

How to Create a Pivot Widget

This article shows how to create a pivot table widget.

A pivot table is a data analysis tool that allows for flexible and quick summarization and visualization of large amounts of data. Its advantages include flexibility, quick summarization, data visualization, and interactivity. However, pivot tables also have some drawbacks, such as the inability to directly edit data, complexity, and limitations on data size. Pivot tables are commonly used when there is a need to analyze sales, financial, or economic data, explore correlations and trends, make comparisons and contrasts, and generate reports quickly. In summary, a pivot table is a powerful tool that supports decision-making and strategic planning.

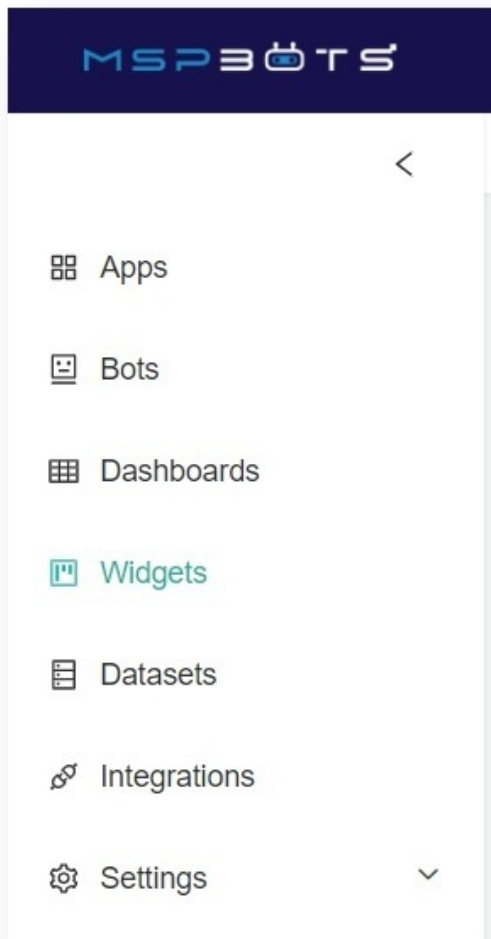
An example of a pivot table widget:

Autotest_PivotTable

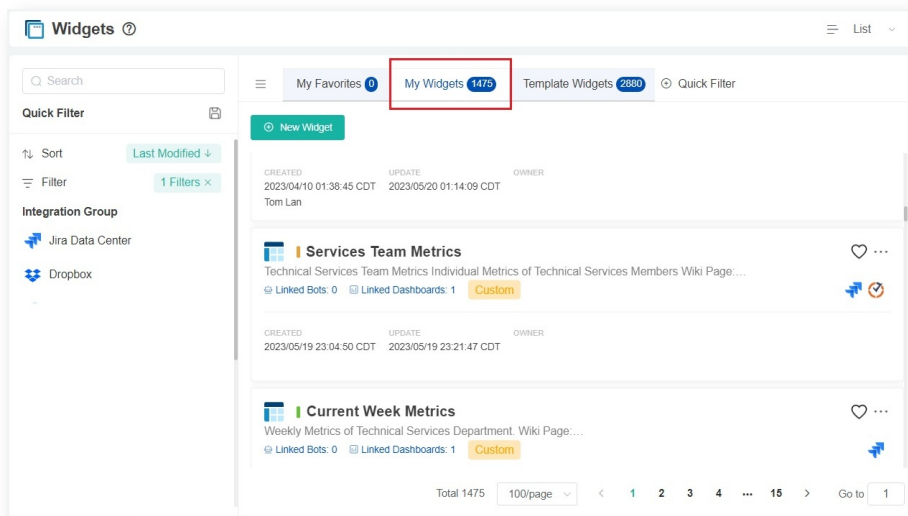
<div><div><div>Sum of Issue Id</div><div>Count of Summary</div><div>Qa Owner</div><div>Sprint Name</div></div><div><div>Create Time (All)</div><div>Type Name</div></div></div>									
Bug		Defect		Story		Grand Total			
Issue Id	Summary	Issue Id	Summary		Issue Id	Summary	Issue Id	Summary	
Carl	929119	10	6538003	72	5939447	67	13406569	149	
Sprint 81	88221	1	4492975	50	2129083	25	6710279	76	
Sprint 82	183829	2	1668188	18	1801049	20	3653066	40	
Sprint 83	657069	7	376840	4	2009315	22	3043224	33	
Kelvin	5066630	56	1664063	18	2284098	26	9014791	100	
Sprint 81	2035460	23	910701	10	1038774	12	3984935	45	
Sprint 82	2189599	24	467236	5	361516	4	3018351	33	
Sprint 83	841571	9	286126	3	883808	10	2011505	22	
Maeve	3352280	37	0	0	975584	11	4327864	48	
Sprint 81	1504526	17	0	0	88632	1	1593158	18	
Sprint 82	1380659	15	0	0	632480	7	2013139	22	
Sprint 83	467095	5	0	0	254472	3	721567	8	
Pan	361762	4	449538	5	707673	8	1518973	17	

