Dashboard Designer How to create a Dashboard Pivot Chart

Version: 4.2.2

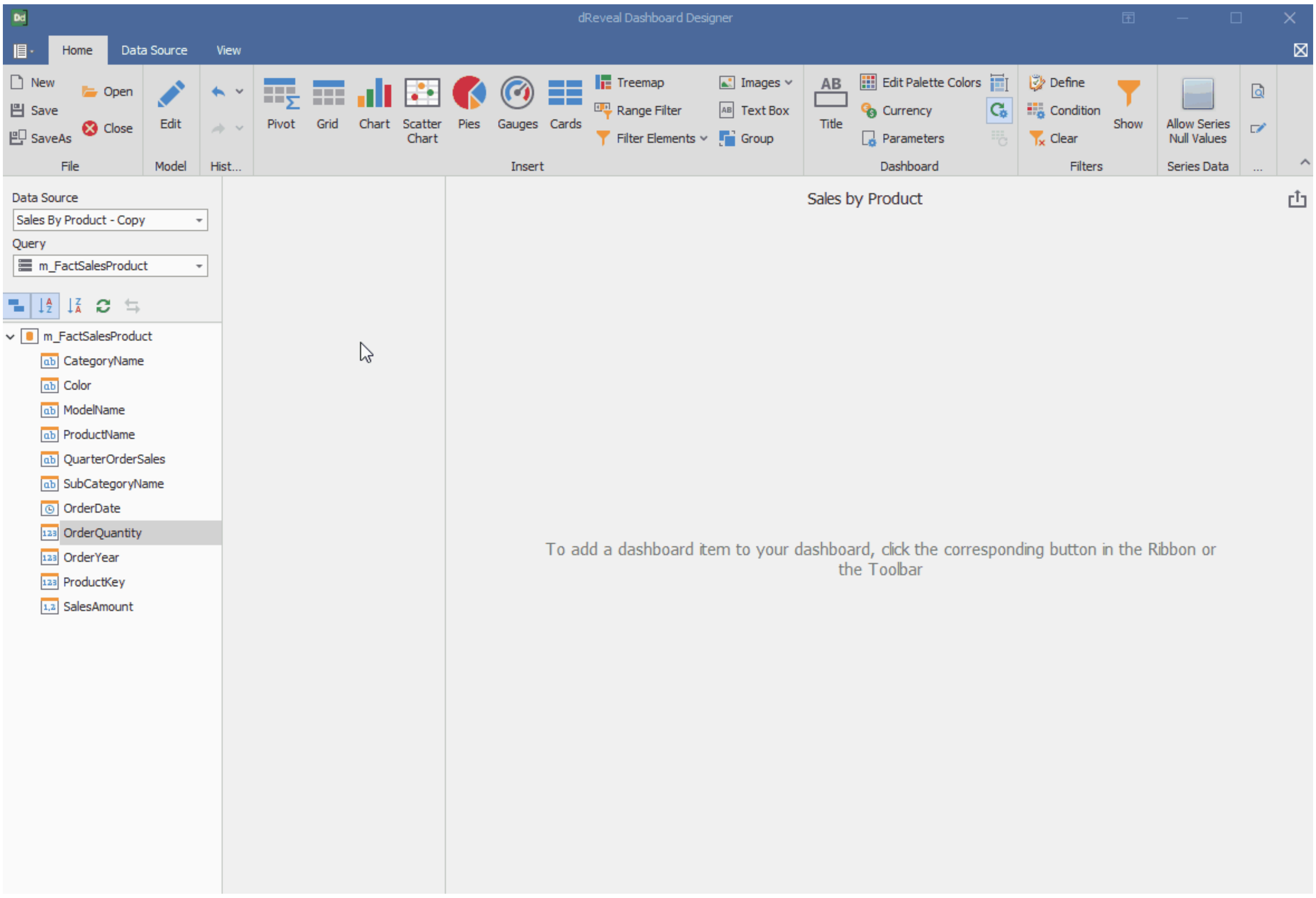
Pivot Chart

Article 08/22/2023

Dashboard Designer provides users with the ability to create detailed reports, allowing you to generate Pivot-type charts that offer a deep and dynamic view of your data. This enables you to analyze and visualize trends intuitively.

