

Performance Data Investigator is a web-based graphical user interface that ships as part of IBM Systems Director Navigator for i. Performance Data Investigator (PDI) provides analysis of data from various collectors such as Collection Services, Job Watcher, Disk Watcher, and Performance Explorer. It provides intelligent drill-down analysis which aids in problem determination. PDI also provides the ability for the user to customize charts for future reference. This article will explain the best way to edit perspectives for customization.

Customizing a perspective in PDI - Edit Perspective Best Practices

Performance Data Investigator is shipped with several content packages each containing numerous perspectives. The perspectives contain one or more views in chart or table form. A user may have a need to modify or change the perspectives so that the chart or table is better suited to their use. This document will explain the best way to edit perspectives to customize them for specific purposes.

Enabling Design Mode

The first thing that needs to be done in order to customize a perspective is to enable Design Mode.

Without design mode enabled, you can only make copies of existing perspectives into your custom content package by using the "Save As" function. You will not be able to make any changes to perspectives or views.

There are multiple ways to get to the Options panel used to enable design mode. There is an "Options" button which appears at the bottom of the Perspective List panel as well as at the bottom of a Perspective Display panel.

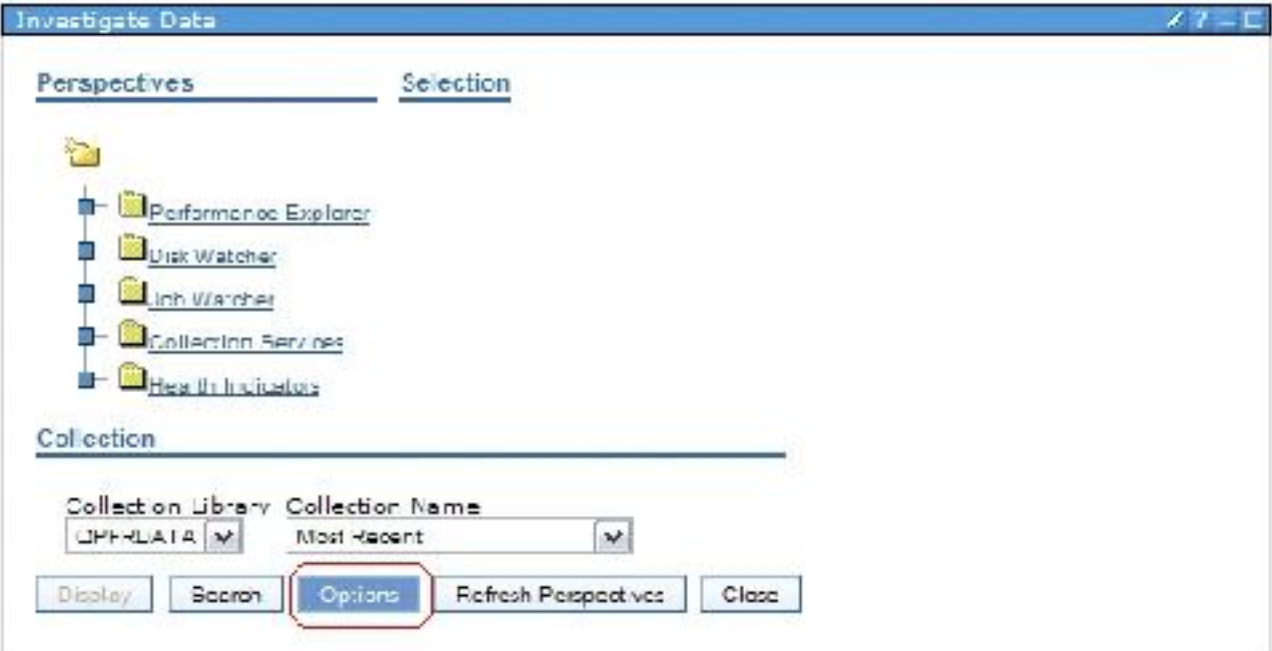


Figure 1: Options Button

There is also an Edit -> Options item as part of the menu bar at the top of a Perspective Display panel. Any of these will bring you to the same Options panel:

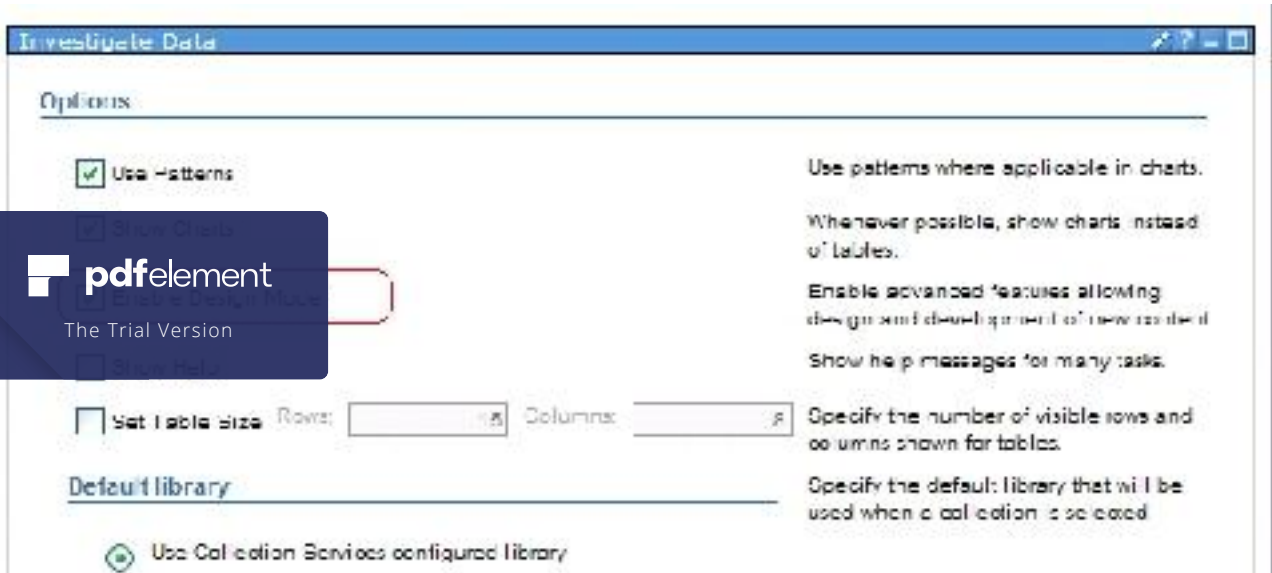




Figure 2: Options Panel – Enable Design Mode

Click on the “Enable Design Mode” checkbox and select “OK”.