How to Create a Pivot Widget

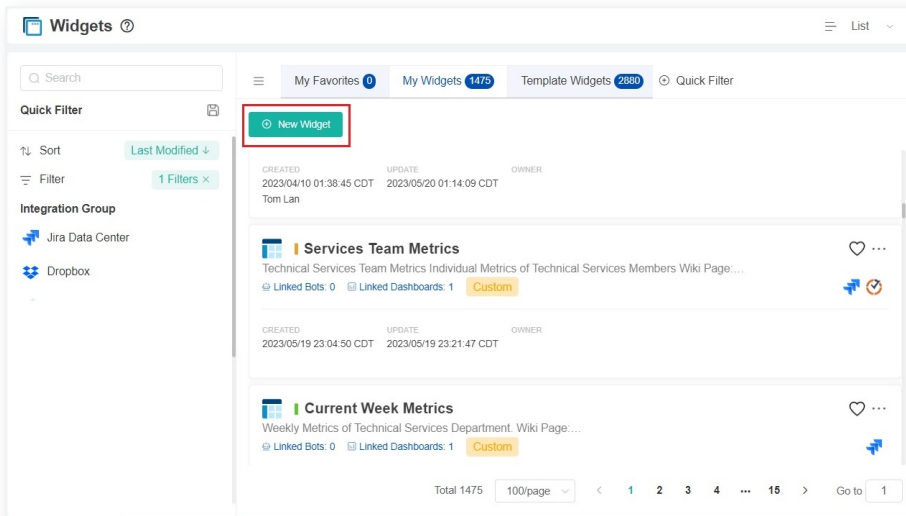
1. Navigate to **Widgets** on the MSPbots app menu.



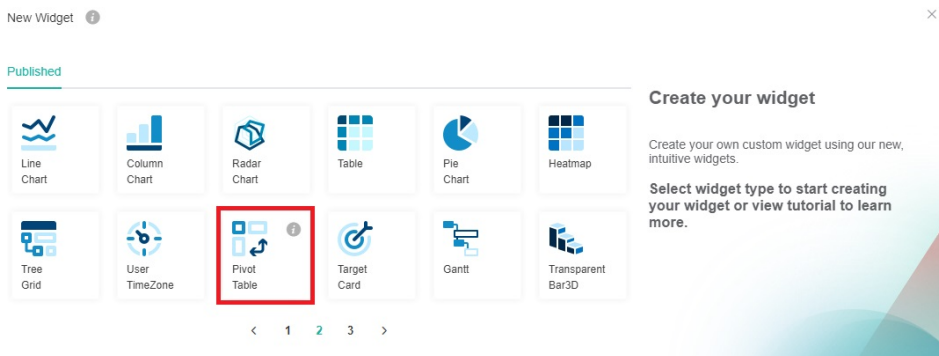
2. On the Widgets tab, click **My Widgets**.



