

## Pivot Table



The **Pivot Table** is a data bound control that provides maximum capabilities for organizing, summarizing and analyzing your business data.

Shipped Quarter ▾					
Product Sales		Shipped Year ▲ ▾			
Category Name ▲ ▾	Product Name ▲ ▾	1994	1995	1996	Grand Total
▸ Grains/Cereals		\$6,086.02	\$52,902.37	\$31,791.19	\$90,779.58
	Alice Mutton	\$6,962.28	\$13,382.85	\$11,885.25	\$32,230.38
	Mishi Kobe Niku		\$6,935.50	\$291.00	\$7,226.50
▾ Meat/Poultry		\$1,571.52	\$9,114.48	\$6,692.40	\$17,378.40
	Pâté chinois	\$1,933.56	\$13,832.13	\$4,546.08	\$20,311.77
	Thüringer Rostbratwurst	\$5,098.50	\$33,503.43	\$41,766.76	\$80,368.69
	Tourtière	\$554.60	\$3,391.76	\$670.12	\$4,616.48
Meat/Poultry Total		\$16,120.46	\$80,160.15	\$65,851.61	\$162,132.22
▸ Produce		\$9,177.08	\$47,491.56	\$36,962.15	\$93,630.79
▸ Seafood		\$15,652.56	\$62,435.02	\$51,982.55	\$130,070.13
Grand Total		\$47,036.12	\$242,989.10	\$186,587.50	\$476,612.72

### Data Presentation

- [Sort Data in Pivot Tables](#)

Describes how you can sort field values alphabetically or by summary values displayed in a particular column or row.

- [Filter Data in Pivot Tables](#)

Provides information on how to filter data by hiding specific rows or columns via filter drop-down lists, and how to provide a more advanced filtering by building a complex filter condition.

### Layout Customization

- [Expand and Collapse Groups in Pivot Tables](#)

Provides information on how to expand and collapse field values and field headers.

- [Hide Pivot Table Fields](#)

Guides you through the process of hiding Pivot Table fields.

- [Display Hidden Pivot Table Fields](#)

Describes how to display fields that have previously been hidden.

- [Reorder Pivot Table Fields](#)

Provides information on how to reorder Pivot Table fields.

### Field List

- [Field List Overview](#)

Provides basic information about Field Lists.

- [Invoke a Field List](#)

Describes how to invoke a Field List.

- [Defer Pivot Table Updates](#)

Describes how to prevent automatic Pivot Table updates and force it to update manually.

- [Change Field List Layout](#)

Provides information on how to change the layout of an advanced Field List.

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## Data Presentation



This section describes how you can customize data presentation in Pivot Tables.

The following sections are available.

- [Sort Data in Pivot Tables](#)

Describes how you can sort field values alphabetically or by summary values displayed in a particular column or row.

- [Filter Data in Pivot Tables](#)

Provides information on how to filter data by hiding specific rows or columns via filter drop-down lists, and how to provide a more advanced filtering by building a complex filter condition.

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## Sort Data in Pivot Tables



This section describes the Pivot Table capabilities used to sort its data by field and summary values.

Topics in this section:

- [Simple Sorting](#)

Provides information on how to sort data by field values.

- [Sort Data Using a Field List](#)

Describes how to use a Field List to sort data.

- [Sort Data by Summaries](#)

Describes how to sort data by column or row values.

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## Simple Sorting



Values of dimension fields are always arranged in ascending or descending order. The sort order is indicated by an Up or Down arrow displayed within a corresponding dimension field's header.

Shipped Quarter		Shipped Year			
Category Name	Product Name	1996	1995	1994	Grand Total
Grains/Cereals		\$31,791.19	\$52,902.37	\$6,086.02	\$90,779.58
Meat/Poultry		\$65,851.61	\$80,160.15	\$16,120.46	\$162,132.22
Produce		\$36,962.15	\$47,491.56	\$9,177.08	\$93,630.79
Seafood		\$51,982.55	\$62,435.02	\$15,652.56	\$130,070.13
<b>Grand Total</b>		<b>\$186,587.50</b>	<b>\$242,989.10</b>	<b>\$47,036.12</b>	<b>\$476,612.72</b>

To toggle the sort order for a dimension field, click this field's header.



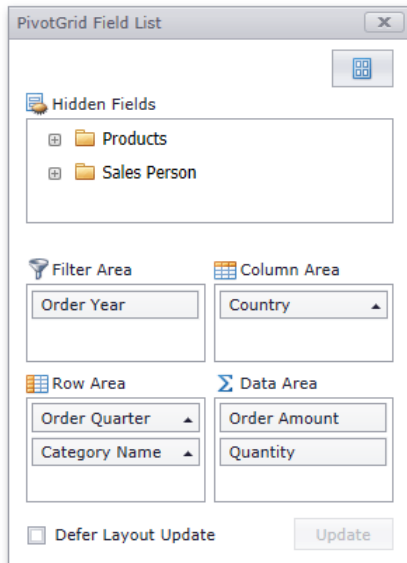
You can also sort field values using a Field List or context menu. To learn more, see [Sort Data Using a Field List](#).

