Introduction to Pivot Tables

Pivot Tables are a quick and efficient way to take your data analysis one step further. Pivot Tables are interactive and automatically organize and summarize your data. You can then use the table to analyze comparisons, discover patterns and relationships, and discover trends. This introduction will show you the basics of how to pull your data from Therap and create a pivot table. Pivot tables allow you to analyze data by Individual if you’d like or agency wide.

For this example we are using Mozilla Firefox on a PC running Windows 7 and Microsoft Excel 2007. All data has been pulled from a Therap Demonstration account which contains only fake Individuals/data.

Step 1- Gathering the Data

Your first step when creating a pivot table is to gather the data. For this pivot table intro I’m going to analyze ISP data, but you can use pivot tables to analyze GER trends, health tracking trends, and more!

In order to analyze ISP data you first need to do a search for the data:
To search for multiple programs at once you can click the top program and then hold Shift and the down arrow on your keyboard. This will allow you to search across your entire agency if you’d like (as long as you have access). You can also hold ctrl and pick and choose a couple of programs by clicking on them. I personally like to start with more data because you’ll soon see it’s very easy to sort and filter out once you have it in excel.

For this example I’m going to be analyzing a year’s worth of data. However, you could search for just a week or a day if you’re trying to find missing documentation.

Then you’ll click search at the bottom. Again, I leave most of the other filters blank so I can pull as much data as possible and then filter down once I have the data in excel.
Step 2 - Exporting the Data to Excel

Here you’ll want to scroll all the way to the bottom and click Export to Detail Excel. Export to Excel typically exports just what you see on your screen. Export to Detail Excel will export the other fields which were possible to be filled out.

Once your data is in excel you will either need to click Enable Editing or Save the data in order to begin working with it. Again, it’s going to depend on the version of excel you’re using as to whether you have to enable editing or save.
Step 3 - Inserting Your Pivot Table

Your next step will be to highlight the data you want to work with, which will be the whole table. You can highlight the whole table by clicking on the square in between column A and row 1 (see below).

Next you’ll insert your pivot table. Where you do this will also depend on what version of excel you’re using. For the version I’m using you click the Insert tab along the top and then Pivot Table.
Excel is then going to ask you for the range of data you want to work with. Since we already selected the whole table all you need to do is click 'Ok'. 
**Step 4- Organizing Your Pivot Table**

Your screen should now look similar to the picture below:

The only thing you have to do here is click and drag your Form ID into the values field. The values field requires a unique identifier for each of the pieces of data which is your Form ID.
Let's say I just want a quick count on how much documentation has been done on each of the individuals I have access to in the last year (the date range I selected in my initial data search). I'm going to click and drag **Individual** to the **Row** box.
Your screen should then look like this:

Here I can quickly see how many pieces of data have been collected on the individuals I have access to. I could also filter down to just a couple of individuals or even one individual by clicking on the **down arrow** next to **Individual**.
Next I want to know which ISP Programs staffs have been documenting on. I’m going to click and drag **ISP Program** into the **Row** box, *underneath* of **Individual**.

Then your screen should look something like this:
Step 5- Creating a Bar Graph

If you want to create a bar graph to show the information above you first have to move the ISP Program option over to the Column box.

Your screen should change and look similar to this:
Again, the version of Excel you’re using will determine where you find your graphs. For the version I’m using I click the **Options** tab at the top (see above) and then select the type of graph I want to insert (see below).

It should look something like this:
Now it’s your turn to play around with pivot tables! Remember your options are limitless! I could drag Service Provider to my Row box and see how many pieces of data staff have collected. I could have drug Scores under my ISP Program label and see what scores Kimo had been receiving for each of his programs. I could drag the Data Collection Date into my row box to see how many days staff had documented for. If I had an ISP Program I knew should be documented on once a day, when I drag the Data Collection Date into my Row box I would expect to see at least a 1 in each of the boxes for each of the days.

**GERs and Pivot Tables**

If you want to track and trend GERs you can either pull your event summary report or the GER Management Summary in your report library. If you’re going to analyze all GERs for your agency I would recommend pulling the management summary as it’s going to give you all fields and all individuals. Again, just remember FORM ID goes in the VALUES FIELD and then start clicking and dragging until your heart’s content! Below is an example of a graph I was able to create identifying what the results of the falls occurring at my agency are.
REMEMBER:

- When doing a pivot table you want to SEARCH for the data rather than pulling reports (except for with the GERs).
- Form ID goes into the Values field.

You can take Pivot Tables a step further and create Macros in which you teach excel how to export and organize your data to save even more time.