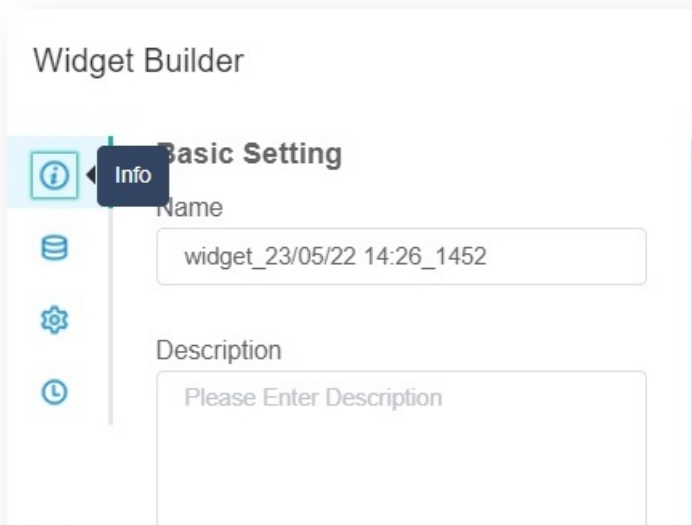
3. Next, click the **New Widget** button.



4. Select the **Pivot Table** widget type on the New Widget window.



5. When the **Widget Builder** window opens, click **Info** on the menu.



6. Provide the following under Basic Setting.

- **Name** - Give the widget a name.
- **Description** - Give the widget a short description.

- **Role** - Select or edit the roles that will have access to the widget. The roles selected by default are Admin, User, and Dashboard Only.

Widget Builder

Basic Setting

Name
widget_23/05/22 14:26_1452

Description
Please Enter Description

More Info
Please Enter More Info

* Role
Admin +3

Tag
Tag

Integration

Preview

widget_23/05/22 14:26_1452

No Data
Click here to get more details

Close Apply

7. Click **Apply** when done.

Widget Builder

Basic Setting

* Name
widget_23/05/22 14:26_1452

Description
Please Enter Description

More Info
Please Enter More Info

* Role
Admin +3

Tag
Tag

Integration

Preview


widget_23/05/22 14:26_1452


No Data
Click here to get more details


Close Apply


8. Next, go to **Dataset** on the menu.

Widget Builder









Basic Setting


* Name

Dataset


Widget_23/05/22 14:26_1452


Description


Please Enter Description


9. Under Data Source, click the  button.

Widget Builder












Data Source





 Please add a new dataset for other settings!


Order By



Row Limit

All Data



10. Select **New Layer** when the Add New Layer window opens. This action will bring up the Dataset window.

Add New Layer

New Layer

This is description about new layer

Calculate Layer

This is description about calculate layer

11. On the **Dataset** window,
- a. Select the **Dataset** containing the information you want to use. You can also give a name for the Datasource (optional).

Dataset

Dataset:

Jira Data Center / Jira Issue Details - Support

Show datasource name as

Dataset name

Columns Display:

Select All

Clear All

Column Name	Alias	Business Type	
<div><div>Select Column Name</div><div></div></div>	<div><div>Enter Alias</div></div>	<div><div>Select Business Typ</div><div></div></div>	<div><div></div><div></div></div>

Filter:

AND

OR

Measure

Dimension

DrillThrough Order By

Order By

Row Limit

All Data

☐ Remove duplicate data

Materialized

Not Materialized

Cancel

Save

- b. For **Columns Display**,

- i. Go to the **Column Name** dropdown and select the field you want to show in the drill-through.

Dataset

Dataset:

Jira Data Center / Jira Issue Details - Support

Show datasource name as

Dataset name

Columns Display:

Select All Clear All

Column Name	Alias	Business Type	
Select Column Name ^ <div><div># issue_id</div><div>Aa jira_ticket_id</div><div>Aa is_blocked_by</div><div>Aa status_name</div><div>create_time</div><div>update_time</div><div>due_date</div><div>Aa priority_name</div></div>	Enter Alias	Select Business Typ	<div><div><div></div></div><div><div></div></div></div>

+

+

Order By

+

Row Limit

All Data


☐ Remove duplicate data

Materialized

Not Materialized

Cancel

Save

Click  to add more rows.