Steps to Create a Pivot Chart:

1. Open Dashboard Designer.
2. Create a new report or open an existing one.
3. Click on the "Pivot" icon.
4. Drag and drop the columns from the main view to the section DATA ITEMS.
5. Apply the desired format to the number column.



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Series Data
m_FactSalesProduct
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ModelName
ProductName
QuarterOrderSales
SubCategoryName
OrderDate
OrderQuantity
OrderYear
ProductKey
SalesAmount

Data Source: Sales By Product - Copy

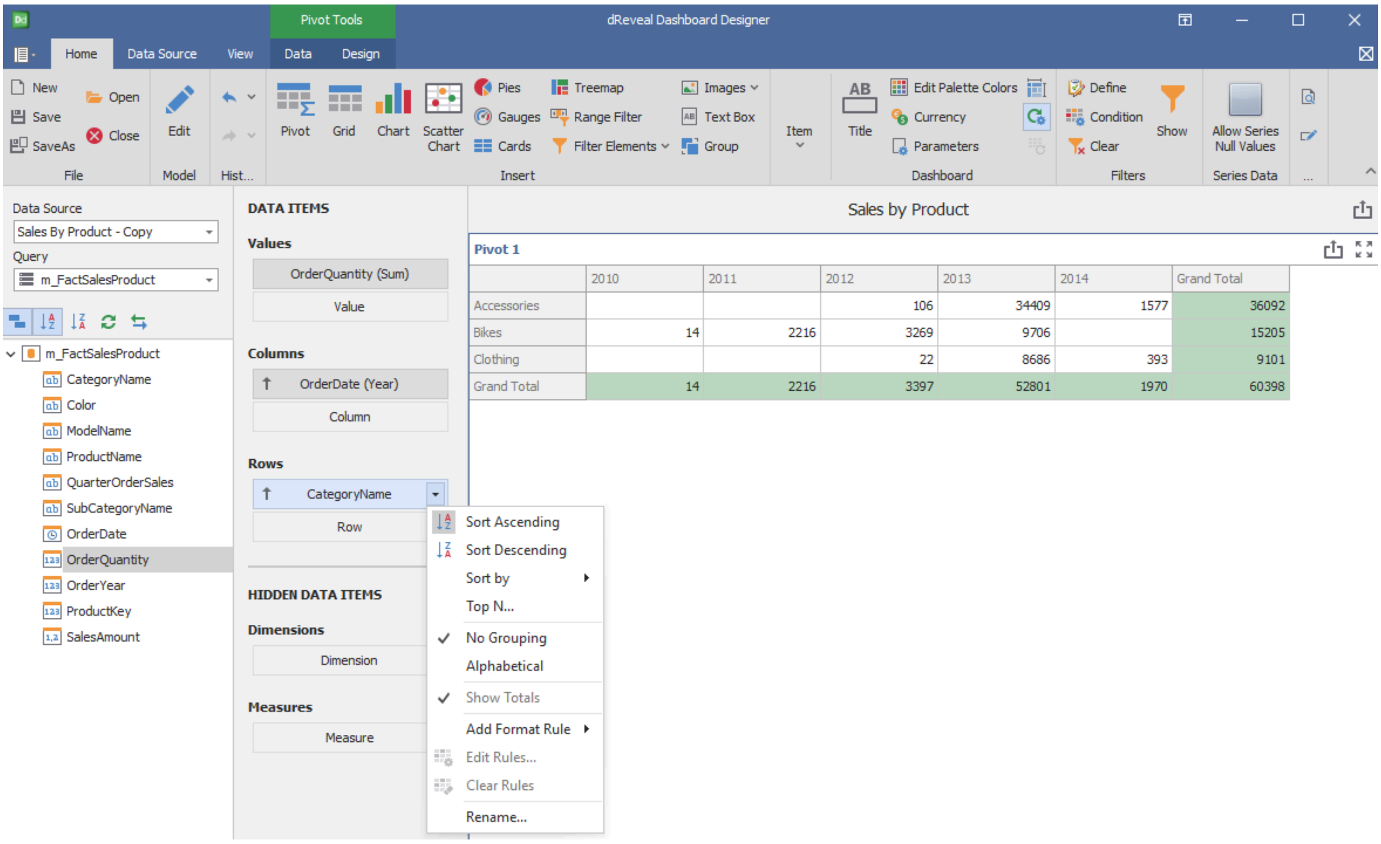
Query: m_FactSalesProduct

Sales by Product

To add a dashboard item to your dashboard, click the corresponding button in the Ribbon or the Toolbar

Dashboard Designer also provides various options to customize the **'Pivot Chart'** based on the data type displayed in each column. Below is a general overview of the different options you can apply to your Pivot Chart.

Column of type String:



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DATA ITEMS
HIDDEN DATA ITEMS
Dimensions
Dimension
Measures
Measure
Sort Ascending
Sort Descending
Sort by
Top N...
No Grouping
Alphabetical
Show Totals
Add Format Rule
Edit Rules...
Clear Rules
Rename...

Data Source: Sales By Product - Copy

Query: m_FactSalesProduct

Values: OrderQuantity (Sum)

Columns: OrderDate (Year)

