

These instructions will show you how to take an existing pivot table and a separate mapping of PCNs/names ... and add the names to the pivot table!

First of all, you'll need to develop an Excel spreadsheet with Column A containing all of your unit's PCNs, and Column B having the name of the employee in that PCN. If the PCN is currently vacant, you could always write in the position title, the previous occupant's name, or some other reminder of what the PCN is for. It is **imperative** that the PCN/name file be **sorted by PCN in ascending order**. This may seem like a lot of work to do upfront, but once you have this file completed, you'll only touch it to make updates. Your file should look something like this:

	A	B
1	PCN	Name
2	123456	Karen Mallette
3	234567	Abigail Ettellam
4	345678	Lucy Labrador

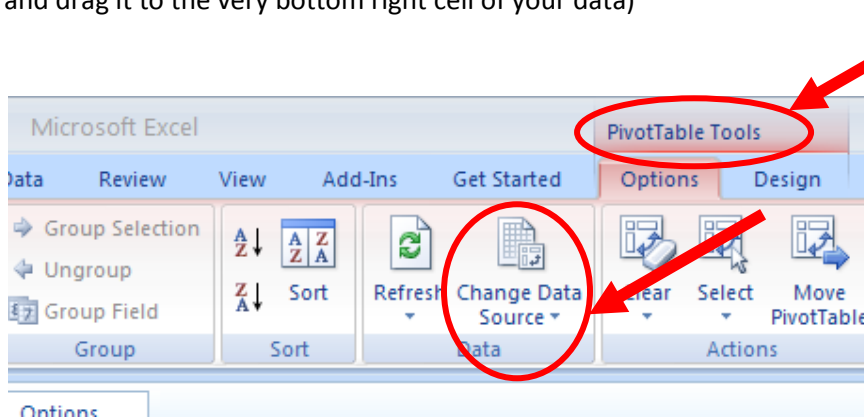
So, let's begin:

We're going to use two files: (1) the labor budget to expended pivot table from the Financial Services web site ("pivot file"), and (2) the 2-column spreadsheet listing PCNs and employee names ("name file").

1. Go to the Financial Services web site (<http://www.uaf.edu/finsvcs/budget-cost-records/reports/labor/>) and click on the link to view your pivot file.
2. Click the Level4 drop-down arrow in cell B1 to view the data for only your unit (if necessary).
3. Now do a **File -- Save As** to save the file to your desktop.
4. Go to very bottom of file and double-click on the value in the Grand Total – Budget cell. This will open a new tab within the workbook containing *all* of your unit's data ("new data tab").

5. Change pivot file's data source to refer to this tab now:

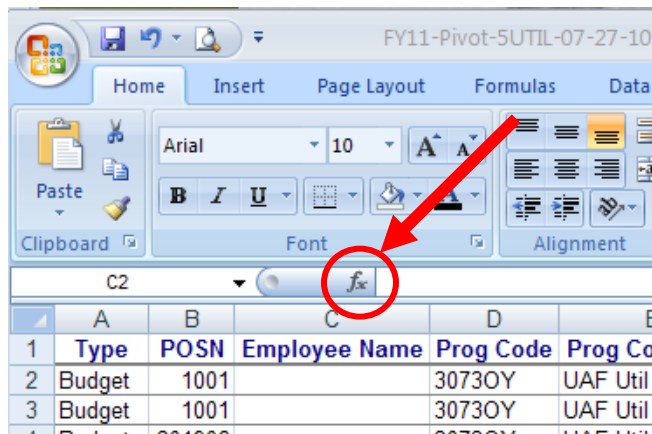
- a. Click on **PivotTable Tools** in Excel header
- b. Click **Change Data Source** and select data from the new data tab (put your cursor in cell A1 and drag it to the very bottom right cell of your data)



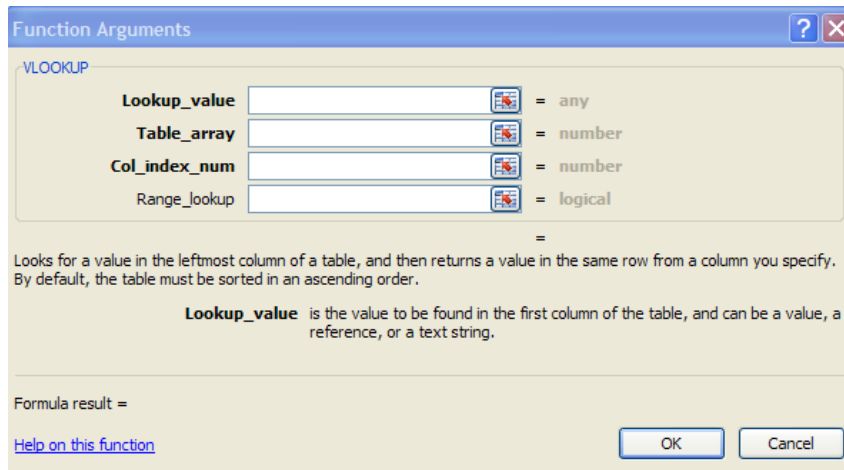
6. In your new data tab, insert a new column – I like putting it adjacent to the PCN column. It needs a title – how about *Employee Name*?