Dataset:

Jira Data Center / Jira Issue Details - Support

Show datasource name as

Dataset name

Columns Display:

Select All Clear All

Column Name	Alias	Business Type	
Select Column Name ^	Enter Alias	Select Business Typ	<div><div></div><div></div></div>
# issue_id			
Aa jira_ticket_id			
Aa is_blocked_by			
Aa status_name			
M create_time			
D update_time			
D due_date			
Aa priority_name			

Order By

Row Limit

All Data

☐ Remove duplicate data

Materialized

Not Materialized

- ii. Give the column an **Alias** and select a **Business Type** for it. Do this for every row that you create.

Dataset

×

Dataset:

Jira Data Center / Jira Issue Details - Support

Show datasource name as

Dataset name

Columns Display:

Select All Clear All

Column Name	Alias	Business Type	
status_name	Status Name	Text	<div>+</div> <div>✕</div>

Filter:

AND OR +

🔍 ✕

Measure +

Dimension +

DrillThrough Order By

+

Order By

+

Row Limit

All Data

☐ Remove duplicate data


Materialized

Not Materialized

Cancel Save

- iii. If the selected Business Type is **Number**, read the article [Options for Custom Formatting in Your Widgets and Dashboards](#) for help with formatting numbers in your widgets.


c. For **Filter**,

- i. Click the  button and choose between **Add Condition** and **Add Group**.

Dataset

Dataset:

Jira Data Center / Jira Issue Details - Support





Show datasource name as


Dataset name

Columns Display:

Select All Clear All

Column Name	Alias	Business Type	
status_name	Status Name	Text	 

Filter:

AND OR 

+ Add Group

+ Add Condition

Measure

Dimension

DrillThrough Order By

Order By

Row Limit

All Data

☐ Remove duplicate data

Materialized

Not Materialized

Cancel

Save

ii. Select a filter from the first dropdown list.

Dataset

×

Dataset:

Jira Data Center / Jira Issue Details - Support



Show datasource name as

Dataset name

Columns Display:

Select All Clear All

Column Name	Alias	Business Type	
status_name	Status Name	Text	

Filter:

AND OR +

create_time ^ Value Slicer

Measure

Dimension

DrillThrou

Order By

Row Limit

All Data

Remove duplicate data

Materialized

Not Materialized

- iii. Next, set a condition or logic for each field using the next two dropdowns. Refer to the article [What Filter Conditions and Formats are Available for Creating Widgets](#) for the descriptions of each condition.

Dataset:
Jira Data Center / Jira Issue Details - Support

Dataset:
Jira Data Center / Jira Issue Details - Support

Show datasource name as
Dataset name

Columns Display:
[Select All](#) [Clear All](#)

Column Name	Alias	Business Type	
create_time	Create Time	Date Time	

Filter:

AND OR

create_time Earlier Than Value ☐ Slicer

Time Variate Time

2023-05-23 22:05:51

Clear Save

Measure +

Dimension +

DrillThrough Order By

Order By

- iv. Repeat Steps c.i to c.iii to add more conditions.
- v. When you have added all the conditions you need, select the logical operator AND or OR for the filter group.

Dataset

Dataset:
Jira Data Center / Jira Issue Details - Support

Show datasource name as
Dataset name

Columns Display:
[Select All](#) [Clear All](#)

Column Name	Alias	Business Type	
create_time	Create Time	Date Time	

Filter:

AND OR

create_time Earlier Than 2023-05-23 22:0 ☐ Slicer


status_name Equals Waiting on Us ☐ Slicer

Measure +


Dimension +


DrillThrough Order By


- d. (Optional) For **Measure**,


- i. Click the  button to show the Measure window.


Filter:


AND OR 


create_time Earlier Than 2023-05-23 22:0: ☐ Slicer 

status_name Equals Waiting on Us ☐ Slicer 



Measure 

Dimension 

DrillThrough Order By 


Order By 

Row Limit

All Data 

☐ Remove duplicate data

Materialized


Not Materialized 


Cancel


Save


- ii. On the Measure window, select a **Summary Type**.
iii. Select a **Field** to use in the computation.
iv. Enter an **Alias** for the measure.
v. Select a **Format Type**.
vi. Then click **Add**.

