Pivot Explorer Manual

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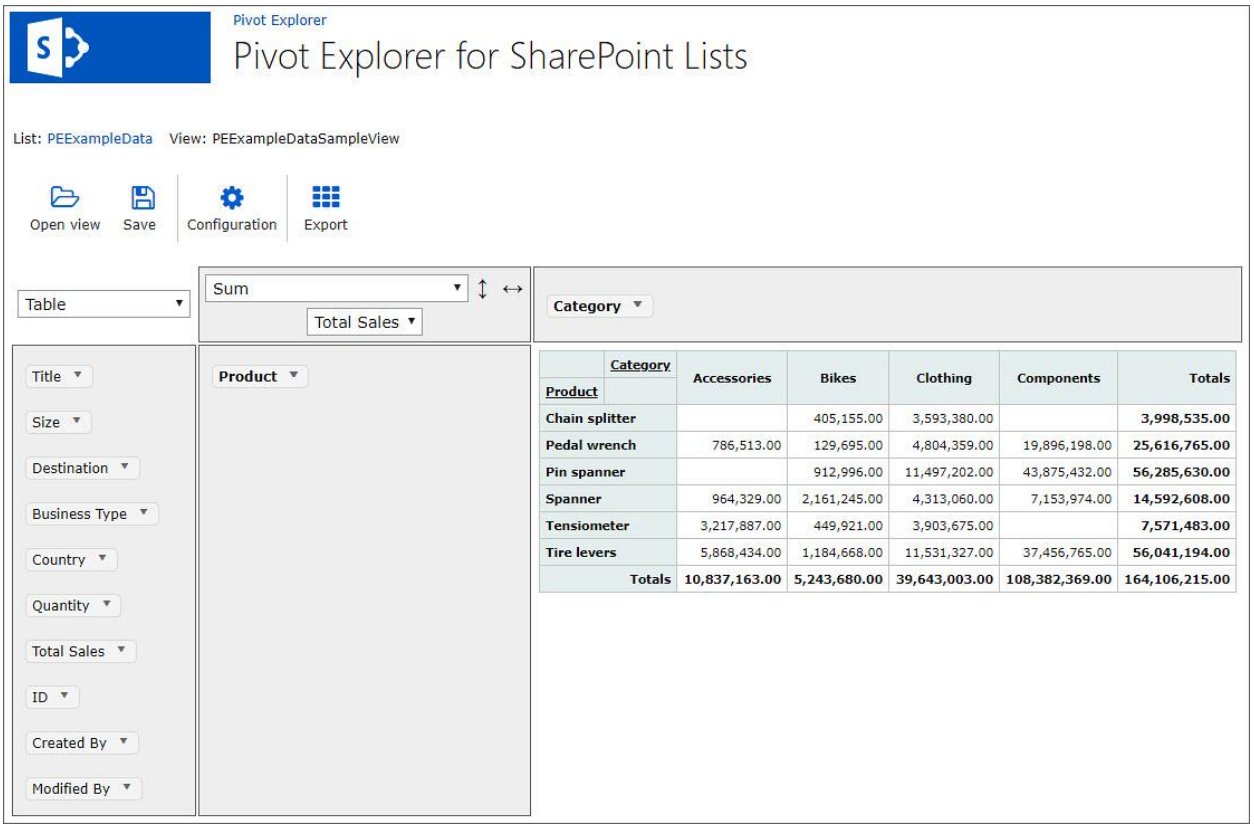
1 INTRODUCTION

Pivot Explorer for SharePoint Lists is designed for analysis and display of multidimensional data online. Just as you explore Excel data in an Excel Pivot Table, you can explore data from any SharePoint list with *Pivot Explorer*. The data is represented in compact yet interactive visual reports — multidimensional tables and charts that are fully customizable for your needs.

With *Pivot Explorer* you can analyze data and look at the same information in different ways with just a few mouse clicks. The product supports a range of different graphs as well as tables which you can modify by simply pivoting the measures.

Use *Pivot Explorer* to create and analyze reports based on SharePoint lists data and to display data in a way that is easy to understand. *Pivot Explorer* offers filtering and sorting of simple or hierarchically arranged values, and analysis results can be exported in various ways.

Pivot Explorer supports all SharePoint lists, including document libraries.



1.1 LANGUAGES

The language of *Pivot Explorer* is automatically set to the same as on the SharePoint site. The supported languages are: Danish, Dutch, English, French, German, Italian, Norwegian, Portuguese, Spanish and Swedish. When the SharePoint site has another language, *Pivot Explorer* will be in English.

The Example list that can be generated for evaluation purposes are in English, and therefore SharePoint Store does not allow us to add more supported languages in the description. *Pivot Explorer* will however work on all supported languages, even if you install it from SharePoint Store.

1.2 REQUIREMENTS

To use *Pivot Explorer* you need to have SharePoint 2013 or above (in-house or hosted) or Office 365 SharePoint Online.

Supported browsers are Microsoft Edge, Internet Explorer 9 and higher and the latest versions of Google Chrome and Mozilla Firefox.

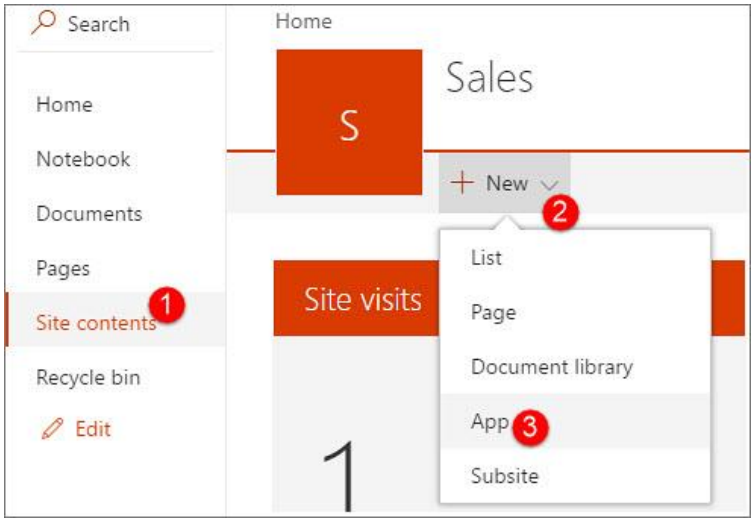
2 INSTALL PIVOT EXPLORER

Pivot Explorer is available on SharePoint Store or can be downloaded from the kalmstrom.com website.

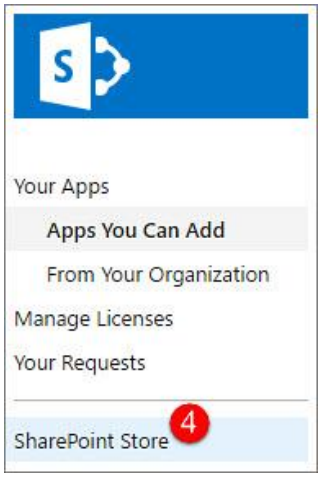
2.1 GET FROM SHAREPOINT STORE

Go to the SharePoint site where you want to use *Pivot Explorer* and click on **Site Contents.**

In the 'Site Contents' click on 'New' and 'App'.



Click on **SharePoint Store** in the left panel and select *Pivot Explorer for SharePoint Lists***.**



2.2 DOWNLOAD FROM KALMSTROM.COM

You can also download *Pivot Explorer* directly from the kalmstrom.com website to your PC and then upload it to the farm's or tenant's App Catalog.

When this is done, you can install *Pivot Explorer* on any site by going into Site Contents and add an app as described under Get from SharePoint Store. Select 'Apps You Can Add' and choose *Pivot Explorer*.

2.3 PERMISSIONS

Pivot Explorer uses standard SharePoint permissions. The permission for the Add-in itself is set automatically when the download is trusted.

2.3.1 ADD-IN

Pivot Explorer needs Manage permission on the site collection where it is installed. Thanks to this permission restriction, the *Pivot Explorer* cannot make any changes on the SharePoint site collection, no matter what permission the user has.

Pivot Explorer sets the required add-in permission when you have clicked on the Trust-it button during the installation.