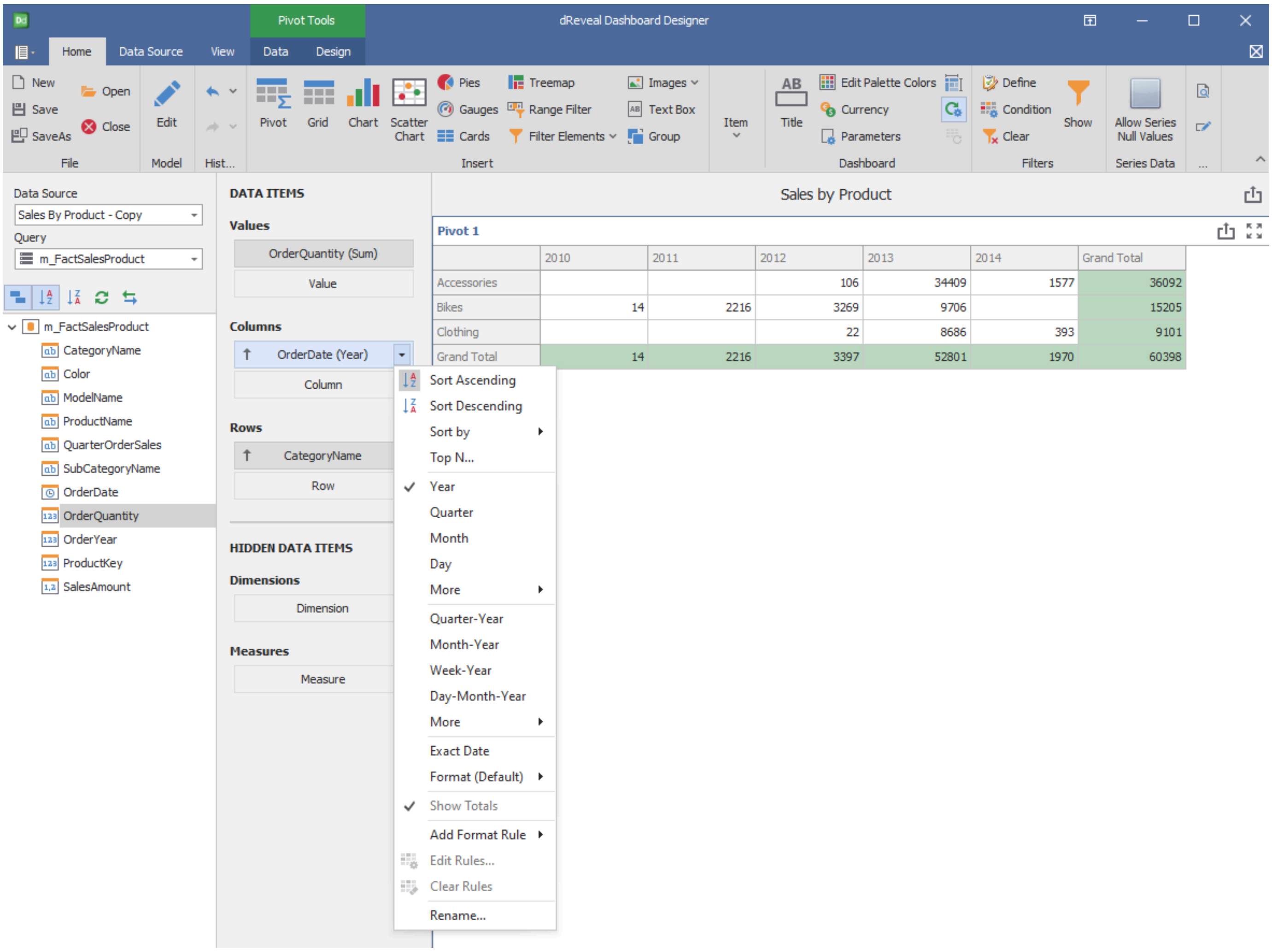
Rows: CategoryName

Sales by Product

Pivot 1

	2010	2011	2012	2013	2014	Grand Total
Accessories			106	34409	1577	36092
Bikes	14	2216	3269	9706		15205
Clothing			22	8686	393	9101
Grand Total	14	2216	3397	52801	1970	60398

