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 tool 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.

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.
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.

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.
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.

   ![Image of column heading]

   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.
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

   ![Image of right-click menu with Move Column option circled]

   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