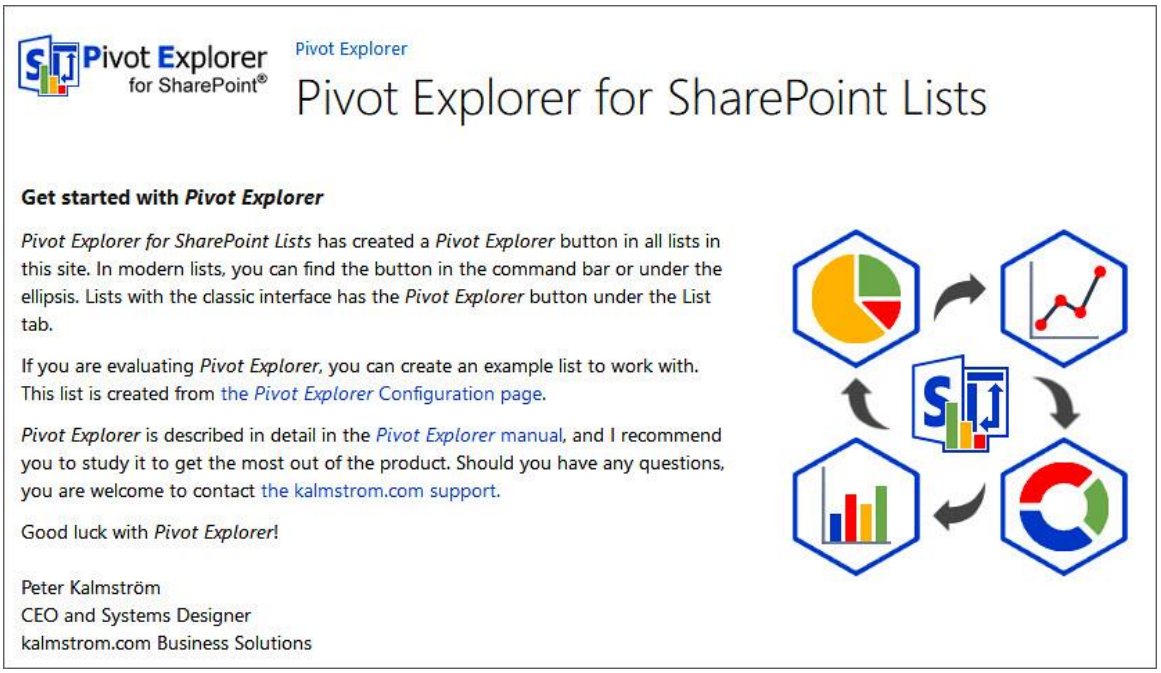
2.3.2 USERS

Users who should use all the Pivot Explorer functionalities must have Contribute permission.

Users who only need to see the list data in *Pivot Explorer* and not save views or create a sample list only need Read permission over the site.

3 *First Time Usage*

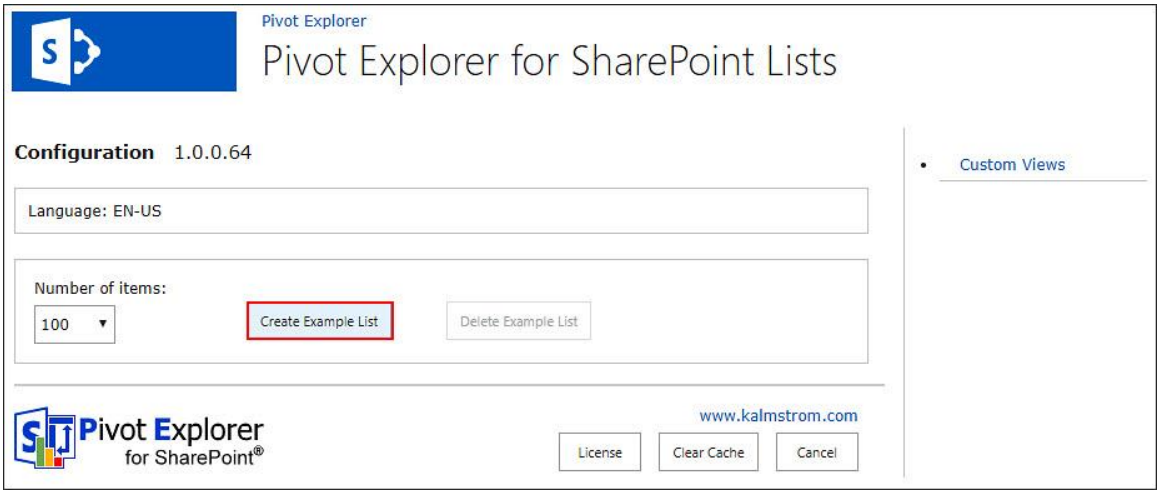
When *Pivot Explorer* has been installed in a site collection, a "Get Started" page will be shown when you click on "Pivot Explorer" in the Site Contents.



From the "Get Started" page you can either go to the product configuration page or generate an Example list. You can also reach the Manual web page, to download this manual.

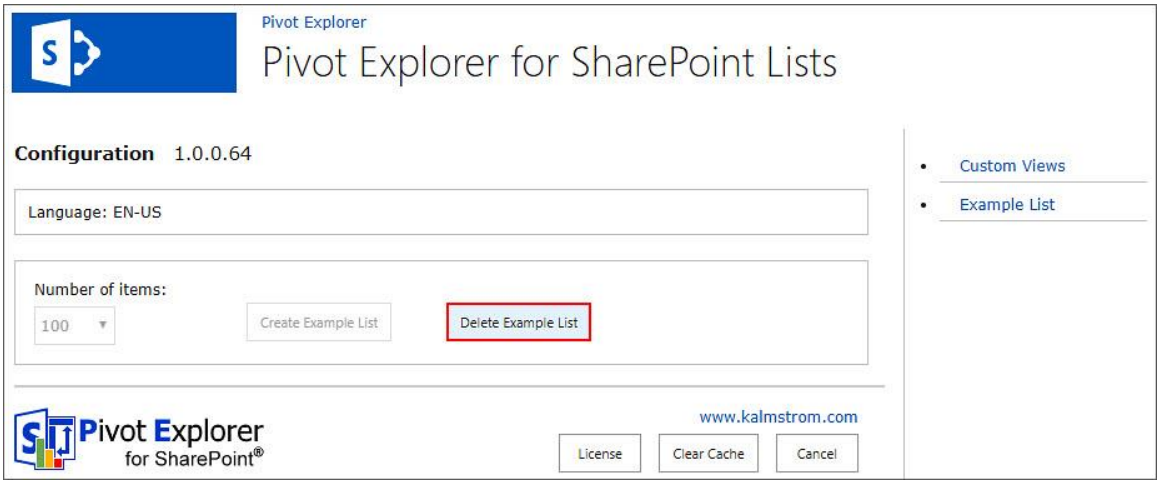
3.1 *Example List*

If you choose to first generate an Example list for the evaluation, click on the 'Create Example List' button in the Configuration page.



3.1.1 REMOVE THE EXAMPLE LIST

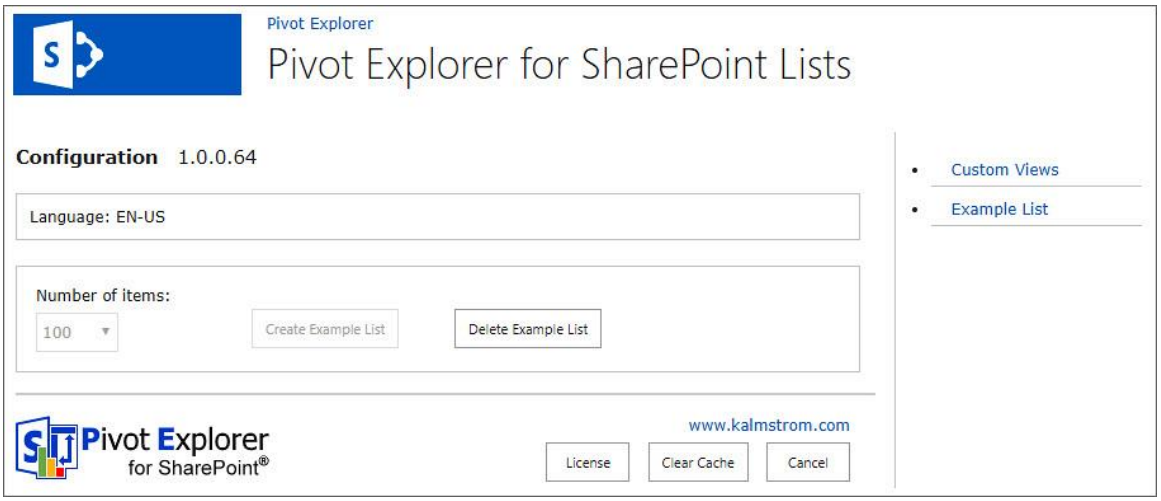
If you have created the Example list and do not want to use it anymore, you can delete it using the 'Delete Example List' button in the configuration page:



4 THE CONFIGURATION PAGE

Open the Configuration page from the *Pivot Explorer* toolbar.

In the Configuration page you can see add-in details, create an example list, delete the example list, open the Custom Views list, register the license and clear the cache.



4.1 CUSTOM VIEWS

The 'Custom Views' list is a *Pivot Explorer* list that stores all users' saved pivot views of the current site.

