



Pivot Grid Embedded

Content Block Guide

Block Version: 2.0.0

Minimum Genesis Version: 2.0.0

Minimum Platform Version: 9.0.0

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Overview

The Pivot Grid Content Block displays data in a Pivot Grid giving users an easy way to analyze and filter on larger data sets. A pre-selected Data Adapter provides the source data which can be Cube, relational and/or external data. Filters are dynamically generated for each Parameter in the Data Adapter(s) and can be added or removed as needed.

This block is almost identical to the Pivot Grid Content Block but was designed to be embedded and display along-side other Components on a Dashboard. This makes it ideal for drill-down analysis. The borders were removed, and the Dashboard Type is Embedded to allow easy integration and the ability to pass Parameters.

My Pivot Grid

Entity Rocky Mtn Clubs Refresh

Default Report Grid View

Sum of Amount Drop filter here

EndDate Total Rows: 57

Account	2024-01-31T00:00...	2024-02-29T00:00...	2024-03-31T00:00...	2024-04-30T00:00...	2024-05-31T00:00...	2024-06-30T00:00...	2024-07-31T00:00...	2024-08-31T00:00...	2024-09-30T00:00...
40000 - Net revenue	38,663,137.16	39,324,464.22	43,786,830.21	44,482,251.66	49,129,964.39	49,894,830.33	43,589,931.41	43,904,326.01	40,074,...
50000 - Cost of goods sold	16,328,970.29	14,214,453.10	14,835,911.12	15,102,091.91	16,994,506.40	17,379,323.67	16,628,148.70	16,986,033.82	14,303,...
59999 - Gross margin	22,334,166.87	25,110,011.12	28,950,919.09	29,380,159.75	32,135,457.99	32,515,506.66	26,961,782.71	26,918,292.19	25,771,...
Grand Total	77,326,274.32	78,648,928.44	87,573,660.42	88,964,503.32	98,259,928.78	99,789,660.66	87,179,862.82	87,808,652.02	80,149,...

Use Cases

- Detailed analysis of tabular data in a pivot table format
 - Ability to pivot and filter on a data set

Designer Page

The designer page is divided into two tabs: Data and Settings.

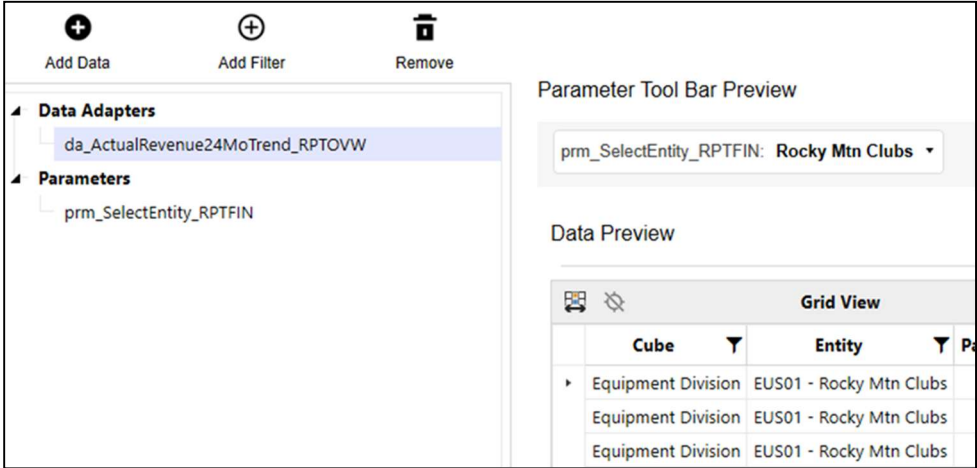
Data

The Data Tab is where you assign the Data Adapter(s) you want to use with the pivot grid. Once assigned, select it to generate a data preview. This displays the first 20 rows of data from the Data Adapter.

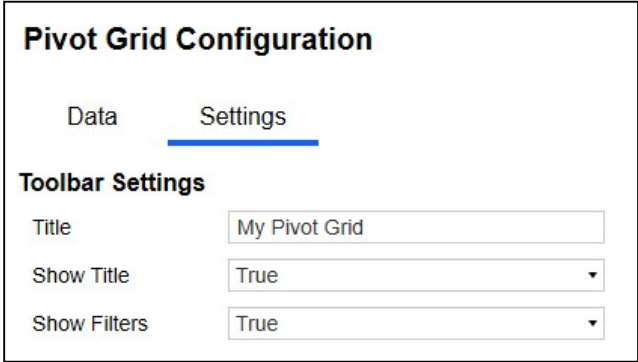
NOTE: The Workspace where the Data Adapter(s) are stored must be **shareable**, otherwise it will not appear in the drop-down menu. Set the Shareable property to True on all applicable Workspaces; this excludes the Default Workspace.

