
Pivot Explorer Manual

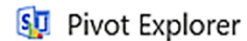
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1 OVERVIEW

Pivot Explorer for SharePoint adds a button to all SharePoint lists in the sites where *Pivot Explorer* is installed. A click on that button opens a page where users can see and modify visualized and summarized list data.



Pivot Explorer is designed for analysis and display of multidimensional data online. Just as you explore Excel data in an Excel pivot table, you can explore data from any SharePoint list with *Pivot Explorer*. The data is represented in compact yet interactive visual reports — multidimensional tables and charts that are fully customizable for your needs.

With *Pivot Explorer* you can analyze data and look at the same information in different ways with just a few mouse clicks. The product supports four different chart types, and the pivot table area of the report page can be modified by simply pivoting the measures.

Use *Pivot Explorer* to create and analyze reports based on SharePoint lists data and to display data in a way that is easy to understand. *Pivot Explorer* offers filtering and sorting of simple or hierarchically arranged values, and analysis results can be exported in various ways.

Pivot Explorer supports modern SharePoint lists and the classic Custom list, whether they are open in the modern interface, the classic interface or Microsoft Lists.

1.1 LANGUAGES

The language of *Pivot Explorer* is automatically set to the same as on the SharePoint site. The supported languages are: Arabic, Danish, Dutch, English, French, German, Italian, Norwegian, Portuguese, Spanish and Swedish. When the SharePoint site has another language, *Pivot Explorer* will be in English.

1.2 REQUIREMENTS

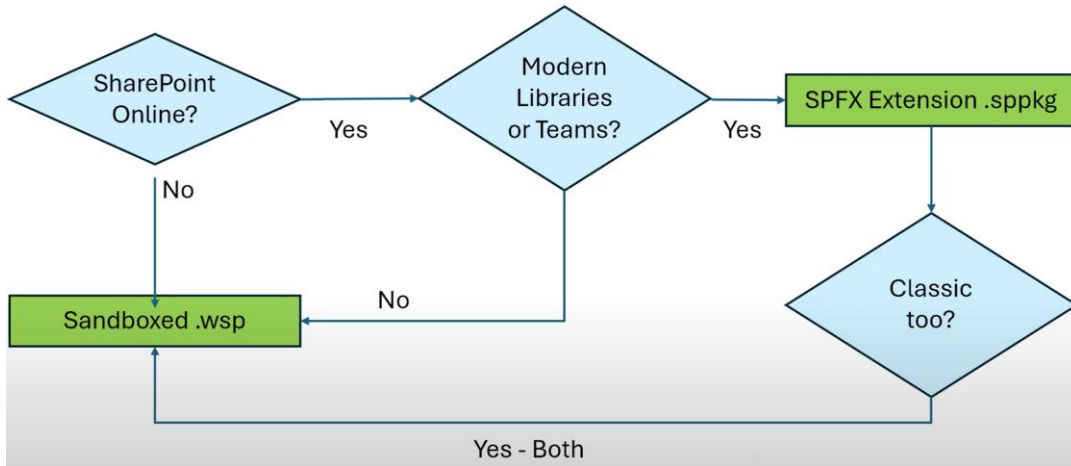
To use *Pivot Explorer*, you need to have SharePoint 2013 or above (in-house or hosted) or Microsoft/Office 365 SharePoint Online.

Tested browsers are Microsoft Edge and the latest versions of Google Chrome and Mozilla Firefox.

1.3 EDITIONS

Pivot Explorer comes in two editions, SPFX edition and Sandboxed solution. They are installed in different ways, but they have the same version number and features.

One subscription is valid for both editions, so you can use any combination of editions you wish. If you want to use SharePoint Online with both the classic and modern experience you need to install both editions, as Microsoft does not support SPFX extensions in the classic experience.



1.3.1 THE SPFX EDITION

The *Pivot Explorer* SPFX edition, or modern client-side extension, only supports SharePoint Online and the modern interface, but it is very easy to install and upgrade so we recommend that you use it when possible.

The SPFX edition comes as an SPPKG file that gives a modern SPFX edition (SPFX). The SPPKG file is uploaded to the tenant's App catalog/Apps site, and as soon as it has been deployed there, it is available to all users to install in a site via the 'Add an app' command. *Pivot Explorer* can also be installed in all sites directly from the App catalog, which is the default option.

To upgrade the SPFX edition, replace the file in the tenant's App catalog/Apps site. All installations in the tenant will then be upgraded automatically.

The SPFX edition supports integration in Microsoft Teams.

1.3.2 THE SANDBOXED SOLUTION

The *Pivot Explorer* Sandboxed SharePoint solution ZIP file includes a WSP file, which is uploaded to a SharePoint Solutions gallery and activated there. After that, *Pivot Explorer* must be activated on the site and on each subsite where it should be used.

The Sandboxed solution supports SharePoint 2013, 2016, 2019, SE and Online.

1.3.2.1 POWERSHELL INSTALLATION

The PowerShell package of the Sandboxed solution is most useful when you want to automate the process of installing *Pivot Explorer* in multiple sites. This edition comes as a ZIP file that includes a PowerShell script, which must be modified for each organization before it is run. The PowerShell package works in both Online and On-Premises SharePoint.

1.4 PERMISSIONS

Standard SharePoint permissions are used for *Pivot Explorer*.

1.4.1 USE *PIVOT EXPLORER*

Users must have at least Contribute permission on the list to create and modify reports. In SharePoint Online, this generally means Edit permission. To view reports, only Read permission is necessary.

1.4.2 UPLOAD AND INSTALL THE SPFX EDITION

To upload the *Pivot Explorer* SPPKG file to an App catalog/Apps site, you need to be a Global or SharePoint Admin of your tenant. Deployment to all sites can be done in the same process.

