

## What is a Pivot Table?

A pivot table summarizes report results and allows you to view trends in data. Customizing a pivot table in OBI lets you group your data in various ways so you can draw conclusions more easily.

There is a dedicated OBI dashboard, *Cost Detail (Pivot)*, that includes templates as a starting point to customize and save pivot reports.

### Areas of a Pivot Table

1. X Axis (horizontal) Column Labels (e.g., *Expenditure Category* and *Expenditure Type*)
2. Y Axis (vertical) Column Labels (Time Series, e.g., *FY Period*)
3. Value Label (*Cost*)
4. Subtotal (e.g., *Indirect Cost Total*)
5. Column Level Total (i.e., farthest right column under *Total*)
6. Row Level Total (last row of the report labeled *Total*)

		3 Cost			5 Total
		2 OCT-FY2021	NOV-FY2021	DEC-FY2021	
Expenditure Category 1	Expenditure Type	2021	2021	2021	
Indirect Cost	Indirect Cost	2,345.67	38,220.58	2,068.61	42,634.86
Indirect Cost Total		2,345.67	38,220.58	2,068.61	42,634.86
Materials and Supplies	Facilities/Shop			160.38	160.38
	Shipping Charges		185.16	8.72	193.88
	Supplies - Allocable	1,407.47	22,149.51	517.93	24,074.91
Materials and Supplies Total 4		1,407.47	22,334.67	687.03	24,429.17
Professorial Salaries	Professorial Faculty	695.87	695.74	695.77	2,087.38
Professorial Salaries Total		695.87	695.74	695.77	2,087.38
Total 6		4,449.01	61,250.99	3,451.41	69,151.41

### Available Actions for Customizing a Pivot Table

There are several actions available for customizing Pivot Tables:

- Move a column
- Include (i.e., add) a column
- Exclude (i.e., remove) a column
- Remove values
- Add Subtotals
- Add column-level Totals
- Add row-level Totals
- Sort
- Add table Prompts
- Add table Sections
- Group values

## Customizing a Pivot Table

Right-clicking on a row or column label will reveal the customization options for that section of the report.

Please note that many of the right-click actions throughout this guide can also be accomplished by dragging and dropping the handle on a label. This is trickier and requires more practice than simply right-clicking and selecting an option.

**Don't forget to save your pivot customization!** Please see the *Customizing Reports Quick Guide* for more information on saving customizations.

### Move a Column

You can move a column left or right by either dragging and dropping by the label handle or by right-clicking.

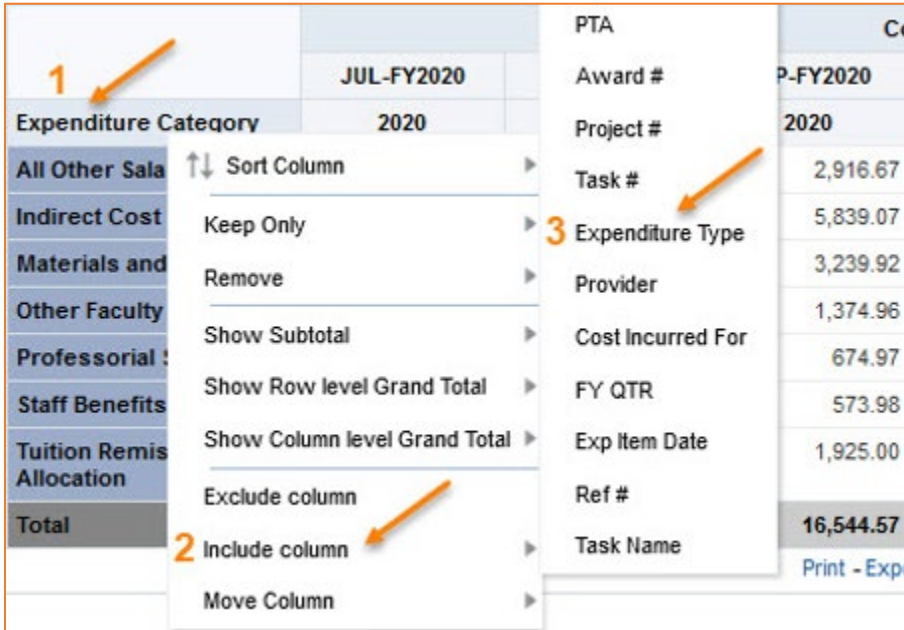
1. Right-click on the column label
2. Hover over *Move Column* and an additional menu will appear.
3. Select *Left* or *Right* to move the column.

