

# Basic Pivot Features

---

Collabion Charts  
for SharePoint

Let's learn how to

# **Implement Pivoting** In Collabion Charts.

Business users like you have to summarize long lists of data to get a clearer view. Moreover, deriving the best insights from your data is a must for intelligent decisions!

---

## Collabion Charts for SharePoint helps you do just that!

- *It represents your data in a neater and more meaningful format, which is a must for **clear interpretation**.*
- *It implements pivoting features in charts to give you **different perspectives of the same data**.*

*With pivoting features,*

- Make the most out of your data by **looking at it from different perspectives** and discover newer angles.
- Gain **numerous insights** and highlight the ones of your choice!

Before proceeding, let's have a look at the table below.

You can easily notice that the same years and companies have been repeated over and over again, rendering the *format untidy and repetitive*!


How about **transforming the table** into a neater and more meaningful format?

Year	Company	Profits(Millions of dollars)
2015	Apple	39510
2015	Exxon Mobil	32520
2015	Wells Fargo	23057
2015	Microsoft	22074
2015	JP Morgan Chase	21762
2014	Apple	37037
2014	Exxon Mobil	32580
2014	Wells Fargo	21878
2014	Microsoft	21863
2014	JP Morgan Chase	17923
2013	Apple	41733
2013	Exxon Mobil	44880
2013	Wells Fargo	18897
2013	Microsoft	16978
2013	JP Morgan Chase	21284
2012	Apple	25922
2012	Exxon Mobil	41060
2012	Wells Fargo	15869
2012	Microsoft	23150
2012	JP Morgan Chase	18976

Year	Company	Profits(Millions of dollars)
2015	Apple	39510
2015	Exxon Mobil	32520
2015	Wells Fargo	23057
2015	Microsoft	22074
2015	JP Morgan Chase	21762
2014	Apple	37037
2014	Exxon Mobil	32580
2014	Wells Fargo	21878
2014	Microsoft	21863
2014	JP Morgan Chase	17923
2013	Apple	41733
2013	Exxon Mobil	44880
2013	Wells Fargo	18897
2013	Microsoft	16978
2013	JP Morgan Chase	21284
2012	Apple	25922
2012	Exxon Mobil	41060
2012	Wells Fargo	15869
2012	Microsoft	23150
2012	JP Morgan Chase	18976

Collabion Charts for SharePoint has **regrouped** the data based on 'Companies' and 'Years'.

The *rows* have been transformed into *columns* and vice-versa using the **pivoting features of Collabion Charts for SharePoint**.

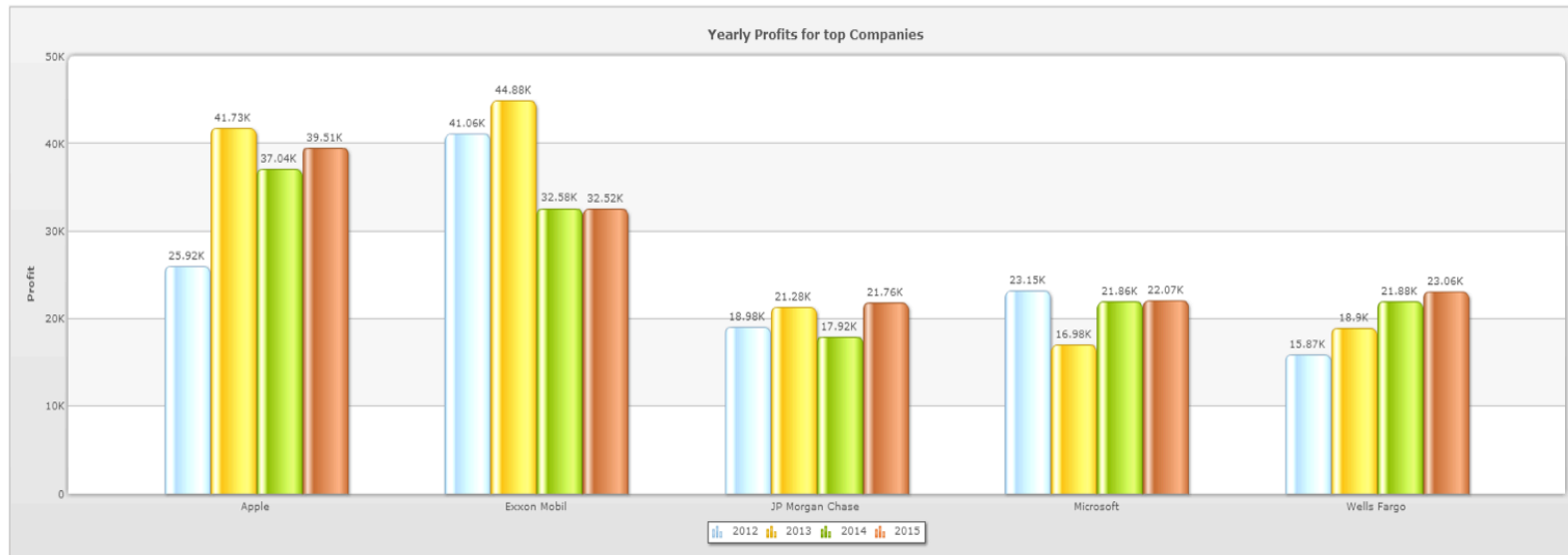


Company	2012	2013	2014	2015
Apple	25922	41733	37037	39510
Exxon Mobil	41060	44880	32580	32520
JP Morgan Chase	18976	21284	17923	21762
Microsoft	23150	16978	21863	22074
Wells Fargo	15869	18897	21878	23057

Page 1 of 1 Rows 1 - 5 of 5

And once you have the data table, you could use it to create a chart like the one shown below.

Collabion Charts for SharePoint



Interesting and insightful, isn't it?

Can't wait to get started?