If *Pivot Explorer* is not enabled for all sites in the upload process, it can be deployed in a single site by the Site owner.

1.4.3 INSTALL AND ACTIVATE THE SANDBOXED SOLUTION

To upload the *Pivot Explorer* Sandboxed solution .wsp file to the Solutions gallery and activate it there, you need to be at least Site admin.

To activate the solution for the site you must be at least Site owner. Often – but not always – the same person has both these roles.

1.4.4 INSTALL WITH A POWERSHELL SCRIPT

You need to be a SharePoint Admin of the farm or tenant to run the PowerShell script that installs *Pivot Explorer* in all sites included in the script.

1.5 THIRD PARTY JAVASCRIPT LIBRARIES

The kalmstrom.com team has modified and extended two third-party JavaScript libraries to create *Pivot Explorer*: WebDataRocks and Chart.js. No extra license is necessary to use these libraries in *Pivot Explorer*.

2 INSTALLATION DETAILS

The recommended way to test *Pivot Explorer* is to create a new site for testing. Once the testing is completed, you should start over by installing *Pivot Explorer* in multiple production sites. It is however also possible to continue with the test installation.

Note that *Pivot Explorer* does not modify the source data in any way. *Pivot Explorer* only has code for reading list data, it never writes/modifies anything in the source data list. The only SharePoint content modified during installation and use of *Pivot Explorer* is:

- The "Site Assets" library, where two files are added.
- The "PE Reports" list, which is created on first use of *Pivot Explorer*.
- The items in the "PE Reports" lists, which are created and updated as you work in *Pivot Explorer*.

When you start using *Pivot Explorer* in your organization, you probably want to have multiple installations for different teams. Be aware that Microsoft recommends use of many sites instead of very big sites with several levels. SharePoint works best that way.

All installation methods are described in video demonstrations on the *Pivot Explorer* Demonstrations page at <https://www.kalmstrom.com/products/Pivot-Explorer/Demonstrations.htm>

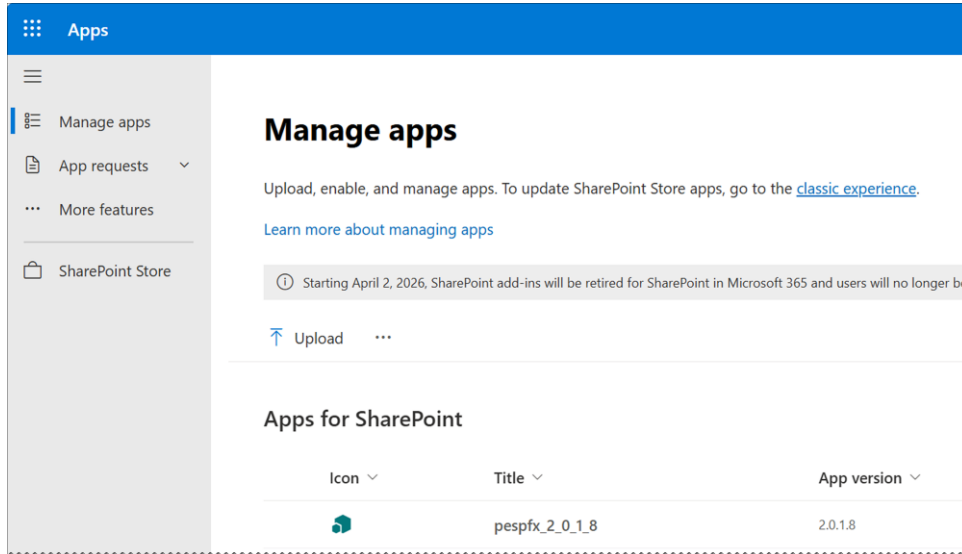
2.1 SPFX EDITION

The *Pivot Explorer* SPFX edition can be used in all modern SharePoint Online lists. It comes as an SPPKG file that gives a modern SPFX edition (SPFX). The SPPKG file is downloaded from the kalmstrom.com website to your PC and then extracted and uploaded to the tenant's App catalog. After that, *Pivot Explorer* can be added to all sites at once or be made available to the whole tenant via the 'Add an app' command.

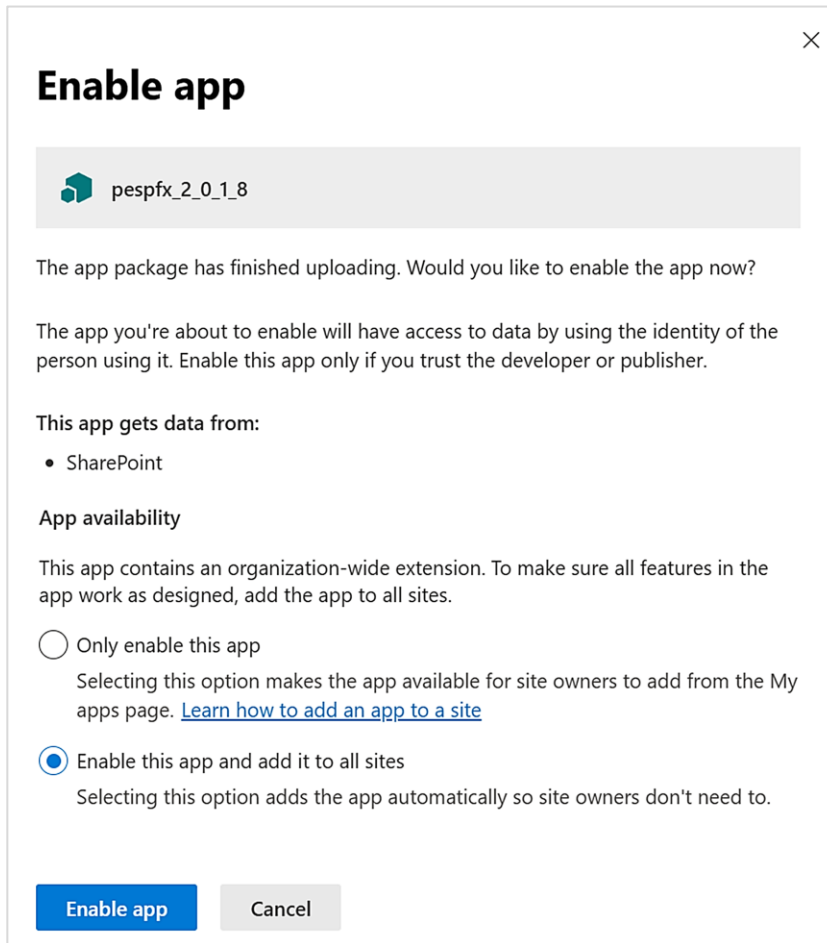
The file can also be loaded from SharePoint Store directly to the App catalog/Apps site. In that case, use the SharePoint 'Add an app' command and select SharePoint Store. When the file has been loaded, you can go directly to step 4 below.