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## Sort Data Using a Field List

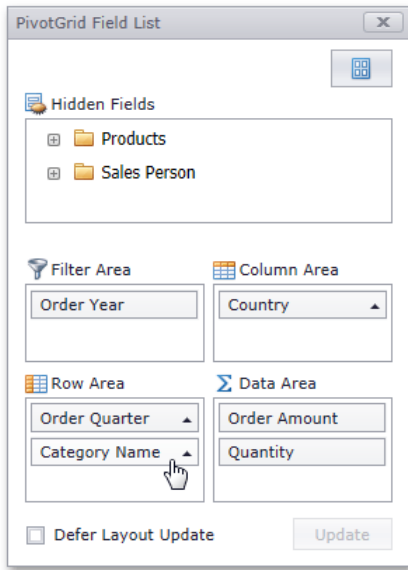


You can use an advanced Field List to sort field values (to learn more about Field Lists, see [Field List Overview](#)).



First, invoke a Field List. For information on how to do this, see [Invoke a Field List](#).

To toggle the sort order of a field, click its header.



You can sort data without using a Field List. To learn more, see [Simple Sorting](#).

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## Sort Data by Summaries



You can sort values of a particular dimension field by summary values calculated against a specific data field. To do this, right-click a column or row header, and choose a dimension field whose values should be sorted by column/row summary values. A specific indicator marks the column/row whose summary values are used to define the sort order.

UnitPrice	Quantity	Discount	Year	Month		
1994						
			August		September	
CategoryName	Product Name	UnitPrice	Quantity	Discount	UnitPrice	Quantity
Grains/Cereals		\$88.				0
Condiments		\$88.				0.1
Seafood		\$94.				0.55
Beverages		\$134.40	272	0.75	\$201.00	347
Produce		\$143.40	156	0.40	\$78.80	22
Meat/Poultry		\$175.60	76	0.15	\$212.70	111
Confections		\$199.10	245	0.55	\$298.00	170
Dairy Products		\$289.60	304	0.55	\$294.20	250
Grand Total		\$1,213.20	1462	3.70	\$1,487.50	1322

You can sort values of multiple dimension fields against a single column/row. To cancel this sorting, click the same item again, or 'Remove All Sorting' to cancel sorting for all dimension fields.

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## Filter Data in Pivot Tables



By default, the Pivot Table processes all records when calculating its values. Data filtering allows you to process only those records that meet your requirements.

Topics in this section describe two ways of filtering data in Pivot Tables - using Filter Windows (provide simple filtering capabilities) and the Prefilter (used for advanced filtering).

The following sections and topics are available:

- [Filter Data by Field Values](#)

This section contains topics that describe how to specify simple filter conditions via Filter Windows.

- [Build Complex Filter Criteria](#)

This topic describes the Prefilter feature that allows you to build complex filter criteria.

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## Filter Data by Field Values



Filter Popup Windows allow you to configure and apply simple filtering conditions by selecting which values you wish to view, and which you do not.

Topics in this section describe how to invoke and use Filter Windows.

The following topics are available:

- [Invoke a Filter Popup Window](#)

Shows how to invoke Filter Windows from the Pivot Table and a Field List.

- [Using Filter Popup Windows](#)

Describes how to build filter conditions in Filter Popup Windows.

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## Invoke a Filter Popup Window



You can invoke a Filter Window from the Pivot Table or from a Field List (to learn about Field Lists, see [Field List Overview](#)).

### Invoke a Filter Window from the Pivot Table

Field headers display special buttons used to invoke a Filter Window.

Click a header's filter button. This invokes the filter dropdown, which lists unique field values.

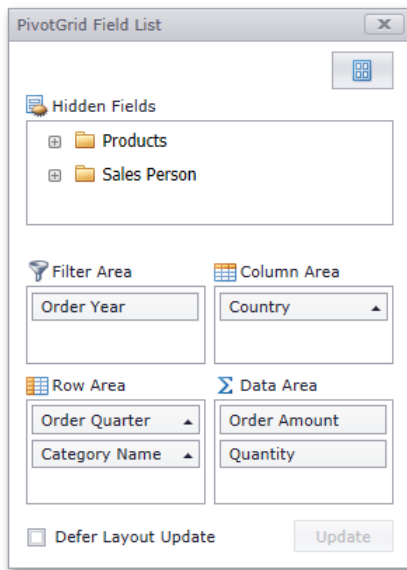
Order Year	Order Amount	Quantity	Country
UK			
Order Quarter	Order Amount	Quantity	
Qtr 1	\$112,769.51	3660	
Qtr 2	\$111,165.14	4355	
Qtr 3	\$56,904.90	2415	
Qtr 4	\$97,186.29	3457	
Grand Total	\$378,025.84	13887	

