscription fields that are separated by commas.

Note: Between a pair of publisher and subscriber, only a single publication and subscription configuration should exist. That is, if pivot grid A publishes to pivot grid B, then pivot grid A uses a single-named publication configuration for all the fields it publishes to pivot grid B, and pivot grid B subscribes to the same-named IWC configuration. The lists of fields to be published and subscribed are separated by commas in the IWC message data field. This is true for IWC between transaction pages and pivot grids. For IWC between a pair of pivot grids, you should configure publication and subscription with all the common intersecting filters between the pivot grids. This is recommended for consistent behavior with progressive filtering in the publisher and subscriber.

Creating a New Pivot Grid Pagelet Using the Pagelet Wizard

This section discusses how to:

- Specify pagelet information.
- Select a data source.
- Specify data source parameters.
- Select a display format.
- Specify display options.
- Specify publishing options.

Specifying Pagelet Information

Use the Specify Pagelet Information page (PTPPB_WIZ_INFO) to enter the pagelet title and other pagelet information.

Navigation

Access the Specify Pagelet Information page by selecting PeopleTools, Portal, Pagelet Wizard, Pagelet Wizard.

Image: Specify Pagelet Information page

This example illustrates the fields and controls on the Specify Pagelet Information page. Definitions for the fields and controls appear following the example.

Pagelet Wiza	ard		Step 1 of 6
1-2-3-	4-5-6		Next >
Specify P	agelet Informati	on	
The following inf	formation will be used to id	lentify and categorize your pagelet.	
Pagelet Inform	ation		
Pagelet ID:	SALES_INFORMATION		
*Pagelet Title:	Sales Information		
Description:			
Owner ID:	PeopleTools	✓	
Category ID:	Portal Administration	×	
Help URL:			
Pagelet Title		Enter a title for the Pivot Grid pagelet.	This field is required.
Category ID		Select the pagelet category ID.	
		Note: The portal administrator can use pagelet reports and when searching for proved between different portal sites.	this value when runnin pagelets that need to b

Next

Note: The Next button is available after you enter the pagelet title in the Pagelet Title field and move the cursor to any other field.

Click to advance the wizard to the next page.

Selecting a Data Source

Use the Select Data Source page (PTPPB_WIZ_DATASRC) to select the pagelet data source type that will be used for the pivot grid, and select the Pivot Grid model to be created as a pagelet.

Navigation

Access the Select Data Source page by clicking the Next button on the Specify Pagelet Information page.

Image: Select Data Source page

This example illustrates the fields and controls on the Select Data Source page. Definitions for the fields and controls appear following the example.

Pagelet Wizard		Step 2 of 6
1-2-3-4-5-6	< Previous	Next >
Select Data Source		
Select the type of data and spec	fy the source which contains the data you want displayed in you	ur pagelet.
Sales Information		
*Data Type Pivot Grid	×	
▼ Description		
Pivot Grid allows users to crea Pivot Grid Wizard is the utility w definitions.	e table and/or chart representation of the data from various so hich allows users to create, customize, and secure these pivot	urces. grid
Data Source		
Pivot Grid Name: PVG_	SALES	Q
Data Type	Select the data type Pivot Grid.	
Pivot Grid Name	Click the search icon to select a pivot grid grids.	from existing pive
	Note: This field appears after you select th <i>Grid</i> .	ne data type Pivot
Next	Note: The Next button is available after ye from the Pivot Grid Name field.	ou select a pivot gr
	Click to advance the wizard to the next pa	ge.

Specifying Data Source Parameters

Use the Specify Data Source Parameters page (PTPPB_WIZ_DATAPRMS) to select a view for the Pivot Grid model, create new views for the model using the Pivot Grid View Options component, and specify the initial width and height of the pagelet.

Navigation

Access the Specify Data Source Parameters page by clicking the Next button on the Select Data Source page.

Image: Specify Data Source Parameters page

This example illustrates the fields and controls on the Specify Data Source Parameters page. Definitions for the fields and controls appear following the example.



- View Name
- Narrow Viewer
- Report Width
- Report Height

Configure pivot grid views Click this link to open the Pivot Grid Views Component dialog box, where you can define pivot grid display options.

Description

Enter a description for the pagelet.

Usage Type

Select a usage type for your pivot grid. Available options are:

- Admin Specified
- Context Sensitive
- Fixed
- Not Used
- System Variable
- User Specified

Click to advance the wizard to the next page.

Next

Narrow Viewer

The Narrow Viewer mode is useful for pivot grid pagelets in the work center. You can set the Narrow Viewer mode for pagelets using the Publish as Pagelet page or the Pagelet Wizard - Specifying Data Source Parameters page.

The published pagelet has a single column filter mode in the chart-only models. All functionalities that are available in the normal viewer are also available in the narrow viewer.

Oracle PeopleSoft recommends that you use the Narrow Viewer mode for the chart-only models. You can expand the width of charts in the narrow viewer from their default settings by using the advanced chart options in the viewer. If you use the Narrow Viewer mode for the grids, the grids occupy the same real estate as in the normal viewer.