2.1.1 DEPLOY IN AN APP CATALOG

1. Download the *Pivot Explorer* file from [the kalmstrom.com website](http://www.kalmstrom.com) to any folder on your computer and extract it.
2. Go to your App catalog/Apps site. (If you have not already created such a site, it will be created the first time you click on the 'Open' button in the SharePoint Admin center >More features >Apps.)
3. Upload the SPPKG file. (If there is a warning message for add-ins, it can be ignored. It does not apply to SPPKG files.)



4. A right Enable app pane opens. Select one of the options:
- Enable the file.
 - Enable the file and add *Pivot Explorer* to all sites (default).



5. Click on the 'Enable app' button.
6. Close the right pane.

2.1.1.1 DEPLOY IN A SITE

If you have selected to only enable the file but not add it to all sites, Site owners must deploy *Pivot Explorer* manually in each site where it should be used.

1. In the site where you want to use *Pivot Explorer*, click on + New >App in the modern homepage or Site contents, or click on the settings icon in the top navigation bar and select 'Add an app'.
2. Select "All" or "From your organization" in the left menu.
3. Click on the 'Add' button on the *Pivot Explorer* tile.

Now *Pivot Explorer* will be installed in the current site. In a minute or so, the *Pivot Explorer* button will show up in the command bar in all the site's lists with the modern interface.

Repeat the process for each site where you want to use *Pivot Explorer*.

2.1.2 ADD THE SPFX EDITION TO TEAMS

To use *Pivot Explorer* in Microsoft Teams, add a list where *Pivot Explorer* is installed to a modern SharePoint page. Then add that page to a new Teams tab.

You can start in SharePoint or open the Files tab in the Teams channel you wish to use and go to SharePoint from the link under the ellipsis.

1. Create a new modern page
 - a. We recommend that you delete the comments section and not add any additional web parts to this page.
 - b. Use a one column section with a List web part. Add a list from a site where *Pivot Explorer* is installed.
 - c. Give the page a name – it will be visible on the Teams tab.
 - d. Publish the page.
2. Add a new SharePoint Page tab to the Teams channel.
3. Select the page you created or paste the page link.

The process is described in a demo at <https://www.kalmstrom.com/products/Pivot-Explorer/Demonstrations.htm>.

2.2 SANDBOXED SOLUTION

The *Pivot Explorer* Sandboxed solution is uploaded as a SharePoint Solution in a site, and it needs to be activated for the site and any subsites where it will be used. This can be done manually or with a PowerShell script.

If you use SharePoint on-premises and have problems with the activation, please make sure that the Sandboxed code service is running on the SharePoint server.

2.2.1 MANUAL INSTALLATION

Download the *Pivot Explorer* Sandboxed solution file from [the kalmstrom.com website](https://www.kalmstrom.com) to any folder on your computer and extract it. Then follow the steps below to add *Pivot Explorer* to the site collection.

2.2.1.1 SHAREPOINT ONLINE

If you want to use the Sandboxed solution in SharePoint Online, custom scripts must be allowed in the site **during installation and upgrade**. This is done in the SharePoint Admin center >Active sites >the sites Details pane >Settings, by a Global or SharePoint administrator.

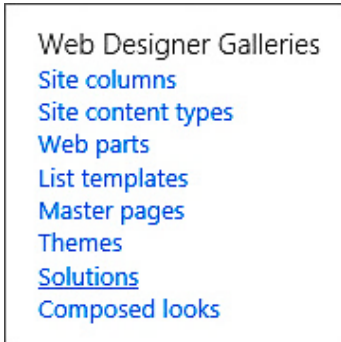
You must also make sure that the site has a Site Assets library. If there is no such library, activate the Wiki Page Home Page feature under Site settings >Site actions >Manage site features, to create the library. (Your homepage will not be affected by this.)

2.2.1.2 UPLOAD TO A SOLUTIONS GALLERY

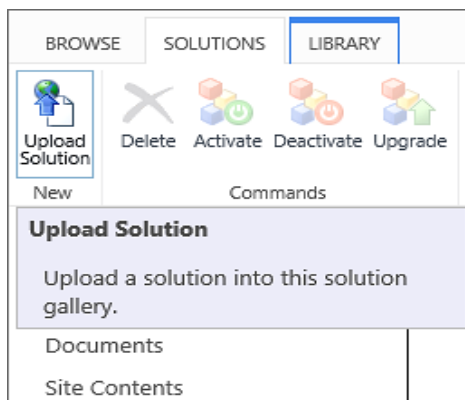
1. Go to the root site of the SharePoint site collection where you want to use *Pivot Explorer* and click on the Settings icon in the top navigation bar.
2. Select the Site settings option or select Site information and then Site settings.
3. (If you don't see these options, most likely you don't have the appropriate permissions.)