Creating a new Content Package

You will want a new package to put your perspectives in. The shipped content packages are locked to preserve their integrity. A locked package cannot be added to or edited. Creating a new content package will allow you to keep your new perspectives together in one package. Each user has a Custom Content Package (CCP) available to them, but these are not visible to other users (except when a perspective is shared by the URL generated when saved).

To create a new content package, click on the new package icon at the top of the Perspectives list (on the Perspective List panel).

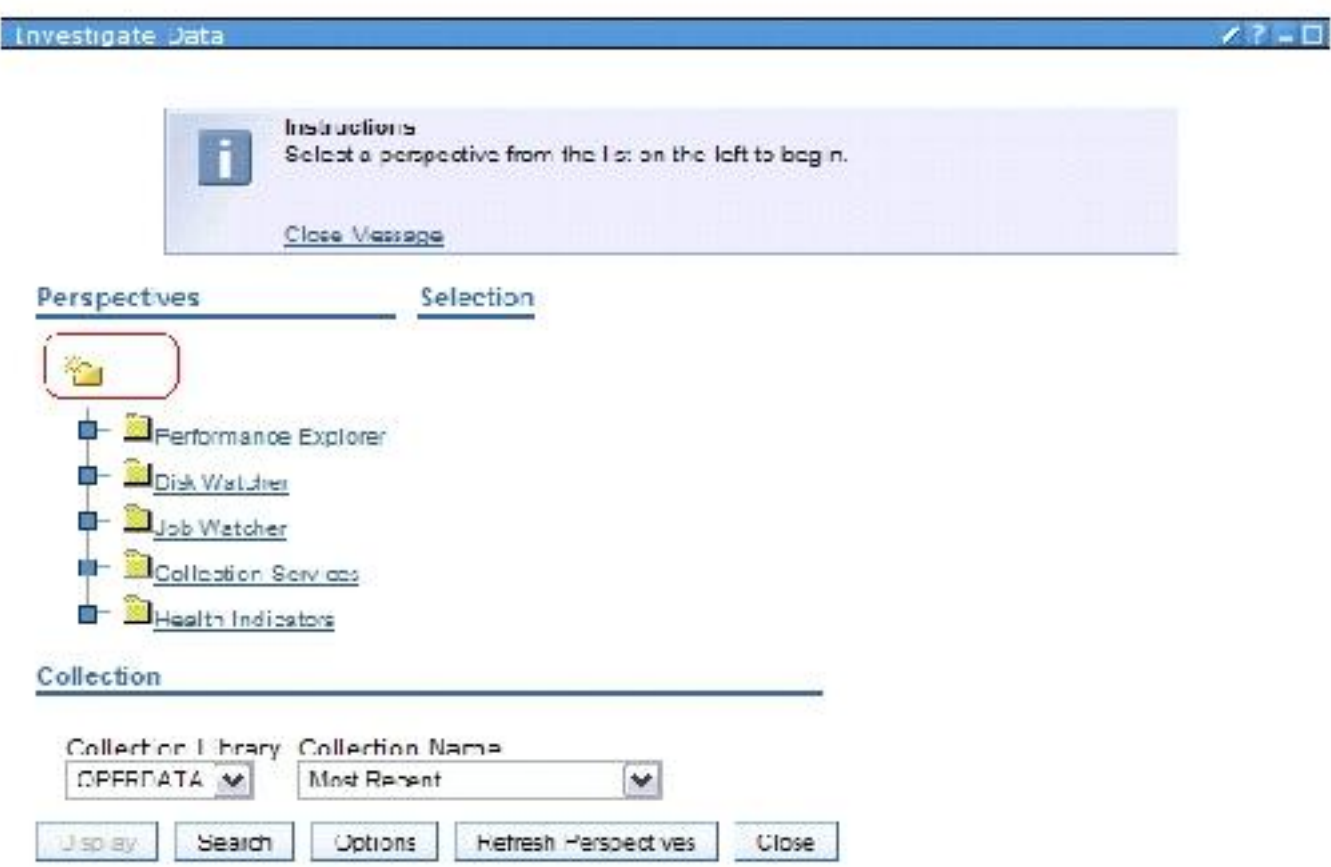


Figure 3: New Package icon

Once you fill in the name and description and press “OK”, you will return to the Perspective List panel and be able to see the new package as shown here in Figure 4.