Image: Narrow chart viewers

This example illustrates a dashboard showing the narrow chart view in the left pane, unexpanded from the default width, and in the right pane, expanded from the default width.



Note that:

•

• Options Menu and chart icons are available for all views.

Pivot Grid administrator or Pivot Grid developers can set to show or hide the Options Menu and chart icons using the Viewer Options section in the Pivot Grid Wizard - Specify Data Model Options page.

If there are filters in the Pivot Grid model, the default narrow view of a Pivot Grid pagelet shows the width of the chart at 210 pixels.

Image: Narrow Viewer, the minimum width for Pivot Grid models with filters

This example shows the narrow view of Pivot Grid pagelets with the minimum width for Pivot Grid models that have filters. The width of the chart is 210 pixels and group boxes are collapsed by default. You can click the bars on the chart to access the detailed view.



If there is no filter in the Pivot Grid model, the default narrow view of a Pivot Grid pagelet can be scaled back to 175 pixels and you can set the narrow view to a smaller size.

Image: Narrow Viewer, the narrowest view for Pivot Grid models without filters

This example shows the narrowest view for a model with no filters. The width of the chart is 175 pixels. You can click the bars on the chart to access the detailed view.



- If the width of the chart is less than 300 pixels, when you click the chart sector or bar, you access the detailed view directly without the drill-down or Related Action menu.
- If the width of the chart is greater than 300 pixels, the narrow view of pagelets shows breadcrumbs, drill-down menu, detailed view, and Related Action menu.

Image: Narrow Viewer, the minimum width for the models with the drill-down menu

This example shows the minimum width of the Pivot Grid models with the drill-down menu.



• If there are multiple levels of drilldowns, the side of the chart is adjusted to show all drilldown levels.

Image: Narrow Viewer, multiple levels of drill-down

This example shows a narrow view of a Pivot Grid pagelet with multiple levels of drilldown.



Defining the Pivot Grid Display Options

Use the Pivot Grid Views page (PTPG_VIEWOPTIONS) to configure different views for the selected Pivot Grid model.

Open the Pivot Grid Views Component dialog box by clicking the Configure pivot grid views link on the Specify Data Source Parameters page.

Image: Pivot Grid Views Component dialog box

This example illustrates the fields and controls on the Pivot Grid Views Component dialog box. Definitions for the fields and controls appear following the example.

Pivot Grid Views Component						
Pivot Grid Views						
Pivot Grid Name PVG	_SALES _SALES.View 🗸					
View Description Sale:	s Information Model					
Grid and Chart View Options						
Display Options						
O Grid Only	Chart Only	Orid and Characteria	rt			
Specify Axis Information	Field Format	Personalize Find 2	First 1-6 of 6 Last			
1 Month	String	Filter	Filter			
2 Product	String	Filter	Filter			
2 Region	String	Row	X-Axis			
4 Unit Cost	Number	Column	Y-Axis			
5 Sales	Number	Column	17000			
6 Prd Sales	Number	Column				
0						
Grid Options						
▶ Chart Options						
Save As Close						
Save						
/iew Name	Select the Pive	ot Grid view to use	for this pagelet.			
Datasource Prompts	Enter the defa	ult values for the P	SQuery runtime prompts.			
	Note: This sec built the grid h	Note: This section is only available when the selected query the built the grid has prompts attached.				
Display Options Define pagelet view options for the grid and the chart.						
	Available opti	ons are:				
	Grid Only					
	Chart Only	y				
	Grid and (Chart				

Grid Options	Define whether drag-and-drop functionality is allowed in the grid, whether the initial view of the grid is expanded or collapsed, and whether the grid can be expanded or collapsed. Available options are:
	Collapsible Data Area
	Expanded State
	• No Drag and Drop
Chart Options	Define information for axis and value columns of the grid, and define chart type and axes information for the chart.
	Available options are Title, Type, X axis label, and Y axis label.
Advanced Options	Define the 3D rotation angle and height of the chart.
Save As	Click to open the Save View As dialog box, where you can either save the current Pivot Grid model as a new view or update an existing view.
Close	Click to close the Pivot Gird Views Component and copy the selected view name to PVG_VIEWNAME data source parameter.

Selecting a Display Format

Use the Select Display Format page (PTPPB_WIZ_DISPFRMT) to confirm the display format of the pagelet.

Access the Select Display Format page by clicking the Next button on the Specify Data Source Parameters page.

Image: Select Display Format page

This example illustrates the fields and controls on the Select Display Format page. Definitions for the fields and controls appear following the example.

Pagelet Wizard	Step 4 of 6			
1-2-3-4-5-6	< Previous Next >			
Select Display Forma	at			
Select the format in which you woul	d like your pagelet data rendered.			
Sales Information				
Specify Display Options	First 🗹 1 of 1 🕨 Last			
Display Format	Description			
	Display your pagelet data with no visual transformation. The data source controls the look and feel.			
Specify Display Options Confirm the display format of the pagelet.				
Note: <i>Passthru</i> is the only display option available for Grid.				
Next Click to advance the wizard to the next page.				