You need to be Site admin to install solutions.)

4. Under Web Designer Galleries, click on 'Solutions'.



5. Click on the 'Upload Solution' button and browse to the WSP file you downloaded from kalmstrom.com.



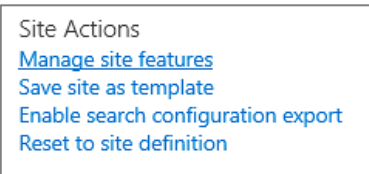
6. When the file has been uploaded, you will be shown a dialog where you can activate the solution for the site collection.

Now *Pivot Explorer* is available for the site and any subsites.


2.2.1.3 ACTIVATE FOR A SITE



Before *Pivot Explorer* can be used, the solution must be activated on each site or subsite where users should see the *Pivot Explorer* button in the lists.

1. Click on the settings icon in the top navigation bar and click on 'Site settings'. You might need to first click on 'Site information'.
2. Click on 'Manage site features' under the Site Actions heading. (If you don't see this option, most likely you don't have the appropriate permissions. You need to be Site owner to manage site features.)
3. Find *Pivot Explorer* in the list of Site features.
4. Click on the 'Activate' button to activate the *Pivot Explorer* feature.



Pivot Explorer for SharePoint 2.0.1.8

 Pivot Explorer makes it easy to visualize and analyze the content of any SharePoint list. Just as an Excel Pivot Table is a fantastic way to explore data in an Excel table, Pivot Explorer is what you should use for business intelligence to explore data in SharePoint lists.

 Activate
 Activate feature

5. The activation adds a *Pivot Explorer* button to all lists in the site.

2.2.2 POWERSHELL PACKAGE

If you want to automate the process of installing the Sandboxed solution in multiple sites, we recommend the PowerShell package. It comes as a .zip file that includes a PowerShell script.

Changes that must be made for each organization are explained in the script, and the demos on the [download page](#) shows the process, but you should still have some experience of PowerShell to use this installation method.

It is the same script for all SharePoint editions, but note that SharePoint Online only supports PS7, which does not work with PowerShell ISE.

1. Open PowerShell ISE or Visual Studio Code as an administrator.
2. Open the .ps1 file included in the downloaded .zip file.
3. Modify the script:
 - a. Change to your SharePoint version if necessary.
 - b. (For SharePoint Online, add your Client ID.)
 - c. Include the sites where you want to install *Pivot Explorer*.
 - d. Connect to your farm or tenant.
4. Run the script.
5. Now the script installs *Pivot Explorer* in each site that has been added to the script.

3 EXAMPLE REPORTS FOR EVALUATORS

If you want to generate an example list with reports for the evaluation, click on the *Pivot Explorer* button in an existing list. Now a new view will be created, but you don't need to use it. Instead, click on the 'Create Example List' icon in the Report toolbar.

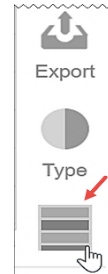
If you have installed the Sandboxed solution, you can also open the file *PivotExplorer.aspx* in the Site Assets library.

The example lists and reports are available in all supported languages, and the same language as the SharePoint site will be picked automatically. The images in the next chapter come from the example reports.

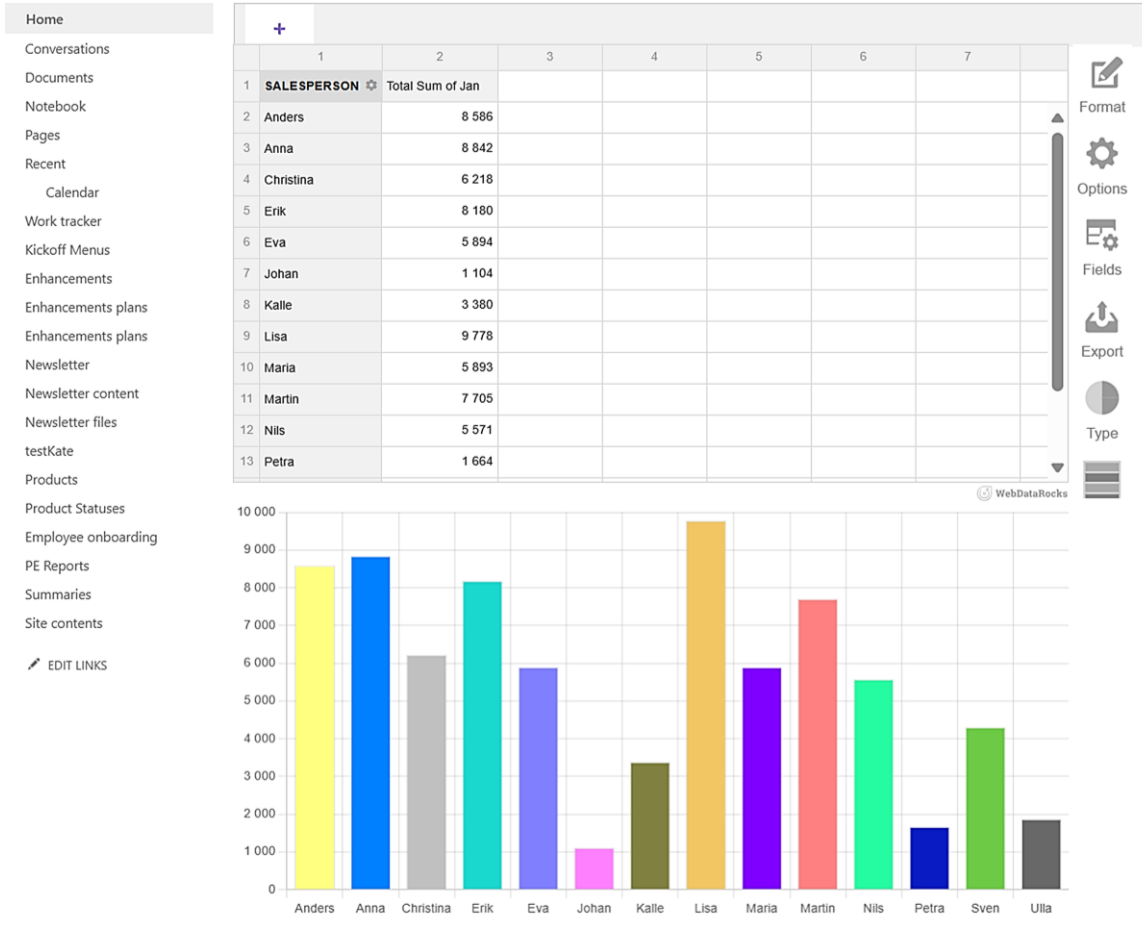
You can select between three lists: Projects, Sales and Summaries. The "Projects" list has the most items and takes a minute or more to generate. The "Sales" list is quicker and the "Summaries" list even quicker.