***The next few slides will run you through the pivoting process in Collabion Charts For SharePoint***

*Let's get started with the data table we've seen earlier.*



Year	Company	Profits(Millions of dollars)
2015	Apple	39510
2015	Exxon Mobil	32520
2015	Wells Fargo	23057
2015	Microsoft	22074
2015	JP Morgan Chase	21762
2014	Apple	37037
2014	Exxon Mobil	32580
2014	Wells Fargo	21878
2014	Microsoft	21863
2014	JP Morgan Chase	17923
2013	Apple	41733
2013	Exxon Mobil	44880
2013	Wells Fargo	18897
2013	Microsoft	16978
2013	JP Morgan Chase	21284
2012	Apple	25922
2012	Exxon Mobil	41060
2012	Wells Fargo	15869
2012	Microsoft	23150
2012	JP Morgan Chase	18976




## Step 1:


### Launch Collabion Charts For SharePoint Wizard



Collabion Charts for SharePoint - v 2.1.0.3 | Temporary License - 58 days left



- Data Source
  - Configure Source**
  - Select Fields
- Data Selection
  - Filter Data
  - Group Data
  - Top 'N' Records
- Chart Configuration
  - Chart Type
  - Captions
  - Series Customization
  - Labels, Values & Tool-tips
  - Cosmetics
  - Number Formatting
  - Axis
  - Legend
  - Trend Lines
  - Other Settings
- User Interaction
  - Drill Down
  - Dynamic Filter
  - Export Settings

#### Configure Source


Select data provider:  



Select list:   

Select list view:   

Select folder: ☒ Root ☐ Sub-folder



#### Chart Preview

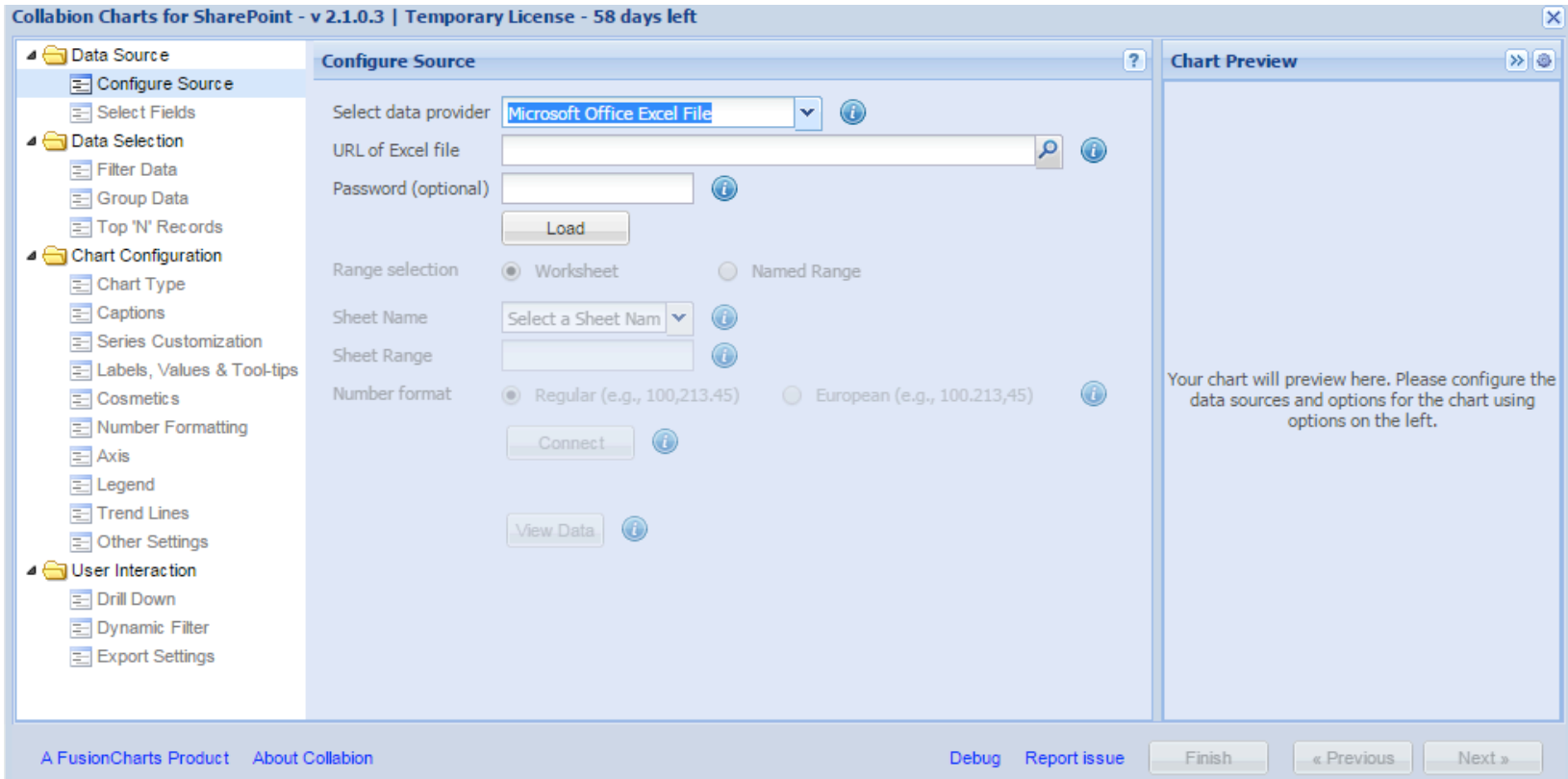
Your chart will preview here. Please configure the data sources and options for the chart using options on the left.

A FusionCharts Product    About Collabion

Debug    Report issue

## Step 2:

Select **Microsoft Office Excel File** as the data provider.



The screenshot shows the 'Collabion Charts for SharePoint - v 2.1.0.3 | Temporary License - 58 days left' window. The left sidebar contains a tree view with the following categories:

- Data Source
  - Configure Source (selected)
  - Select Fields
- Data Selection
  - Filter Data
  - Group Data
  - Top 'N' Records
- Chart Configuration
  - Chart Type
  - Captions
  - Series Customization
  - Labels, Values & Tool-tips
  - Cosmetics
  - Number Formatting
  - Axis
  - Legend
  - Trend Lines
  - Other Settings
- User Interaction
  - Drill Down
  - Dynamic Filter
  - Export Settings

The main 'Configure Source' panel contains the following fields and controls:

- Select data provider: **Microsoft Office Excel File** (dropdown menu)
- URL of Excel file: [Text input field]
- Password (optional): [Text input field]
- Load: [Button]
- Range selection: ☒ Worksheet, ☐ Named Range
- Sheet Name: [Select a Sheet Name] (dropdown menu)
- Sheet Range: [Text input field]
- Number format: ☒ Regular (e.g., 100,213,45), ☐ European (e.g., 100.213,45)
- Connect: [Button]
- View Data: [Button]