See *Appendix 1* for more information on Workspace Requirements and Parameter behavior.

If the Data Adapter(s) contain Parameters, you will see them listed (excluding Literal Value and Input Parameters). You can also add or remove Parameters. Select a Parameter from the list to update its Parameter Settings if applicable.



The Settings Tab is where you specify Toolbar settings such as title and filter display.



Appendix 1

Workspace Requirements and Considerations

Workspace objects:

- Data Adapters
- Parameters

Requirements for all Workspaces and objects you intend to use in Genesis:

Requirements	Options
Shareable Workspaces:	Ensure the Is Shareable Workspace setting is set to True on each Workspace; this excludes the Default Workspace.
Share Workspaces with Genesis Workspace:	Locate the Genesis Workspace and ensure each Workspace is assigned to the Shared Workspace Names property.
Object Storage:	Same Shareable Workspace <ul style="list-style-type: none">• All objects stored together Default Workspace <ul style="list-style-type: none">• All objects stored in the Default Workspace Default/Shareable Workspace <ul style="list-style-type: none">• Universal objects such as Parameters stored in Default• Data Adapters stored in separate shareable Workspace

Release Notes

Version 2.0.0

This major release introduces block upgradeability further strengthening content development and management. This capability is foundational to how Genesis content will evolve going forward.

Important Notes

Upgradeability is only available for blocks running version 2.0.0 or later. Existing blocks on version 1.x must be migrated to 2.0.0 first. This is a one-time process. See *Content Block Upgrade Path* below for migration details.

Enhancements

Block Upgradeability

This block has been updated to fully support the new upgradeability framework introduced in Genesis 2.0.0. This ensures that the block can evolve over time without requiring pages to be rebuilt or configurations to be recreated.

The following capabilities are now available for all blocks at version 2.0.0 and above:

- Version Awareness**
Blocks now report their version and indicate when a newer version is available. Administrators can see at a glance which pages are running older versions.
- Compatibility Validation**
Each block now includes version-to-version compatibility rules. During an upgrade, Genesis automatically checks whether content and configuration can be safely migrated.
- Selective Upgrades**
Identify and select specific blocks to upgrade on specific pages.
- Configuration and Content Preservation**
Upgrades carry forward existing filter settings, parameters, and layout configuration. Pages do not need to be rebuilt.

Important Note: This feature is not retroactive. Blocks on version 1.x do not include the upgradeability framework. They must be migrated to 2.0.0 first. See *Content Block Upgrade Path* below for migration details.

Platform and Genesis Compatibility

Genesis Version Requirement

Blocks at version 2.0.0 are only compatible with Genesis 2.0 or later.

Do not inject a 2.0.0 block into a Genesis 1.x Instance. The block will not function, and the upgradeability features will not be available.

Minimum Platform Version	9.0.0
Minimum Genesis Version	2.0.0

Content Block Upgrade Path

One-time Migration: Moving an Existing Block to Version 2.0

This process applies only to blocks currently on version 1.x. Follow these steps once to bring your existing block up to version 2.0.

After completing this migration, future upgrades can be performed directly within Genesis and will not require content re-building.

1. Create a new page and set its visibility to Hidden.
2. Inject and configure the 2.0.0 version of the block on this page.
3. Verify functionality to ensure the block behaves as expected.
4. Hide the original page and make the new page visible.
5. After end-user confirmation, delete the original block and page.

Why is this still required for 2.0?

Block upgradeability is functionality built into the 2.0.0 block itself. Blocks on version 1.x do not include this functionality and therefore cannot be upgraded in place. The steps above are the final time you will need to follow this process for this block.

Upgrading from 2.0.0 to Future Versions

Once a block is running version 2.0.0 or later, upgrades are handled directly within Genesis. No page rebuilding or reconfiguration is required.

Refer to the [Genesis Guide](#) for more details on the block upgrade process.

Version 1.0.0

This is the initial release of this block.

Platform and Genesis Compatibility

- Minimum Platform Version: 9.0.0
- Minimum Genesis Version: 1.0.0

