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# 3.3 Pivot Table Operations: Filtering, Sorting & Calculations

## Filtering

Use the filter drop‑downs in pivot tables to include or exclude categories. You can filter row or column labels and use **Label Filters** or **Value Filters** to show top/bottom items. **Slicers** (see Unit 3.5) provide user‑friendly filters.

## Sorting

Right‑click a row or column field and choose **Sort A → Z** or **Sort Z → A**. Sorting helps highlight highest or lowest values and trends.

## Grouping and ungrouping

Group dates into months, quarters or years; group numbers into bins. Select the items, right‑click and choose **Group**. Ungroup to return to original detail.

## Calculations

* **Value field settings** – Change the summarisation (Sum, Count, Average, etc.) and format.
* **Show Values As** – Display values as percentages of totals, differences from previous, running totals or ranks【268199141166436†L153-L171】.
* **Calculated fields/items** – Add new fields defined by formulas referencing existing fields.

## Example

Filter a sales pivot table to display only the top 5 products by revenue, sort them descending and add a calculated field for profit margin (Profit ÷ Revenue).

## Summary

Filtering, sorting, grouping and custom calculations enhance pivot tables’ analytical power. These operations allow tailored views that answer specific questions【268199141166436†L153-L171】.

## Reflection questions

1. How would you show each region’s revenue as a percentage of the grand total?
2. What is the difference between grouping and filtering data in a pivot table?
3. Describe how to create a calculated field in a pivot table.

## References