Filter:


AND OR 


create_time Earlier Than 2023-05-23 22:0: ☐ Slicer 

status_name Equals Waiting on Us ☐ Slicer 



Measure 

Dimension

DrillThrough Order By 


Order By 

Row Limit

All Data 

☐ Remove duplicate data

Materialized

Not Materialized 


Close

Add

- e. (Optional) For **Dimensions**,

i. Click the  button.


Filter:

AND OR 

create_time

Earlier Than


2023-05-23 22:0:


☐ Slicer 


status_name


Equals


Waiting on Us

☐ Slicer 



Measure 

Dimension 

DrillThrough Order By 


Order By 

Row Limit

All Data 

☐ Remove duplicate data

Materialized

Not Materialized 

Cancel

Save

ii. Click on **Fields** and select an option for grouping the data.

iii. Next, enter an **Alias** for the measure.

iv. Select a **Format Type**.




v. Then click **Add**.

create_time

fx


Create Time

Date Time



Center Request


Filter:

AND OR 

create_time

Earlier Than


2023-05-23 22:0:

☐ Slicer 


status_name


Equals


Waiting on Us

☐ Slicer 



Measure

Dimension 

DrillThrough Order By 


Order By 

Row Limit


All Data 

☐ Remove duplicate data

Materialized


Not Materialized 

* Fields

Please Select 

* Alias

Format Type

Please Select 


Close

Add

f. (Optional)For **DrillThrough Order By**,

i. Click the  button.


Filter:

AND OR 

create_time

Earlier Than


2023-05-23 22:0:


☐ Slicer 


status_name

Equals


Waiting on Us


☐ Slicer 

Measure 

Dimension 



DrillThrough Order By



Order By 

Row Limit


All Data



☐ Remove duplicate data

Materialized

Not Materialized




Cancel

Save

ii. Select a parameter to automatically sort data according to your selection.

DrillThrough Order By



Summary

Status Name

Type Name

Create Time

Sprint Name

g. (Optional)For **Order By**,

i. Click the  button.

Dimension



DrillThrough Order By



Order By



Row Limit

☐ Remove duplicate data


Materialized

Cancel

Save

ii. Select a parameter to sort the data based on your selected field.

Order By



count_summary

groupBy_create_time_date_days

h. (Optional)Next, select a **Row Limit** to set a limit to the number of rows on your widget.

Dimension



DrillThrough Order By



Order By



Row Limit

☐ Remove duplicate data

Materialized

Cancel

Save

- i. (Optional) Tick the checkbox for **Remove duplicate data** to delete duplicate data based on your set conditions.

Dimension +

DrillThrough Order By +

Order By +

Row Limit All Data ^ v

☐ Remove duplicate data

Materialized v

Not Materialized

Cancel Save

- j. (Optional) Then select an option from the **Materialized** dropdown to materialize data based on the actual conditions.

DrillThrough Order By +

Order By +

Row Limit All Data ^ v

☐ Remove duplicate data

Materialized ^

Not Materialized

Materialized

None

Cancel Save

← Delete

- k. Click **Save** to keep the configuration.

12. **Other optional settings:**

The following options are also available on the Dataset tab. When applied, these two settings reflect on the pivot table instead of the drill-down.

- **Order By** - Sorts the data based on the selected field.
- **Row Limit** - Sets a limit to the number of rows that appear on the widget.

ⓘ ☰ ⚙️ 🕒

Data Source

Autotask Ticket Statistics ...

+

Order By +

↑ Ticket Count x


Row Limit All Data ^ v


🗨️


After adjusting the settings for these, click **Apply** to save the setup.


Move on to **Config** on the menu.

Widget Builder









Widget Type

Pivot Table

Show Grouping Bar

☒

Collapse Fields

☒

For Empty Cells Show Zero

☒

Do the following:

- Widget Type** - You can switch this widget to different widget types. If you want to learn more, please refer to [How to Switch Widget Types](#).
- Show Grouping Bar** - This is the toggle for hiding or showing the row fields, column fields, value fields, and filter fields in the pivot table.
 - When turned on, it will display the row fields, column fields, value fields, and filter fields.
 - When turned off, it will not display them.