Category Name	Order Amount	Quantity
(Show All)		
Beverages		
Condiments		
Confections		
Dairy Products		
Grains/Cereals		

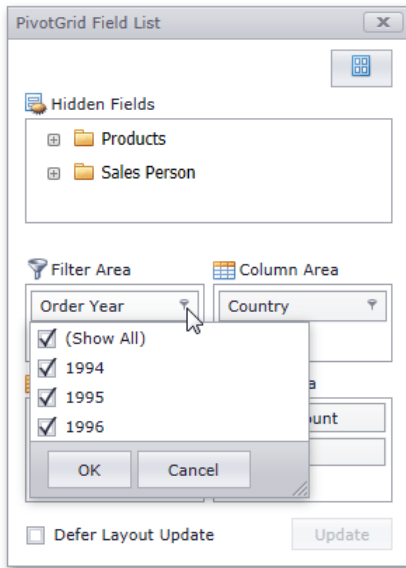
## Invoke a Filter Window from a Field List

You can use an advanced Field List to filter field values.



First, invoke a Field List. For information on how to do this, see [Invoke a Field List](#).

To open a Filter Window, click the filter button displayed in the field header.



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## Using Filter Popup Windows

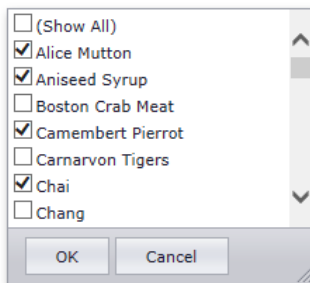


Depending on the settings made by your application vendor, the Pivot Table can display an individual Filter Window for each field, or an integrated Filter Window for a group of fields.

This topic describes how to filter data using both types of Filter Windows.

### Simple Filter Window

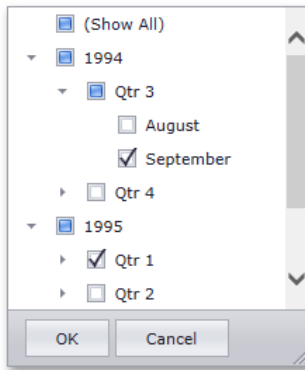
A simple Filter Window allows you to hide visible and show previously hidden values of a particular field.



In the Filter Window, uncheck field values that should be hidden and check values that should be visible. Then, click **OK** to close the window and apply the filtering.

### Hierarchical Filter Window

A hierarchical Filter Window displays values of several fields, arranged in a tree-like manner.



In the Filter Window, uncheck field values that should be hidden and check values that should be visible.

Use the ► buttons to expand field values and access their child values. To collapse an expanded field value and hide its child values, use the ▼ button.

Click **OK** to close the window and apply the filtering.

## Filtering Indication

If a field's values are filtered, the corresponding filter button is highlighted.

Order Quarter	Order Amount	Quantity
Qtr 1	\$79,965.79	2379
Qtr 2	\$64,543.60	3066
Qtr 3	\$30,097.80	1409
Qtr 4	\$64,126.55	2259
<b>Grand Total</b>	<b>\$238,733.74</b>	<b>9113</b>

## Removing Filtering

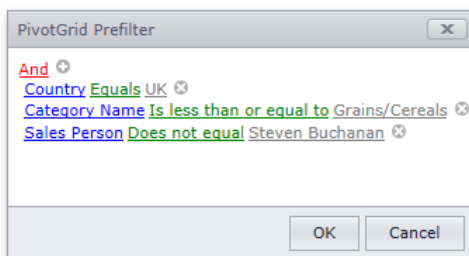
To remove filtering against a specific field, invoke its Filter Window and select **(Show All)**.

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## Build Complex Filter Criteria



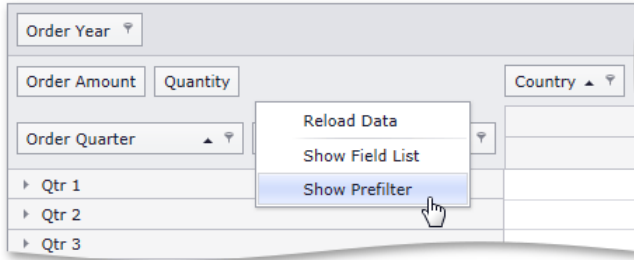
To build complex filter criteria consisting of multiple filter clauses using various filter operators, you can use a Prefilter (Filter Editor).



The Prefilter does not affect filtering via Filter Windows.