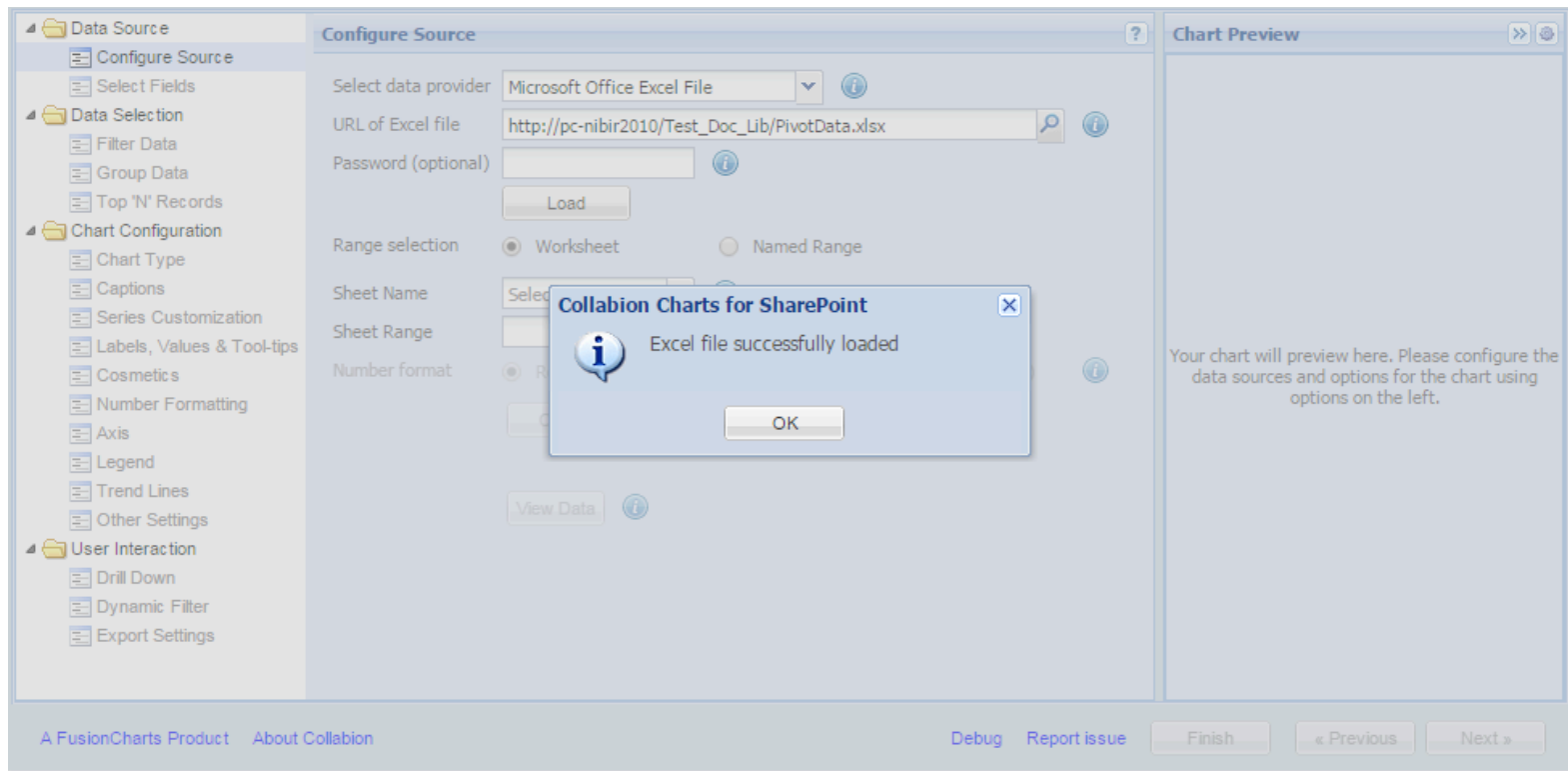
The 'Chart Preview' panel on the right contains the text: "Your chart will preview here. Please configure the data sources and options for the chart using options on the left."

At the bottom of the window, there are links for "A FusionCharts Product" and "About Collabion", and buttons for "Debug", "Report issue", "Finish", "« Previous", and "Next »".

