

How do I configure a summary table or pivot table widget?

Overview

Summary tables and pivot tables both lay your data out as rows and columns you can scan at a glance. A summary table groups and totals data by the fields you choose; a pivot table cross-tabs two fields against each other.

When to Use

Use this feature when:

- You want a grouped breakdown of your data, like totals by region or product — use a summary table
- You want to compare two dimensions at once, like region vs. month — use a pivot table
- You need to see the actual underlying values in a group, not just a count

Concepts

- Summary Table – A plain table that groups and totals your data by the row fields you choose
- Pivot Table – A table that cross-tabs a Row field against a Column field, with totals in between
- Row Field(s) – The field or fields whose values become the rows of the table
- Column Field – Pivot tables only: the field whose values become the columns of the table
- Data Column – A field and aggregation shown in the table's cells, such as Sum, Count, Average, or Actual Value
- Actual Value – An aggregation that lists a group's distinct text values instead of a number — capped at 50 values, and left out of totals
- Grand Total – The total row or column summarizing every group

Set Up Guide

1. Go to a dashboard and click Add Widget — this opens the Configure Widget panel
2. Enter a Title for the widget
3. Turn on Apply Dashboard Filters if you want this widget to respond to the dashboard's global and timeline filters
4. Choose the Widget Type — Summary Table or Pivot Table
5. Choose the Data Source
6. Choose the Row field(s) [TODO: confirm exact field label and whether multiple row fields are supported]
7. For a pivot table, choose the Column field [TODO: confirm exact field label]
8. Add one or more Data columns — choose the field and aggregation (Sum, Count, Average, or Actual Value for distinct text values)
9. Apply any filters you want the table to respect — the filter value list supports search once there are more than 100 values
10. Click Save & Apply

Best Practices

Use Actual Value only when you need to see distinct text values, not a number — it's capped at 50 values and excluded from totals

Keep row fields to what you actually need — too many rows make a table hard to scan

If you're exporting a dashboard to PDF, know that a pivot table's PDF only captures its first 10 rows, and a summary table's first 500 — export that table to Excel or CSV instead if you need the complete data

Related Links/FAQs

Related pages in this book:

- [What widget types are available in Vantage?](#)
- [How do I configure a chart widget?](#)
- [How do I configure a geo map widget?](#)

FAQs

What's the difference between a summary table and a pivot table? A summary table groups data by one set of row fields. A pivot table cross-tabs a row field against a column field, so you can compare two dimensions in one table.

Can I see the actual text values in a group, not just a count? Yes — use the Actual Value aggregation on a Data column. It lists the group's distinct values as text (up to 50), but it's left out of totals.

Does exporting a dashboard to PDF capture the full table? No — a pivot table's PDF only shows its first 10 rows, and a summary table's first 500, because the PDF only captures what's visible on screen. Export that table to Excel or CSV if you need the complete data.

Version Notes

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