To invoke a Prefilter, click an empty space within the Pivot Table header region and select **Show Prefilter** from the context menu.



After you have built and applied a filter condition, a filter panel appears at the Pivot Table bottom. This panel displays the filter condition.

Order Amount		Quantity		Country	Order Year				
Order Quarter		Category Name		UK				UK Total	
		1994		1995		1996			
		Order Amount	Quantity	Order Amount	Quantity	Order Amount	Quantity	Order Amount	Quantity
Qtr 1				\$27,602.90	1013	\$53,156.61	1776	\$80,759.51	2789
Qtr 2				\$29,838.04	1263	\$70,710.60	2490	\$100,548.64	3753
Qtr 3		\$10,618.00	609	\$31,308.70	1156			\$41,926.70	1765
Qtr 4		\$30,635.20	1049	\$48,588.04	1495			\$79,223.24	2544
Grand Total		\$41,253.20	1658	\$137,337.68	4927	\$123,867.21	4266	\$302,458.09	10851

[Country] Equals 'UK' And [Sales Person] Does not equal 'Steven Buchanan' [Clear](#)

To modify a filter condition, open a Prefilter. You can now do it by clicking a filter condition displayed in the filter panel.

To temporarily disable filtering, uncheck the  button.

To remove filtering, click **Clear**.

For information on the Prefilter filtering capabilities, see [Filter Editor](#).

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## Layout Customization



This section describes how to customize the Pivot Table layout by expanding and collapsing field values, as well as hiding, displaying and reordering fields.

The following sections are available.

- [Expand and Collapse Groups in Pivot Tables](#)  
Provides information on how to expand and collapse field values and field headers.
- [Hide Pivot Table Fields](#)  
Guides you through the process of hiding Pivot Table fields.
- [Display Hidden Pivot Table Fields](#)  
Describes how to display fields that have previously been hidden.
- [Reorder Pivot Table Fields](#)  
Provides information on how to reorder Pivot Table fields.

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## Expand and Collapse Groups in Pivot Tables



### Expand/Collapse Values Groups

To expand/collapse value groups, do one of the following.

- Click the corresponding expand button.

Product Sales		Year	Quarter
Category Name	Product Name	1994	1995
Beverages	Chai	\$1,422.00	\$5,070.60
	Chang	\$2,732.96	\$5,817.80
	Chartreuse verte	\$2,613.60	\$2,995.74
Beverages Total		\$6,768.56	\$13,884.14
Condiments		\$15,942.14	\$50,952.60
Confections		\$22,642.99	\$78,128.73

- Right-click a value that has nested values, and select the required Expand or Collapse command from the menu that opens.

Product Sales		Year	Quarter
Category Name	Product Name	1994	1995
Beverages	Chai	\$1,422.00	\$5,070.60
	Chang	\$2,732.96	\$5,817.80
	Chartreuse verte	\$2,613.60	\$2,995.74
Beverages Total		\$6,768.56	\$13,884.14
Condiments		\$15,942.14	\$50,952.60
Confections		\$22,642.99	\$78,128.73

### Expand/Collapse Fields

To expand/collapse a group of fields, click a corresponding field expand button.

Product Sales		Year	Quarter
Category Name	Product Name	1994	1995
Beverages	Chai	\$1,422.00	\$5,070.60
	Chang	\$2,732.96	\$5,817.80
	Chartreuse verte	\$2,613.60	\$2,995.74
Beverages Total		\$6,768.56	\$13,884.14
Condiments		\$15,942.14	\$50,952.60
Confections		\$22,642.99	\$78,128.73

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### Hide Pivot Table Fields



This section describes the Pivot Table capabilities to hide fields.

Topics in this section:

- [Hide Fields Using the Context Menu](#)

Provides information on how to use context menus to hide fields.

- [Hide Fields Using a Field List](#)

Describes how to hide fields using a Field List.

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## Hide Fields Using the Context Menu



To hide a field, right-click within its header and select **Hide** within the context menu that opens.

Order Year	Order Amount	Quantity	Country
	UK		
Order Quarter	Order Amount	Quantity	
Qtr 1	\$112,769.51	3660	
Qtr 2	\$111,165.14	4355	
Qtr 3	\$56,904.90	2415	
Qtr 4	\$97,186.29	3457	
Grand Total	\$378,025.84	13887	

You can also use a Field List to hide fields. To learn more, see [Hide Fields Using a Field List](#).

