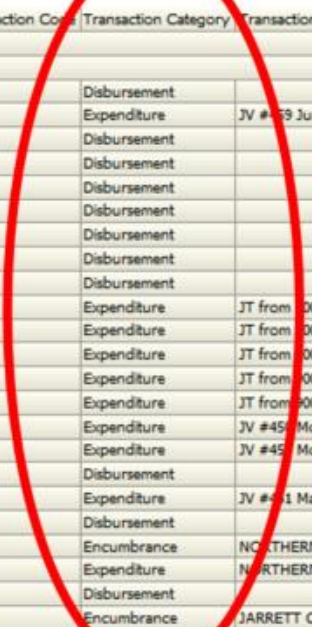


# Helpful Hint #5: Moving a Column from Table to Pivot Table Prompt or Sections

When reviewing larger sets of data, the “move column” to pivot table prompts and to sections options can be a very useful tools to help sort and easily view data. For fields that are category based and can have many lines of data associated with one category, (e.g. Campus, Fiscal Year, Transaction code, Transaction category, document type, date, etc.) moving the column to a pivot table prompt or sections can allow the user to group and view data by an individual value in that field without having to filter one value at a time. When a field has many unique values/results and only a few lines of data associated with it, moving a column to prompt or sections is not as useful of a tool as you will have to switch or scroll more to view the data.

**For our example we will be using Transaction Inquiry> Transactions dashboard, with the selections: Campus – System Admin, Acct. # - 900837, Fiscal year – 16-17, and we will include column “transaction category” and then move the column to pivot table prompt and sections by transaction category.**

When initially queried the data results as the image below.



Campus	Transaction Date	Transaction Code	Transaction Category	Transaction Desc	Document Number	Vendor	Account	Subobject	Transaction Amount
<b>Grand Total</b>									<b>1,140,805.95</b>
<b>System Admin Total</b>									<b>1,140,805.95</b>
System Admin	08/03/2017	319	Disbursement		W603851	NO VENDOR	900837-99	5402	19.67
System Admin	08/03/2017	319J	Expenditure	JV #459 June'17 Telephone Recharges	W603851	NO VENDOR	900837-99	5402	19.67
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3095	8.98
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3410	2,499.40
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3561	384.88
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3600	928.86
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3600	268.45
System Admin	07/28/2017	319	Disbursement		W595939	NO VENDOR	900837-99	3410	63.32
System Admin	07/28/2017	319	Disbursement		W595939	NO VENDOR	900837-99	5638	1,543.75
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3095	8.98
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3410	2,499.40
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3561	384.88
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3600	268.45
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3600	928.86
System Admin	07/28/2017	319J	Expenditure	JV #459 Move exp from 900650-01	W595939	NO VENDOR	900837-99	3410	63.32
System Admin	07/28/2017	319J	Expenditure	JV #459 Move exp from 900650-01	W595939	NO VENDOR	900837-99	5638	1,543.75
System Admin	07/26/2017	319	Disbursement		W590925	NO VENDOR	900837-99	5402	20.39
System Admin	07/26/2017	319J	Expenditure	JV #459 1 May'17 Telephone Recharges	W590925	NO VENDOR	900837-99	5402	20.39
System Admin	07/26/2017	399	Disbursement		8000435	NO VENDOR	900837-99	3600	1,395.00
System Admin	07/25/2017	203V	Encumbrance	NORTHERN NURSERIES INC	8000435	NO VENDOR	900837-99	3600	-1,395.00
System Admin	07/25/2017	304A	Expenditure	NORTHERN NURSERIES INC	8000435	NORTHERN NURSERIES INC	900837-99	3600	1,395.00
System Admin	07/21/2017	399	Disbursement		8000336	NO VENDOR	900837-99	5638	1,475.00
System Admin	07/20/2017	203V	Encumbrance	JARRETT CARROLL	8000336	NO VENDOR	900837-99	5638	-1,475.00

Moving to pivot table prompts allows the user to quickly toggle between the resulting values, and see all data associated with an individual value in the prompted field. This is similar to applying a filter or selection on a dashboard, but the data for all other resulting values in the prompted field are loaded and easily switched between.

Campus	Transaction Date	Transaction Code	Transaction Desc	Document Number	Vendor	Account	Subsubject	Transaction Amount
<b>Grand Total</b>								<b>269,419.00</b>
<b>System Admin Total</b>								<b>269,419.00</b>
System Admin	04/05/2017				NO VENDOR	900837-99	7000	-28,985.00
System Admin	02/02/2017		LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-50	5500	1,000.00
System Admin	02/02/2017		LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-99	0000	176,224.00
System Admin	02/02/2017	1611	LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-99	1970	13,180.00
System Admin	02/02/2017	1611	LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-99	2610	5,000.00
System Admin	02/02/2017	1611	LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-99	3000	43,000.00
System Admin	02/02/2017	1611	LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-99	5000	10,000.00
System Admin	02/02/2017	1611	LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-99	7000	50,000.00

Account begins with **900837**  
 and Fiscal Year is equal to **16-17**  
 and Charge Agency Name is equal to **System Admin**

Moving to Sections allows the user to continue to view all data at once and on one page but organizes by the sectioned field into separate tables.