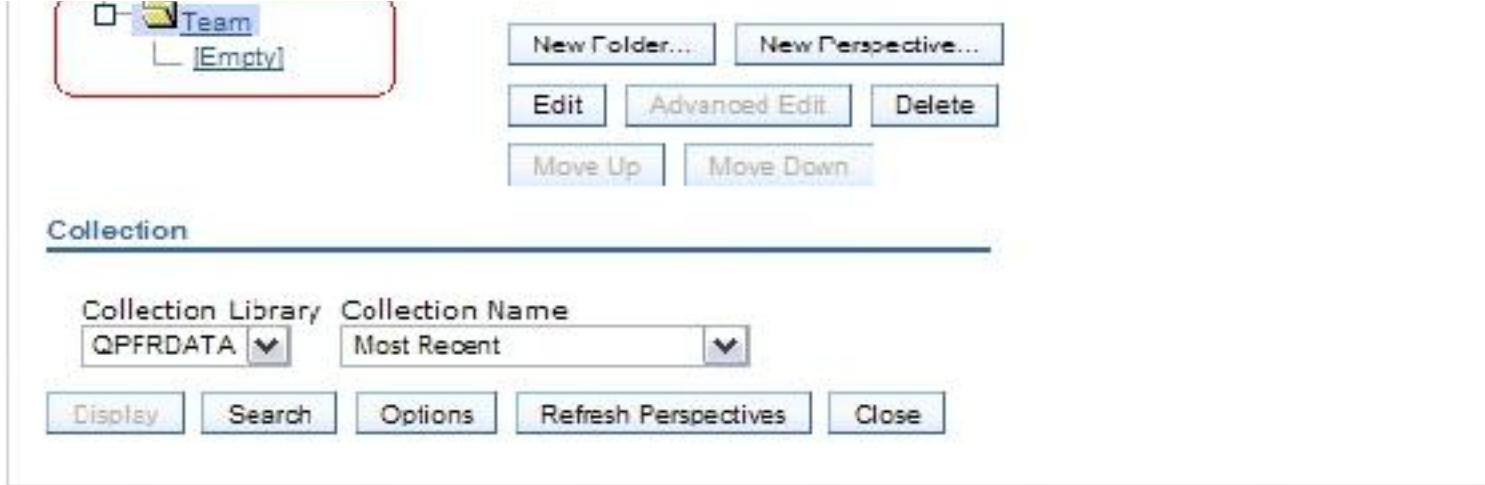


Figure 4: New Package created

Editing a Perspective

To modify an existing perspective that you would like to change for custom purposes, there are two different methods. The best method is to edit a locked perspective *from the Perspective Display Panel*, and then save the modifications to a new name. The other approach is to edit an unlocked copy of the original *from the Perspective List Panel*.

The advantages of editing a locked perspective from the Perspective Display panel are:

- If you don't like the changes, you can leave the display without saving and you will not affect the original or preserve the modifications.
- As you make changes, you will be able to verify the results in the display panel.

To edit the perspective while displaying the results, we recommend editing a locked perspective only. There are known side effects when saving an edited unlocked perspective from this mode which may cause your original perspective to be modified.

Locking a Perspective

The recommended method for locking a perspective is from the Perspective List panel. Select the perspective, select "Edit" and then select the "Locked" checkbox and "OK".

Note that once a perspective is locked, it cannot be unlocked.

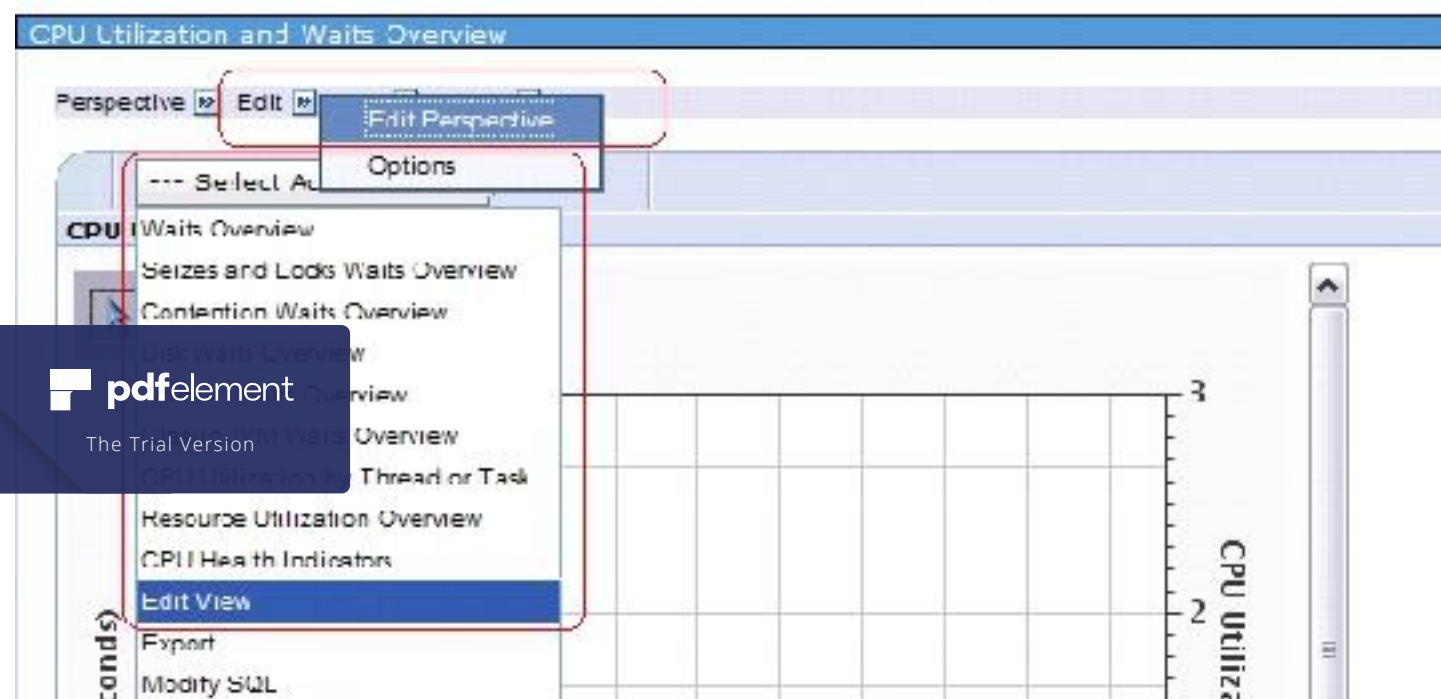
Editing from the Perspective Display Panel

Select the (locked) perspective you want to modify, and a valid collection for that perspective. Select the "Display" button.