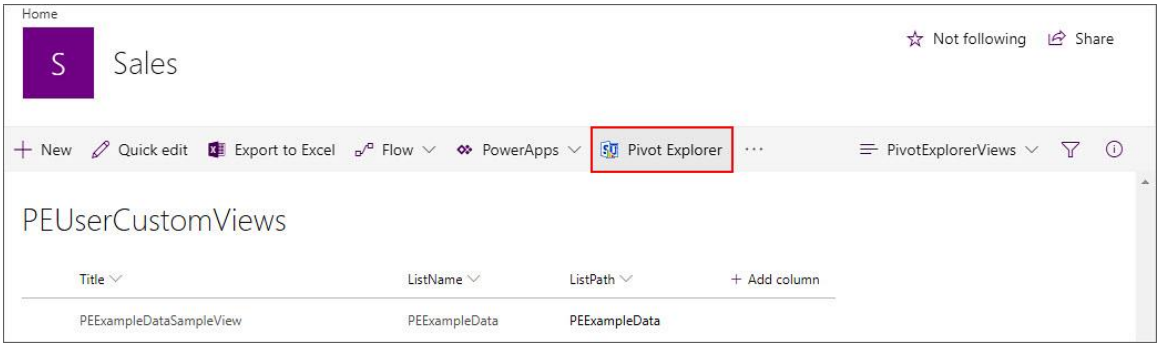
4.2 CLEAR CACHE

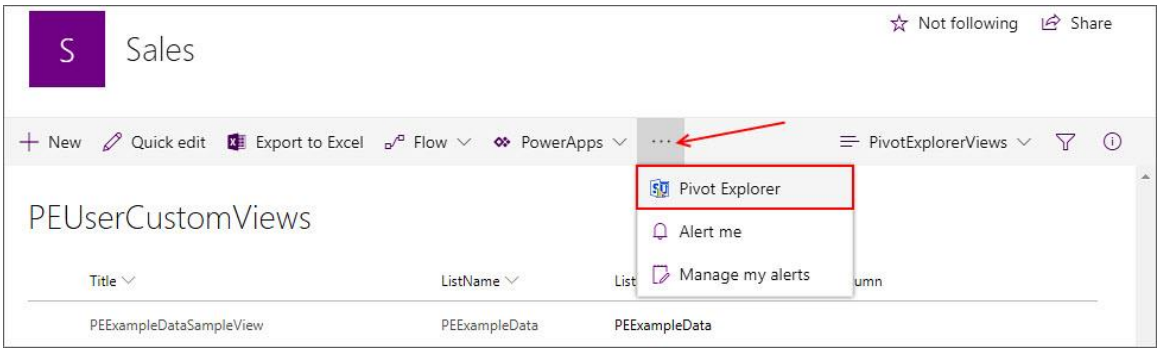
To increase performance, *Pivot Explorer* saves a cache of all the used list data. Sometimes this cache gets corrupt. If that happens once, click on the 'Clear Cache' button to resolve the problem. If it happens often, please [contact the kalmstrom.com support](#)!

5 USE PIVOT EXPLORER

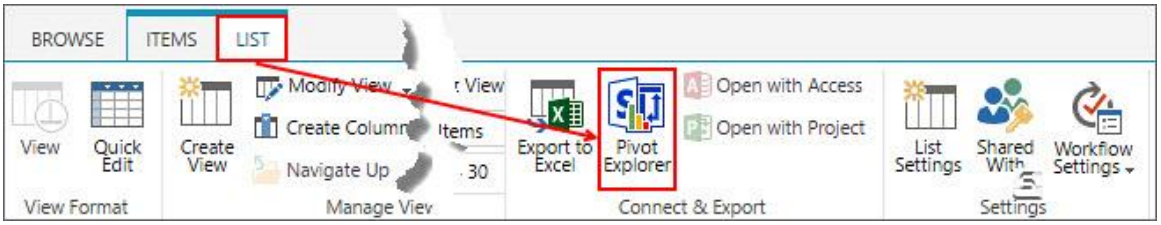
You can reach *Pivot Explorer* by clicking on the 'Pivot Explorer' button in any SharePoint list in the site where *Pivot Explorer* has been installed.

The modern experience has the button either in the command bar or under the ellipsis.





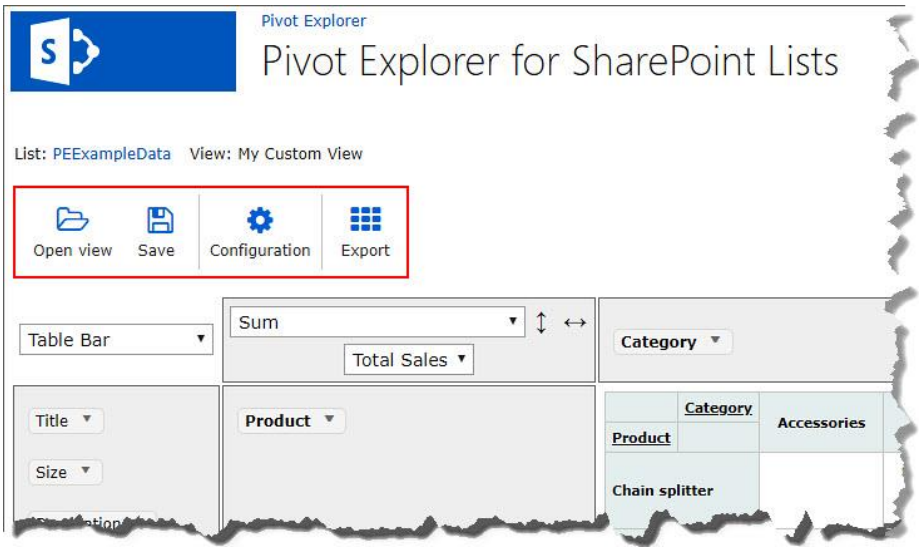
In the classic experience you can find the button under the LIST tab.



Now you can start analyzing the list data with the help of the *Pivot Explorer*.

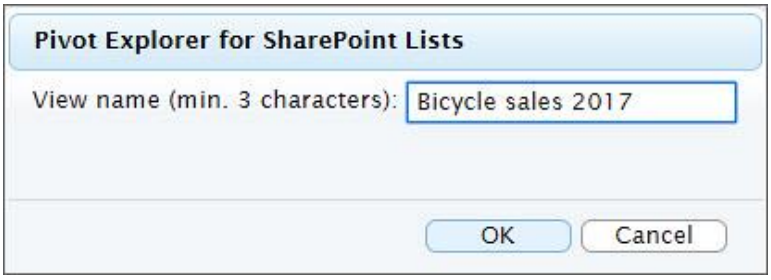
5.1 TOOLBAR

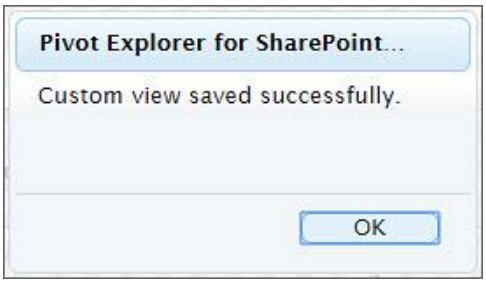
The most used *Pivot Explorer* features can be easily accessed via the toolbar. Below the controls are described from left to right.



5.1.1 Open and Save Custom Views

You can save and load your favorite views to be used later. This saved view will be available to all users of the current site.





Select a previous saved custom view to be opened.

5.1.2 Pivot Explorer Configuration

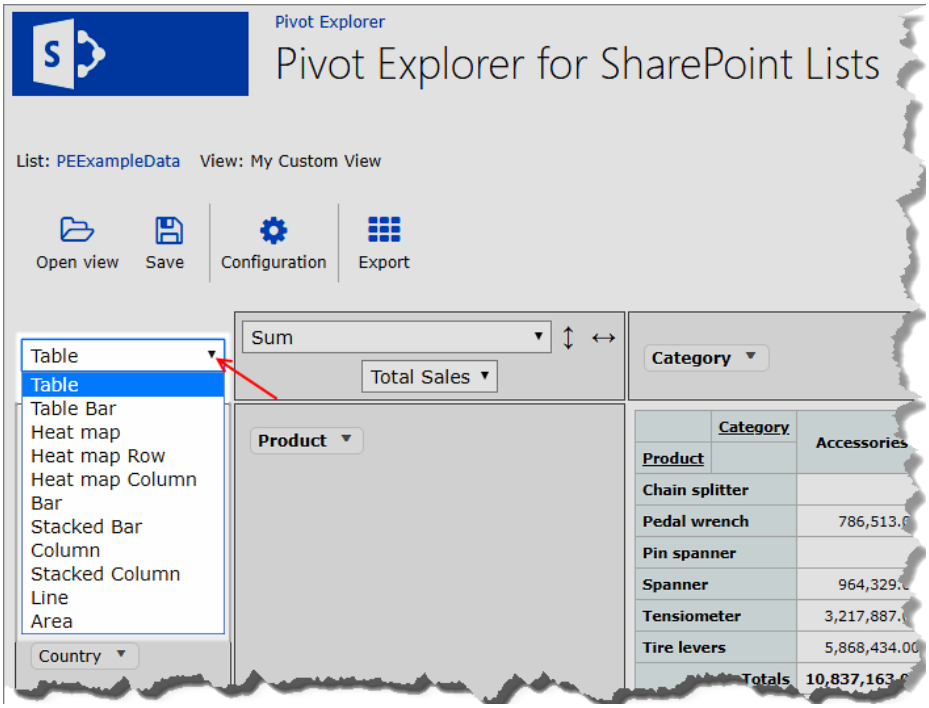
This option redirects to the *Pivot Explorer* Configuration page described in chapter 4.

5.1.3 EXPORT

Under the Export button you can export the view data to IMAGE, EXCEL or PDF formats. The EXCEL and PDF formats depend on the visualization options. Note that Microsoft Edge does not support the export. Use another browser for the export, even if you normally use Edge.

5.2 VISUALIZATION OPTIONS

Use the dropdown to select a chart that is appropriate to visualize the list data.



The *Pivot Explorer* charts are interactive. *Pivot Explorer* supports the following chart types: Table, Table Bar, Heat map, Heat map Row, Heat map Column, Bar, Stacked Bar, Column, Stacked Column, Line and Area.