Column of type Date: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OrderQuantity (Sum)
Value
Columns
OrderDate (Year)
Column
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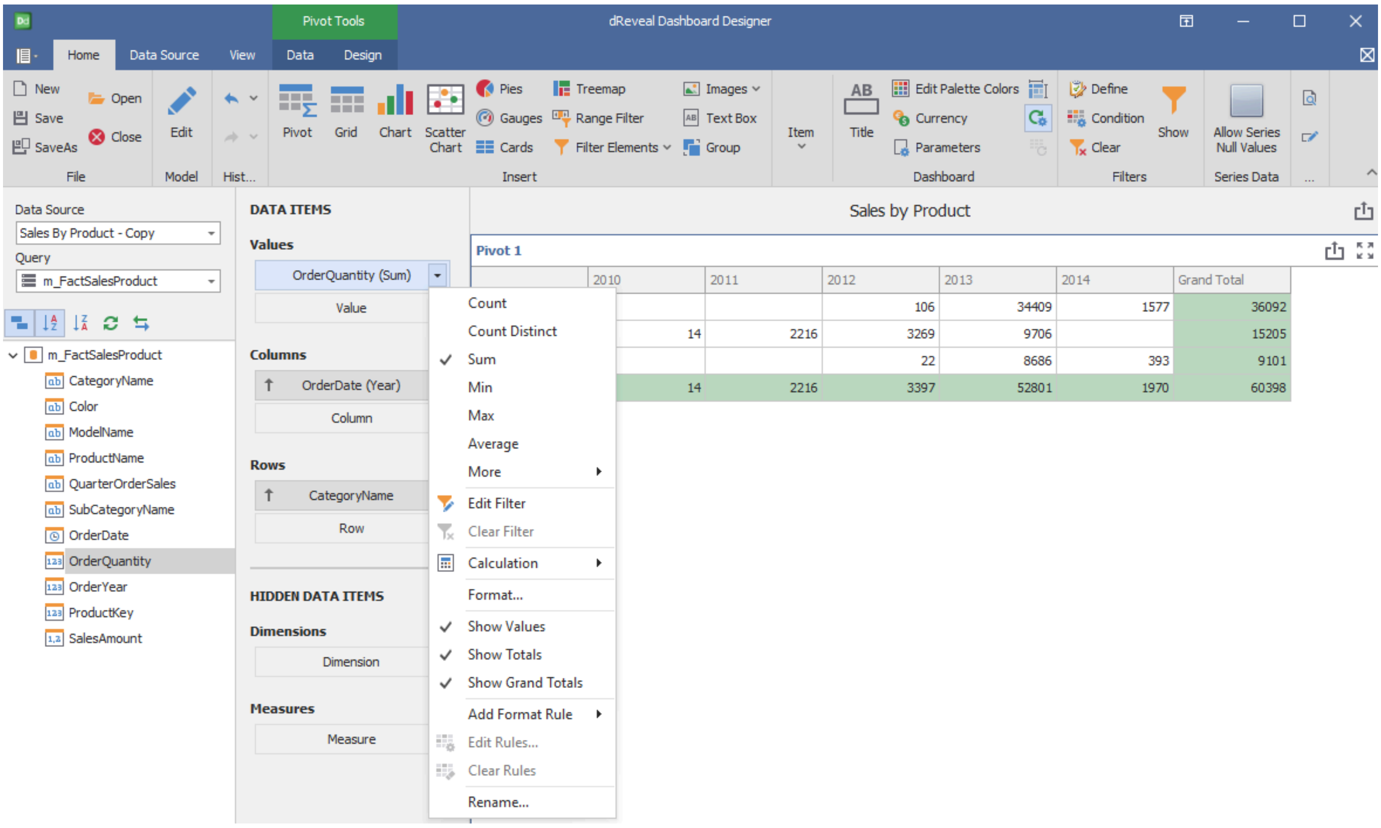
CategoryName
Row
HIDDEN DATA ITEMS
Dimensions
Dimension
Measures
Measure
Sort Ascending
Sort Descending
Sort by
Top N...
✓ Year
Quarter
Month
Day
More
Quarter-Year
Month-Year
Week-Year
Day-Month-Year
More
Exact Date
Format (Default)
✓ Show Totals
Add Format Rule
Edit Rules...
Clear Rules
Rename...
Sales by Product
Pivot 1

Data Source: Sales By Product - Copy

Query: m_FactSalesProduct

	2010	2011	2012	2013	2014	Grand Total
Accessories			106	34409	1577	36092
Bikes	14	2216	3269	9706		15205
Clothing			22	8686	393	9101
Grand Total	14	2216	3397	52801	1970	60398

Column of type Numeric: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Value
Columns
OrderDate (Year)
Column
Rows
CategoryName
Row
HIDDEN DATA ITEMS
Dimensions
Dimension
Measures
Measure
Count
Count Distinct
✓ Sum
Min
Max
Average
More
Edit Filter
Clear Filter
Calculation
Format...
✓ Show Values
✓ Show Totals
✓ Show Grand Totals
Add Format Rule
Edit Rules...
Clear Rules
Rename...
Sales by Product
Pivot 1