Campus	Transaction Date	Transaction Code	Transaction Desc	Document Number	Vendor	Account	Subsubject	Transaction Amount
<b>Grand Total</b>								<b>269,419.00</b>
<b>System Admin Total</b>								<b>269,419.00</b>
System Admin	04/05/2017	1621			NO VENDOR	900837-99	7000	-28,985.00
System Admin	02/02/2017	1611	LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-50	5500	1,000.00
System Admin	02/02/2017	1611	LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-99	0000	176,224.00
System Admin	02/02/2017	1611	LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-99	1970	13,180.00
System Admin	02/02/2017	1611	LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-99	2610	5,000.00
System Admin	02/02/2017	1611	LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-99	3000	43,000.00
System Admin	02/02/2017	1611	LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-99	5000	10,000.00
System Admin	02/02/2017	1611	LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-99	7000	50,000.00

Campus	Transaction Date	Transaction Code	Transaction Desc	Document Number	Vendor	Account	Subsubject	Transaction Amount
<b>Grand Total</b>								<b>267,093.86</b>
<b>System Admin Total</b>								<b>267,093.86</b>
System Admin	06/03/2017	319		W603851	NO VENDOR	900837-99	5402	19.67
System Admin	07/28/2017	319		W593183	NO VENDOR	900837-99	3095	8.98
System Admin	07/28/2017	319		W593183	NO VENDOR	900837-99	3410	2,499.40
System Admin	07/28/2017	319		W593183	NO VENDOR	900837-99	3561	384.88
System Admin	07/28/2017	319		W593183	NO VENDOR	900837-99	3600	928.86
System Admin	07/28/2017	319		W593183	NO VENDOR	900837-99	3600	268.45
System Admin	07/28/2017	319		W595939	NO VENDOR	900837-99	3410	63.32
System Admin	07/28/2017	319		W595939	NO VENDOR	900837-99	5638	1,543.75
System Admin	07/26/2017	319		W590925	NO VENDOR	900837-99	5402	20.39
System Admin	07/26/2017	399		8000435	NO VENDOR	900837-99	3600	1,395.00
System Admin	07/21/2017	399		8000336	NO VENDOR	900837-99	5638	1,475.00
System Admin	07/17/2017	319		W544014	NO VENDOR	900837-99	3001	327.98

As seen above, the rows of data show the same data, but now are grouped by Transaction Category and totals between categories are easily identifiable.

When a field has many unique values/results and only a few lines of data associated with it, moving a column to pivot table prompt or sections is not as useful of a tool as you will have to switch or scroll more to view the data.


Subobject	Date	Transaction Code	Transaction Category	Transaction Desc	Document Number	Vendor	Account	Transaction Amount
0000								
0600								
<b>Grand Total</b>								<b>176,224.00</b>
1500								<b>176,224.00</b>
System Admin		161I	Allocation	LEGISLATIVE BUDGET REQUEST	CRT020F	NO VENDOR	900837-99	176,224.00
1908								
1918								
1928								
1948								
1970								
1985								
1991								
2610								
2699								
3000								
3001								
3095								
3300								
3301								
3410								
3561								
3562								

Account begins with **900837**  
and Fiscal Year is equal to **16-17**  
and Charge Agency Name is equal to **System Admin**

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# How to Move Column to Pivot Table Prompt or Sections – 2 ways:

1. **Click – hold – drag by the column Heading:** This is similar to moving columns to the left or right
  - a. Click when the column heading has a bar across the top.



Campus	Transaction Date	Transaction Code	Transaction Cate	Transaction Desc	Document Number	Vendor	Account	Subobject	Transaction Amount
<b>Grand Total</b>									<b>1,140,805.95</b>
<b>System Admin Total</b>									<b>1,140,805.95</b>
System Admin	06/03/2017	319	Disbursement		W603851	NO VENDOR	900837-99	5402	19.67
System Admin	06/03/2017	319J	Expenditure	JV #459 June'17 Telephone Recharges	W603851	NO VENDOR	900837-99	5402	19.67
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3095	8.98
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3410	2,499.40
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3561	384.88
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3600	928.86
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3600	268.45
System Admin	07/28/2017	319	Disbursement		W595939	NO VENDOR	900837-99	3410	63.32
System Admin	07/28/2017	319	Disbursement		W595939	NO VENDOR	900837-99	5638	1,543.75
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3095	8.98
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3410	2,499.40
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3561	384.88
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3600	268.45
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3600	928.86
System Admin	07/28/2017	319J	Expenditure	JV #450 Move exp from 900650-01	W595939	NO VENDOR	900837-99	3410	63.32
System Admin	07/28/2017	319J	Expenditure	JV #450 Move exp from 900650-01	W595939	NO VENDOR	900837-99	5638	1,543.75
System Admin	07/26/2017	319	Disbursement		W590925	NO VENDOR	900837-99	5402	20.39
System Admin	07/26/2017	319J	Expenditure	JV #441 May'17 Telephone Recharges	W590925	NO VENDOR	900837-99	5402	20.39
System Admin	07/26/2017	399	Disbursement		8000435	NO VENDOR	900837-99	3600	1,395.00
System Admin	07/25/2017	203V	Encumbrance	NORTHERN NURSERIES INC	8000435	NO VENDOR	900837-99	3600	-1,395.00
System Admin	07/25/2017	304A	Expenditure	NORTHERN NURSERIES INC	<a href="#">8000435</a>	NORTHERN NURSERIES INC	900837-99	3600	1,395.00
System Admin	07/21/2017	399	Disbursement		8000336	NO VENDOR	900837-99	5638	1,475.00
System Admin	07/20/2017	203V	Encumbrance	JARRETT CARROLL	8000336	NO VENDOR	900837-99	5638	-1,475.00

