How to Create a Pivot Table

The following instructions will walk you through how to create a Pivot Table in Microsoft Excel.

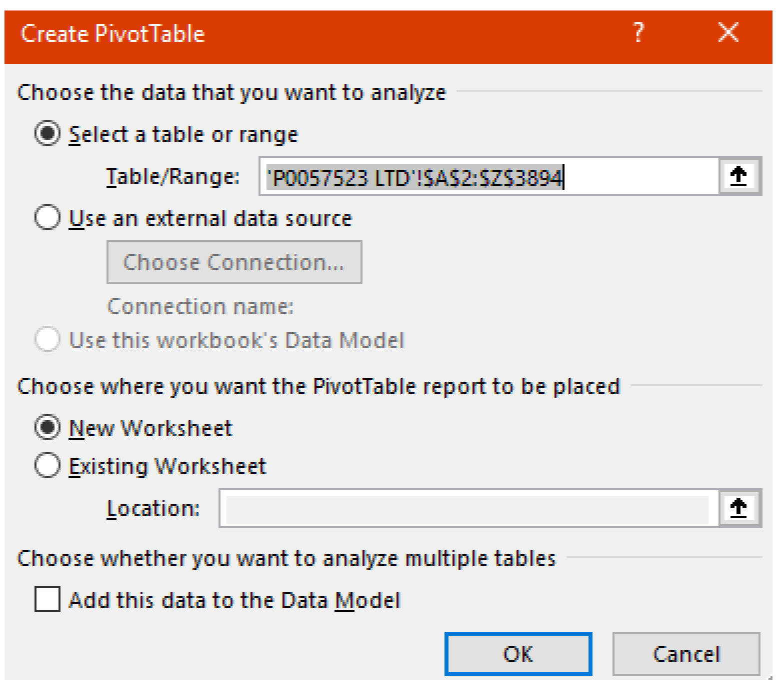
Navigation

Login into myUFL and navigate to:

Main Menu > Enterprise Reporting > Department Reports > Select a College

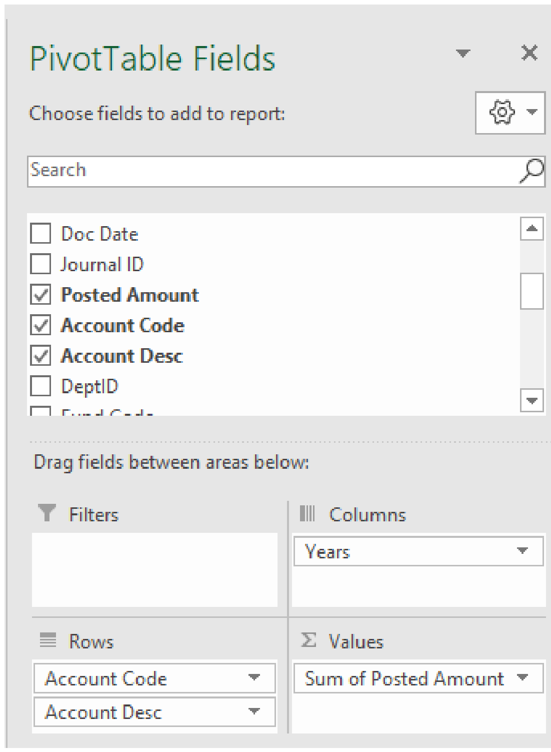
Instructions

1. To download the Transaction Detail, **Select a Department > Open Transaction Detail** as Excel Report by selecting the Excel icon .
2. In Excel, on the **Insert** tab, of the **Pivot Tables** group, select **PivotTable**.
3. The Transaction Detail data should automatically be selected in the table range. If it is not selected, then do this:
    a. Under **Choose the data that you want to analyze**, click on the radio button for **Select a table or range**.
    b. Verify the cell range in the **Table/Range** field by selecting the data from the Excel worksheet.
4. Under **Choose where you want the PivotTable report to be placed**, click on the radio button for **New worksheet**.
5. Click **OK**.



6. From the Pivot Table fields, drag **Posted Amount** into the Sum Values area.

   Note: Consider formatting this number into an Accounting format to help compare numbers.



7. Drag **Fiscal Year** from Pivot table fields to the Columns area.
8. Drag **Account Code** and **Account Desc** to the Rows area.
9. Compare amounts or create variance columns.
10. Double click on any cell with an amount to review the data behind the number.

Customers	Region			
StartYr	Central	East	West	Grand Total
2013	6	10	11	27
2014	17	15	22	54
2015	18	31	19	68
2016	21	15	15	51
Grand Total	**62**	**71**	**67**	**200**

Number	Customer	Region	StartYr
10080	Kitchens	East	2014
10078	Evans	East	2014
10070	Blankenship	East	2014
10069	Smith	East	2014
10060	Bancroft	East	2014
10055	Carnes	East	2014
10050	Morgan	East	2014