Table

Category

Product \ Category	Accessories	Bikes	Clothing	Components	Totals
Chain splitter		311.00	64.00		375.00
Pedal wrench	194.00	264.00	342.00	1,267.00	2,067.00
Pin spanner		1,114.00	1,411.00	3,160.00	5,685.00
Spanner	132.00	1,007.00	579.00	1,007.00	2,725.00
Tensiometer	1,870.00	54.00	218.00		2,142.00
Tire levers	1,426.00	1,116.00	371.00	2,723.00	5,636.00
Totals	3,622.00	3,866.00	2,985.00	8,157.00	18,630.00

Table Bar

Category

Product \ Category	Accessories	Bikes	Clothing	Components	Totals
Chain splitter		311.00	64.00		375.00
Pedal wrench	194.00	264.00	342.00	1,267.00	2,067.00
Pin spanner		1,114.00	1,411.00	3,160.00	5,685.00
Spanner	132.00	1,007.00	579.00	1,007.00	2,725.00
Tensiometer	1,870.00	54.00	218.00		2,142.00
Tire levers	1,426.00	1,116.00	371.00	2,723.00	5,636.00
Totals	3,622.00	3,866.00	2,985.00	8,157.00	18,630.00

Heat map

Category

Product \ Category	Accessories	Bikes	Clothing	Components	Totals
Chain splitter		311.00	64.00		375.00
Pedal wrench	194.00	264.00	342.00	1,267.00	2,067.00
Pin spanner		1,114.00	1,411.00	3,160.00	5,685.00
Spanner	132.00	1,007.00	579.00	1,007.00	2,725.00
Tensiometer	1,870.00	54.00	218.00		2,142.00
Tire levers	1,426.00	1,116.00	371.00	2,723.00	5,636.00
Totals	3,622.00	3,866.00	2,985.00	8,157.00	18,630.00

Heat map Row

Category

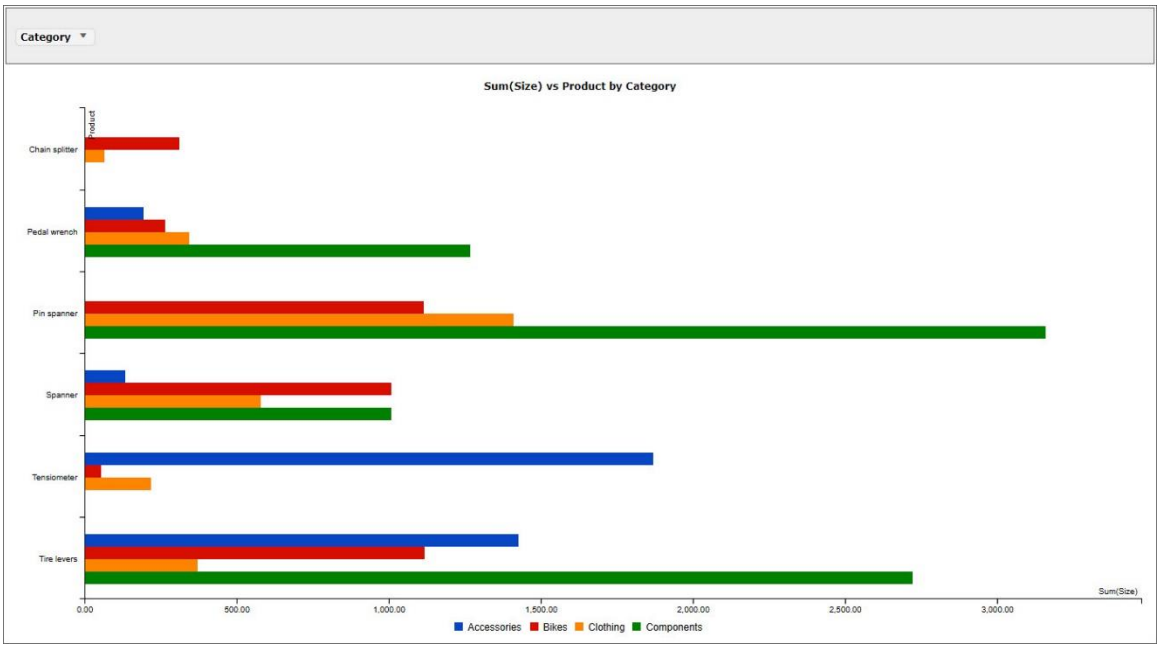
Product \ Category	Accessories	Bikes	Clothing	Components	Totals
Chain splitter		311.00	64.00		375.00
Pedal wrench	194.00	264.00	342.00	1,267.00	2,067.00
Pin spanner		1,114.00	1,411.00	3,160.00	5,685.00
Spanner	132.00	1,007.00	579.00	1,007.00	2,725.00
Tensiometer	1,870.00	54.00	218.00		2,142.00
Tire levers	1,426.00	1,116.00	371.00	2,723.00	5,636.00
Totals	3,622.00	3,866.00	2,985.00	8,157.00	18,630.00

Heat map Column

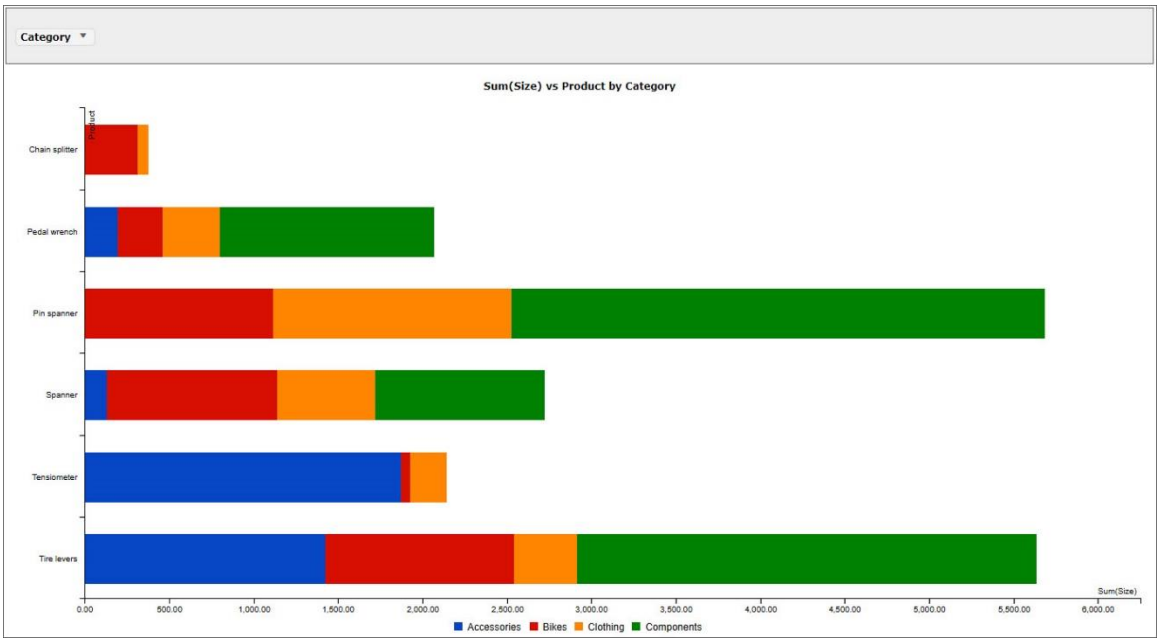
Category

Product \ Category	Accessories	Bikes	Clothing	Components	Totals
Chain splitter		311.00	64.00		375.00
Pedal wrench	194.00	264.00	342.00	1,267.00	2,067.00
Pin spanner		1,114.00	1,411.00	3,160.00	5,685.00
Spanner	132.00	1,007.00	579.00	1,007.00	2,725.00
Tensiometer	1,870.00	54.00	218.00		2,142.00
Tire levers	1,426.00	1,116.00	371.00	2,723.00	5,636.00
Totals	3,622.00	3,866.00	2,985.00	8,157.00	18,630.00