Widget Builder

Widget Type

Pivot Table

Show Grouping Bar

☒

Collapse Fields

☒

For Empty Cells Show Zero

☒

Preview

Autotest_PivotTable

	Bug		Defect		Story		Grand Total	
	Issue Id	Summary	Issue Id	Summary	Issue Id	Summary	Issue Id	Summary
➤ Merge	3352280	37	0	0	975584	11	4327864	48
➤ Sprint B1	1604626	17	0	0	88632	1	1593158	18
➤ Sprint B2	1380659	15	0	0	632480	7	2013139	22
➤ Sprint B3	467095	5	0	0	254472	3	721567	8
➤ Pantene	361762	4	449538	5	707673	8	1518973	17
➤ Sprint B3	88539	1	0	0	0	0	88539	1
➤ Sprint B2	184913	2	92232	1	176599	2	453744	5
➤ Sprint B1	88310	1	367306	4	531074	6	976690	11
➤ Tom	714156	8	1202145	13	3132547	35	5648848	56
➤ Sprint B3	0	0	189435	2	924516	10	1113851	12
➤ Sprint B1	438197	5	453916	5	1392788	16	2284901	26
➤ Sprint B2	275989	3	568794	6	815243	9	1649996	18
➤ Kelvin	5066630	56	1664063	18	2284090	26	5014791	100
➤ Sprint B3	841571	9	289126	3	883600	10	2011565	22
➤ Sprint B2	2189599	24	487236	5	361516	4	3018351	33

🗑️

Delete

📄

Clone

✖

Close

📌

Apply


c. Collapse Fields


- When this toggle is turned on, all column fields in the table will be expanded when you open the widget.

- When it is turned off, collapsible column fields will be collapsed when you open the widget, and only non-collapsible column fields will be displayed.

d. For Empty Cells Show Zero

- When this toggle is turned on, empty values will be displayed as 0.
- When it is turned off, empty values will be displayed as blank.

- e. Click on the  located at the top right corner of the **Preview** page to access the Field List pop-up.

- The fields listed under "All Fields" are sourced from the fields set in the Data Source. Please check the fields you want to display in the pivot table under "All Fields". These fields will be automatically displayed in the Filters, Columns, Rows, or Values section respectively.
- If you want to adjust the position of each field, drag the  in front of each field. Place the mouse cursor over it until the cursor icon changes to Drag, then drag the field to the area where you want it to be displayed.

iii. Click **Apply**.


Field List

Calculated Field

The screenshot shows a configuration interface with three main panels. On the left, the 'All Fields' panel lists several fields: Type Name, Issue Id, Summary, Create Time, Qa Owner, and Sprint Name, each with a checkbox and a vertical ellipsis icon. In the center, the 'Filters' panel is empty with the text 'Drop filter here'. Below it, the 'Rows' panel lists the same fields with up and down arrows for reordering. On the right, the 'Columns' panel is empty with the text 'Drop column here'. Below it, the 'Values' panel shows 'Sum of Issue Id' with a dropdown arrow. At the bottom right, there are 'Apply' and 'Cancel' buttons.

f. In the action column above the pivot table, you can edit the format of the table.

i. Clicking on  the **Show table** button displays the pivot table in table style.

ii. Clicking on  to switch the widget to another type.

1. Column
2. Bar
3. Line
4. Area
5. Scatter
6. Polar

7. If none of the above chart types meet your needs, please click "More" and set the chart type you need in the "Chart Type" within the Chart Type Settings.

Preview

The screenshot shows a preview of a pivot table titled 'Autotest_PivotTable'. Above the table, there is a toolbar with icons for table, bar chart, line chart, area chart, scatter plot, and polar chart. A dropdown menu is open, showing the following options: Column, Bar, Line, Area, Scatter, Polar, and More... (highlighted with a red box). Below the menu, there are checkboxes for 'Multiple Axis' and 'Show Legend'.