Specifying Display Options

Use the Specify Display Options page (PTPG_PGVIEWER) to define the display options of the pagelet, preview the Pivot Grid model, and view the pagelet that is selected.

Access the Specify Display Options page by clicking the Next button on the Select Display Format page.

Image: Specify Display Options page

This example illustrates the fields and controls on the Specify Display Options page. Definitions for the fields and controls appear following the example.

Pagelet Wizard		Step 5 of 6			
	-(2)-(3)-(4)-(5)-(6) < Previous Next>				
Specify Display Options					
Specify the visual options related to the display format fo	r vour pagelet.				
Sale Information	.,				
Additional Text	Pagelet Preview				
Header	- Augeret Forten				
Opening Text	🌼 🗸				
Closing Text	▼ Sale Information Model			부 🕌 🖬	
Footer	Time (All)	✓ Item	(AII)	*	
	Cost	t (Sum) Sale (Sum) Prod	luct Sales (Sum)		
✓ Search Options	■ AII 120	67823.00	25627454.11		
Search is supported for homepage pagelets and embeddable pagelets only.	EAST_COAST 29	923.78 13874.00	4778536.68		
*Search Box No Search Box	HAVVAII 30	28105.00	9020511.87		
Custom Search Class	WEST COAST 30	171.55 20139.00	5476325.83		
	_				
		Sala Infa	rmation Model		
	30K	sale mo			
	25K				
	20K				
	15K				
	10K				
	ок				
	LSPO	AWAI	WES	OAST	
		т	DIM	U LS	
	Ē			ŴE	
	In ke in E		Location		
Additional Text	The Addition	onal Text section	on contains the op	otions to add head	ers,
	footers, op	ening text, and	l closing text to a	pagelet.	
	~ "~ '				
	See "Speci:	fying Passthru	Display Options"	(PeopleTools 8.5)	3:
	Portal Tech	nology).			
~					
Search Options	The Search	Options section	on contains the op	tions to override t	the
	default sear	rch functionalit	ty for the current	pagelet only.	
		.			
Pagelet Preview	When you	change the Add	ditional Text or So	earch Options, the	÷
	changes au	tomatically upo	date the preview.		
Next	Click to ad	vance the wiza	rd to the next pag	e.	

Specifying Publishing Options

Use the Specify Publishing Options page (PTPPB_WIZ_PUBOPT) to define the location, type, and security attributes for the pagelet and publish the pagelet.

Access the Specify Publishing Options page by clicking the Next button on the Select Display Options page.

Image: Specify Publishing Options page

This example illustrates the fields and controls on the Specify Publishing Options page. Definitions for the fields and controls appear following the example.

Pagelet Wizard Step 6 of	6
1-2-3-4-5-6 <	
Specify Publishing Options	
Specify the manner in which your pagelet is published.	
Sale Information	
✓ Homepage Pagelet	
Publishing as a Homepage Pagelet allows this pagelet to be placed on a user's Homepage tab. Homepage Pagelets are organized by pagelet folders.	
Folder: PeopleSoft Applications	
Advanced Options	
Template Pagelet	
Publishing as a Template Pagelet allows this pagelet to be used with any template. For the Context Manager template, this pagelet can be context sensitive to the target transaction.	
Advanced Options	
Embeddable Pagelet	
Publishing as an Embeddable Pagelet allows this pagelet to be rendered on a target transaction page. The target transaction executes this pagelet from the Pagelet Wizard API.	
✓ Pagelet Security	
*Security Type: Public Access	

Note: You can include the Pivot Grid pagelet in Operational Dashboards, WorkCenters (pagelet width 256 pixels when configured in a workcenter), and homepages. Only the Homepage Pagelet and Embeddable Pagelet options are applicable for Pivot Grid pagelets.

Homepage Pagelet	Select this option to publish the pagelet as a homepage pagelet that can be added to a homepage or WorkCenter operational dashboard page.
Template Pagelet	This option is not applicable for pivot grids.
Embeddable Pagelet	Select this option to make your pagelet available as an embeddable pagelet that can be generated by the Pagelet Wizard

	API for rendering within an HTML area of a PeopleSoft Pure Internet Architecture target page or using an iScript.
Pagelet Security	Administrators can set pagelet security as public, or they can set a permission list based on user roles.
Save	Click to save the pagelet.
Finish	Click to transfer to the Pagelet Creation Confirmed page, where you also can save the pagelet.
	Access the homepage to personalize it to include the newly created pagelet.

Note: While working with the Pagelet Wizard, you can modify your previous selections at any step by clicking the step number icons. Changes in your selection could change the structure of a pagelet.

See "Specifying Pagelet Publication Options" (PeopleTools 8.53: Portal Technology).