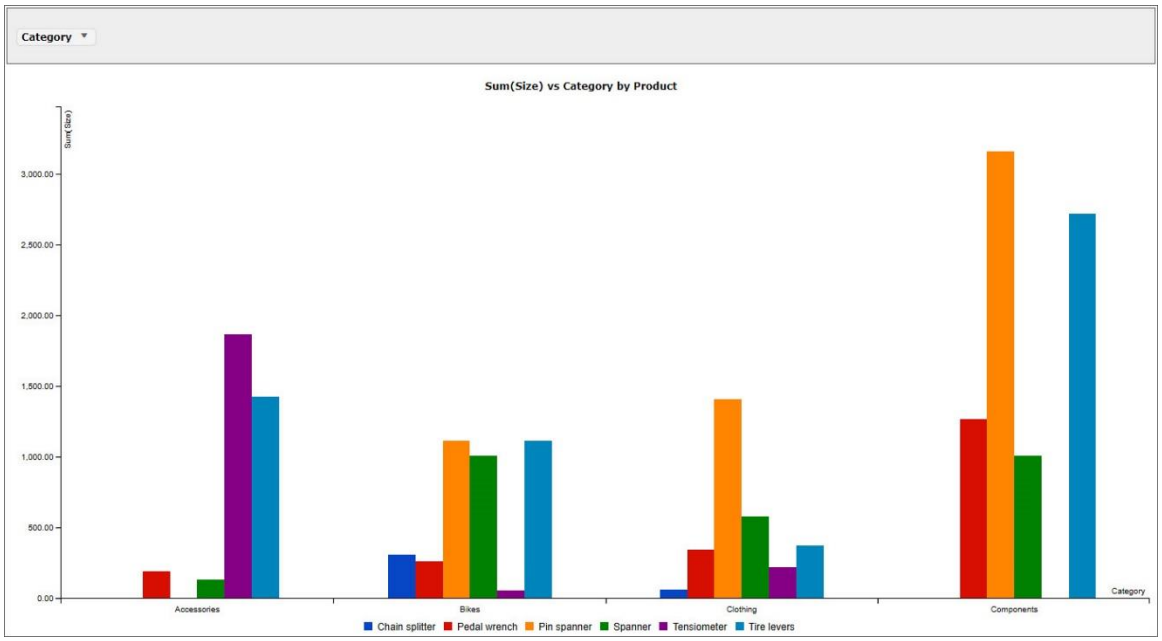
Bar



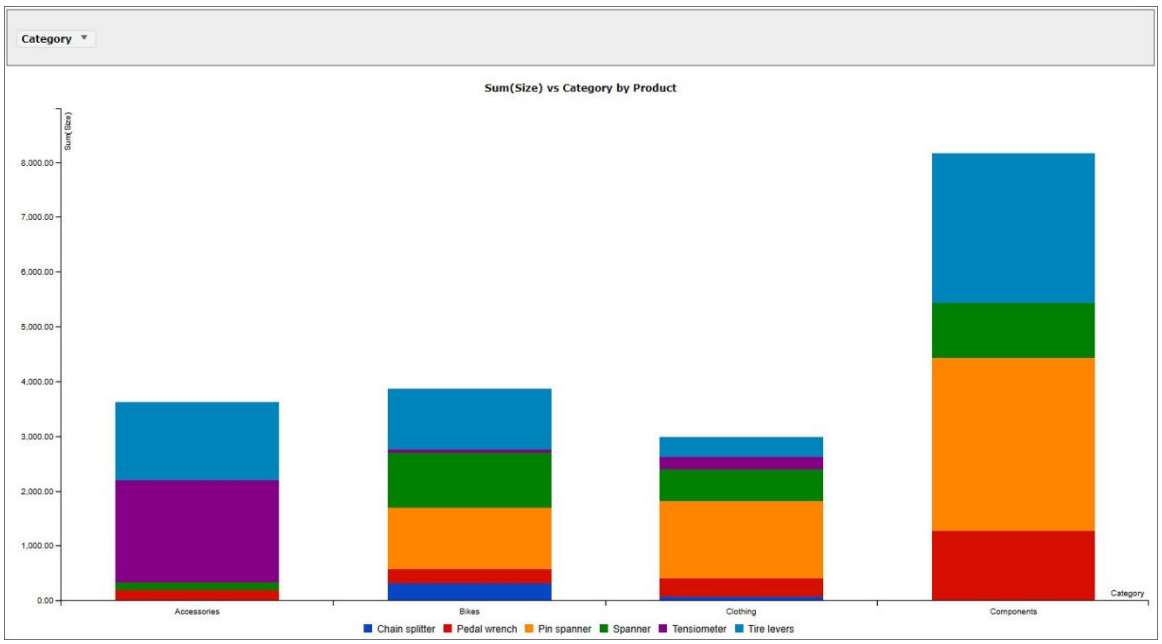
Stacked Bar



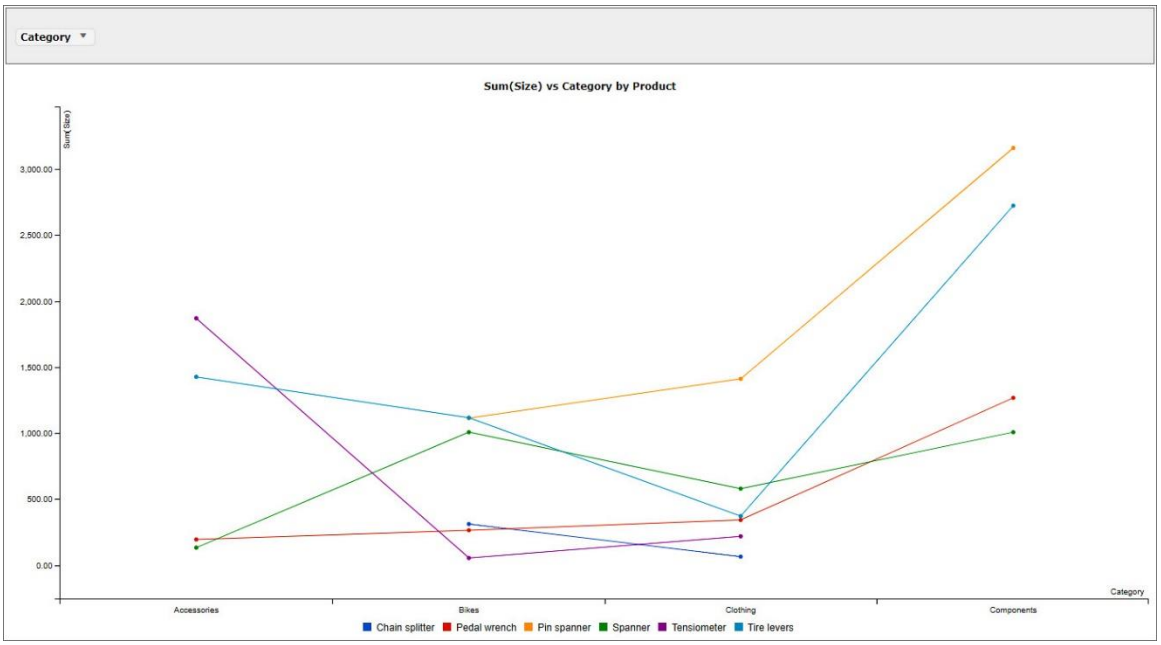
Column



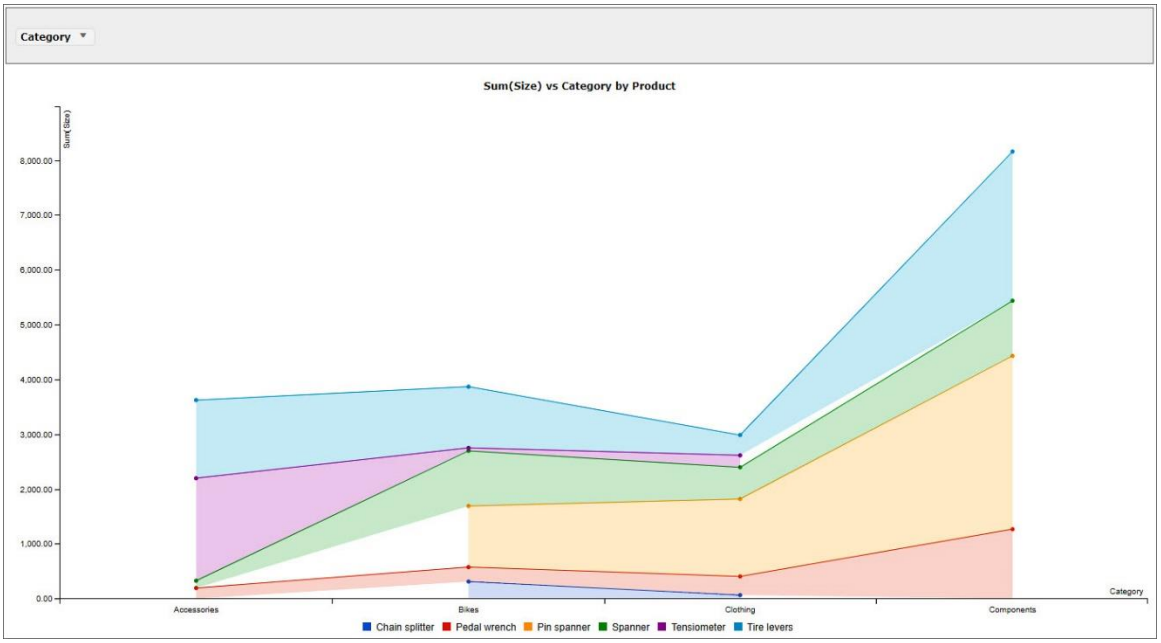
Stacked Column



Line

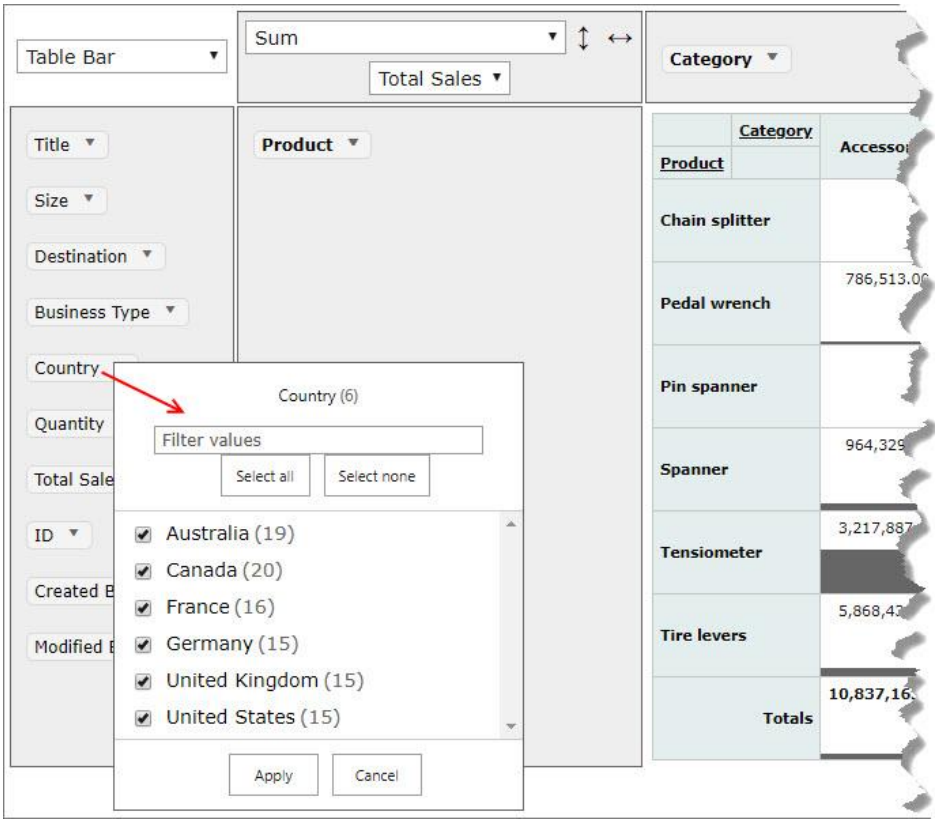

Category
Sum(Size) vs Category by Product
Sum(Size)
3,000.00
2,500.00
2,000.00
1,500.00
1,000.00
500.00
0.00
Accessories
Bikes
Clothing
Components
Category
Chain splitter
Pedal wrench
Pin spanner
Spanner
Tensiometer
Tire levers

Area

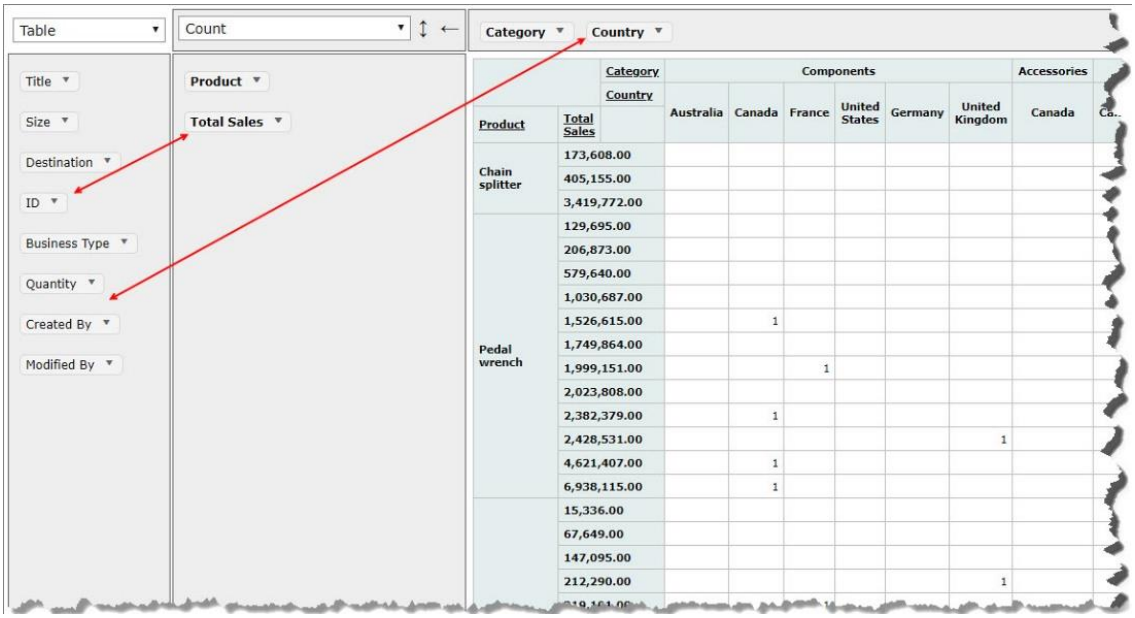

Category
Sum(Size) vs Category by Product
Sum(Size)
8,000.00
7,000.00
6,000.00
5,000.00
4,000.00
3,000.00
2,000.00
1,000.00
0.00
Accessories
Bikes
Clothing
Components
Category
Chain splitter
Pedal wrench
Pin spanner
Spanner
Tensiometer
Tire levers

5.2.1 FILTER VALUES

You can filter the values by expanding the particular drop down. The filtered values caption will be shown in italics.



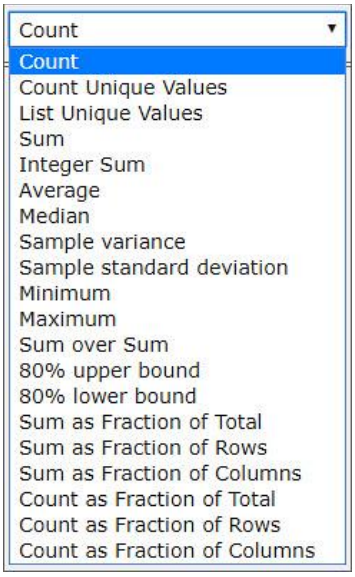
All column names from the source list are displayed in the left section. They can be dragged and dropped to the right columns.



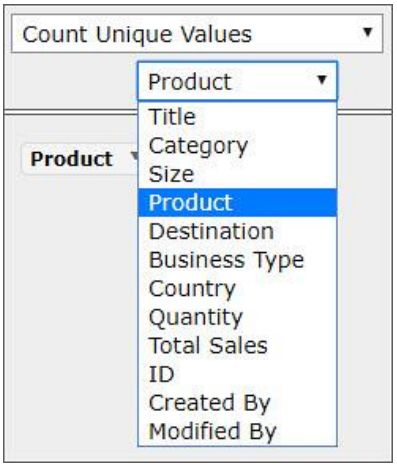
5.3 AGGREGATE FUNCTION

