

Topic: Excel Pivot Tables for Quick Analysis

Portfolio Projects
with
Pizzazz



Welcome to Today's Lecture!

Today's Lecture

- Pivot tables in Excel – what exactly are they?
- Why do most people hate them, and a few people totally love them?
- Why do I even use them at all?

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What are Pivot Tables in Excel?

- Pivot table (and pivot chart) are functions in Excel that allow you to apply summary operations to a relatively large dataset
- The pivot table is essentially a set of dynamic filters that you can change interactively, and it will update
- Since Excel can be used for both data storage and reporting, making a pivot table that actually works can be challenging.
- The minute someone interacts with it, whatever analysis that it was displaying is destroyed.

Resources

Blog post where I use a pivot table for quick analysis: <https://dethwench.com/faers-data-for-portfolio-projects/>

Another blog post where I use a pivot table for quick analysis:
<https://dethwench.com/descriptive-analysis-for-data-science-portfolio-projects/>

Datasets for portfolio projects:
<https://dethwench.com/curated-datasets-for-data-science-portfolio-projects/>

Ideas for portfolio projects:
<https://dethwench.com/portfolio-project-examples-for-data-science/>



Why not just use R or SAS?

Pivot Table Considerations

- Definitely – you should use R or SAS for an extensive analysis.
- But what if you have a small dataset on one tab of an Excel spreadsheet?
- What if you want to do a quick analysis to see if it is worth pursuing a larger project?
- Or maybe you just want to answer a quick question about the data?

Pivot Table Best Practices for Portfolio Projects

1. Put the dataset on one tab in tabular format (no sums, etc.)
2. Make the pivot table on another tab alone
3. Make the pivot table “look at” just the populated data from the data tab
4. Once you set up the pivot table with calculations you want, copy it and paste the values into another tab



Conclusion

- Pivot tables are not “permanent” things – they like to pivot!
- You can use them to do your dirty work for you – but don’t expect them to stay static.
- Always keep datasets in tabular format – even aggregated ones

	A	B
1	Row Labels	Sum of NH2020 n Claims
2	Alternative Medicine	76
3	Mental Health	4289
4	Nurse	27226
5	Other Specialist	13923
6	Pain Management	316
7	Physician Assistant	9232
8	Primary Care	55463
9	Radiology	5
10	Surgery or subspecialty	5513
11	Trainee	672
12	Grand Total	116715
13		



Questions?

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