	OCT-FY2021	NOV-FY2021	D
<b>Expenditure Type</b>	<b>2021</b>	<b>2021</b>	
Grad Assistantst		608.26	
		<b>608.26</b>	
Indirect Cost		38,220.58	
		<b>38,220.58</b>	
Facilities/Shop			
Shipping Charge:		185.16	
Supplies - Allocat		22,149.51	
tal		<b>22,334.67</b>	
Postdoctoral Sch		26,355.89	
al			
Professorial Faculty	695.87		To Prompts

*Include a Column*

You can add (*include*) a column using the following steps:

1. Right-click on the column label to the left of where you would like to add a column.
2. Hover over *Include column* and an additional menu will appear with the columns that are available to add.
3. Select the column you would like to include.



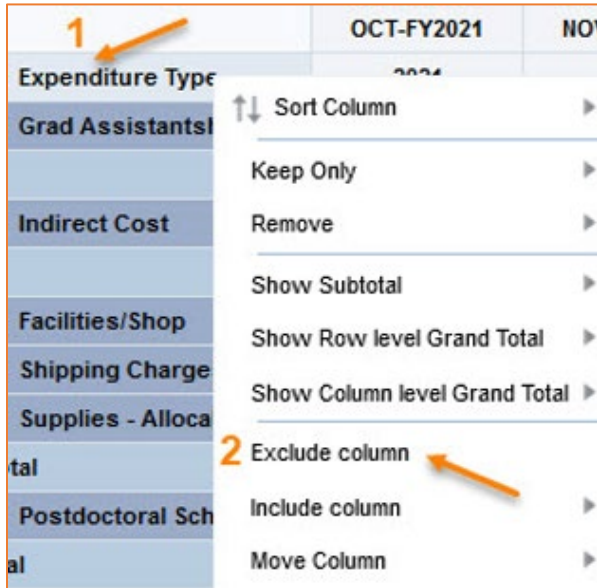
4. Once selected, the column will appear to the right of the right-clicked column.

Expenditure Category	Expenditure Type	OCT-FY2021
All Other Salaries	Grad Assistantships	2021
All Other Salaries Total		
Indirect Cost	Indirect Cost	2,345.67
Indirect Cost Total		2,345.67
Materials and Supplies	Facilities/Shop	

*Exclude a Column*

You can remove (*exclude*) a column using the following steps:

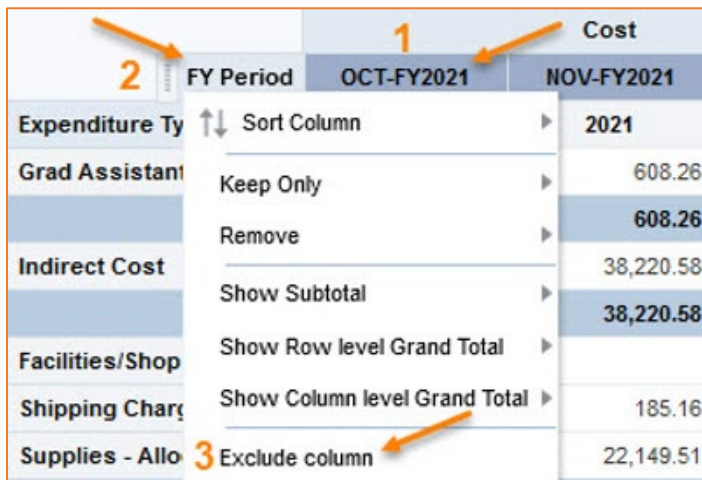
1. Right-click directly on the column label you would like to *exclude* from the pivot table report.
2. Select *Exclude column*.