### Step 3:

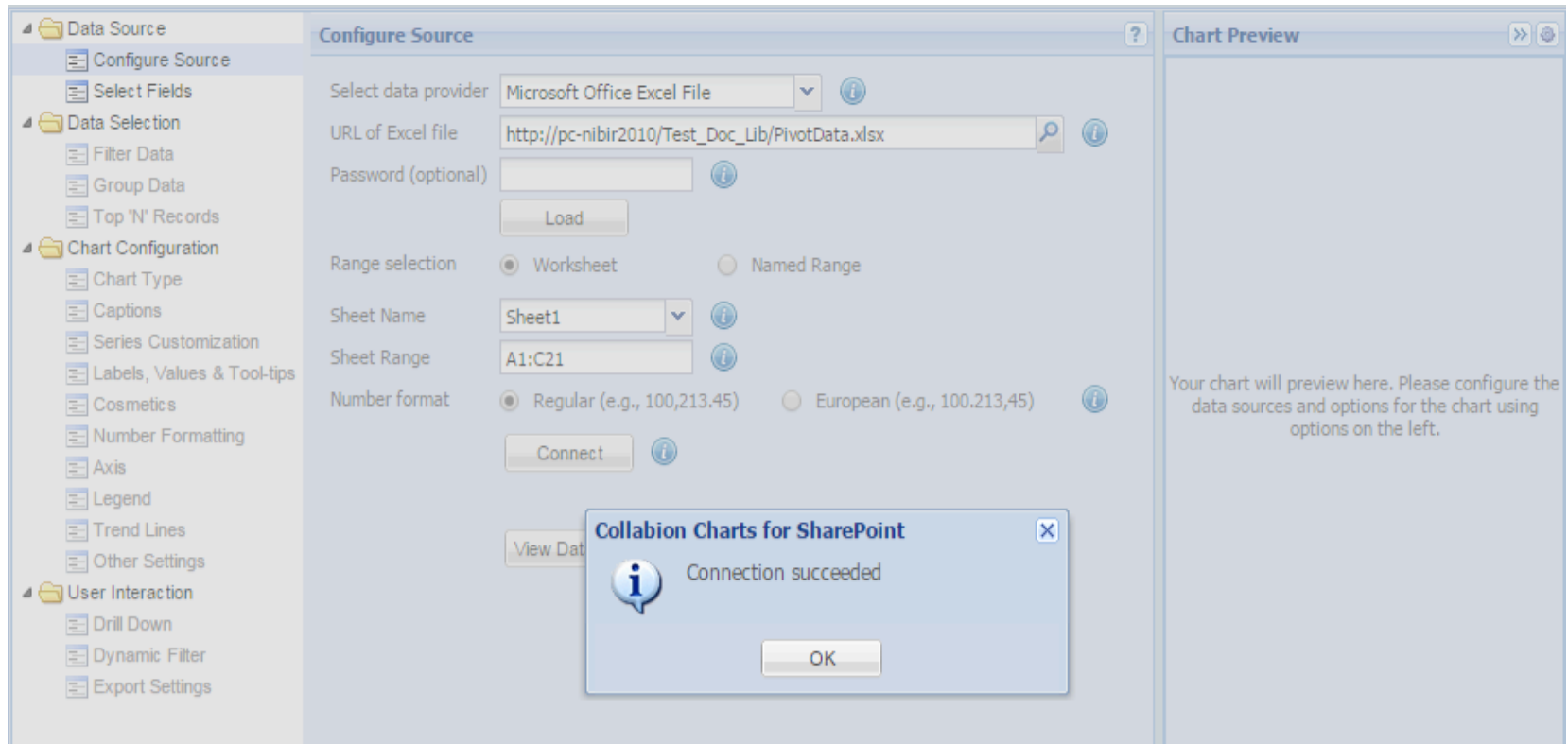
Enter the **URL** of the Excel file you want to implement pivoting on (here we are using a file with the data table defined in the example).

Click on **Load**.



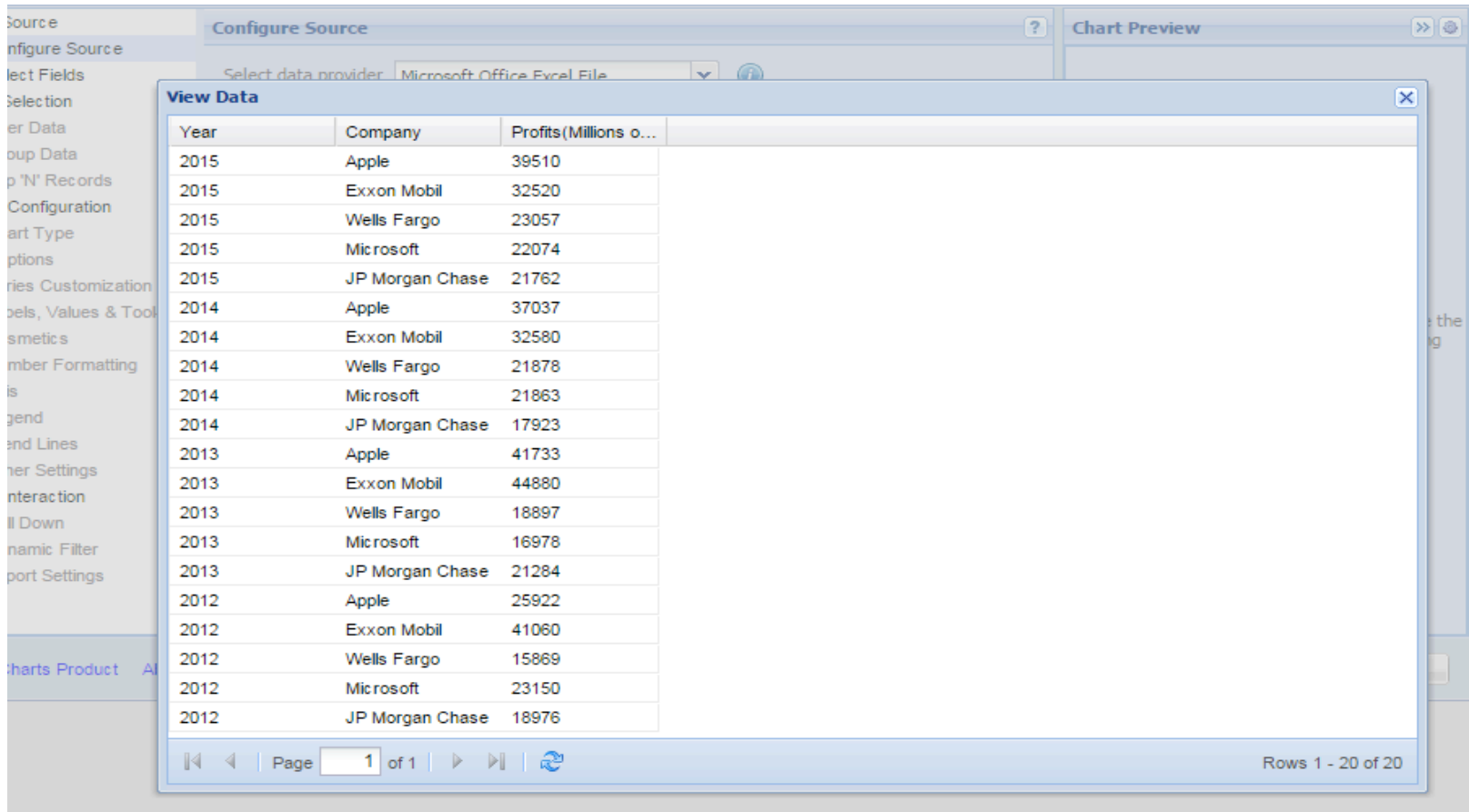
## Step 4:

In the Sheet Name field, select the sheet with the data you want to process. Set the Sheet Range. Click on Connect.



## Step 5:

Click on View Data to view the data from the selected sheet.