Data Source: Sales By Product - Copy

Query: m_FactSalesProduct

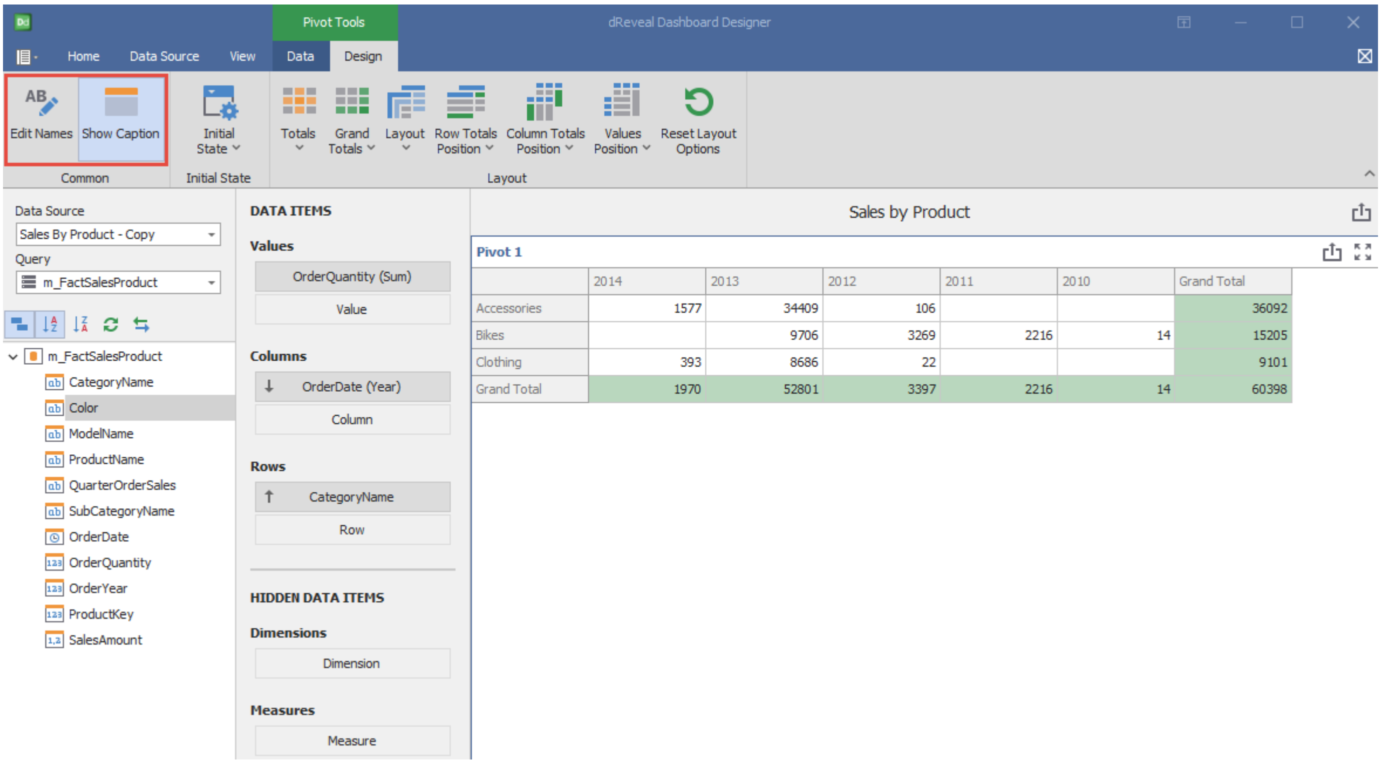
2010	2011	2012	2013	2014	Grand Total
		106	34409	1577	36092
14	2216	3269	9706		15205
		22	8686	393	9101
14	2216	3397	52801	1970	60398

Design

'Pivot Chart' has a variety of options in the **'Design'** tab to customize your chart. Next, we will show you the different options you can apply to your Pivot chart.

Common

Options	Description
Edit Names	*Edit the name of the chart.*
Show Caption	*Show the dashboard item's caption.*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Data Source: Sales By Product - Copy

Query: m_FactSalesProduct

Values: OrderQuantity (Sum)

Columns: OrderDate (Year)