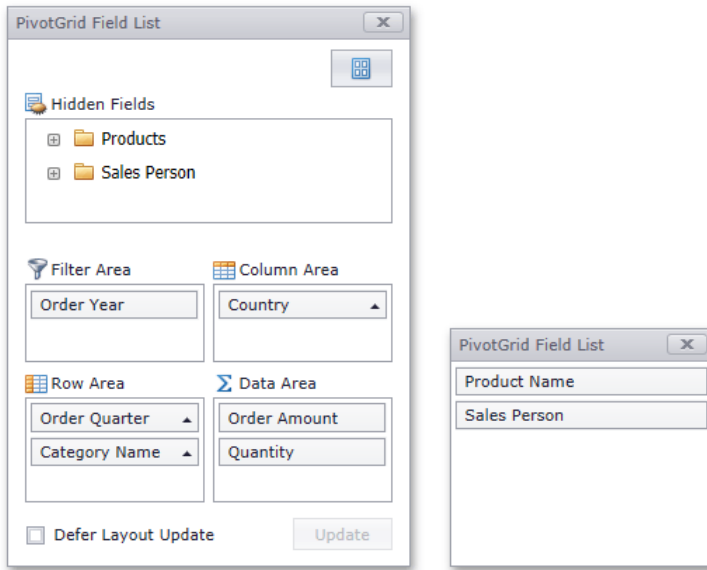
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## Hide Fields Using a Field List



You can use a simple or an advanced Field List to hide fields (to learn more about Field Lists, see [Field List Overview](#)).

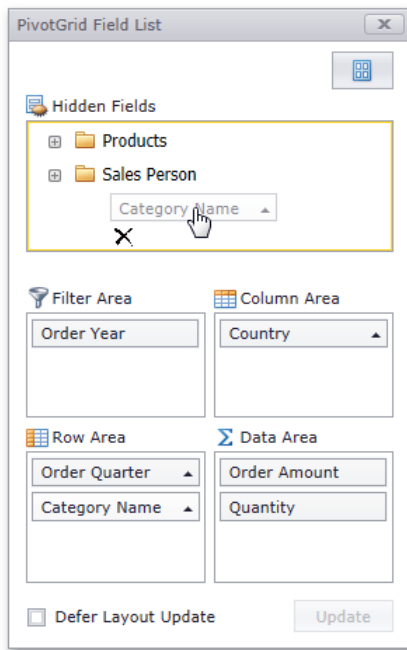


First, invoke a Field List. For information on how to do this, see [Invoke a Field List](#).

Then drag and drop a field onto the Field List form.

		UK		USA	
		Order Amount	Quantity	Order Amount	Quantity
Qtr 1	Beverages	834		\$74,651.35	1975
	Condiments	365		\$24,412.10	1196
	Confections	369		\$47,582.44	2305
	Dairy Products	811		\$44,579.50	2012
	Grains/Cereals	433		\$24,832.20	1100
	Meat/Poultry	180		\$60,782.84	1422
	Produce	204		\$19,141.40	628
	Seafood	464		\$32,994.99	1698
Qtr 1 Total		\$112,769.51	3660	\$328,976.82	12336

If you are using an advanced Field List, you can hide a field by dragging its header to the hidden fields area displayed on the Field List top.



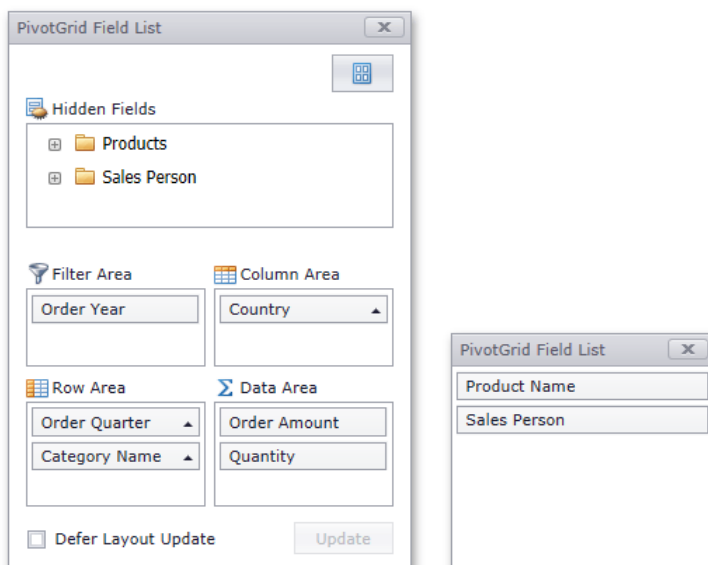
You can also hide fields using the context menu. To learn more, see [Hide Fields Using the Context Menu](#).

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## Display Hidden Pivot Table Fields



To display hidden fields, use a simple or advanced Field List (to learn more about Field Lists, see [Field List Overview](#)).

