BI Publisher – CS 9.0, PT 8.52 Pivot Table

### Page 1 of 3

# **Pivot Table Illustration**

This is a simple illustration of the use of the Pivot Table with BI Publisher.

For this example, the underlying query contains a selection of external organizations in the US showing, among other fields, their State, External Org ID and Proprietorship. The Pivot Table will show a count of organizations by State and Proprietorship.

Select *Pivot Table* from the *Add-Ins > Insert* menu.



#### The Pivot Table dialog opens.

| ta:          | Layout:          | Preview |                        |        |
|--------------|------------------|---------|------------------------|--------|
| 🔁 query 🔺    |                  | P       | roperties              |        |
| Qnumrows     |                  |         | <b>i</b> 2↓   <b>m</b> |        |
|              |                  |         | Misc                   |        |
| @xmins:xsi   |                  |         | Aggregation            | Sum    |
|              | Please drop data | a here  | Format                 | 0      |
| @rowpumber   |                  |         | Row Layout             | Inline |
| EXT ORG ID   |                  |         | Sort                   |        |
| EFF STATUS   |                  |         | Sort Column 1          |        |
| EXT_ORG_TYPE |                  |         | Sort Column 2          |        |
| COUNTRY      |                  |         | Sort Column 3          |        |
| ADDRESS1     |                  |         | Sort Column 4          |        |
|              |                  |         | Sort Row 1             |        |
| - STATE      |                  |         | Sort Row 3             |        |
| POSTAL       |                  |         | Sort Row 4             |        |
|              |                  |         | Sort Row 5             |        |
|              |                  |         | Total                  |        |

## BI Publisher – CS 9.0, PT 8.52 Pivot Table

2. Under Properties, change the Aggregation from Sum to Count.

| a: Lay                     | yout: |                       | Preview |               |          |
|----------------------------|-------|-----------------------|---------|---------------|----------|
| □ @xsi:noNamespaceScł ▲    |       | PROPRIETOR<br>SHIP    |         | Properties    |          |
| @rownumber<br>@ EXT_ORG_ID | STATE | EXT_ORG_ID            |         |               | <b>C</b> |
| EFF_STATUS                 |       | Please drop data here |         | Eormat        | O        |
|                            |       |                       |         | Row Layout    | Inline   |
|                            |       |                       |         | E Sort        |          |
|                            |       |                       |         | Sort Column 1 |          |
| STATE                      |       |                       |         | Sort Column 2 |          |
| POSTAL                     |       |                       |         | Sort Column 3 |          |
| DESCR 50                   |       |                       |         | Sort Column 4 |          |
| ORG LOCATION               |       |                       |         | Sort Row 1    |          |
|                            |       |                       |         | Sort Row 2    |          |
| LS SCHOOL TYPE             |       |                       |         | Sort Row 3    |          |
| ATP CD                     |       |                       |         | Sort Row 4    |          |
| OFFERS COURSE: -           |       |                       |         | Sort Row 5    |          |
| 4 11                       |       |                       |         | E Total       |          |
|                            |       |                       |         | L             | -        |

3. Note at the bottom of the **Properties** section there are choices regarding sorting columns and that by default there are Subtotals and Totals. For this example, leave the last four items as True.

| Sort            |      | - |
|-----------------|------|---|
| Sort Column 1   |      |   |
| Sort Column 2   |      |   |
| Sort Column 3   |      |   |
| Sort Column 4   |      |   |
| Sort Row 1      |      |   |
| Sort Row 2      |      |   |
| Sort Row 3      |      |   |
| Sort Row 4      |      |   |
| Sort Row 5      |      |   |
| 🗆 Total         |      |   |
| Column Subtotal | True |   |
| Column Total    | True |   |
| Row Subtotal    | True |   |
| Row Total       | True |   |

4. Click OK.

## BI Publisher – CS 9.0, PT 8.52 Pivot Table

Page 3 of 3

5. The template code appears as follows:

| СН      | G<br>PROPRIETOR<br>SHIPE | Total |
|---------|--------------------------|-------|
| G STATE | G 999E                   | 999E  |
|         | G 999E                   | 999   |

6. To observe the results, click *Preview > PDF*. A sample of some of the data appears as follows:

|    | INDC | INDN | OTHR | PUBL | RELG | Total |
|----|------|------|------|------|------|-------|
| AK | 0    | 0    | 4    | 10   | 0    | 14    |
| AL | 0    | 0    | 16   | 20   | 0    | 36    |
| AR | 0    | 0    | 11   | 11   | 0    | 22    |
| AS | 0    | 0    | 0    | 1    | 0    | 1     |
| AZ | 0    | 0    | 7    | 13   | 0    | 20    |

7. As shown, each row has a total by **State** broken out by **Proprietorship**. And on the last page (not shown) there are totals by each column.

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