*Exclude a Time Series Column*

By default, when you first run a Pivot Report, the *Fiscal Year*, *Fiscal Year Quarter*, and *FY Period* will appear across the top of the report. Mostly likely you will only want to include one time series. This can be done by *excluding* the time series column you do not want in your report.

1. Identify the time series that you want to *exclude* and hover over the column value, e.g., OCT-FY2021.
2. The column label will appear (e.g., *FY Period*).
3. Right-click on the column label Select *Exclude column*.



## Working with Values, Subtotals, and Totals

You can add or remove subtotals on any row in the report and add or remove grand totals on the pivot table rows and columns.

### Remove Values

The *Remove* function acts as a filter. For example, if you want to remove the values for FY2020:

1. Right-click on the column value 2020.
2. Select *Remove* and all 2020 columns values will be removed from the report and only 2021 will remain.

Expenditure Type	Cost		Total
	2021	2020	
Grad Assistantships	912.32	2,916.6	
	912.32	2,916.6	
Indirect Cost	42,634.86	22,043.7	

### Row Subtotals

1. To add a subtotal, right-click on the column label for which you would like to add a subtotal.
2. Hover over *Show Subtotal* and the next menu will appear.
3. Select where you would like the subtotal to appear. This is typically *After Values*.
4. To remove subtotals, follow the same procedure and select *None*.

Expenditure Category	Expenditure Type	Cost	
		2021	
All Other Salaries		912.32	
All Other Salaries Total		912.32	
Indirect Cost		42,634.86	
Indirect Cost Total		42,634.86	
Materials and Supplies			
Materials and Supplies T			
Other Faculty Salaries			

Row Level Total

1. To add a row level grand total, right-click on any column label.
2. Hover over *Show Row level Grand Total* and the next menu will appear.
3. Select where you would like the subtotal to appear. This is typically *After Values*.
4. To remove the Row level Grand Total, follow the same procedure and select *None*.

Expenditure Category	Expenditure Type	2021	Cost
Materials and Supplies	Sort Column	160.38	
	Keep Only	193.88	
	Remove	24,074.91	
Materials and Supplies	Show Subtotal	24,429.17	
Professorial Salaries	Show Row level Grand Total	None	
Professorial Salaries T	Show Column level Grand Total	Before Values	
Tuition Remission Allocation	Exclude column	After Values	
Tuition Remission Allo	Include column	602.13	
Total	Move Column	27,118.68	

Column Level Total

1. Right-click on any column label.
2. Hover over *Show Column level Grand Total* and the next menu will appear.
3. Select where you would like the subtotal to appear. This is typically *After Values*.
4. The column totals will appear on the right of the report.
5. To remove the Column level Grand Total, follow the same procedure and select *None*.

Expenditure Type	2021	2020	Total
Facilities/Shop	Sort Column	319.75	480.13
Shipping Charge	Keep Only	59.85	253.73
Supplies - Allocat	Remove	4,134.87	28,209.78
ital	Show Subtotal	4,514.47	28,943.64
Professorial Facu	Show Row level Grand Total	4,049.92	6,137.30
il	Show Column level Grand Total	None	2,527.13
Tuition Remissio	Exclude column	Before Values	2,527.13
Allocation	Include column	After Values	37,608.07
ion Total	Move Column		

Sorting

Right-clicking over column and totals labels in different areas of the report provides options for sorting the values.

In the example below the *Total Column* has been right-clicked to reveal the sorting options.

- *Sort Ascending*: Sorts the values in the column by ascending order, as a first-level sort. For example, numbers sort lowest to highest, dates sort earliest to latest, and the rest sort alphabetically A through Z.
- *Sort Descending*: Sorts the values in the column by descending order, as a first-level sort. For example, numbers sort highest to lowest, dates sort latest to earliest, and the rest sort alphabetically Z through A.
- *Add Ascending Sort*: Adds an additional ascending sort on the column.
- *Add Descending Sort*: Adds an additional descending sort on the column.
- *Clear All Sorts in View*: Removes all sort specifications that have been made.