There are multiple ways to get to the Edit Perspective or Edit View panels from the Perspective Display panel:

- Edit -> Edit Perspective from the top menu bar
- Edit Perspective button at the bottom of the panel
- Edit View from Select Action pull down menu.

Note that there can be one or more views in a perspective. Each view has its own Select Action pull down menu.



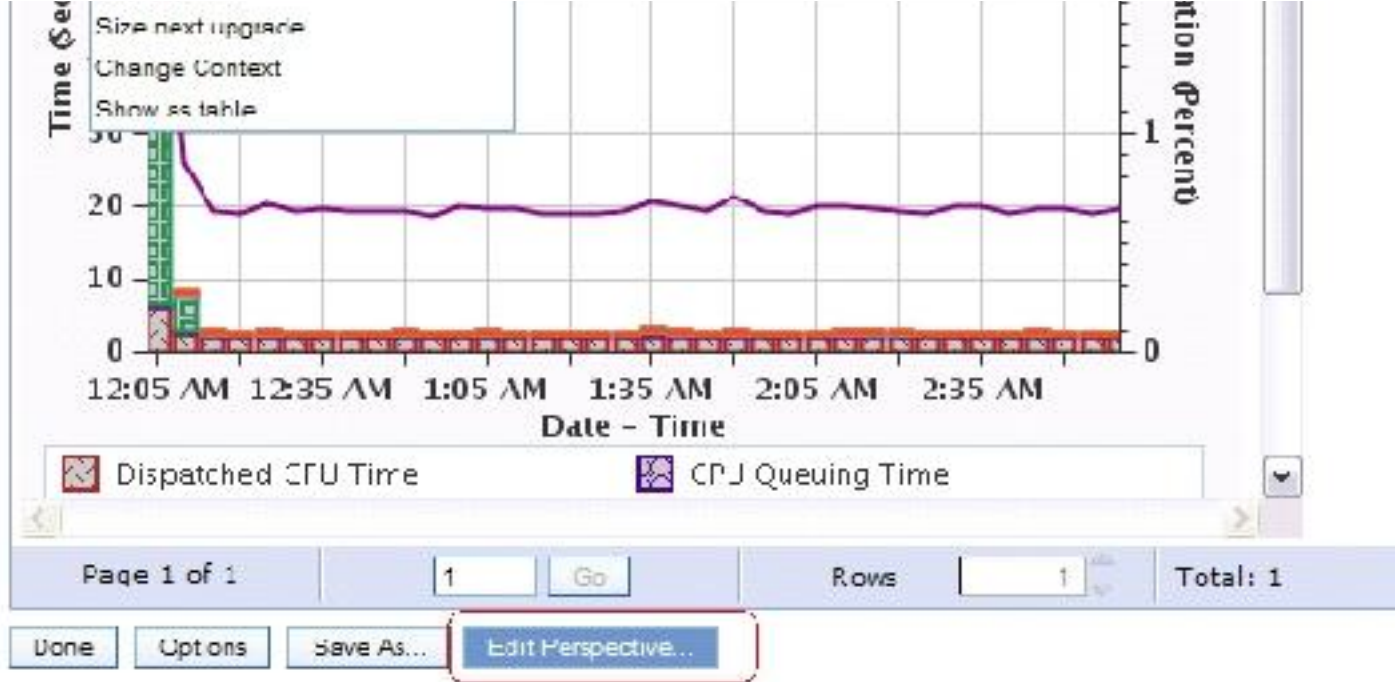


Figure 5: Perspective Display Panel

If you start with Edit Perspective, you will see the Edit Perspective panel and can edit the perspective information or select a view to edit:

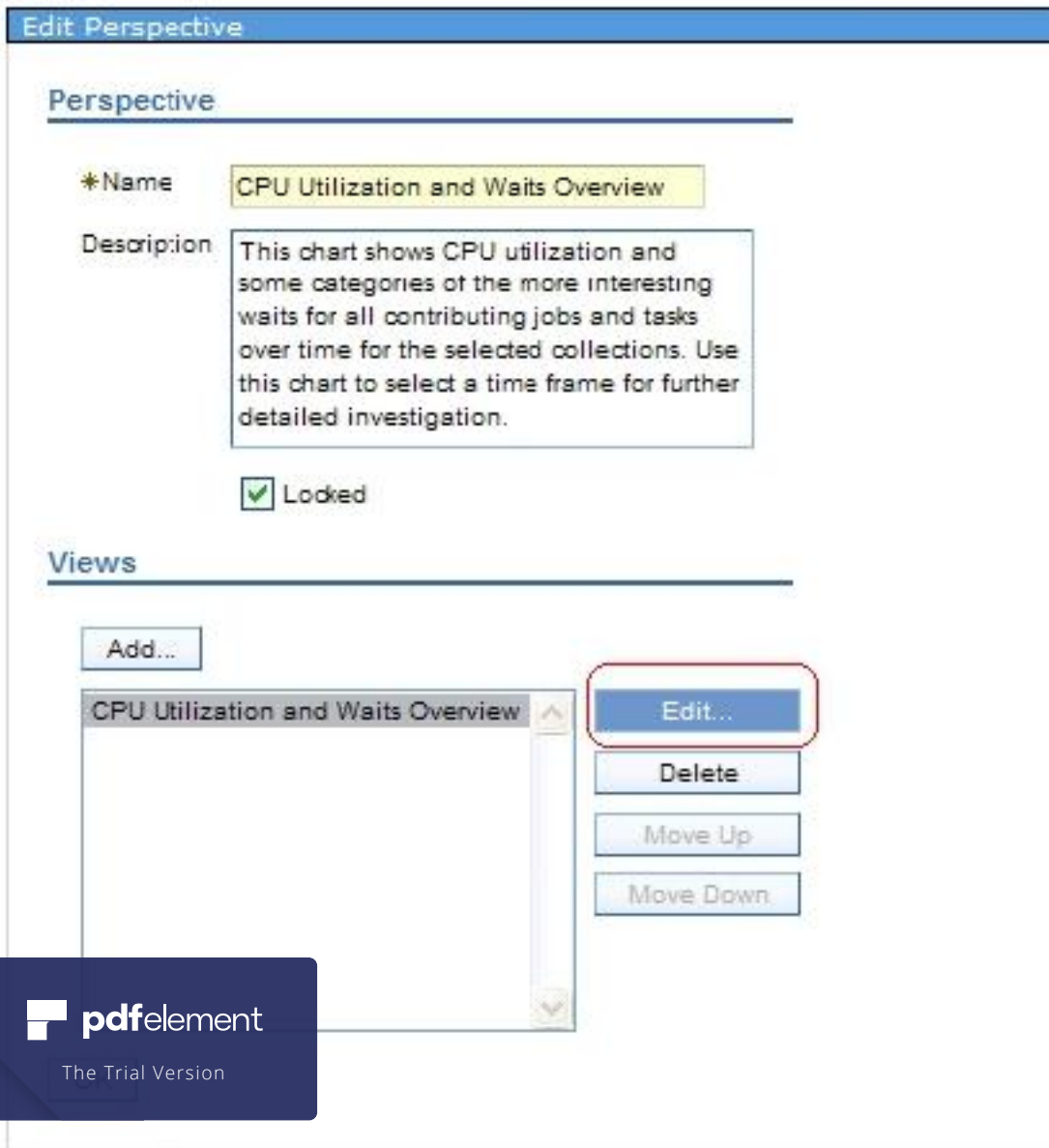


Figure 6: Edit Perspective Panel

If you go to Edit View directly or from the Edit Perspective panel, you will see the specifications that make up the view and can be modified (Name, Type, DataSet (SQL), Drilldown options, Chart properties such as DataSeries and Thresholds).

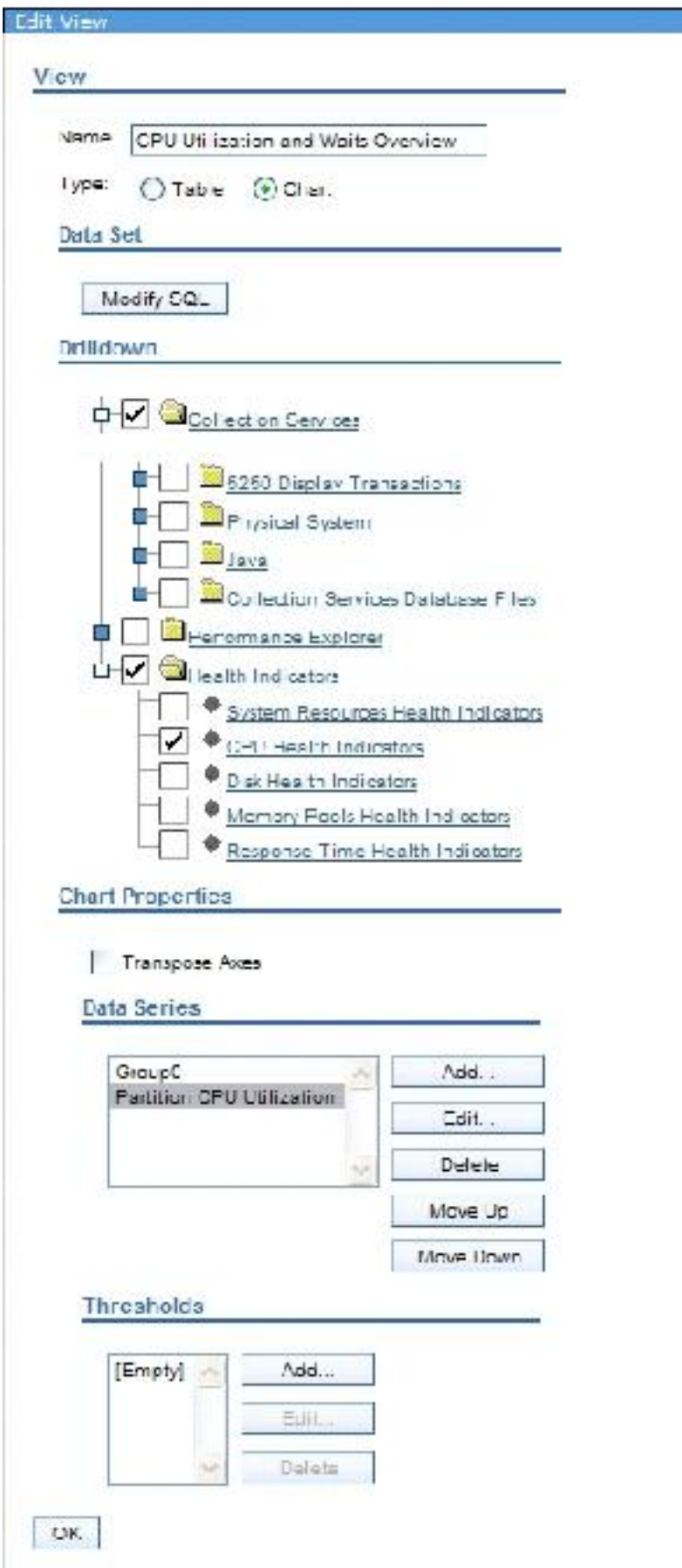


Figure 7: Edit View Panel

By selecting "Modify SQL" you can view and make changes to the SQL that creates the view dataset:



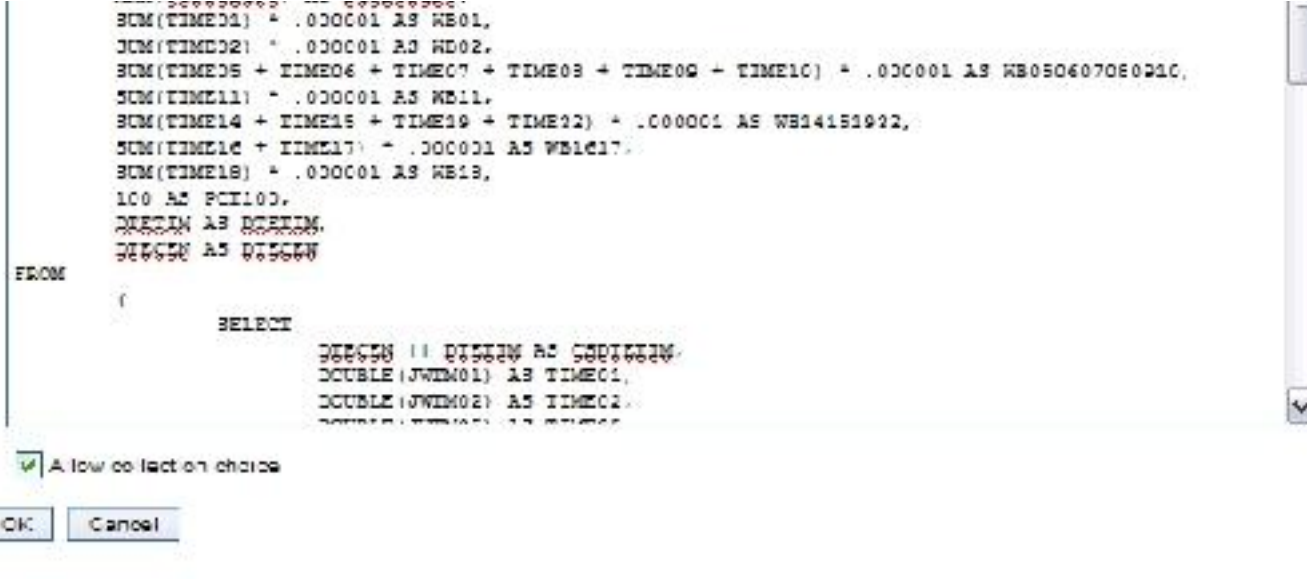


Figure 8: Modify SQL Panel

By selecting the “Edit” button for a Data Series, you can make changes to how the data will be displayed for the chart:

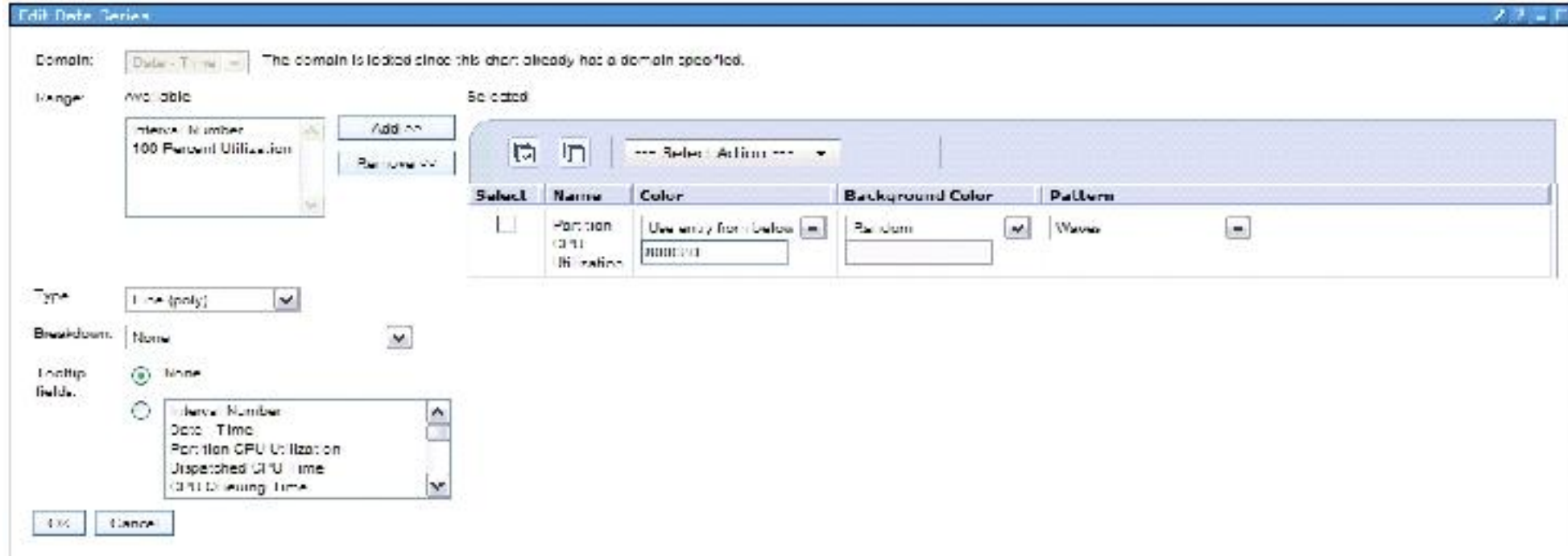


Figure 9: Edit Data Series

From the Edit Data Series panel, you can preserve your changes by selecting “OK” or cancel with the “Cancel” button. From the Edit View and Edit Perspective panels, selecting “OK” will preserve your changes for the display, but will not save your changes (when editing from the Perspective Display panel).

Saving Edited Changes

When editing from the Perspective Display panel, the changes are not saved until you explicitly save the perspective using the “Save As” button. They are only preserved for the current display.

After editing a locked perspective, use the “Save As” button to save the changes into an alternate location by using a different name.

When editing a **Locked** perspective, you are required to Save As to a different name. If you wish to edit from the Perspective Display panel, we recommend you lock the original and edit that. Then save the modified perspective into a new name when all your changes are verified (your original will be preserved).