Click on one of the list options, and a standard SharePoint list with example data and some already saved reports will be created. It will open in a *Pivot Explorer* page, and you can start playing with it directly.

If you are not used to creating reports with pivot tables, we recommend that you study the next chapter and watch the first video on the *Pivot Explorer* Demonstrations webpage <https://www.kalmstrom.com/products/Pivot-Explorer/Demonstrations.htm>



K Summaries - Pivot Explorer



4 USE PIVOT EXPLORER

When *Pivot Explorer* has been installed in a site, all lists have a *Pivot Explorer* button. In the modern experience you can find it visible in the command bar or under the command bar ellipsis, depending on screen resolution. In the classic experience, the button is found in the ribbon, under the ITEMS tab.

When you click on the *Pivot Explorer* button in a list, you will be directed to a *Pivot Explorer* page where a view is created from the list data. This view is just a suggestion on how a report could be designed, and you can modify it in many ways so that it suits your organization or team. Then you can save it, and a report is created. You can very well create and save different kinds of reports from the same data.

4.1 PARTS

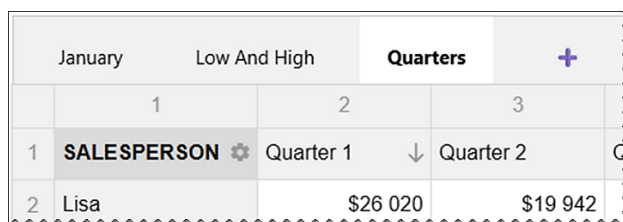
The *Pivot Explorer* page has the name of the list + *Pivot Explorer* on top. The image above shows a *Pivot Explorer* page created from the "Summaries" list. Below is a pivot table and a chart area. To the right of the pivot table, you can find a toolbar.

4.2 REPORTS

When no reports have been created yet, the top banner above the pivot table the *Pivot Explorer* pivot table only has a plus icon, to save the current view as a report and give it a name. You can see that on the image in the previous chapter.

When reports have been saved, you can reach them from tabs to the left of the plus icon. They are available to all users of the list that the reports build on. They just need to click on the *Pivot Explorer* button in that list.

The list in the image below has three reports, and the "Quarters" report is open. Click on the plus sign to create a new report from the current view. When you give it a name and click OK, it will be saved as a report, and a new tab with the report name will be added.



January		Low And High		Quarters	+
	1	2	3		
1	SALESPERSON	Quarter 1	Quarter 2		
2	Lisa	\$26 020	\$19 942		

4.2.1 STORAGE

A "PE Reports" list created by *Pivot Explorer* stores all the site's reports. Each report is stored as an item, where the report information is coded in JSON format. The "PE Reports" list can be found in the Site contents, among the other lists in the site.

4.2.1.1 DELETION

If you delete a list, its report items will remain in the "PE Reports" list, in case the list is recreated. That way, the reports can be used again, for example if a list of current data from another system is created.

If you want to remove the report items, they are deleted in the same way as other SharePoint list items.

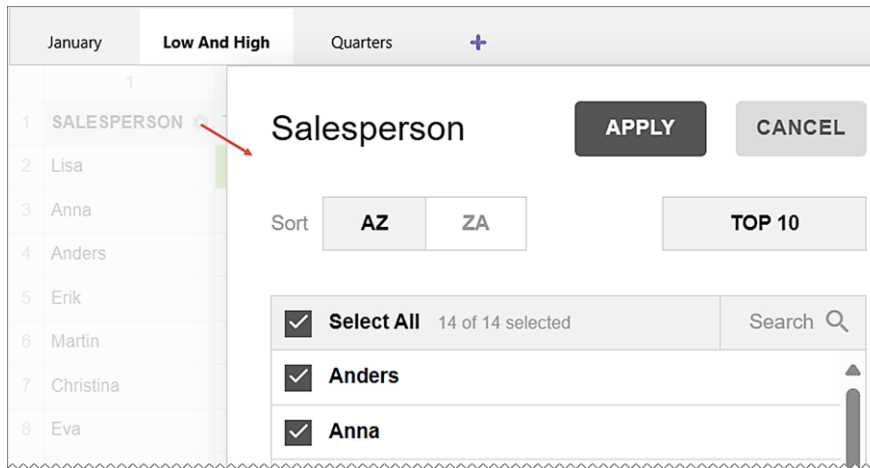
4.3 SORTING AND FILTERING

The values in the pivot table columns can be arranged in ascending and descending order, alphabetically or numerically. Columns can also be filtered, so that not all values are displayed. In both cases, the charts will be changed accordingly without delay.