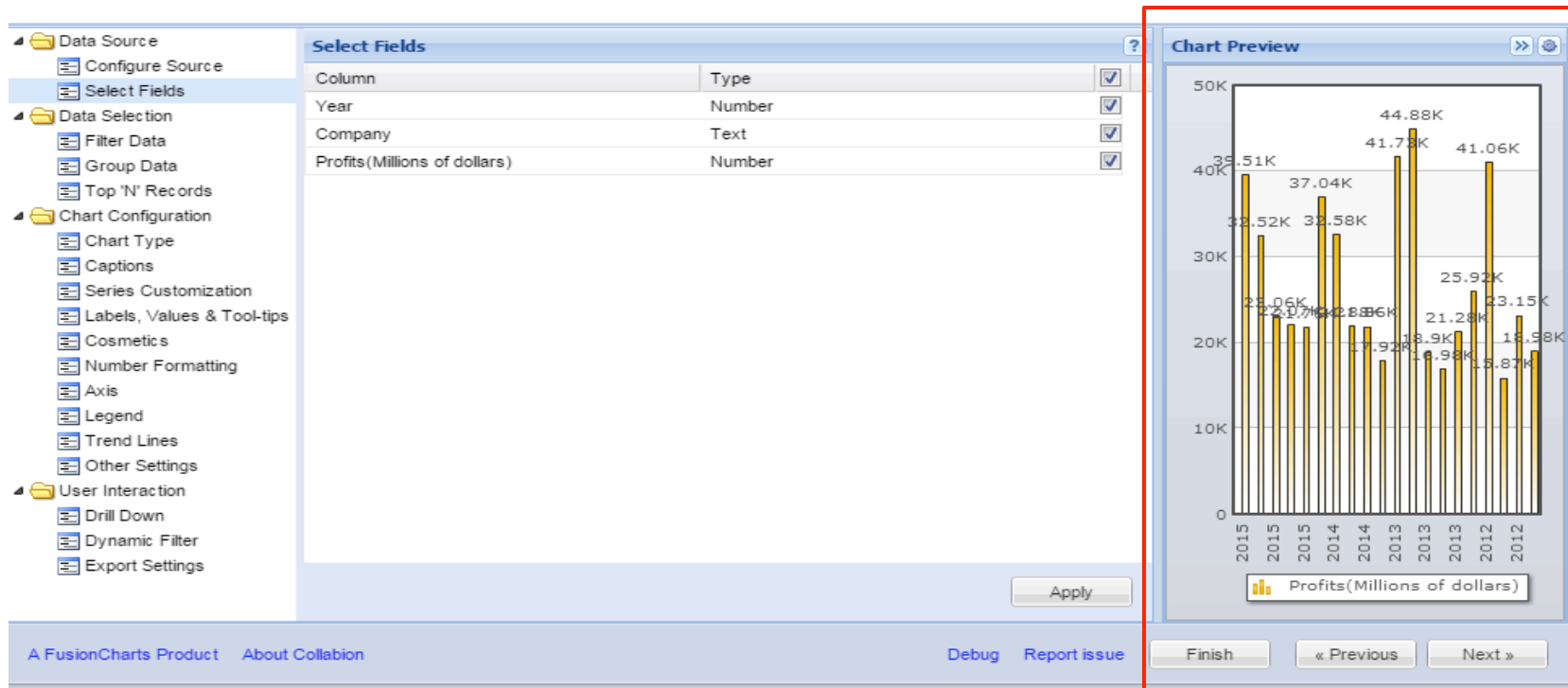
The 'View Data' dialog box displays the following data:

Year	Company	Profits(Millions o...
2015	Apple	39510
2015	Exxon Mobil	32520
2015	Wells Fargo	23057
2015	Microsoft	22074
2015	JP Morgan Chase	21762
2014	Apple	37037
2014	Exxon Mobil	32580
2014	Wells Fargo	21878
2014	Microsoft	21863
2014	JP Morgan Chase	17923
2013	Apple	41733
2013	Exxon Mobil	44880
2013	Wells Fargo	18897
2013	Microsoft	16978
2013	JP Morgan Chase	21284
2012	Apple	25922
2012	Exxon Mobil	41060
2012	Wells Fargo	15869
2012	Microsoft	23150
2012	JP Morgan Chase	18976

Page 1 of 1 | Rows 1 - 20 of 20

## Step 6:

In the Select Fields section, select all the fields present. Click on Apply.



The screenshot shows the Collabion Charts configuration interface. On the left is a tree view with categories like Data Source, Data Selection, Chart Configuration, and User Interaction. The 'Select Fields' section is active, displaying a table with the following data:

Column	Type	Selected
Year	Number	<input checked="" type="checkbox"/>
Company	Text	<input checked="" type="checkbox"/>
Profits(Millions of dollars)	Number	<input checked="" type="checkbox"/>

Below the table is an 'Apply' button. To the right, a 'Chart Preview' window is open, showing a bar chart of profits over time. The chart is titled 'Profits(Millions of dollars)' and has a y-axis ranging from 0 to 50K. The x-axis shows years from 2015 down to 2012. The bars are yellow with black outlines, and each bar has its value labeled on top. The values are: 38.51K, 32.52K, 37.04K, 32.58K, 41.73K, 44.88K, 41.06K, 25.92K, 23.15K, 21.28K, 18.9K, 16.98K, 15.87K, 18.98K. The chart preview window is highlighted with a red border.

Something's wrong? You got it!

***We have the solution in the next slide.***

You may have noticed that a default chart plotted with the Year against the Profits of each company is being displayed in the **Chart Preview** pane.