This Aggregate function allows you to apply various functions with different parameters.

Supported Functions



The parameter's options depends on the function which has been selected.



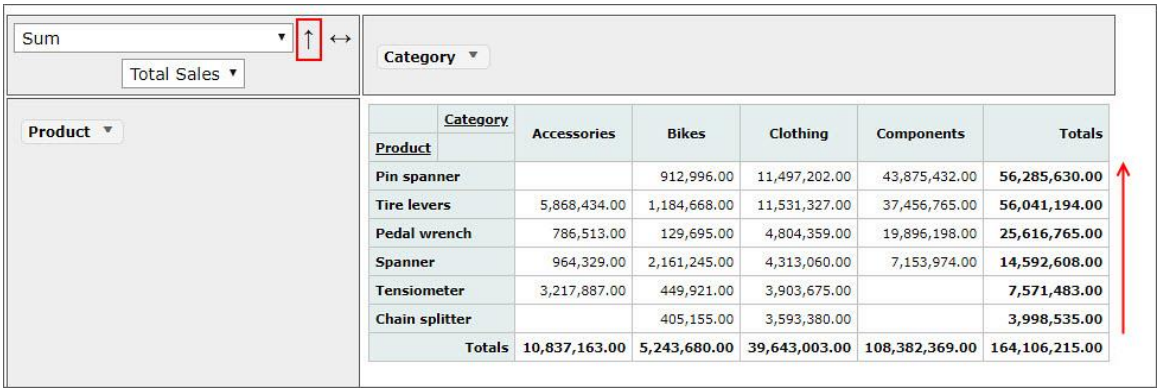
5.3.1 SORTING

The values in the charts can be arranged, alphabetically or numerically, in ascending and descending orders.

Click on the arrows to change the sorting order. The vertical arrow reflects the rows, and the horizontal arrow reflects the columns.

Vertical Arrow

Upward: sorts the totals of the numeric values in descending order.



Product \ Category	Accessories	Bikes	Clothing	Components	Totals
Pin spanner		912,996.00	11,497,202.00	43,875,432.00	**56,285,630.00**
Tire levers	5,868,434.00	1,184,668.00	11,531,327.00	37,456,765.00	**56,041,194.00**
Pedal wrench	786,513.00	129,695.00	4,804,359.00	19,896,198.00	**25,616,765.00**
Spanner	964,329.00	2,161,245.00	4,313,060.00	7,153,974.00	**14,592,608.00**
Tensiometer	3,217,887.00	449,921.00	3,903,675.00		**7,571,483.00**
Chain splitter		405,155.00	3,593,380.00		**3,998,535.00**
Totals	**10,837,163.00**	**5,243,680.00**	**39,643,003.00**	**108,382,369.00**	**164,106,215.00**

Downward: sorts the totals of the numeric values in ascending order.