		Cost		Total
Expenditure Category	Expenditure Type	2021	2020	
Materials and Supplies	Facilities/Shop	160.38	319.75	<div style="border: 1px solid gray; padding: 5px;">                     Sort                      Show Row level Grand Total                      Show Column level Grand Total                      Exclude column                      Include column                      Move Measure Labels                 </div>
	Shipping Charges	193.88	59.85	
	Supplies - Allocable	24,074.91	4,134.87	
<b>Materials and Supplies Total</b>		<b>24,429.17</b>	<b>4,514.47</b>	
Professorial Salaries	Professorial Faculty	2,087.38	4,049.92	<div style="border: 1px solid gray; padding: 5px;">                     Sort Ascending                      Sort Descending                      Add Ascending Sort                      Add Descending Sort                      Clear All Sorts in View                 </div>
<b>Professorial Salaries Total</b>		<b>2,087.38</b>	<b>4,049.92</b>	
Tuition Remission Allocation	Tuition Remission Allocation	602.13	1,925.00	
<b>Tuition Remission Allocation Total</b>		<b>602.13</b>	<b>1,925.00</b>	<b>2,527.13</b>
<b>Total</b>		<b>27,118.68</b>	<b>10,489.39</b>	<b>37,608.07</b>

## Adding Prompts

Prompts act as a filter in your report by showing only the data that is selected in the dropdown list of values. You can create a *Prompt Section* by moving a column *To Prompts*.

1. To add a prompt on a column, right-click on the row label that you would like to move to a *Prompts* section.
2. Hover over *Move Column* and the next menu will appear.
3. Select *To Prompts*.

		OCT-FY2021
Expenditure Category	Expenditure Type	2021
All Other Salaries	Sort Column	
All Other Salaries Total	Keep Only	
Indirect Cost	Remove	2,345.67
Indirect Cost Total	Show Subtotal	2,345.67
Materials and Supplies	Show Row level Grand Total	
	Show Column level Grand Total	1,407.47
Materials and Supplies	Exclude column	1,407.47
Other Faculty Salaries	Include column	970.67
Other Faculty Salaries Total	Move Column	
Professorial Salaries	Professorial Faculty	
Professorial Salaries Total		
Staff Benefits Allocation	Staff Benefits Allocation	

Your report will now display the column selected at the top. Choose from the list of values to show only costs related to your selection.

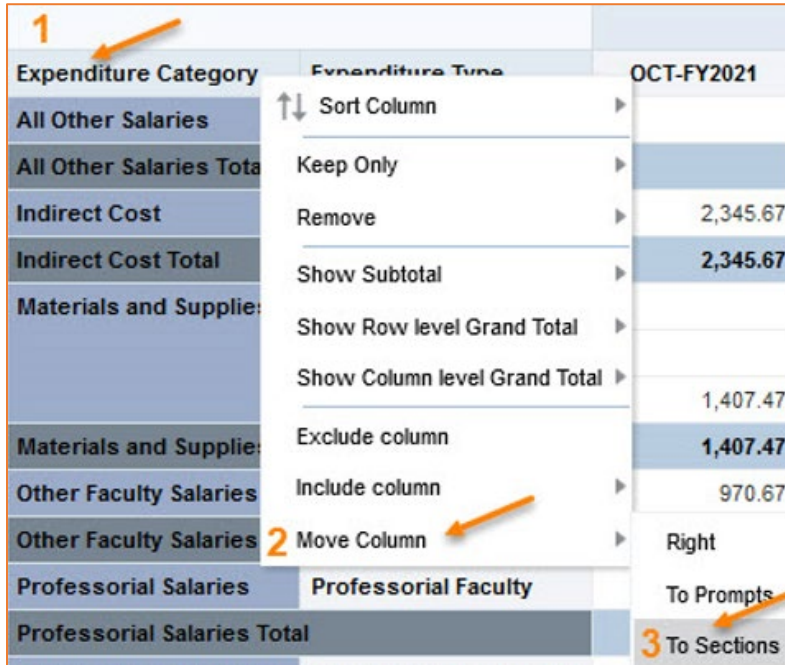
		DEC-FY2021		Total
Expenditure Category	Expenditure Type	2021	2021	
Facilities/Shop			160.38	160.38
Shipping Charges		185.16	8.72	193.88
Supplies - Allocable		1,407.47	517.93	24,074.91
<b>Total</b>		<b>1,407.47</b>	<b>687.03</b>	<b>24,429.17</b>



Adding Sections

Your data can be grouped into *Sections* by moving a column *To Sections*.