*We know you definitely don't want that.*

*You want to plot each company on the X-Axis with a Y-axis series for each year's profit, right?*

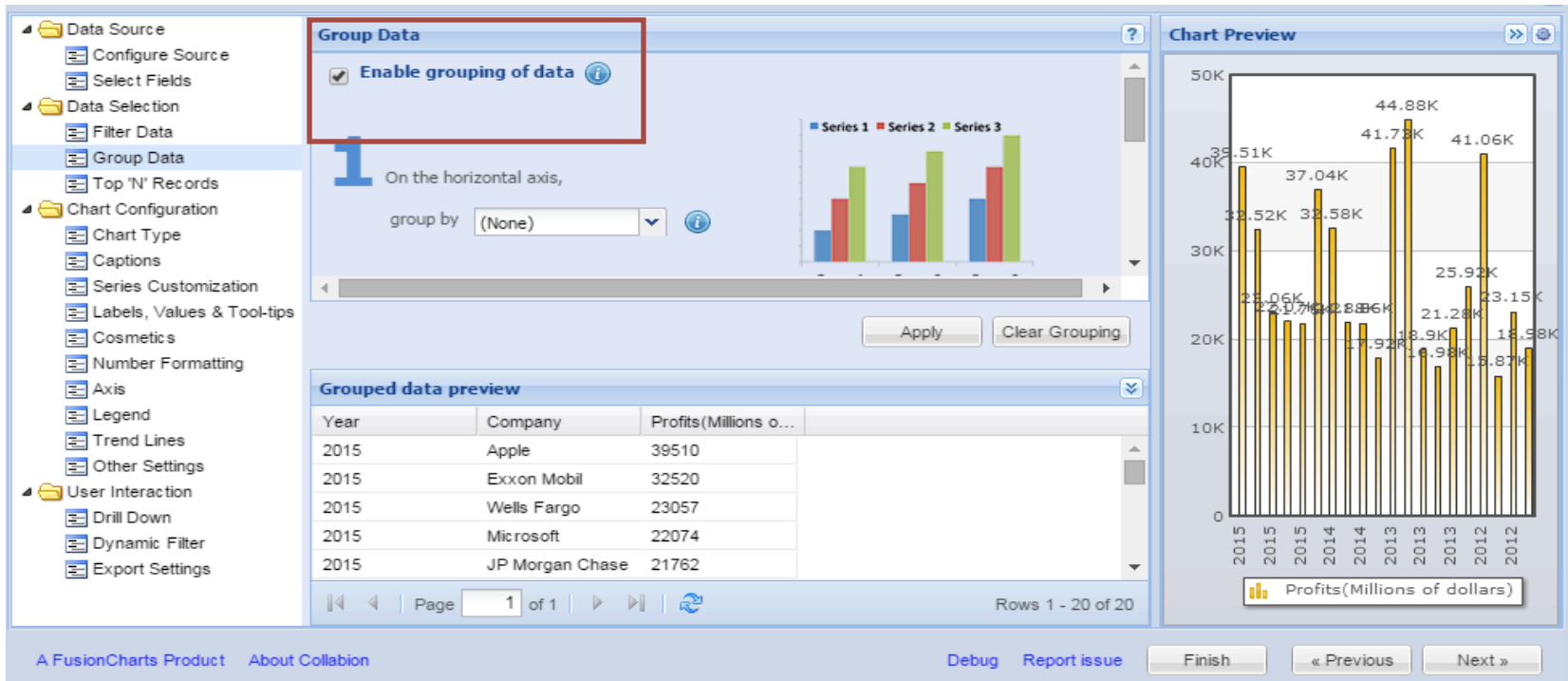
So, the table should look somewhat like this:

Sum of Profits(Millions of dollars)	Year			
Company	2012	2013	2014	2015
Apple	25922	41733	37037	39510
Exxon Mobil	41060	44880	32580	32520
JP Morgan Chase	18976	21284	17923	21762
Microsoft	23150	16978	21863	22074
Wells Fargo	15869	18897	21878	23057

*We have solved it in the next few slides.*

## Step 7:

In the **Group Data** section under **Data Selection**, check the **Enable grouping of data** checkbox.



The screenshot shows the Collabion Charts configuration interface. On the left is a navigation pane with categories: Data Source, Data Selection, Chart Configuration, and User Interaction. The 'Group Data' option under 'Data Selection' is selected. The main panel shows the 'Group Data' configuration section with the 'Enable grouping of data' checkbox checked. Below this, there is a 'Grouped data preview' table and a 'Chart Preview' window.

**Group Data Configuration:**

- ☒ Enable grouping of data
- On the horizontal axis, group by: (None)
- Buttons: Apply, Clear Grouping

**Grouped data preview:**

Year	Company	Profits(Millions o...
2015	Apple	39510
2015	Exxon Mobil	32520
2015	Wells Fargo	23057
2015	Microsoft	22074
2015	JP Morgan Chase	21762

**Chart Preview:**

The chart preview shows a bar chart titled 'Profits(Millions of dollars)' with the y-axis ranging from 0 to 50K. The x-axis shows years from 2015 down to 2012. The bars are grouped by year, and the values are labeled on top of each bar.

Legend: Profits(Millions of dollars)

Page 1 of 1 | Rows 1 - 20 of 20

Footer: A FusionCharts Product | About Collabion | Debug | Report issue | Finish | « Previous | Next »



## Step 8:

Select **Company** as the horizontal axis group-by column.

- Data Source
  - Configure Source
  - Select Fields
- Data Selection
  - Filter Data
  - Group Data
  - Top 'N' Records
- Chart Configuration
  - Chart Type
  - Captions
  - Series Customization
  - Labels, Values & Tool-tips
  - Cosmetics
  - Number Formatting
  - Axis
  - Legend
  - Trend Lines
  - Other Settings
- User Interaction
  - Drill Down
  - Dynamic Filter
  - Export Settings


### Group Data

1

On the horizontal axis,  
group by Company

2

For each group, display following series



Apply

Clear Grouping

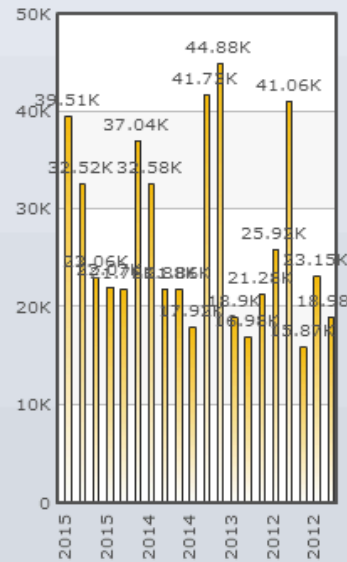
### Grouped data preview

Year	Company	Profits(Millions o...
2015	Apple	39510
2015	Exxon Mobil	32520
2015	Wells Fargo	23057
2015	Microsoft	22074
2015	JP Morgan Chase	21762

Page 1 of 1

Rows 1 - 20 of 20

### Chart Preview



Profits(Millions of dollars)