- b. Drag column to the white space above the Table and look for a blue highlighted bar indicating to 'let go' of column. The blue highlighted bar will say Pivot Table Prompt, or Sections. To place into pivot table prompt drag the column slightly higher in the white space, to place into section drag the column slightly lower in the white space. This area can be sensitive and can easily miss the correct area to drop the column into, as you drag your mouse you will see the blue bar pop-up and as used more often the user will be able to better place the column.

Pivot Table Prompts									
Campus	Transaction Date	Transaction Code	Transaction Category	Transaction Desc	Document Number	Vendor	Account	Subobject	Transaction Amount
<b>Grand Total</b>									<b>1,140,805.95</b>
<b>System Admin Total</b>									<b>1,140,805.95</b>
System Admin	08/03/2017	319	Disbursement		W603851	NO VENDOR	900837-99	5402	19.67
System Admin	08/03/2017	319J	Expenditure	JV #459 June'17 Telephone Recharges	W603851	NO VENDOR	900837-99	5402	19.67

Sections									
Campus	Transaction Date	Transaction Code	Transaction Category	Transaction Desc	Document Number	Vendor	Account	Subobject	Transaction Amount
<b>Grand Total</b>									<b>1,140,805.95</b>
<b>System Admin Total</b>									<b>1,140,805.95</b>
System Admin	08/03/2017	319	Disbursement		W603851	NO VENDOR	900837-99	5402	19.67
System Admin	08/03/2017	319J	Expenditure	JV #459 June'17 Telephone Recharges	W603851	NO VENDOR	900837-99	5402	19.67

c. Release your mouse to put the column into prompts or sections

2. Right-Click on column heading and select 'Move Column' on drop down.

a. Right-Click on column heading to open drop down menu

Campus	Transaction Date	Transaction Code	Transaction Category	Transaction Desc	Document Number	Vendor	Account	Subobject	Transaction Amount
<b>Grand Total</b>									<b>1,140,805.95</b>
<b>System Admin Total</b>									<b>1,140,805.95</b>
System Admin	08/03/2017	319	Disbursement		W603851	NO VENDOR	900837-99	5402	19.67
System Admin	08/03/2017	319J	Expenditure	JV #459 June'17 Telephone Recharges	W603851	NO VENDOR	900837-99	5402	19.67
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3095	8.98
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3410	2,499.40
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3561	384.88
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3600	928.86
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3600	268.45
System Admin	07/28/2017	319	Disbursement		W595939	NO VENDOR	900837-99	3410	63.32
System Admin	07/28/2017	319	Disbursement		W595939	NO VENDOR	900837-99	5638	1,543.75
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3095	8.98
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3410	2,499.40

b. Hover over 'Move Column' to show drop down list of options and left-click on where you would like to move your column to

Campus	Transaction Date	Transaction Code	Transaction Category	Transaction Desc	Document Number	Vendor	Account	Subobject	Transaction Amount
<b>Grand Total</b>									<b>1,140,805.95</b>
<b>System Admin Total</b>									<b>1,140,805.95</b>
System Admin	08/03/2017	319	Disbursement		W603851	NO VENDOR	900837-99	5402	19.67
System Admin	08/03/2017	319J	Expenditure	JV #459 June'17 Telephone Recharges	W603851	NO VENDOR	900837-99	5402	19.67
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3095	8.98
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3410	2,499.40
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3561	384.88
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3600	928.86
System Admin	07/28/2017	319	Disbursement		W593183	NO VENDOR	900837-99	3600	268.45
System Admin	07/28/2017	319	Disbursement		W595939	NO VENDOR	900837-99	3410	63.32
System Admin	07/28/2017	319	Disbursement		W595939	NO VENDOR	900837-99	5638	1,543.75
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3095	8.98
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3410	2,499.40
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3561	384.88
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3600	268.45
System Admin	07/28/2017	319J	Expenditure	JT from 900650-01 to several accounts	W593183	NO VENDOR	900837-99	3600	928.86
System Admin	07/28/2017	319J	Expenditure	JV #459 Move exp from 900650-01 to several accounts	W595939	NO VENDOR	900837-99	3410	63.32
System Admin	07/28/2017	319J	Expenditure	JV #459 Move exp from 900650-01 to several accounts	W595939	NO VENDOR	900837-99	5638	1,543.75