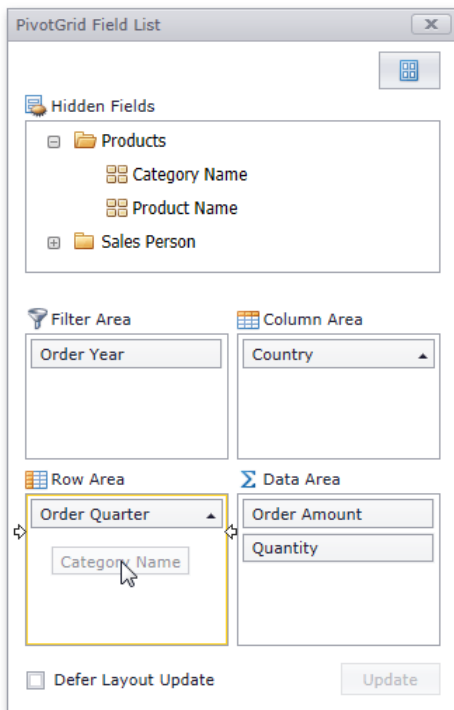


First, invoke a Field List. For information on how to do this, see [Invoke a Field List](#).

To display a hidden field, drag-and-drop the field from the Field List onto the required area of Pivot Table. This works for both simple and advanced Field Lists.

Order Year	Order Amount	Quantity	Country
			UK
Category Name	Order Quarter	Order Amount	Quantity
Beverages			2666
Condiments			1382
Confections			1840
Dairy Products			3225
Grains/Cereals			920
Meat/Poultry			1088
Produce			905
Seafood			1861
<b>Grand Total</b>		\$378,025.84	13887

If you are using an advanced Field List, you can display a hidden field by dragging its header from the hidden fields section to the section corresponding to the required Pivot Table area.



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## Reorder Pivot Table Fields



This section describes the Pivot Table capabilities to reorder fields.

The following topics are available:

- [Simple Fields Reordering](#)  
Describes how to reorder fields via drag-and-drop and context menus.
- [Reorder Fields Using a Field List](#)

Provides information on how to use a Field List to reorder fields.

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## Simple Fields Reordering



To move a field to another position, use drag-and-drop.

Order Year ▾	Quantity ▾	Order Amount	Country ▲ ▾	Order Quarter ▲ ▾	UK	USA	Grand Total
Qtr 1					\$112,769.51	\$328,976.82	\$441,746.33
Qtr 2					\$111,165.14	\$305,692.52	\$416,857.66
Qtr 3					\$56,904.90	\$144,431.22	\$201,336.12
Qtr 4					\$97,186.29	\$197,332.19	\$294,518.48
Grand Total					\$378,025.84	\$976,432.75	\$1,354,458.59

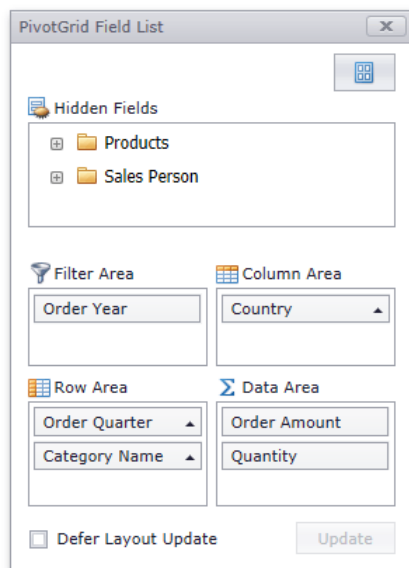
You can also use a Field List to reorder fields. For more information, see [Reorder Fields Using a Field List](#).

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## Reorder Fields Using a Field List

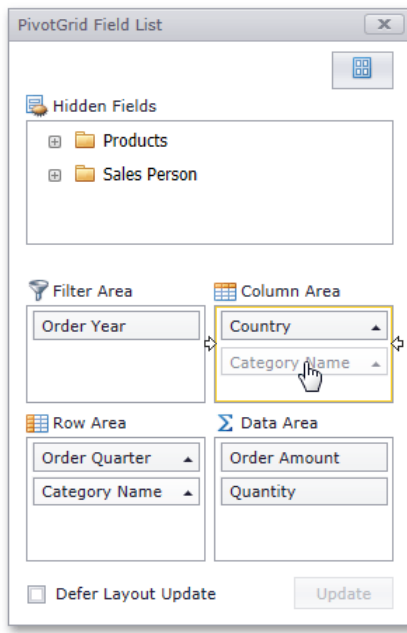


You can use an advanced Field List to reorder fields (to learn more about Field Lists, see [Field List Overview](#)).



First, invoke a Field List. For information on how to do this, see [Invoke a Field List](#).

To reorder fields, drag their headers within or between Field List sections that correspond to different Pivot Table areas.



You can also reorder fields via simple drag-and-drop operations without invoking a Field List. To learn more, see [Simple Fields Reordering](#).