Total Sum of Jan ↓

Click on an arrow to the right of a column name to change the sorting order of that column.

When a column has a settings wheel at the column name, it can be filtered too. The settings icon opens a dialog that looks a bit different for different value types, as all types don't have all possibilities. When you filter a column here, the chart and the other charts will adapt accordingly.



4.4 TOOLBAR

The toolbar to the right of the pivot table in the *Pivot Explorer* page gives multiple possibilities. The Example list option at the bottom of the toolbar was described in the previous chapter.

4.4.1 FORMAT

The Format button gives a possibility to format the grid cells. There is a choice between simple cell formatting and formatting based on specified conditions.

The format settings apply to the current report and other reports that are based on this report. Therefore, we recommend that you right from the beginning format a report as you want most other reports to be formatted and then base additional reports on that first report.

4.4.1.1 FORMAT CELLS

The first option formats **all** cells in the pivot table. Here, you can set decimal separator, currency symbol and more.



Label	Value
CHOOSE VALUE	Choose value
Text align	right
Thousand separator	(Space)
Decimal separator	.
Decimal places	None
Currency symbol	
Currency align	left
Null value	
Format as percent	false

4.4.1.2 CONDITIONAL FORMATTING

Use the Conditional formatting option if you want to format **some** cells differently, for example highlight values that stand out, based on certain conditions.

Click on the plus icon on top of the Conditional formatting dialog to create a condition and define how it should be formatted. Use the 'A' icon for text and background colors. Click on 'Apply' in the color selector to save the colors.

Click on the plus again if you want to combine with another condition and format. In the image below, there are two conditions:

- Sum of Totals less than 500 is formatted with an orange background.
- Sum of Totals greater than 2000 is formatted with a green background.

Conditional form... + APPLY CANCEL

{0}: Sum of Total ... Less than 500

Format: Arial 12px A 73,93

{0}: All values Greater than 2000

Format: Arial 12px

Click on Apply on top of the dialog to save the conditional formatting for that report.

4.4.2 OPTIONS

The Options button gives options for Grand total and subtotals.

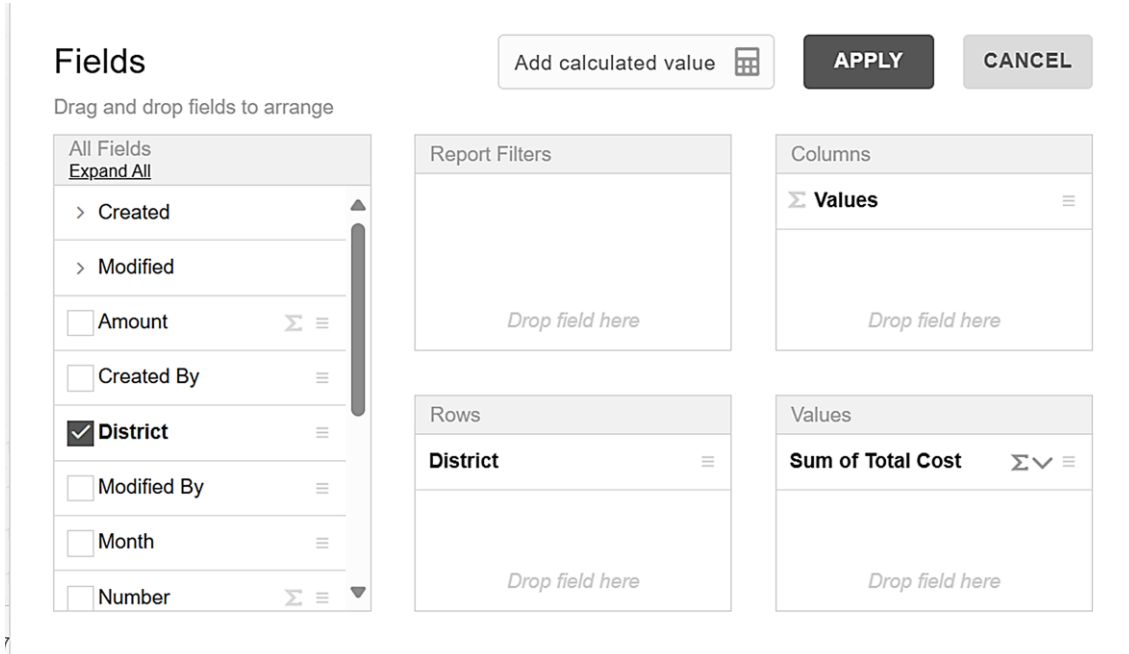
4.4.3 FIELDS

The Fields button gives the possibility to decide which list column should be included in the report and how data should be displayed. Some of the column names are checked automatically from the beginning and thereby included in the suggested report view. Uncheck them to exclude them from the report.

When you check a box at a column name that is not included already, that column will automatically be added to one of the field areas to the right. The selected area depends on the type of data in the column.

You can also drag and drop the list columns to, from or between the fields to show the data in different ways. When you drag a column to a field it will be checked automatically, and it will be unchecked again if you drag it back to the list of columns.

The pivot table fields also include values from the list, even if there is no such column.



The current version of *Pivot Explorer* does not support columns of the type Multiple lines of text, Managed metadata and Enterprise keywords. We have also excluded some other columns that don't give a reasonable report, for example ID columns.

