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.