As well as being able to use the slicers and timelines to filter the chart data, Excel automatically creates filters for each of the Pivot fields depicted in the chart.

Notice above the legend in each chart, there is a filter with the field name and a dropdown listing each of the legend items. This will allow the end user to customise which items are depicted in the chart legend (status, incident severity or priority).

Let's filter the first chart to show only the corrective actions that are still open; from the 'Status' drop-down; tick Assigned and Checked and untick 'Closed'. Great. Our PivotChart has been updated to only show the number of corrective actions that haven't been completed, grouped by who the approver is.

This tool is available in each of the remaining charts to filter the Incident Severity or Priority. Notice also that next to the vertical axis in the bar chart, and below the horizontal axis in the area and column charts; there are additional filters.

In the horizontal axis of the column and area chart are filters for each group per created date (Years, Quarters, Months and Created Date). This will allow the end user to choose which date range is displayed in each chart. Within the area chart ('Corrective Actions per Incident Severity'), from the Years filter, select just the last year (2023).

The chart has updated to show a single data point. Unfortunately, an area chart doesn't work well with a single data point, so let's expand the year. Notice in the bottom right-hand corner, next to the horizontal axis, is the expand and collapse buttons (the plus and minus). Excel creates the expand and collapse buttons for showing and hiding the detail whenever there's a grouped item in the axis. Click the plus to expand the date group to see all months within the year. Click the expand button again to expand it further and see each date within each month of the year.

This is probably a little too much information, so collapse it into months by clicking the collapse (minus) button.

Report filters can be added to the PivotCharts, allowing the developer or the end user to filter by items that aren't depicted in the chart. These filters may appear in the top left corner of the chart as a drop-down field, allowing the user to select the items to be displayed.

Let's add some. In the third chart (Overdue Actions), let's add a report filter. With the chart selected, drag the field 'Count of Days Past Due' into the Filters area.

Now the report filters are like the Slicers in that you can't use advanced filter options (like greater than, less than, between, contains, etc.), but we can select a single item to filter by it and if we tick the box 'Select Multiple Items', we can tick and untick options to display or not display them.

Click the filter 'Days Past Due' within the Overdue Actions chart. By default all items are ticked, including (as you scroll all the way to the bottom), the blank. If a corrective action shows blank in the overdue days, it's clearly Not overdue, so let's untick the blank cell and click OK.

Perfect. Our chart updates to only show us the corrective actions that were overdue.

Let's add another one so we can view only the corrective actions that are overdue and still unresolved.

Drag the 'Status' field into the report filter.

From the 'Status' filter button in the chart, tick 'select multiple items' and untick 'Closed'. Click OK.

Perfect. Our chart has updated to show only the Corrective Actions that are Overdue and still open.

If we're happy for the end user to clear or change this filter, we can leave it like this. But this chart is supposed to show only the overdue actions, so let's get rid of the filter buttons from the chart now that it's applied correctly.

Right-click on the filter button 'Status' and select 'Hide Report Filter Buttons on chart'. This will hide just the report filters.

To hide All filter buttons (the legend filter (priority) and the horizontal axis filters (Years, Months & Date), right-click on any of these filter buttons and choose 'Hide All Field buttons on chart'.

Perfect. Now the end user can only change what's depicted in this chart by using the slicer or timeline.

So should you hide the filter buttons or allow the end user to change them? That depends entirely on what your chart is depicting and whether your end users can be trusted to consider the filters when interpreting the results.