Viewing a Pivot Grid Homepage Pagelet

Use the Pivot Grid homepage pagelet to view and update the Pivot Grid model.

Access the Pivot Grid homepage pagelet from the Pure Internet Architecture home page.

Image: Pivot Grid homepage pagelet

This is an example of the Pivot Grid homepage pagelet.

ORACLE'								
				Home	Worklist MultiCha	innel Console	Add to Favorites	<u>Sign out</u>
Favorites Main Menu								
	1.7						Personalize <u>C</u>	ontent Layout
Sale	Information							
· · · · · · · · · · · · · · · · · · ·	🔅 👻							
▷ My Favorites	 Sale Information Mo 	odel			🏴 🏭 😭			
Data Expansion Tools	Time (All)	v ltem	(AII)	×			
D PeopleTools SDK		Cost (Sum)	Sale (Sum) Drod	uct Sales (Sum)				
D Manage Assets	= AII	120201.99	67823.00	25627454 11				
Employee Self-Service Manager Self-Service	EAST COAST	29923.78	13874.00	4778536.68				
D Supplier Contracts	HAWAII	30355.10	28105.00	9626511.87				
▷ Customers ▷ Partners	MIDWEST	29751.56	5705.00	5746079.73				
▷ Products	WEST_COAST	30171.55	20139.00	5476325.83				
Catalog Management Promotions								
D Customer Contracts								
Pricing Configuration	2014		Sale Info	mation Model				
D Customer Returns	25K						_	
D Cost Accounting	2014		_					
D Vendors D Procurement Contracts	₩ 15K		-					
▷ Purchasing	00 10K		-					
▷ Inventory ▷ eProcurement	5K		-				_	
Services Procurement						_		
▷ Sourcing ▷ Engineering	.seo		AWAI	NES.		.seo		
Manufacturing Definitions	Ë		Ŧ	MID		0 1		
Production Control Configuration Modeler	EAG					WE		
Product Configurations				Location				
D Inventory Policy Planning	II 🛶 🕋 🚍							
Supply Planning Crants	III 🗠 💗 🖴							

Note: Viewing the pivot grid from a pagelet is the same as viewing it from the Pivot Grid Viewer.

See Viewing a Pivot Grid Model Using the Pivot Grid Viewer.

Pivot Grid Administration

Understanding Pivot Grid Administration

Pivot Grid administrators use the Pivot Grid Administration component to administer Pivot Grid models, views, and user personalization.

Note: In the grid section, if you are not assigned the Pivot Grid Administrator users role, when you perform a search in the Pivot Grid Administration component, the search result is restricted to the models that you have created in the Pivot Grid Wizard. Non-administrative users are not able to delete, copy, import, export, or generate scripts on the models that they did not create.

Deleting Pivot Grid Models

Pivot Grid administrators use the Delete Pivot Grid Models page (PTPG_ADMN_DELETE) to delete the models and all their associated views in the database.

Reporting Tools, Pivot Grid, Pivot Grid Administration

Image: Delete Pivot Grid Models page

This example illustrates the fields and controls on the Delete Pivot Grid Models page. Definitions for the fields and controls on this page follow this example.

Delete Models	Delete Personalization	Generate Scripts	Copy Model	
Delete Pivo	ot Grid Models			
Delete Pivot Gr	id Models and Views.			
	Keyword PVG_		7	
On each				
Search				
Model Sear	ch Results	Personalize Find	First	🛾 1-9 of 9 🚺 Last
Pivot G	<u>rid Name</u>	Pivot Grid Title		
PVG_C	HART	Sales		
PVG_S	ALES	Sale Information Model		
PVG_S	UPPLY	Invoice Analysis		
QE_PV	G_FM_PRMPT_C	QE_PVG_FM_PRMPT_	C_T	
QE_PV	G_FM_PRMPT_C_CLONE	QE_PVG_FM_PRMPT_	C_CLONE_T	
QE_PV	G_FM_PRMPT_G	QE_PVG_FM_PRMPT_	.G_T	
QE_PV	G_FM_PRMPT_GC	QE_PVG_FM_PRMPT_	GC_T	
QE_PV	G_FM_PRMPT_GC_CLONE	QE_PVG_FM_PRMPT_	GC_CLONE_T	
QE_PV	G_FM_PRMPT_G_CLONE	QE_PVG_FM_PRMPT_	G_CLONE_T	
Select All	Deselect All			
Delete Mod	del(s)			
Keyword	(Click to perform a free	-text search on	model name and title
Delete Non De	fault Views (t	Click to access the Del can view and delete no he models.	ete Non Defau n-default view	It Views page, where you start are associated w
Delete Model(s	s) (Click to delete the sele	cted Pivot Grid	d models.

Note: An error message appears if any selected model or view is referenced in pagelets or in related content. You have to remove the references in the Pagelets or Related Content components before you can delete the model or views.