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## Field List Overview



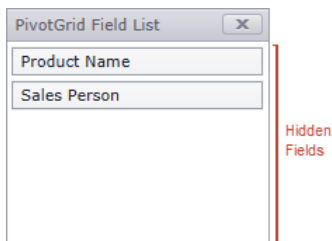
Pivot Table provides a Field List form used to reorder and hide fields, sort and filter data, etc. For more information on how to invoke a Field List, see [Invoke a Field List](#).

This topic describes Field List visual elements and layout.

Depending on Pivot Table settings made by your application vendor, Pivot Table can display either a simple or advanced Field List.

## Simple Field List

The following picture shows a simple Field List.



A simple Field List contains the following visual elements:

- **Hidden Fields Section** - contains headers of fields hidden from Pivot Table. Use it to display hidden fields.

Use a simple Field List to hide fields from Pivot Table and display hidden fields again.

For more information on operations available in a simple Field List, refer to the following topics:

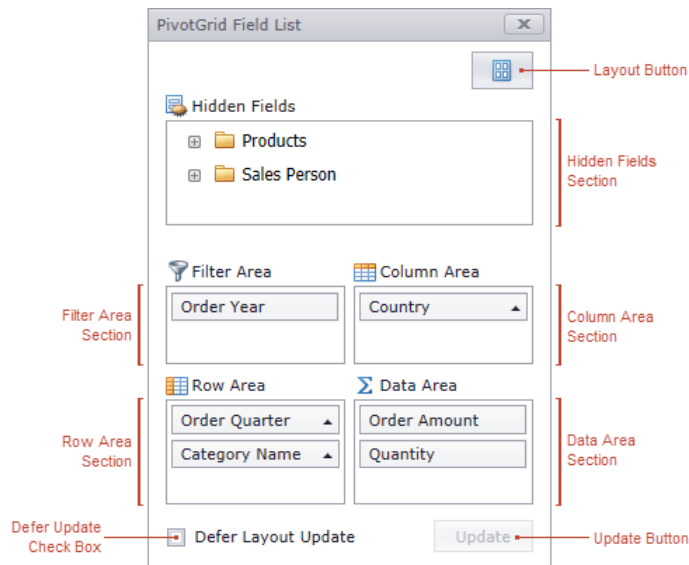
- [Hide Fields Using a Field List](#)



- [Display Hidden Pivot Table Fields](#)

## Advanced Field List

The following picture shows an advanced Field List.



An advanced Field List contains the following visual elements:

- **Hidden Fields Section** - contains headers of fields hidden from Pivot Table. Use it to display hidden fields.
- **Filter, Column, Row and Data Area Sections** - contains headers located in respective Pivot Table areas.
- **Defer Updates Check Box** - used to enable/disable automatic Pivot Table updates (see [Defer Pivot Table Updates](#)).
- **Update Button** - used to force Pivot Table to update (see [Defer Pivot Table Updates](#)).
- **Layout Button** - used to invoke the *Layout* menu and change the Field List layout (see [Change Field List Layout](#)).

Use an advanced Field List to sort and filter data, reorder and hide visible fields, and show fields that have been hidden.

For more information on operations available in an advanced Field List, refer to the following topics:

- [Sort Data Using a Field List](#)
- [Invoke a Filter Popup Window](#)
- [Hide Fields Using a Field List](#)
- [Display Hidden Pivot Table Fields](#)
- [Reorder Fields Using a Field List](#)

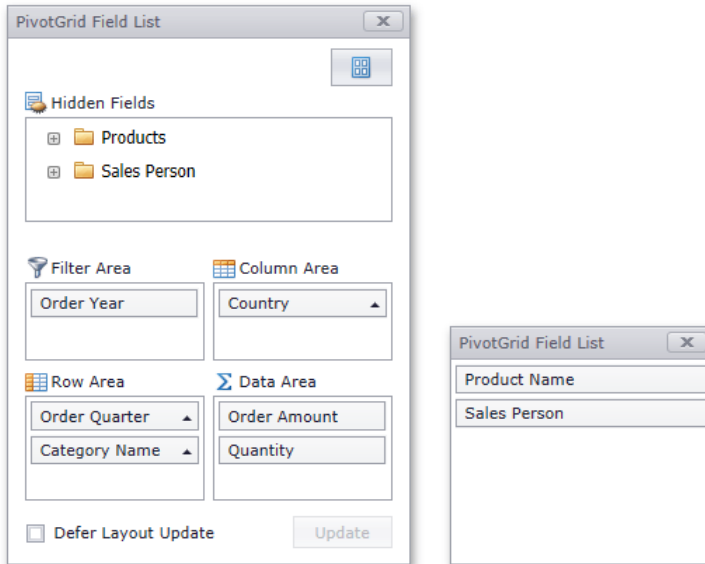
## Invoke a Field List



To invoke a Field List, right-click on an empty space within the Pivot Table header region, and select **Show Field List** from the context menu.