8. Multiple Axis: If selected, you can configure the "Multiple Axis Mode" with options such as "Stacked" or "Single".

9. Show Legend: If checked, the pivot table is displayed as a line chart. Clicking on "Show table" button allows you to return to table style.

Chart Type Settings

×

Chart Type


Line

☒ Multiple Axis ☒ Show Legend

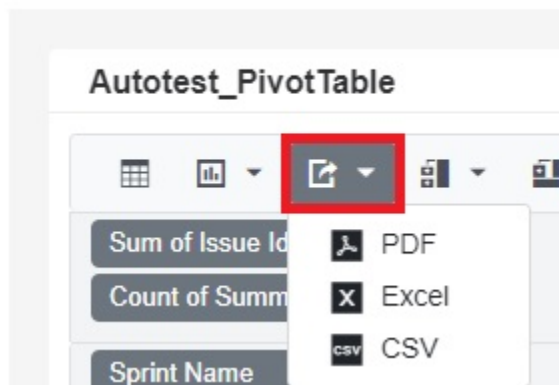
Multiple Axis Mode


Stacked

OK Cancel

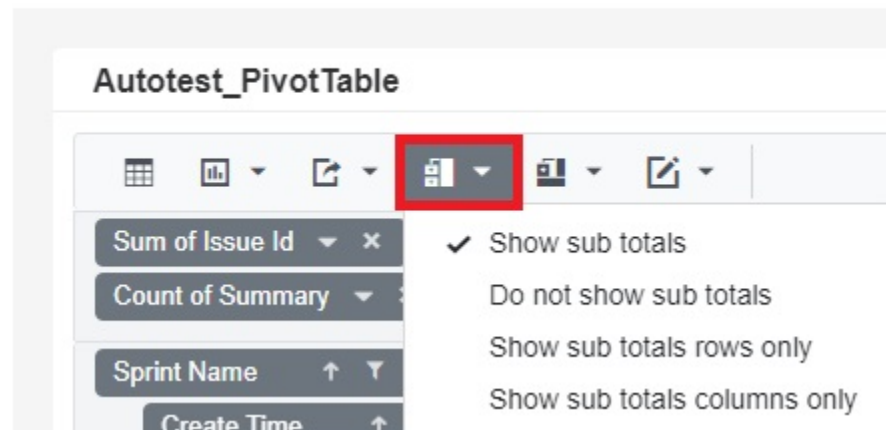
- iii. Click on  to export the table as PDF, Excel or CSV format.


Preview



- iv. Click on  to set sub totals.
1. Show sub totals
 2. Do not show sub totals
 3. Show sub totals rows only
 4. Show sub totals columns only

Preview




- v. Click on  to set grand totals.
1. Show grand totals
 2. Do not show grand totals
 3. Show grand totals rows only

4. Show grand totals columns only

Preview

The screenshot shows the 'Autotest_PivotTable' interface. The 'Show grand totals columns only' option is selected, indicated by a checkmark. The interface includes a toolbar with icons for grid, chart, link, data, and a red box around the 'Show grand totals' icon. Below the toolbar, there are filters for 'Sum of Issue Id', 'Count of Summary', 'Sprint Name', and 'Create Time'. The right side of the interface shows the selected option: 'Show grand totals columns only'.

- vi. Click on  to set formatting.
1. Number Formatting
 2. Conditional Formatting

Preview

The screenshot shows the 'Autotest_PivotTable' interface. The 'Number Formatting...' and 'Conditional Formatting...' options are visible in the dropdown menu. The interface includes a toolbar with icons for grid, chart, link, data, and a red box around the 'Format' icon. Below the toolbar, there are filters for 'Sum of Issue Id' and 'Count of Summary'.

13. Finally, click **Apply**. This will show a preview of the pivot table.

The screenshot shows the 'Advance Mode' dialog box. The 'Apply' button is highlighted with a red box. The dialog box includes buttons for 'Delete', 'Clone', 'Close', and 'Apply'.

Autotest_PivotTable