To delete specific Pivot Grid models and all associated views in the database:

- 1. Select Reporting Tools, Pivot Grid, Pivot Grid Administration, Delete Models.
- 2. Click the Search button to display all Pivot Grid models that you have authorization to delete.
- 3. Select the models that you want to delete.
- 4. Click the Delete button to delete the selected models and their associated views.

If any selected model is referenced in an exported pagelet, an error message appears asking you to delete the pagelet reference.

Deleting Non-Default Views

Pivot Grid administrators use the Delete Non Default Views page (PTPG_ADMN_DELNDV) to view and delete non-default views that are associated with the models.

Navigation

Reporting Tools, Pivot Grid, Pivot Grid Administration, Delete Models

Image: Delete Non Default View page

This example illustrates the fields and controls on the Delete Non Default Views page.

Delete Non Default Views					
Delete the non default views as	sociated with the model				
Pivot Grid Name QE_FSCM_DEL_PERSON_PAGELET_GC					
View Search Results	Personalize Find 🗖 🛗	First 🚺 1 of 1 🚺 Last			
View Name	View Description				
QE_GC_NON_DEF1	For Delete Personalization Test	ing			
Select All					
Delete	Im				

To delete non-default views that are associated with a Pivot Grid model in the database:

- 1. Select Reporting Tools, Pivot Grid, Pivot Grid Administration, Delete Models.
- 2. Click the Search button to display all Pivot Grid models that you have authorization to delete.

If there are non-default views associated with the model, the Delete Non Default Views link appears.

3. Click the Delete Non Default Views link next to the Pivot Grid model.

The non-default views are listed by name and description.

4. Select appropriate non-default views, and click the Delete button.

Note: Non-default views are created using the Pagelet Wizard - Specify Data Source Parameters page.

Deleting User Personalization

Pivot Grid administrators use the Delete User Personalization page (PTPG_ADMN_RSTPERS) to delete the personalization, by users, on the views that are associated with any model in the database.

Navigation

Reporting Tools, Pivot Grid, Pivot Grid Administration, Delete Personalization

Image: Delete User Personalization page

This example illustrates the fields and controls on the Delete User Personalization page.

Delete Models Delete Personal	lization Generate Scripts	Clone Model					
Delete User Personalization							
Delete user personalization on the p	pivot grid views.						
Pivot Grid Name							
View Search Results	Personalize Find	🗖 🗐 👘 First 🤇	🜒 1-2 of 2 🕑 Last				
View Name V	/iew Description		User ID				
IWC_HRS_PVG_REC3.View			E100				
IWC_HRS_PVG_REC3.View			VP1				
Select All Deselect All							
Delete							

Note: The User ID and the view name are presented in model search results. The search lists only the models whose views have user personalization. For users who are not Pivot Grid Administrators, the search result is further limited to the models that they have created in the wizard.

To delete user personalization on specific Pivot Grid models in the database:

1. Select Reporting Tools, Pivot Grid, Pivot Grid Administration, Delete User Personalization.

2. Search for a model name.

All the user personalization and the associated USERIDs are listed.

3. Select and delete the personalization for a specific user or for all users.

Exporting and Importing Pivot Grid Models

Pivot Grid administrators can use the Generate Import/Export Scripts page (PTPG_ADMN_EXPIMP) to generate the import and export scripts for the selected models.

Reporting Tools, Pivot Grid, Pivot Grid Administration, Generate Scripts

Image: Generate Import/Export Scripts page

This example illustrates the fields and controls on the Generate Import/Export Scripts page. Definitions for the fields and controls appear following the example.

Delete Models	Delete Personalization	Generate Scripts	Сору	Model	
Generate Im	oort/Export Scripts				
Generate Scripts	for Exporting and Importin	a Pivot Grid Models and	Views		
concrate compte		gr not ona modolo and			
	Keyword 199_				
Search					
Model Search	Results		. 10	First K	
Pivot Grid	Name	Pivot Grid Title	1	riist	1-9 of 9 🔤 Last
PVG_CHA	RT	Sales			
PVG_SAL	ES	Sale Information Model			
PVG_SUF	PLY	Invoice Analysis			
QE_PVG_	FM_PRMPT_C	QE_PVG_FM_PRMPT_C	с_т		
QE_PVG_	FM_PRMPT_C_CLONE	QE_PVG_FM_PRMPT_C	C_CLON	IE_T	
QE_PVG_	FM_PRMPT_G	QE_PVG_FM_PRMPT_G	G_T		
QE_PVG_	FM_PRMPT_GC	QE_PVG_FM_PRMPT_G	SC_T		
QE_PVG_	FM_PRMPT_GC_CLONE	QE_PVG_FM_PRMPT_G	SC_CLO	NE_T	
QE_PVG_	FM_PRMPT_G_CLONE	QE_PVG_FM_PRMPT_C	G_CLON	IE_T	
Select All	Deselect All				
Export with	Personalizations				
Generate Scri	pts				
port with Pers	sonalizations S d	elect to export the gen eselect to export the ge	erated s enerated	script wi l script v	th personalization without personal
	N tł	Note: The existing pers	onaliza Ilways c	tion of t	he Pivot Grid mo

Generate Scripts	Click to access the Export/Import Models dialog box, where you
	can view the exported or imported scripts.