It is not recommended to use the “Save As” button after editing an unlocked perspective from the Perspective Display panel. Using a new name will cause the original to be updated as well, resulting in two identical perspectives.

Note that once you have done the Save from the Perspective Display panel, the perspective you are viewing is still the original locked perspective, not the newly saved one. Press the “Done” or History-> Home button to get back to the Perspective List panel. From there you can select and view the newly saved perspective.



Copying a Perspective

Before editing an unlocked perspective, we recommend that you make a copy of the original perspective.

Select the perspective and a valid collection and click on Display. From the perspective panel select "Save As" to save this perspective under a new name.

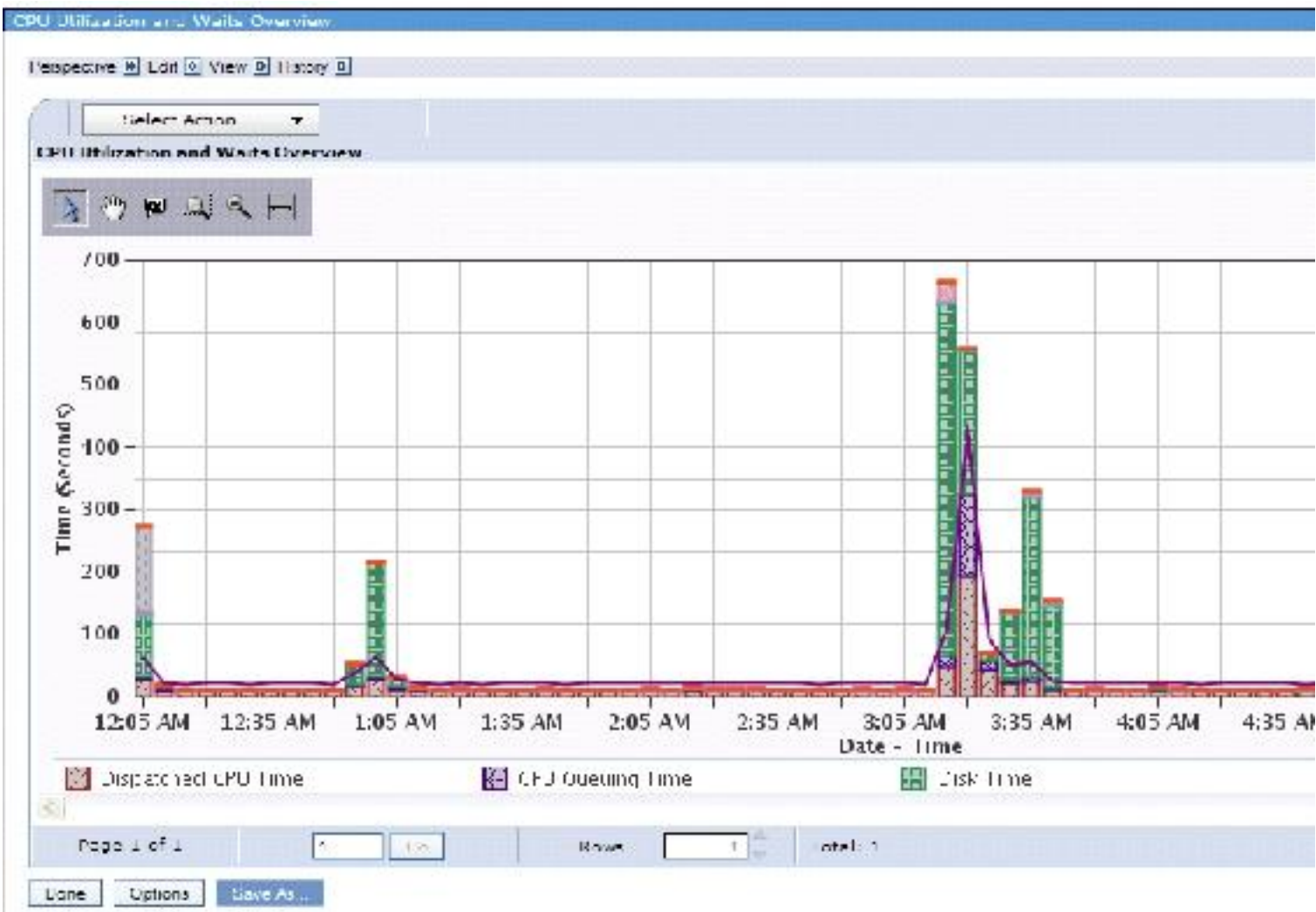


Figure 10: Copy a Perspective with the Save As button from Perspective Display Panel

Select the package name. Change the name if desired for the new location. Uncheck or check the "Locked" checkbox as needed (the default is the setting of the perspective you are "copying"). Click on "Save"

Instructions
Choose a folder to save to
[Close Message](#)

Saving a custom perspective

Original Location
Collection: Services > Waits > Waits by Element Job or Task

Save Location

Perspectives	Selection
	Name Bump-1
	Description
	<input type="checkbox"/> Locked
	<input type="button" value="New Folder"/> <input type="button" value="New Perspective"/>
	<input type="button" value="Edit"/> <input type="button" value="Advanced Edit"/> <input type="button" value="Delete"/>
	<input type="button" value="Move Up"/> <input type="button" value="Move Down"/>