4.4.3.1 REPORT FILTERS

Columns that are dragged to the Report Filters area in the pivot table will be displayed on top of the table. In the image below, data from the "Projects" list can be filtered by organization, region, status and state via the cogwheel icons.

Appropriation	State	Status	+
ORGANIZATION ⚙ All	REGION ⚙ All	STATUS ⚙ All	STATE ⚙ All
1	2	3	
1 APPROPRIATION ⚙	Total Sum of Amount ↑		
2 Landcare	\$17 244 610		

4.4.3.2 COLUMNS

By default, each report view takes values in the Columns pivot table area, but you can also add list columns there. In the image below, start date year and month for each project are added, so that the data can be even more filtered.

Appropriation	State	Status	+		
STATUS ⚙	ORGANIZATION ⚙	REGION ⚙			
All	All	All			
1	2	3	4	5	
1	START DATE.YEAR ⚙		START DATE.MONTH ⚙		
2	STATE ▼ ⚙	> 2022	> 2023	> 2024	> 2025
3	QLD	\$1 243 270	\$2 373 040	\$2 295 210	\$1 105 290
4	WA	\$1 301 530	\$1 934 070	\$1 681 120	\$1 091 080
5	NSW	\$1 279 800	\$2 067 450	\$2 250 250	\$1 072 260

4.4.3.3 ROWS

In the Rows area, it is suitable to add the column that is most important for the report. It will then be displayed with its values to the left in the pivot table, as State and Appropriation in the images above. The Rows values can also be filtered via a cogwheel icon.

4.4.3.4 VALUES

By default, report views have a sum value in the Values area, and every column that you add here will be summarized by default. By opening the dropdown at the sum icon, you can change that to Median, standard deviations or Running totals values.

4.4.3.5 CALCULATED VALUES

With the 'Add calculated value' feature, you can add values to the report that does not exist in the list. You can, for example, calculate the quarterly sums from a list that only shows sales sums per month, by adding the values for three months.

Give the calculated value a name, so that it can be added to the report as if it was a column.

Drag and drop the columns to the formula field and click on the calculation symbols to add them to the field. It is also possible to type in the formula field. If a column has an arrow symbol, you can open a dropdown and select something else than Sum, for example Median.

Fields

Drop & Arrange Values

Value name

Created.Year (Sum)	≡
Dec (Sum)	Σ ∨ ≡
Feb (Sum)	Σ ∨ ≡
Jan (Sum)	Σ ∨ ≡
Jul (Sum)	Σ ∨ ≡

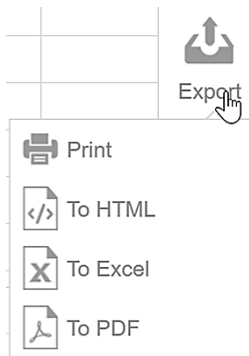
Calculate individual values

+	-	×	÷	^	=	<	>	≤
≥	==	!=	OR	AND	IF	ABS	MIN	MAX

Drop values and edit formula here

4.4.4 EXPORT

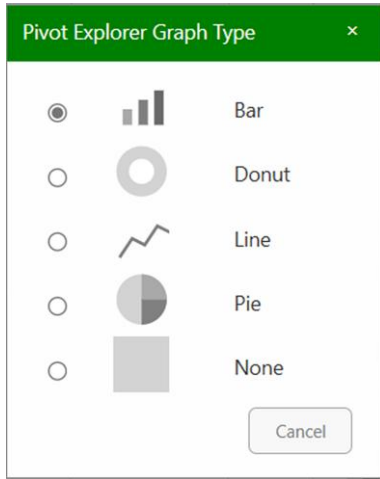
Under the Export button you can export the pivot table part of the report or view to HTML, Excel or PDF formats.



From here, you can also print the report/view.

4.4.5 TYPE

Use the Type button to select a chart that is appropriate to visualize the list data. Choose one of the chart types, and the chart will be changed immediately. Select None if you don't want to show a chart at all.



5 REGISTRATION FOR STANDARD USERS

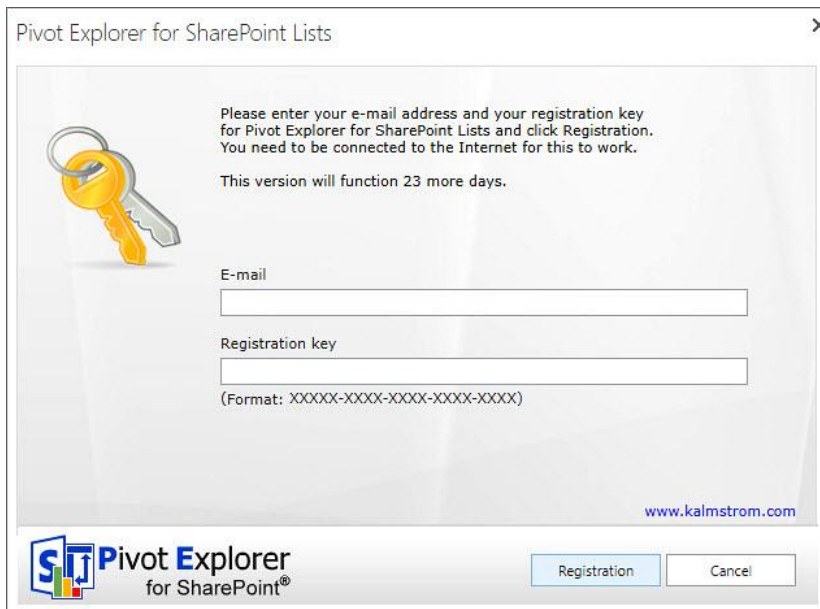
You may evaluate *Pivot Explorer* without cost and with full functionality for 30 days.