Image: Export/Import Models page - Data Mover Scripts

This example illustrates the fields and controls on the Export/Import Models dialog box with Data Mover Scripts.



To generate the Export/Import scripts for migrating specific models in the database:

- 1. Select Reporting Tools, Pivot Grid, Pivot Grid Administration, Generate Scripts.
- 2. Search for and select Pivot Grid models for creating a script.
- 3. Define the option to include or exclude personalization.
- 4. Click the Generate Scripts button to create the scripts.

Copying Pivot Grid Model

Pivot Grid administrators use the Copy Pivot Grid Model page (PTPG_ADMN_SAVEAS) to copy an existing model and give it a new model name and title. Optionally, they can select to copy user personalization using the Include Personalization option.

Navigation

Reporting Tools, Pivot Grid, Pivot Grid Administration, Copy Model

Image: Copy Pivot Grid Model page

This example illustrates the fields and controls on the Copy Pivot Grid Model page.

Delete Models Delete Personalizatio	n Generate Scripts Copy Model
Copy Pivot Grid Model	
Copying a Pivot Grid Model clones an exi	sting definition from Pivot Grid Wizard.
Keyword PVG_S	
Search	
Model Search Results	Personalize Find 🖾 🛗 First 🚺 1-2 of 2 💟 Last
Pivot Grid Name	Pivot Grid Title
O PVG_SALES	Sale Information Model
O PVG_SUPPLY	Invoice Analysis
*New Model Name	
*New Model Title	
Include Dersonalizations	Include All Views
Copy Model	

To copy a specific model and its associated views in the database:

- 1. Select Reporting Tools, Pivot Grid, Pivot Grid Administration, Copy Model.
- 2. Search for and select a model.
- 3. Enter a new model name and its description.
- 4. Optionally, select the Include Personalizations option to copy all user personalizations.
- 5. Optionally, select the Include All Views option to copy all customized views.
- 6. Click the Copy Model button to copy the model.

A successful message appears if the copy is completed.

An error message appears if the name of the new model already exists, the name of the new model is empty, or the description of the new model is empty.

System Data and Sample Data

Time and Labor Model

Suppose you create a Time and Labor model for different values (Quantity, Estimated Gross, Labor Distribution Amount, Diluted Distribution Labor Amount) based on different attributes (Employee Information, Location, Department, Time Reporting Code, Payable Status, and so on).

If you have constructed a view that represents a join of all the SQL tables required for getting the data, this view is a base for forming the PSQuery. We use this PSQuery as the data source for this Pivot Grid model.

To create a time and labor model:

1. Access the Pivot Grid Wizard, Specify Pivot Grid Properties page.

Image: Specify Pivot Grid Properties page

This example illustrates the fields and controls on the Specify Pivot Grid Properties page.

1-2-3-4-5 Next >	1
Specify Pivot Grid Properties	
The following information will be used to identify and categorize your Pivot Grid.	
Pivot Grid Information	
Pivot Grid Name TIME AND LABOR	
*Pivot Grid Title Time and Labor	
Description Time and Labor	
Pivot Grid Type Public	
Owner PeopleTools	

2. Access the Pivot Grid Wizard, Select Data Source page.

In this step, you select the PSQuery and output columns from the PSQuery that you will plot. The attributes you will plot are Time Reporting Code, Payable Status, Department, Job Code, Location,

Taskgroup, Quantity, Estimated Gross, Labor Distribution Amount, and Diluted Distribution Labor Amount.

Image: Select Data Source page

This example illustrates the fields and controls on the Select Data Source page.

Pivot Grid W	izard		St	ep 2 o
1-2-3-	4-5	< Previous	Next >	
Select Dat	a Source			
elect the Data S	Source Type and the Columns for the Pivot Grid			
litle Time a	nd Labor			
	Data Sauraa Tuma PS Ouoru			
ata Source				
	*Query Name TIME_AND_LABOR_REPORT	Q		
		199 - 194		
elect Columns Select	Per Data Source Columps	rsonalize Find 🛄 🎬 Fir Field For	st 🚺 1-22 of 22 🍱 mat	Last
1	ID	String		
2 🗌	Empl Rcd#	Number		
3 🗹	TRC	String		
4 🗹	Payable Status	String		
5 🗹	Dept	String		
6 🗹	Job Code	String		
7 🗹	Location	String		
8 🗹	Task	String		
9 🗖	Position	String		
10 🗖	PC Bus Unit	String		
11 🗌	Project	String		
12 🔽	Quantity	Signed N	umber	
13 🔽	Est Gross	Signed N	umber	
14 🗹	LbrDistAmt	Signed N	umber	
15 🗹		Signed N	umber	
16	Location SettD	String		
17 🗖	Subcategory	Saling		

3. Access the Pivot Grid Wizard, Specify Data Model Values page.

In this step, you define the Pivot Grid model core, including the axis and values, All members, Aggregate functions, and so on. You select Time Reporting Code, Payable Status, Department, Job Code, Location, and Taskgroup as the axis columns; and Quantity, Estimated Gross, Labor Distribution Amount, and Diluted Labor Distribution Amount as the Values.