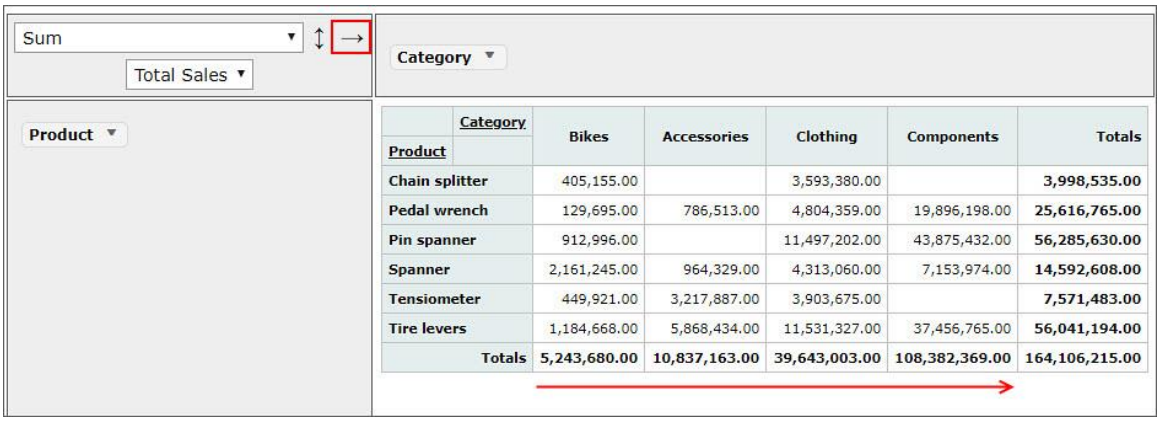
Product \ Category	Accessories	Bikes	Clothing	Components	Totals
Chain splitter		405,155.00	3,593,380.00		**3,998,535.00**
Tensiometer	3,217,887.00	449,921.00	3,903,675.00		**7,571,483.00**
Spanner	964,329.00	2,161,245.00	4,313,060.00	7,153,974.00	**14,592,608.00**
Pedal wrench	786,513.00	129,695.00	4,804,359.00	19,896,198.00	**25,616,765.00**
Tire levers	5,868,434.00	1,184,668.00	11,531,327.00	37,456,765.00	**56,041,194.00**
Pin spanner		912,996.00	11,497,202.00	43,875,432.00	**56,285,630.00**
Totals	**10,837,163.00**	**5,243,680.00**	**39,643,003.00**	**108,382,369.00**	**164,106,215.00**

Double side headed: sorts the alphabetic values in ascending order.

Product \ Category	Accessories	Bikes	Clothing	Components	Totals
Chain splitter		405,155.00	3,593,380.00		**3,998,535.00**
Pedal wrench	786,513.00	129,695.00	4,804,359.00	19,896,198.00	**25,616,765.00**
Pin spanner		912,996.00	11,497,202.00	43,875,432.00	**56,285,630.00**
Spanner	964,329.00	2,161,245.00	4,313,060.00	7,153,974.00	**14,592,608.00**
Tensiometer	3,217,887.00	449,921.00	3,903,675.00		**7,571,483.00**
Tire levers	5,868,434.00	1,184,668.00	11,531,327.00	37,456,765.00	**56,041,194.00**
Totals	**10,837,163.00**	**5,243,680.00**	**39,643,003.00**	**108,382,369.00**	**164,106,215.00**

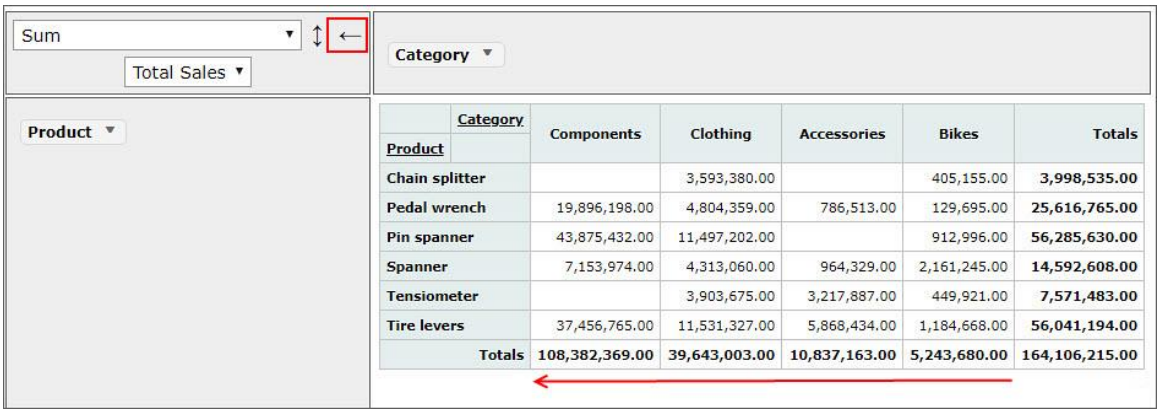
Horizontal Arrow

Right-sided: sorts the totals of the numeric data in ascending order.



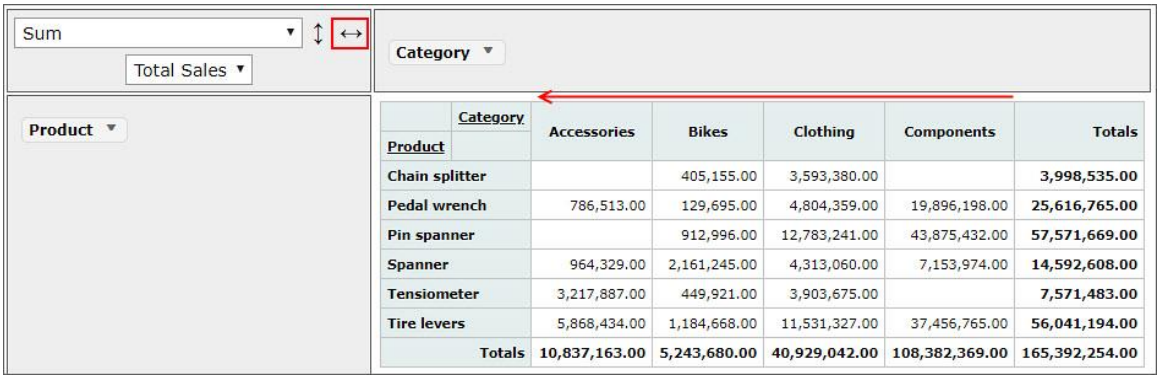
Product \ Category	Bikes	Accessories	Clothing	Components	Totals
Chain splitter	405,155.00		3,593,380.00		3,998,535.00
Pedal wrench	129,695.00	786,513.00	4,804,359.00	19,896,198.00	25,616,765.00
Pin spanner	912,996.00		11,497,202.00	43,875,432.00	56,285,630.00
Spanner	2,161,245.00	964,329.00	4,313,060.00	7,153,974.00	14,592,608.00
Tensiometer	449,921.00	3,217,887.00	3,903,675.00		7,571,483.00
Tire levers	1,184,668.00	5,868,434.00	11,531,327.00	37,456,765.00	56,041,194.00
Totals	5,243,680.00	10,837,163.00	39,643,003.00	108,382,369.00	164,106,215.00

Left sided: sorts the totals of the numeric values in descending order.



Product \ Category	Components	Clothing	Accessories	Bikes	Totals
Chain splitter		3,593,380.00		405,155.00	3,998,535.00
Pedal wrench	19,896,198.00	4,804,359.00	786,513.00	129,695.00	25,616,765.00
Pin spanner	43,875,432.00	11,497,202.00		912,996.00	56,285,630.00
Spanner	7,153,974.00	4,313,060.00	964,329.00	2,161,245.00	14,592,608.00
Tensiometer		3,903,675.00	3,217,887.00	449,921.00	7,571,483.00
Tire levers	37,456,765.00	11,531,327.00	5,868,434.00	1,184,668.00	56,041,194.00
Totals	108,382,369.00	39,643,003.00	10,837,163.00	5,243,680.00	164,106,215.00

Double side headed: sorts the alphabetic values in ascending order.