If you want to continue using *Pivot Explorer* after the trial period, you must start a subscription. We supply a Premium version of *Pivot Explorer*, which does not require registration at all, but organizations who select the Standard plan must register their installations of *Pivot Explorer*.

Standard subscribers will be given a registration key which allows the organization to continue using *Pivot Explorer* for the duration of the subscription year.

When the 30 days trial period has expired, you will be prompted to register and a register dialog will be displayed.

To register, enter an e-mail address with your company/organization domain and the registration key you have received from kalmstrom.com. Then click on 'Registration'.



The screenshot shows a dialog box titled "Pivot Explorer for SharePoint Lists" with a close button (X) in the top right corner. On the left side, there is a graphic of a yellow key. The main text area contains the following instructions: "Please enter your e-mail address and your registration key for Pivot Explorer for SharePoint Lists and click Registration. You need to be connected to the Internet for this to work." Below this, it states "This version will function 23 more days." There are two input fields: "E-mail" and "Registration key". Below the "Registration key" field, the format is specified as "(Format: XXXXX-XXXX-XXXX-XXXX-XXXX)". At the bottom right of the dialog, there is a blue hyperlink "www.kalmstrom.com". In the bottom left corner, there is the "Pivot Explorer for SharePoint" logo. At the bottom center, there are two buttons: "Registration" and "Cancel".

The person who registers *Pivot Explorer* should have at least Owner permission on the site. Each site installation needs to be registered.

The registration key will continue to work as long as the organization is a kalmstrom.com Subscriber.

Pivot Explorer will automatically verify that your registration key is still valid every 30 days. No private information will be collected. There will be a count-down during 30 days and then an automatic renewal for another 30 days and so on, as long as the company/organization has a valid subscription. Should the subscription be cancelled, there will be no renewal.

6 UPGRADE

Upgrades are free for all subscribers, and we recommend that you always use the latest version of *Pivot Explorer*. That is the only version we support, so we have made our utmost to make the upgrade process easy and quick.

Premium subscribers will have an e-mail when their unique copies of *Pivot Explorer* have been updated. Standard subscribers can download the new version of *Pivot Explorer* from the kalmstrom.com website.

You can see all the revisions and file numbers at:

<https://www.kalmstrom.com/products/Pivot-Explorer/Revisions.htm>

The Sandboxed solution och PowerShell package use the same folders, so you can very well upgrade the Sandboxed solution installations with the PowerShell script and vice versa.

The SPFX edition is different, so if you upgrade these installations with one of the other editions, there is a risk that you will get double *Pivot Explorer* buttons.

If you still have the old version after upgrade, it is probably left in the browser cache. Please clear the cache to solve that problem.

6.1 UPGRADE THE SPFX EDITION

All the tenant's installations of *Pivot Explorer* will be upgraded automatically when you add the new SPPKG file to the app catalog.

1. Download the file.
2. Remove the old *Pivot Explorer* SPPKG file from the app catalog.
3. Upload the new SPPKG file to the app catalog.
4. Enable the SPPKG file.
5. All *Pivot Explorer* installations will now be upgraded automatically.

6.2 UPGRADE PIVOT EXPLORER SANDBOXED SOLUTION

To upgrade *Pivot Explorer*, replace the old *Pivot Explorer* WSP file with a new version of the file. This is the upgrade process for each site collection where *Pivot Explorer* is used:

1. Deactivate *Pivot Explorer* under Site settings >Solutions in the root site.
2. Delete the old *Pivot Explorer* WSP file.
3. Delete any *Pivot Explorer* files in the Site Assets library.
4. Upload the new *Pivot Explorer* WSP file to the Solutions gallery in the root site.
5. Activate the new WSP file in the Solutions gallery.
6. Activate *Pivot Explorer* under 'Manage site features' on each site.

6.3 UPGRADE WITH A POWERSHELL SCRIPT

Use this upgrade method whether you have installed *Pivot Explorer* with the PowerShell package or with the Sandboxed solution and want to upgrade using PowerShell.

-
1. Open the new *Pivot Explorer* script in PowerShell ISE or Visual Studio Code.
 2. Modify the script so that it suits your installations. This is quickly done if you have saved the part of the old script that contains the sites where *Pivot Explorer* was installed.
 3. Run the script to upgrade the installations in all sites that are included in the script.

7 CONTACT

If you have any kind of problem or questions about *Pivot Explorer*, there are several ways of contacting us:

E-mail	support@kalmstrom.com – Technical issues
	sales@kalmstrom.com – Subscription and general issues
	finance@kalmstrom.com – Invoices, payments, quotations
Telephone	+46 739 206 106
Teams:	peter@kalmstrom.com – Chats, remote sessions
Zoom:	peter@kalmstrom.com – Chats, remote sessions

7.1 SHAREPOINT TIPS

You surely have noticed that *Pivot Explorer* is a great tool for improving the SharePoint experience. For tips on SharePoint usage in general, please refer to the [Tips section of the kalmstrom.com website](#).

8 REMOVE PIVOT EXPLORER

We of course hope that you will be satisfied with *Pivot Explorer*, but if you want to remove it from a site that is an uncomplicated process.

If your organization cancels the *Pivot Explorer* subscription, the product must be removed in all sites.

- To remove the *Pivot Explorer* SPFX edition, remove the file from the App catalog/Apps site.
- To remove the *Pivot Explorer* Sandboxed solution, follow step 1-3 in the Upgrade instruction above.
- To remove *Pivot Explorer* with a PowerShell script, run the parts of the script that remove *Pivot Explorer*.