All the axis columns have an All (Total) attribute associated with them, and the aggregate function for all the Values is SUM.

Image: Specify Data Model Values page

This example illustrates the fields and controls on the Specify Data Model Values page.

1-2-3-6-5				<	Previous	Next	>
Specify Data in		es					
Specify the Column Type	e and the Aggrega	te functions for the	selected D	ata Mod	lel		
Title Time and Lab	or						
Solact Data Source Info	rmation						
Data Source Columns	Column Label	Field Format	Column T	уре	<u>Total</u>	Aggregate	Total Name
TRC		String	Axis	~	V		
Payable Status		String	Axis	*	~		
Dept		String	Axis	~	V		
Job Code		String	Axis	~	✓		
Location		String	Axis	*	V		
Task		String	Axis	*	~		
Quantity		Signed Number	Value	*		Sum 🗸]
Est Gross		Signed Number	Value	~		Sum 🗸]
LbrDistAmt		Signed Number	Value	*		Sum 🗸	
		Righted Number	Value			Sum	1

4. Access the Pivot Grid Wizard, Specify Data Model Options page.

In this step, you define the initial layout of the grid and the chart.

For the grid, Time Reporting Code and Department are on the row axis; Payable Status, Location, JobCode, and Taskgroup are the filters; and all the Value type members are on the column axis.

Image: Specify Data Model Options page

This example illustrates the fields and controls on the Specify Data Model Options page.

Pivot Grid Wizard				Step 4 of 5
1-2-3-4-5		< Previous	Next >	
Specify Data Model O	ptions			
pecify the values for the Display and	- d View Options for the Pivot Grid an	d Chart.		
Title Time and Labor				
➡ Grid and Chart View Options				
Default View				
O Grid Only	Chart Only	Orid and	Chart	
Specify Axis Information	Pe	rsonalize Find 🗖	First 🚺 1-1	0 of 10 🔽 Last
Data Source Columns	Field Format	Grid Axis	Chart	Axis
1 TRC	String	Row	V X-Axis	3 😽
2 Payable Status	String	Filter	V Filter	~
3 Dept	String	Row	~	~
4 Job Code	String	Filter	✓ Filter	~
5 Location	String	Filter	V Filter	*
6 Task	String	Filter	✓ Filter	*
7 Quantity	Signed Number	Column	Y-Axi	3 🖌
8 Est Gross	Signed Number	Column	¥	~
g LbrDistAmt	Signed Number	Column	¥	~
10 DilLbrDst	Signed Number	Column	¥	~
Crid Onting				
r Grid Options				
Chart Options				
Viewer Options				

For the chart, Time Reporting Code automatically becomes the X axis because it is the highest level in the grid; from the Value type members; Quantity is on the Y axis; the filters are same in the grid and in the chart; chart title and axis labels are specified; and the chart type is 2D Bar.

Image: Specify Data Model Options page, chart settings

This example illustrates the fields and controls on the Specify Data Model Options page, Chart Options section.

Chart Options
Title Time and Labor
Type 2D Bar Chart
X-Axis Label Time Reportingt Code
Y-Axis Label Quantity (Hours)
Advanced Options
Legend None
Height
Width
Subtitle
Footer
Y-Axis Precision V Exploded Pie

5. Access the Pivot Grid Wizard, Pivot Grid Display page.

Preview the Pivot Grid model based on the options previously selected.

In the grid, you can see the axis member names if you bring the mouse close to the icon alongside the axis values.

In the chart, you can see the actual value plotted as a hover item if you bring the mouse close to the bars in the 2D Bar chart.

Image: Example of the Pivot Grid Display page

This example illustrates the fields and controls on the grid portion of the Pivot Grid Display page.



Organizational Analysis Model

Suppose you create an Organizational Analysis model showing values (count of employees, average salaries based on different attributes like employee information, location, department, pay grade, and so on) in a chart format using Pivot Grid. You construct a view that represents a join of all the SQL tables

required for getting the data. This view is a base for forming the PSQuery. You use this PSQuery as the Data Source for this Pivot Grid model.

To create an organizational analysis model:

1. Access the Pivot Grid Wizard, Specify Pivot Grid Properties page.

Image: Specify Pivot Grid Properties page

This example illustrates the fields and controls on the Specify Pivot Grid Properties page.