Rows: CategoryName

Sales by Product

Pivot 1

	2014	2013	2012	2011	2010	Grand Total
Accessories	1577	34409	106			36092
Bikes		9706	3269	2216	14	15205
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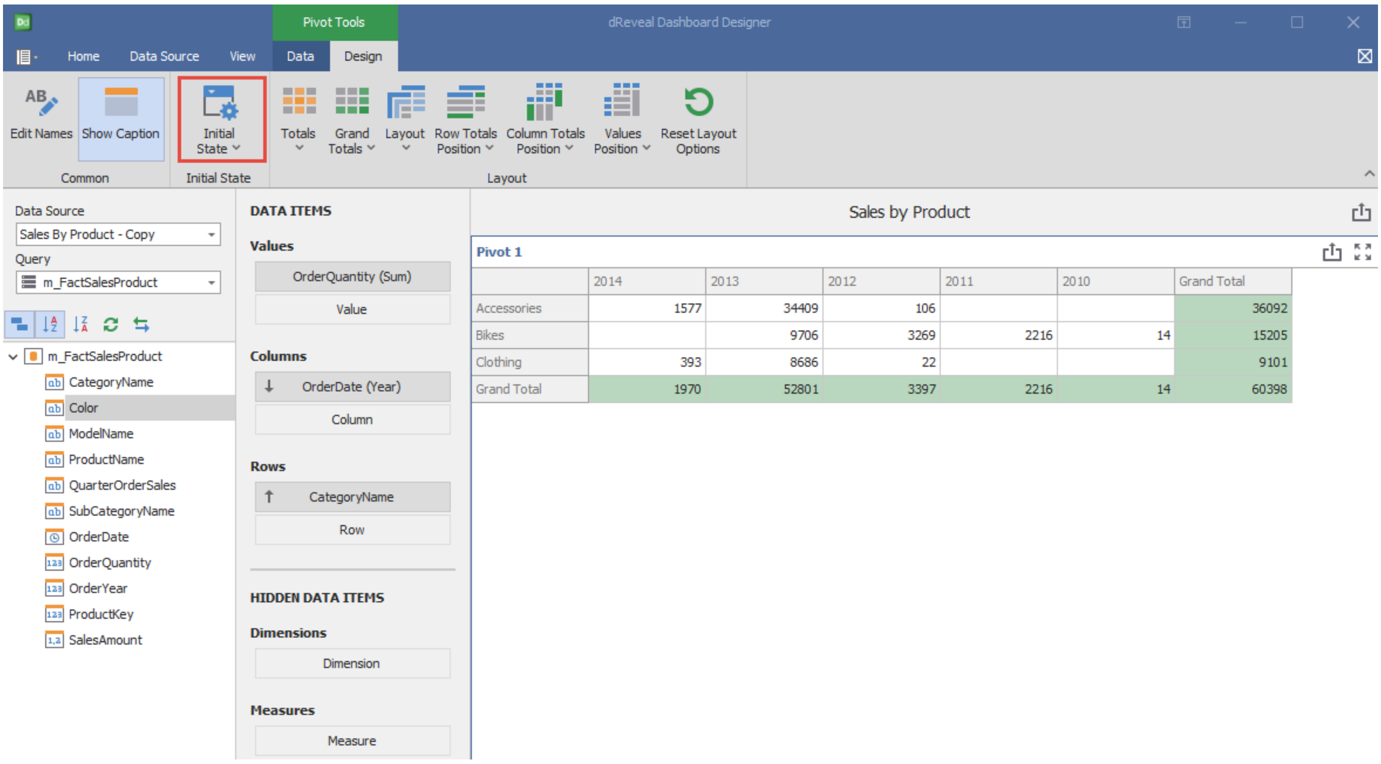
Initial State

Options	Description
Initial State	*Specify how the pivot dashboard item appears in the Dashboard Viewer by default. There are two options:* ***Expand Column Groups*** *and* ***Expand Row Groups****.*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Sales by Product