A FusionCharts Product

About Collabion

Debug

Report issue

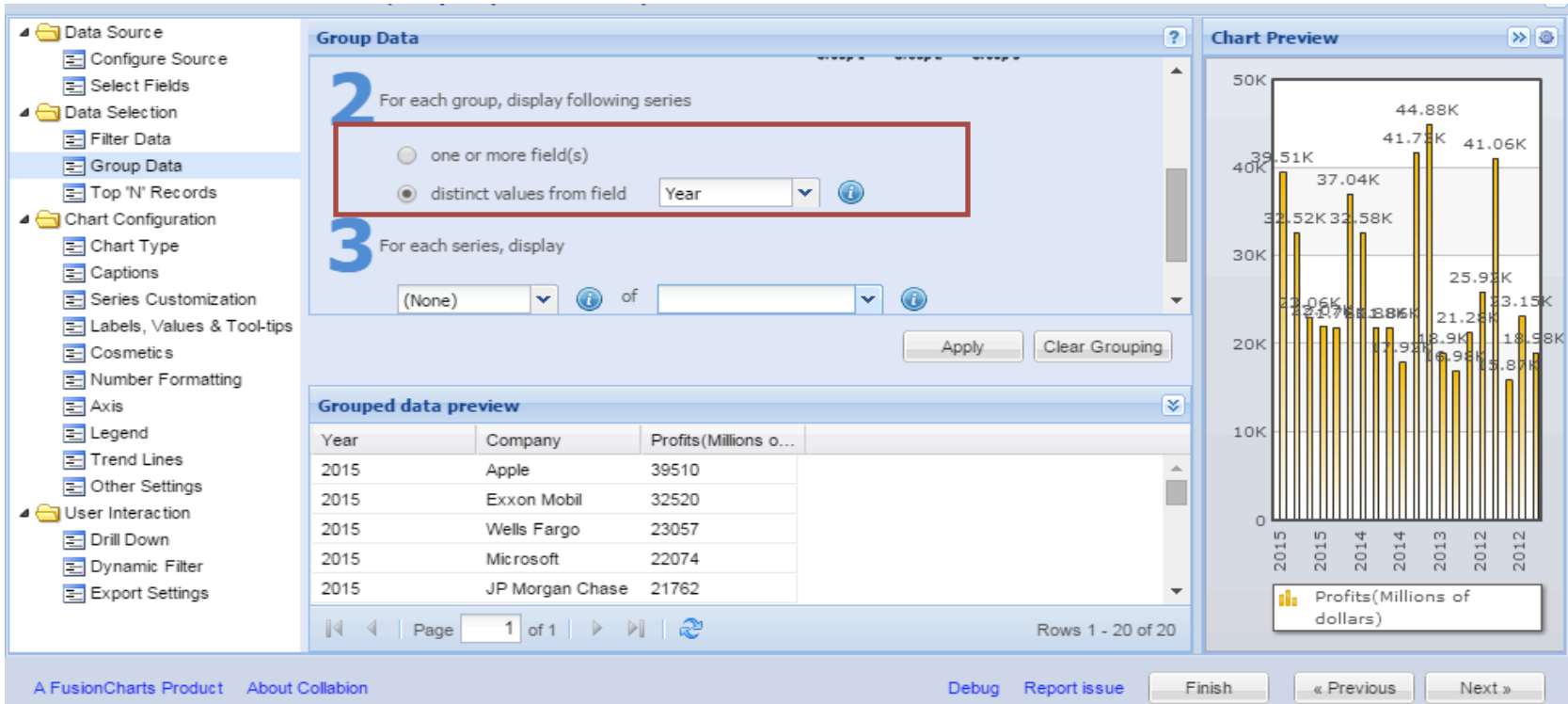
Finish

« Previous

Next »

## Step 9:

Select the 'distinct values from field' radio button for 'For each group, display following series'.  
Select **Year** as the field to choose distinct values from.



**Group Data**

2 For each group, display following series

☐ one or more field(s)

☒ distinct values from field **Year**

3 For each series, display

(None) of

Apply Clear Grouping

**Grouped data preview**

Year	Company	Profits(Millions o...
2015	Apple	39510
2015	Exxon Mobil	32520
2015	Wells Fargo	23057
2015	Microsoft	22074
2015	JP Morgan Chase	21762

Page 1 of 1 Rows 1 - 20 of 20

**Chart Preview**

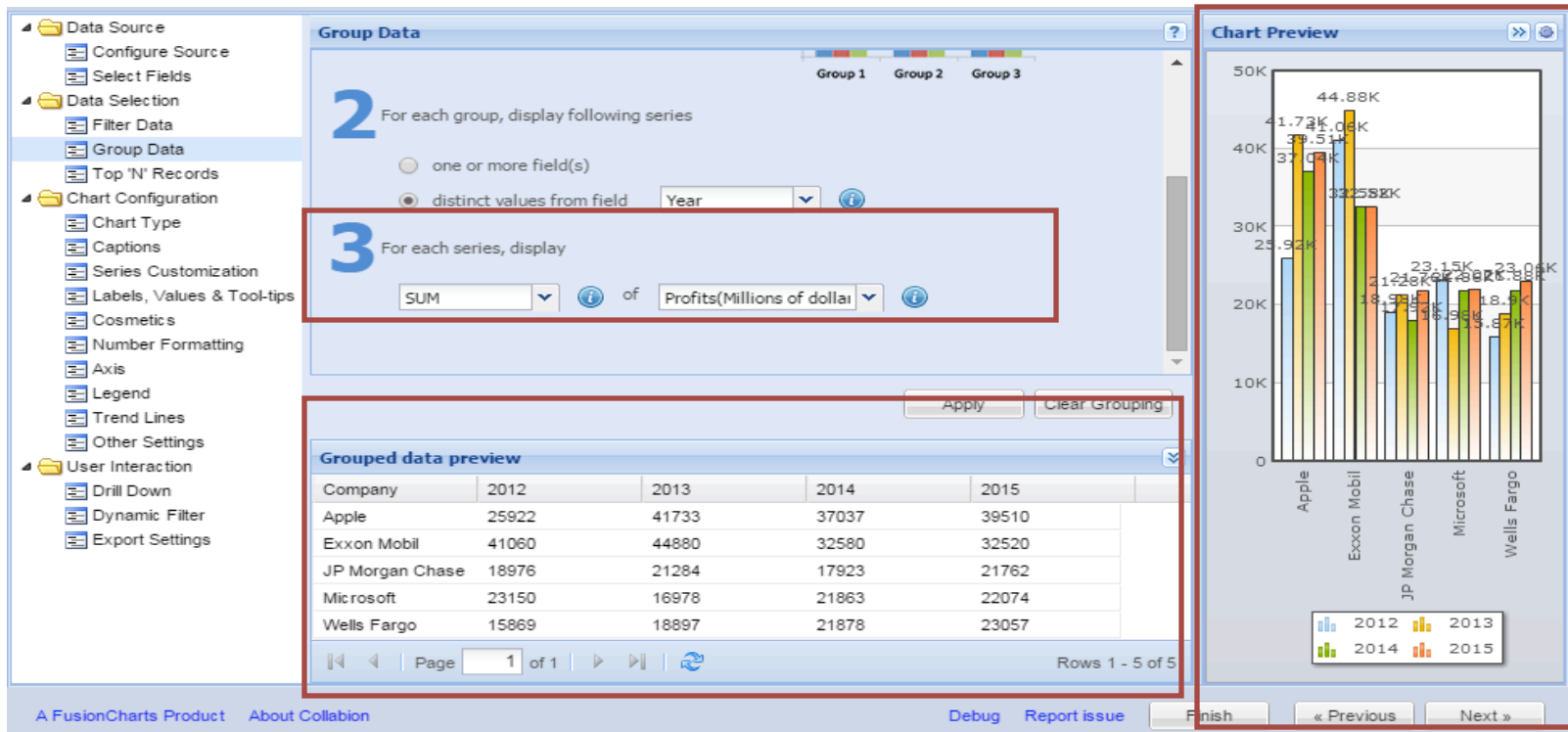
Bar chart showing Profits(Millions of dollars) by Year and Company. The Y-axis ranges from 0 to 50K. The X-axis shows years from 2015 to 2012. The legend indicates Profits(Millions of dollars).