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 ORG_CHART_MODEL	
*Pivot Grid Title Org Analysis Model	
Description	
Pivot Grid Type Public	
Owner PeopleTools	

2. Access the Pivot Grid Wizard, Select Data Source page.

In this step, you select the PSQuery and output columns from the PSQuery that you will plot. The attributes to be plotted are Employees, Annual Rate, Department, Job Code, Location, Company, and Paygroup.

Image: Select Data Source page

This example illustrates the fields and controls on the Select Data Source page.

Pivot Grid Wizard			Step 2 of 5			
1 2 3 4 5 Next >						
Select Data Se	ource					
Select the Data Source	Type and the Columns for the Pivot	Grid				
Title Org Analysis	Model					
Data	a Source Type PS Query	¥				
Data Source						
*Qu	ery Name ORG_CHART	٩				
Select Columns		Description of File and Market and American Americ	. 🕅			
Select Columns	Data Source Columns	Field Format	1 Last			
1 🔽	Employee ID	String				
2 🔲	Employee Name	String				
3 🗖	HR Status	String				
4 🔲	Paycheck Status	String				
5 🔽	Annual Rate (\$)	Signed Number				
6 📃	Unit	String				
7 🔽	Location	String				
8 🔽	Department ID	String				
9 🔽	Job Code	String				
10 🔽	Company	String				
11 🔽	Pay Group	String				
Select All	Clear All					

3. Access the Pivot Grid Wizard, Specify Data Model Values page.

In this step, you define the Pivot Grid model core, including the axis and values, All members, aggregate functions, and so on.

You select Department, Job Code, Location, Company, and Paygroup as the axis columns; and Employees and Annual Rate as the Values.

All the axis columns have an All (Total) attribute associated with them. The aggregate function for the value member Annual Rate is AVERAGE, and the aggregate function for the value member Employees is COUNT.

Business Unit is the runtime prompt for the PSQuery. The default values for this prompt are provided.

Image: Specify Data Model Values page

This example illustrates the fields and controls on the Specify Data Model Values page.

Pivot Grid Wizard Step 3 of 5									
1-2-3-4-5					revious		Next >		
Specify Data Model Values									
Specify the Column Type	and the Aggregate	e functions for the	selected D	ata Mod	el				
Title Org Analysis I	lodel								
						_	-	~	
Select Data Source Infor	mation					Fi Ei	rst 🕙	1-7 of 7 🔛 Last	
Data Source Columns	Column Label	Field Format	Column T	ype	<u>Total</u>	Aggregate	8	Total Name	
Employee ID		String	Value	*		Count	*		
Annual Rate (\$)		Signed Number	Value	*		Average	*		
Location		String	Axis	~					
Department ID		String	Axis	~	~				
Job Code		String	Axis	~	V				
Company		String	Axis	~	 Image: A start of the start of				
Pay Group		String	Axis	*					
Select All	Clear	All							-

4. Access the Pivot Grid Wizard, Specify Data Model Options page.

In this step, you define the initial layout of the grid and the chart. Note that even though you are plotting only a chart, grid layout is mandatory.

For the chart, Job Code is selected as the X axis from the value type members; Employees is selected to be on the Y axis; Department is selected as a filter for the chart; chart title and axes labels are specified; and chart type is selected as the 2D Bar.

Image: Specify Data Model Options page

This example illustrates the fields and controls on the Specify Data Model Options page.

Pivot Grid Wizard			Step 4 of 5
1-2-3-4-5		< Previous	Next >
Specify Data Model O	ptions		
Specify the values for the Display and	View Options for the Pivot Grid :	and Chart.	
Title Org Analysis Model			
T Grid and Chart View Options			
Default View			
O Grid Only	Chart Only Grid and Chart		art
Specify Axis Information		Personalize Find 🗖	First 🕙 1-7 of 7 🕑 Last
Data Source Columns	Field Format	Grid Axis	Chart Axis
1 Employee ID	String	Column 👻	×
2 Annual Rate (\$)	Signed Number	Column 💌	Y-Axis 🔽
3 Location	String	×	✓
4 Department ID	String	Filter 🗸	Filter 🔽
5 Job Code	String	Row 🗸	X-Axis 💌
6 Company	String	~	~
7 Pay Group	String	×	✓
Grid Options			
Chart Options			
[▶] Viewer Options			

Image: Specify Data Model Options page, Chart Options section

This example illustrates the fields and controls on the Specify Data Model Options page, Chart Options section.

T Chart Options		
Title	Org Analysis by Jobcode	
Туре	2D Bar Chart 👻	
X-Axis Label	Job Code	
Y-Axis Label	Employee ID	
Advanced Options		
Legend	None 🗸	
Height		
Width		
Subtitle		
Footer		
Y-Axis Precision	Exploded Pie	

5. Access the Pivot Grid Wizard, Pivot Grid Display page.

The system displays the Pivot Grid model based on the options previously selected. On the chart, the actual value plotted can be seen as a hover item if you bring the mouse close to the bars on the 2D Bar chart.

Image: Pivot Grid Display page

This example illustrates the fields and controls on the Pivot Grid Display page.