Order Amount	Quantity	UK	
Order Quarter	Category	Amount	Quantity
Qtr 1		\$112,769.51	3660
Qtr 2		\$111,165.14	4355
Qtr 3		\$56,904.90	2415
Qtr 4		\$97,186.29	3457
<b>Grand Total</b>		<b>\$378,025.84</b>	<b>13887</b>

A simple or advanced Field List (similar to one of those shown below) will be displayed.



To learn more about Field Lists, see [Field List Overview](#).

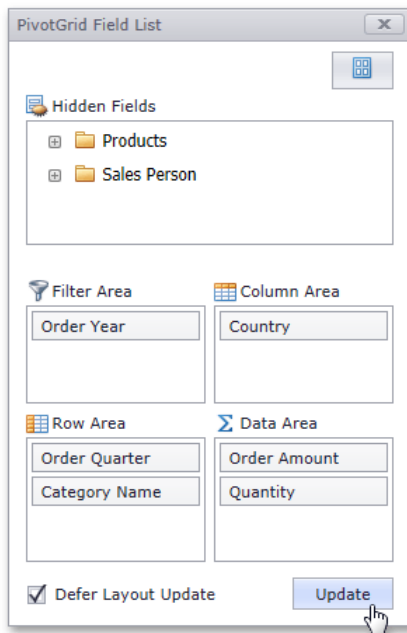
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## Defer Pivot Table Updates



When you perform several sequential operations like hiding, displaying or reordering fields using an advanced Field List, Pivot Table is updated after each operation.

You can disable automatic Pivot Table updates by checking the **Defer Layout Update** check box. In this instance, use the **Update** button to force Pivot Table to update.



Note that if the **Defer Layout Update** check box is checked, you cannot sort or filter data in the Field List.

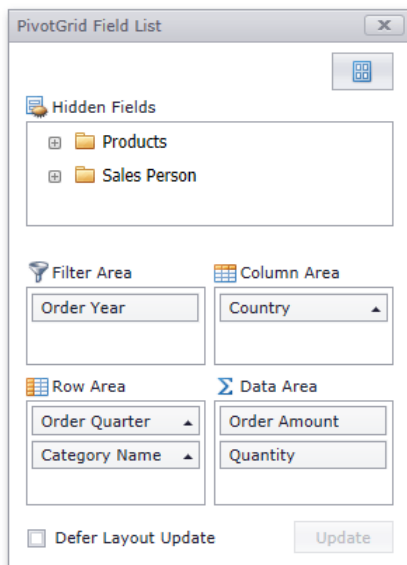
To learn more about Field Lists, see [Field List Overview](#).


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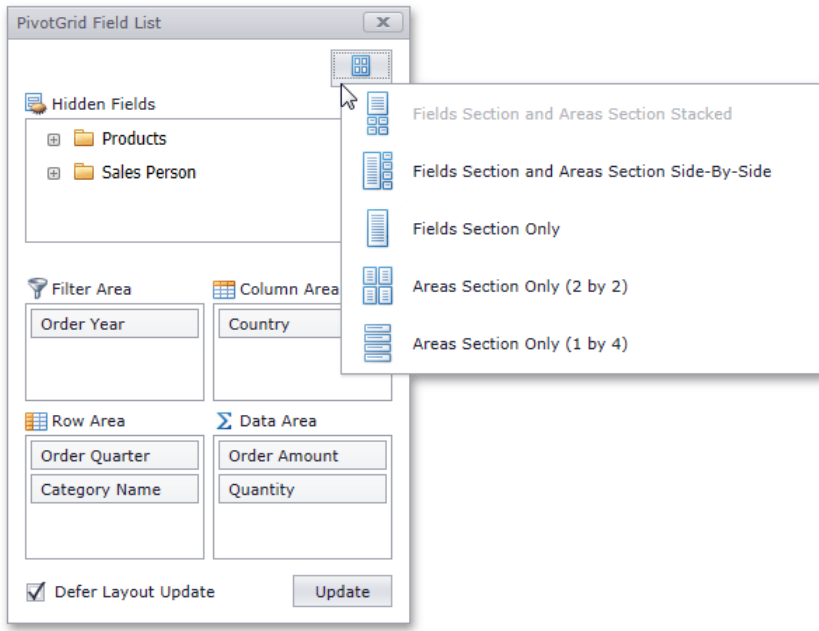
## Change Field List Layout



By default, an advanced Field List displays a hidden fields section on the top, and four sections that correspond to Pivot Table areas at the bottom (see [Field List Overview](#) for details).



You can use the *Layout* menu to control which sections are displayed and where they are displayed. To do this, click the  button and select the required layout from the drop-down menu.



To learn more about Field Lists, see [Field List Overview](#).