Legend: Profits(Millions of dollars)

Footer: A FusionCharts Product About Collabion Debug Report issue Finish « Previous Next »

## Step 10:

Select any **aggregate** function for the series (*here, Profits(Millions of dollars)*). Click on **Apply**. You will see the desired grouped table and the chart in the preview panes.



**Group Data**

2 For each group, display following series

☐ one or more field(s)

☒ distinct values from field **Year**

3 For each series, display

**SUM** of **Profits(Millions of dollars)**

**Grouped data preview**

Company	2012	2013	2014	2015
Apple	25922	41733	37037	39510
Exxon Mobil	41060	44880	32580	32520
JP Morgan Chase	18976	21284	17923	21762
Microsoft	23150	16978	21863	22074
Wells Fargo	15869	18897	21878	23057

**Chart Preview**


Bar chart showing profits for five companies across four years (2012, 2013, 2014, 2015). The Y-axis represents profits in thousands (K), ranging from 0 to 50K. The X-axis lists the companies: Apple, Exxon Mobil, JP Morgan Chase, Microsoft, and Wells Fargo. Data labels are provided for each bar.

Legend: 2012 (Blue), 2013 (Orange), 2014 (Green), 2015 (Red)

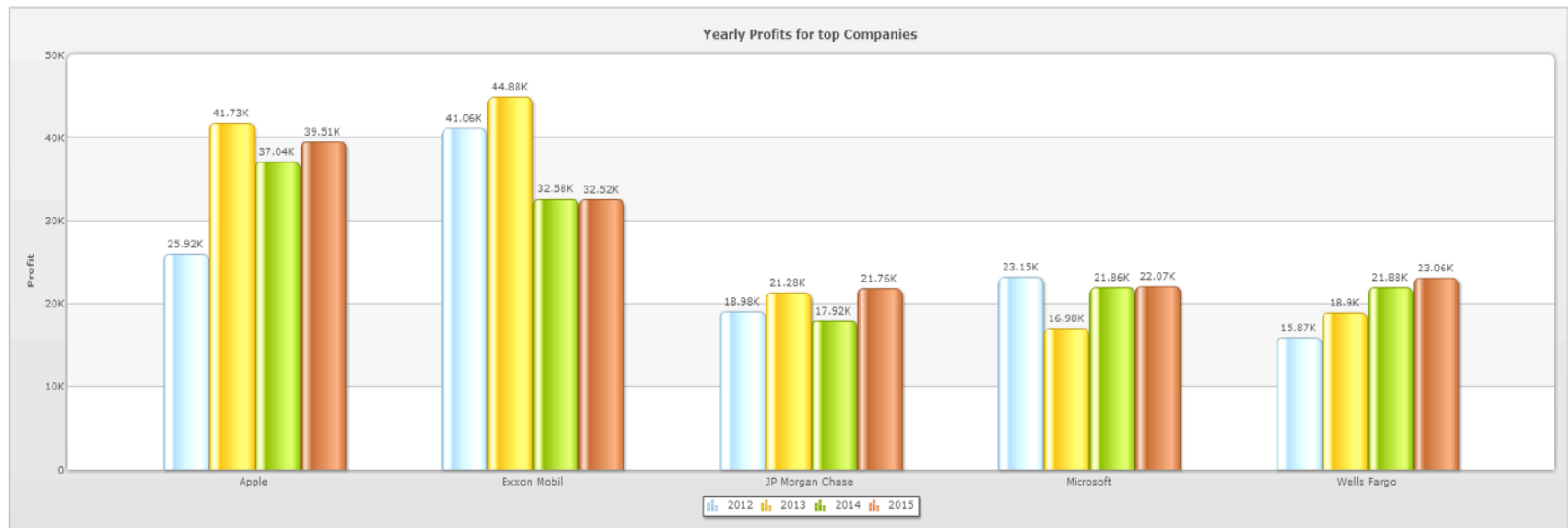
Buttons: Apply, Clear Grouping, Finish, « Previous, Next »

## Step 11:

Complete all the other sections in the wizard according to your choice.  
Click on Finish to render your chart!

*Here's the chart you were looking for.* 

Collabion Charts for SharePoint



*Cakewalk, wasn't it?*

Hope this was useful and fun!

We're anyway a shout away and always ready to hear you out.

# Happy charting!!



[info@collabion.com](mailto:info@collabion.com)



[fb.com/collabion](https://fb.com/collabion)



[@collabion](https://twitter.com/collabion)