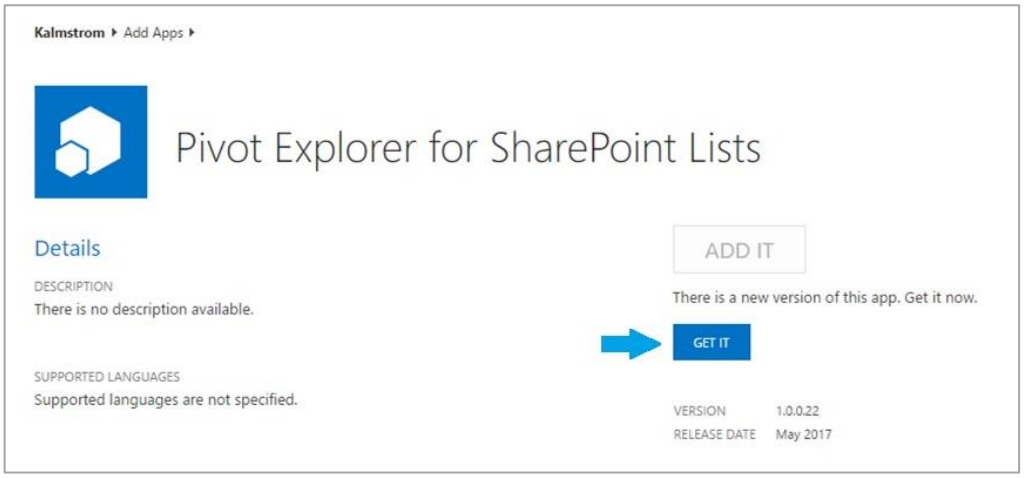


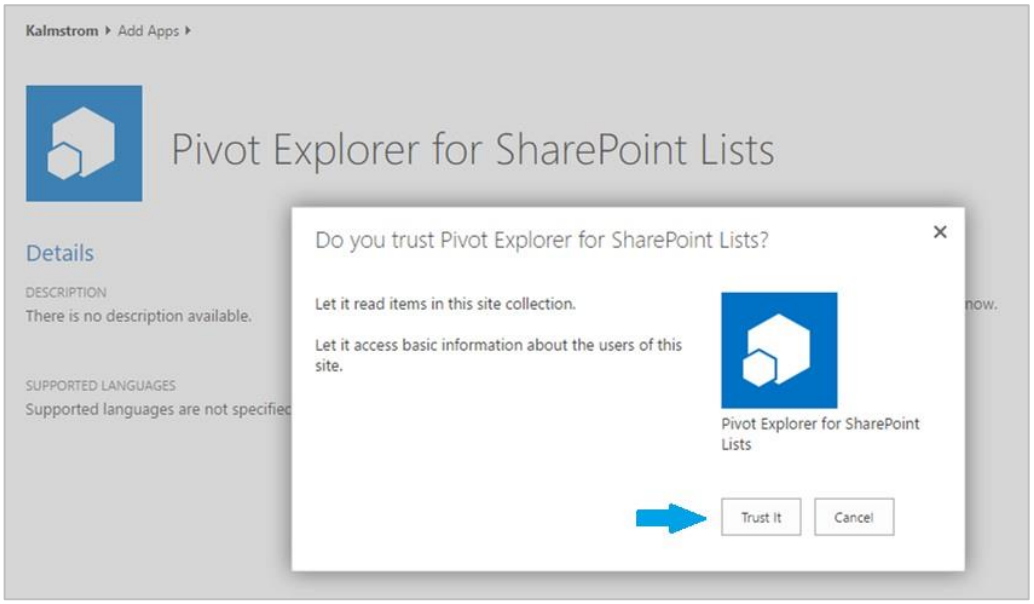
Product \ Category	Accessories	Bikes	Clothing	Components	Totals
Chain splitter		405,155.00	3,593,380.00		3,998,535.00
Pedal wrench	786,513.00	129,695.00	4,804,359.00	19,896,198.00	25,616,765.00
Pin spanner		912,996.00	12,783,241.00	43,875,432.00	57,571,669.00
Spanner	964,329.00	2,161,245.00	4,313,060.00	7,153,974.00	14,592,608.00
Tensiometer	3,217,887.00	449,921.00	3,903,675.00		7,571,483.00
Tire levers	5,868,434.00	1,184,668.00	11,531,327.00	37,456,765.00	56,041,194.00
Totals	10,837,163.00	5,243,680.00	40,929,042.00	108,382,369.00	165,392,254.00

6 *UPGRADE*

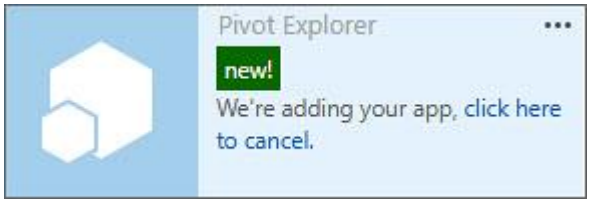
When a new version of *Pivot Explorer* is available, there will be a message about it from Microsoft.

1. On each site where *Pivot Explorer* is installed, a message about the new version will be displayed in the Site Contents.
2. Click on the GET IT button and then on Trust It.





3. The Site Contents page will open again with the notice 'We are updating your app' on the *Pivot Explorer* tile.



7 REGISTRATION

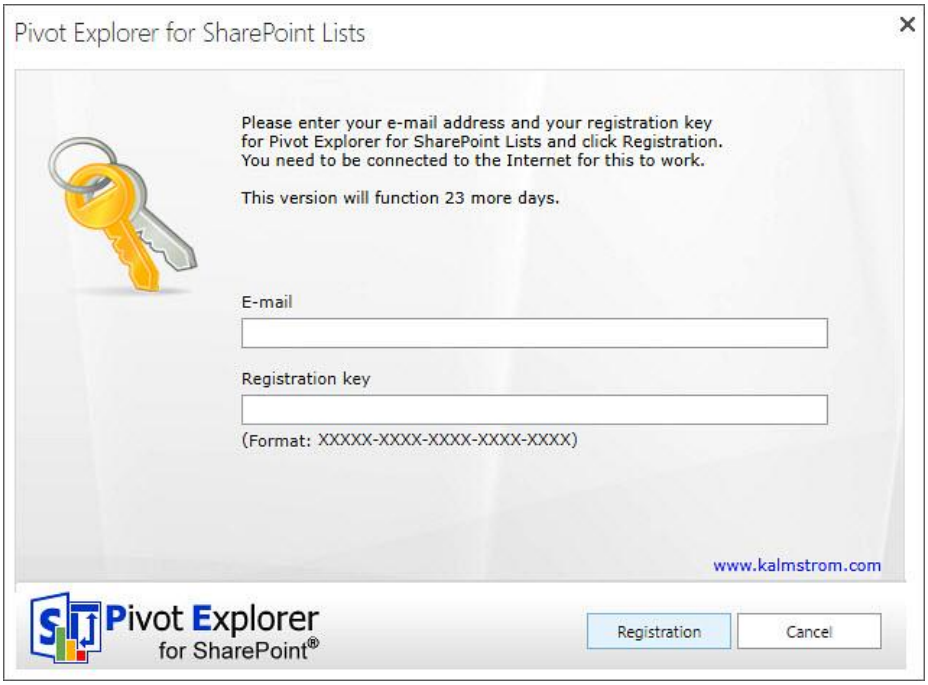
You may evaluate *Pivot Explorer* without cost and with full functionality for 30 days.

If you want to continue using *Pivot Explorer* after the trial period, you must subscribe to the solution. We supply a Premium version, which does not require registration at all, but organizations who select the Standard plan must register their installations of *Pivot Explorer*.

Standard subscribers will be given a registration key which allows the organization to continue using *Pivot Explorer* for the duration of the subscription.

To register, open the Configure page, click on the License button, and a registration dialog will open.

Enter an e-mail address with your company domain and the registration key you have received from kalmstrom.com and click on 'Registration'.



The registration must be done once on every site where *Pivot Explorer* is used. In the future we plan to give our customers an easier way to register all installations.

The registration key will continue to work as long as the organization is a kalmstrom.com Subscriber.

8 CONTACT

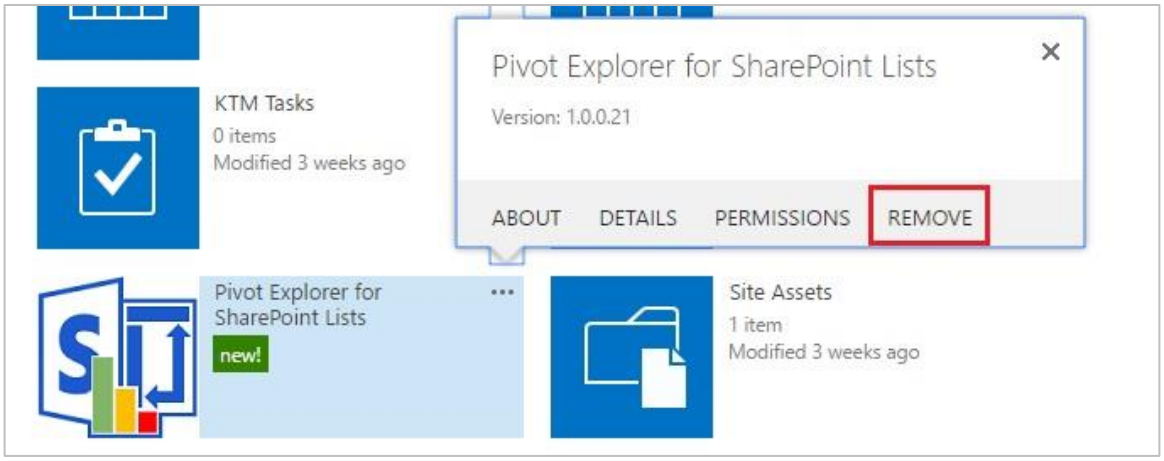
If you have any kind of problem or questions about *Pivot Explorer for SharePoint Lists*, there are several ways of contacting us:

E-mail	support@kalmstrom.com – Technical issues
	sales@kalmstrom.com – Subscriptions, general issues
	finance@kalmstrom.com – Invoices, payments
Telephone	+46 739 206 106

9 REMOVE PIVOT EXPLORER

Should *Pivot Explorer* not be used anymore, you can remove it. Currently the removal can only be done in the classic experience, as Microsoft has not supplied a removal feature for add-ins in the new experience.

To remove, go to the Site Contents and find *Pivot Explorer for SharePoint Lists.* Right click on the ellipses(**...**) and select REMOVE from the context menu.



10 MORE SHAREPOINT TIPS

You surely have noticed that *Pivot Explorer* is a great tool for improving the SharePoint experience. For tips on SharePoint usage in general, please refer to the Tips section of the kalmstrom.com website.