Pivot 1

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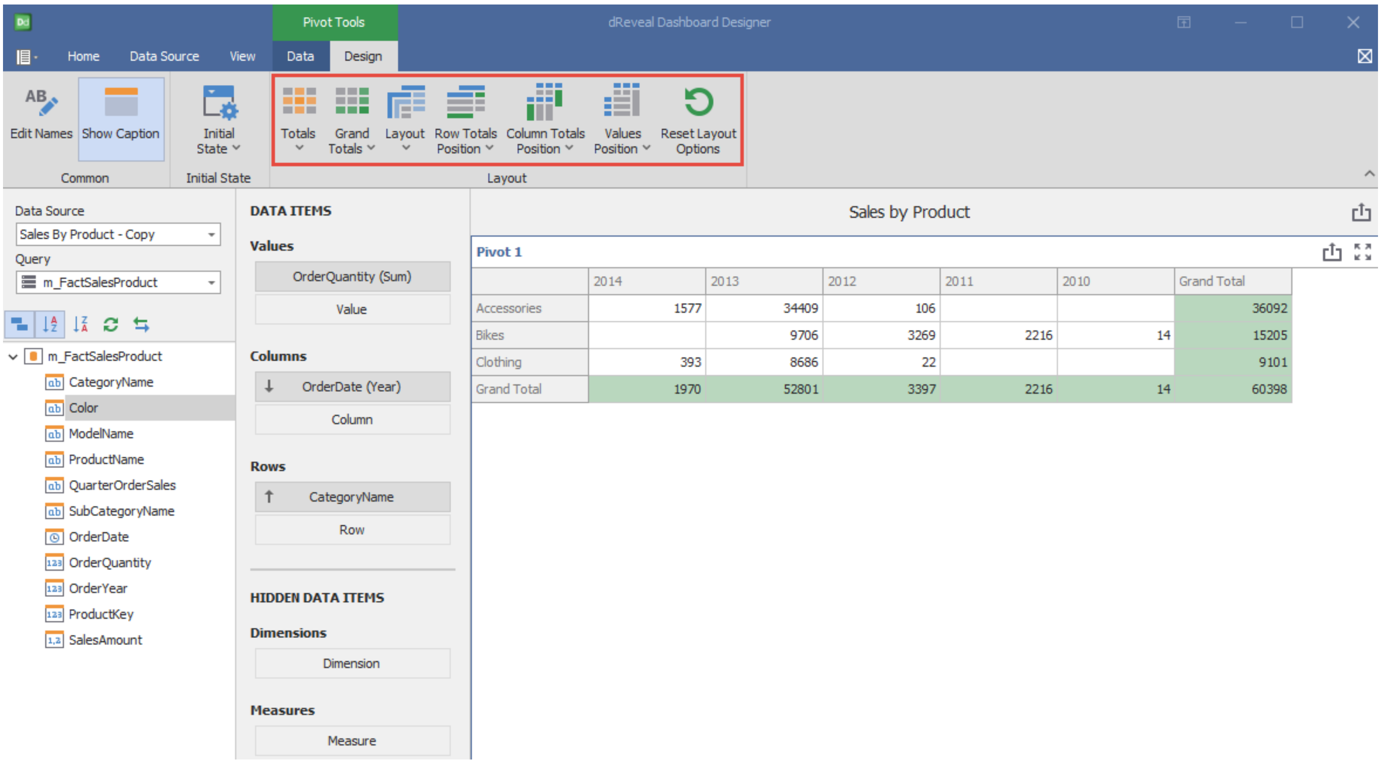
Layout

Options	Description
Totals	*Show Totals in the pivot dashboard item. There are two options:* ***Show Column Totals*** *and* ***Show Row Totals****.*
Grand Totals	*Show Grand Totals in the pivot dashboard item. There are two options:* ***Show Column Grand Totals*** *and* ***Show Row Grand Totals****.*
Layout	*Select a pivot table's layout. There are two options:* ***Compact*** *and* ***Tabular****.*
Row Totals Position	*Specify the row totals' position. There are two options:* ***Top*** *and* ***Bottom****.*
Column Totals Position	*Specify the column totals' position. There are two options:* ***Near*** *and* ***Far****.*
Values Position	*Specify the position of data headers used to arrange summary values. There are two options:* ***Columns*** *and* ***Rows****.*
Reset Layout Options	*Reset options related to a pivot table layout to their default values.*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