7. Now, in the first blank cell of the Name column (it should be **C2**), we're going to create a lookup to bring in the name.

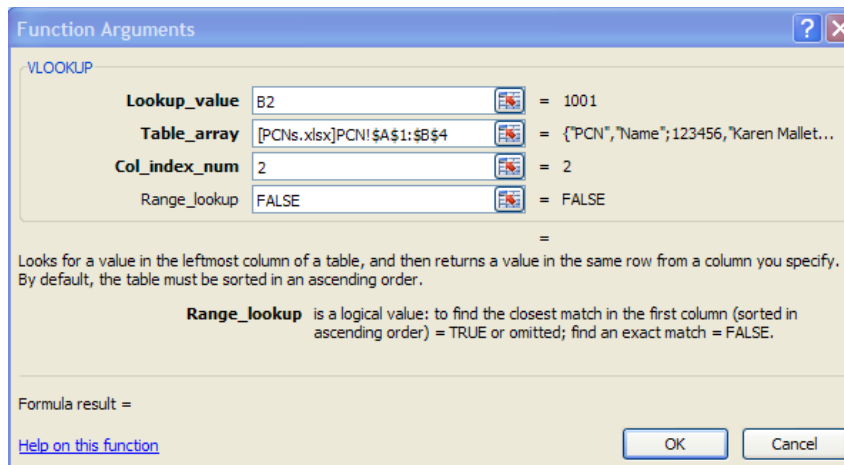
- a. Click on the formula button:



- b. In the search box, type VLOOKUP, then select it to bring up the dialog box.

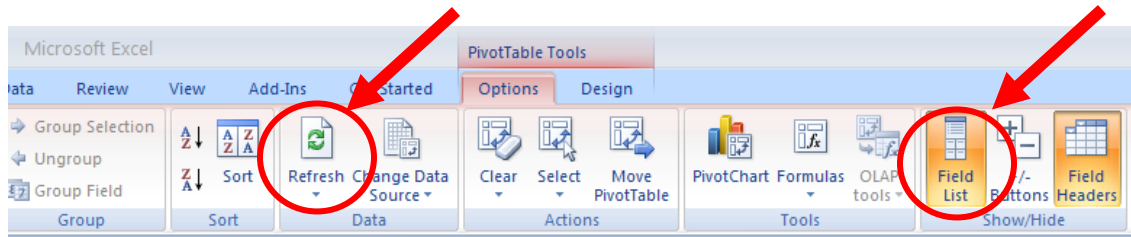


- c. In the **Lookup_value** field, you are telling the formula what PCN you want to know more about, so you are going to click on the PCN in cell B2 in the **data tab**.
- d. In the **Table_array** field, you are telling the formula where you want to find this new information, so you are going to select all of the data in the **PCN file** (put your cursor in cell A1 of the PCN file and drag to select all PCNs and names).
- e. In the **Col_index_num** field, you are telling the formula what information about that PCN you want to bring in, so you will enter 2 (first column of the file is the PCN, second column is the name associated with that particular PCN).
- f. In the **Range_lookup** field, just type in FALSE.
- g. Click OK.



8. Now you can copy this formula down for all rows of Column C. You may see a lot of '#N/A' in the fields. This is for two reasons: (1) some PCNs will never have a person's name, like 1001 and 1970 for rows of budget data, and (2) the other PCNs aren't yet in the name file (you may find that you need to add PCNs and names of staff from other units who have charged labor to you).

9. Go to the tab with your pivot table. Click on the **PivotTable Tools** menu and click **Refresh**, then click to show the **Field List**.



10. Include **Employee Name** in the pivot table.

11. Now you can click to hide the Field List.

12. And look! You have employee names in your pivot report!

The screenshot shows a pivot table with the following data:

Position	Employee Name	Fund Type	Org	Acct	Sum of Budget	Sum of Expended	Sum of Remaining Balance
123456	Karen Mallette	Unrestr	50528	1251	\$ 10,678.00		\$ 10,678.00
			50528 Total		\$ 10,678.00		\$ 10,678.00
			Unrestricted Total		\$ 10,678.00		\$ 10,678.00
123456 Total					\$ 10,678.00		\$ 10,678.00
234567	Abigail Ettellam	Unrestr	50528	1251	\$ 10,435.00	\$ 5,078.88	\$ 5,356.12
			50528 Total		\$ 10,435.00	\$ 5,078.88	\$ 5,356.12
			Unrestricted Total		\$ 10,435.00	\$ 5,078.88	\$ 5,356.12
234567 Total					\$ 10,435.00	\$ 5,078.88	\$ 5,356.12
345678	Lucy Labrador	Unrestr	50528	1251	\$ 8,765.00	\$ 10,153.13	\$ (1,888.13)
			50528 Total		\$ 8,765.00	\$ 10,153.13	\$ (1,888.13)
			Unrestricted Total		\$ 8,765.00	\$ 10,153.13	\$ (1,888.13)