1. Right-click on the row label that you would like to use to Section the report.
2. Hover over *Move Column* and the next menu will appear.
3. Select *To Sections*.



Your pivot report will now be broken into sections by the row that was chosen (Expenditure Category below).

Indirect Cost				
	Cost			Total
Expenditure Type	OCT-FY2021	NOV-FY2021	DEC-FY2021	
Indirect Cost	2,345.67	38,220.58	2,068.61	42,634.86
<b>Total</b>	<b>2,345.67</b>	<b>38,220.58</b>	<b>2,068.61</b>	<b>42,634.86</b>

Materials and Supplies				
	Cost			Total
Expenditure Type	OCT-FY2021	NOV-FY2021	DEC-FY2021	
Facilities/Shop			160.38	160.38
Shipping Charges		185.16	8.72	193.88
Supplies - Allocable	1,407.47	22,149.51	517.93	24,074.91
<b>Total</b>	<b>1,407.47</b>	<b>22,334.67</b>	<b>687.03</b>	<b>24,429.17</b>

*Creating a Group*

You can combine row values to create custom groups of data.

1. Shift-click or Ctrl-click the values you would like to combine into a custom group.
2. Right-click one of your selected values.
3. Select *Create Group...*

Expenditure Category	Expenditure Type	OCT-FY2021
All Other Salaries		
Indirect Cost		2,345.67
Materials and Supplies		
		1,407.47
Other Faculty Salaries		970.67
Professorial Salaries	Professorial Faculty	695.87
Staff Benefits Allocation	Staff Benefits Allocation	453.30
Tuition Remission Allocation	Tuition Remission Allocation	
<b>Total</b>		<b>5,872.98</b>

4. You will be prompted to name your new group.

**New Group** ? X

Display Label

Add to  Current View  All Views

The group will now appear at the bottom of the report.

<b>All Salaries</b>	<b>Grad Assistantships</b>		608.26	304.06	<b>912.32</b>
	<b>Postdoctoral Scholar Sal</b>	970.67	26,355.89	970.58	<b>28,297.14</b>
	<b>Professorial Faculty</b>	695.87	695.74	695.77	<b>2,087.38</b>
<b>Total</b>		<b>5,872.98</b>	<b>96,096.38</b>	<b>5,379.98</b>	<b>107,349.34</b>

*Removing Custom Group Details*

To further customize the report view, you can remove the details behind the custom group by removing the columns that were added to the group. Notice the grand totals stay correct and do not change no matter how many groups have been created.

1. Right-click on a column value that was added to the custom group.
2. Select *Remove*

The screenshot shows a pivot table with three columns: 'Expenditure Category', 'Expenditure Type', and 'OCT-FY2021'. The 'All Other Salaries' row is selected, and a context menu is open over it. The menu options are: 'Keep Only', 'Remove', 'Create Group...', and 'Create Calculated Item...'. An orange arrow labeled '1' points to the 'All Other Salaries' cell, and another orange arrow labeled '2' points to the 'Remove' option in the menu. The 'Indirect Cost' row shows a value of 2,345.67, and the 'Indirect Cost Total' row also shows 2,345.67.

Expenditure Category	Expenditure Type	OCT-FY2021
All Other Salaries	Grad Assistantship	
All Other Salaries Total		
Indirect Cost		2,345.67
Indirect Cost Total		2,345.67
Materials and Supplies		

Please note that the *Totals* will *not change* no matter how many custom groups are added.

**Don't forget to save your pivot customization!** Please see the *Customizing Reports Quick Guide* for more information on saving customizations.