Perspective



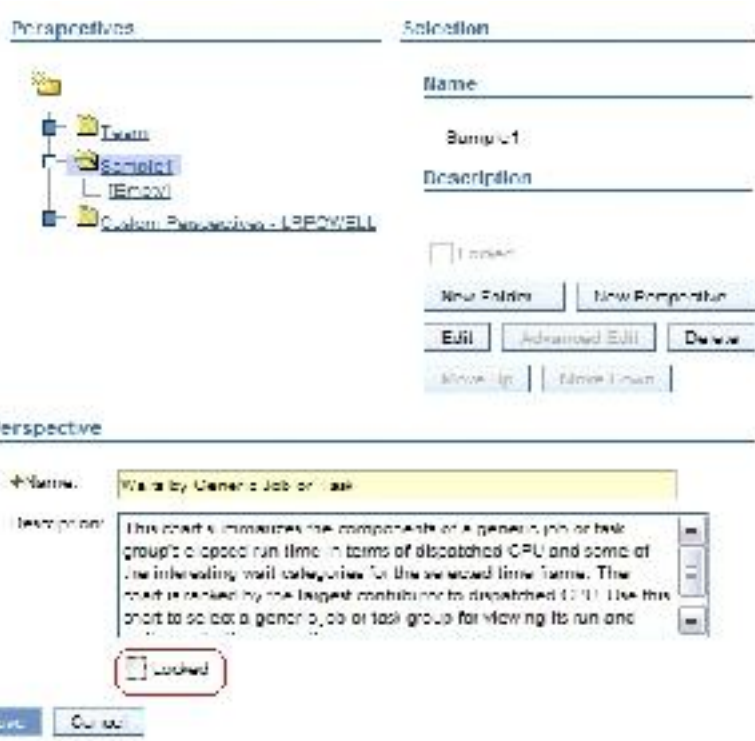


Figure 11: Save a Perspective

Click on “Done” to go back to the Perspectives List Panel.

Editing from the Perspective List Panel

Note that only unlocked perspectives can be edited from this panel. Editing from the Perspective List panel is the best method for editing an unlocked perspective. We recommend making a copy of a perspective before editing with this method because as changes are made, they are saved to the perspective as you exit the editing panels.

Select the “Edit” button on the right side of the panel.

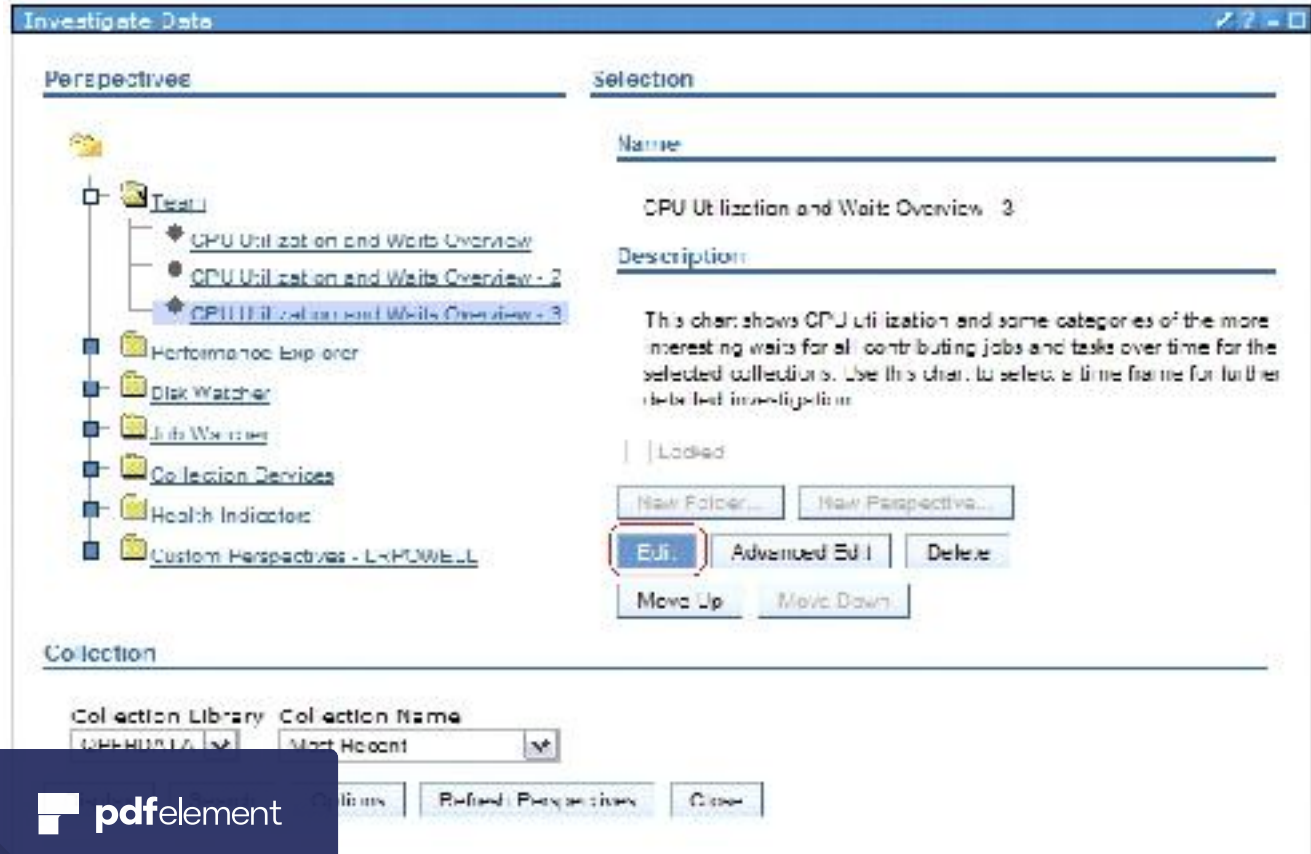


Figure 12: Edit an unlocked perspective from the Perspective List Panel

Note that when you edit from the Perspective List panel, changes are saved to the package as you exit the panels with “OK”. There is no “Cancel” button on the Edit Perspective and Edit View panels.

Figure 12: Edit an unlocked perspective from the Perspective List panel.

Note that when you edit from the Perspective List panel, changes are saved to the package as you exit the panels with “OK”. There is no “Cancel” button on the Edit Perspective and Edit View panels.