

The Basics of Pivot Tables

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[Link to Performance Resource video](#)



[Link to larger graphic](#)

Need, Purpose and Goals

Instructional Designers are required to have a wide variety of skills from content and curriculum creation, knowledge of authoring tools and software, training, evaluating, data analysis and more. I recently applied and interviewed for a position and was asked about my experience with pivot tables. Unfortunately, I had never heard this term before. After the interview I did some research and discovered an entire world of data analysis tools and tricks that I didn't know existed (many of which I wish I had known about when I was a classroom teacher).

A pivot table is a tool available through Microsoft Excel that enables users to take large data sets and sort the data within seconds. Creating pivot tables cuts down on the need for using and memorizing formulas and creating charts by hand. Users can create pivot tables and change them with a few clicks. Pivot tables are a valuable tool for Instructional Designers because it allows them to easily sort through and analyze data from their company's LMS such as completion rates, assessment scores, progress, etc. Most of the information on creating and using pivot tables centers around sales and product design and there is a distinct need for data specific tutorials for Instructional Designers.

I will create a performance resource for new and existing Instructional Designers about how to create and use pivot tables and how they are beneficial in our work specific work setting. The resource will help Instructional Designers improve their data analysis skills and overall job performance. I will use the screen capture tool Camtasia to create a short introductory tutorial.

After viewing the resource video learners will be able to:

- Create and manipulate a pivot table using large data sets
- Describe the benefits of using pivot tables in an Instructional Design setting

Further Resources

In addition to my performance resource (below) the following is a list of additional resources for pivot table creation.

- [Excel Easy - Pivot Tables](#)
- [Dynamic Edge - Pivot Tables Save Time](#)
- [Excel Campus - Introduction to Pivot Tables Part 1](#)
- [Excel Campus - Introduction to Pivot Tables Part 2](#)
- [Learn Excel Online - The Ultimate Guide to Creating Pivot Tables](#)
- [Pivot Tables in Google Sheets](#)

Method and Rationale

I utilized design thinking for the planning of my performance resource.

Empathize

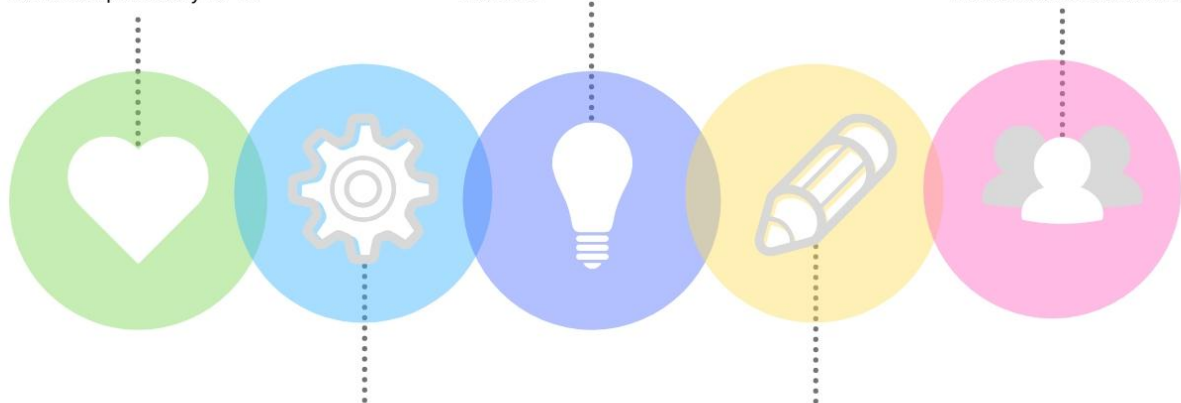
As a new ID and someone knows quite a few people in the same shoes I realized that there are very limited resources and tutorials available to us online. I want to address this problem and create a resource specifically for ID

Ideate

I created a list of ways that I could demonstrate pivot tables in a way that would be useful to an ID. Once I narrowed down my idea I thought of the best ways to demonstrate the concept to learners

Test

With the scope of this class it will be difficult for me to test and distribute my resource. I plan to share it with my classmates, share it on my Twitter page, create a blog post and send it to several IDs for feedback and revision



Define

After some research I discovered that there are tools that would be beneficial to IDs (such as pivot tables) but the vast majority of the available tutorials are geared toward sales and product design

Prototype

After choosing Camtasia as the tool to demonstrate pivot tables I created a script and outline to help me create a detailed walk through

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Sharing and Improving the Resource

I plan to share this resource with individuals and groups I associate with, e.g. professional organizations like ATD or meetup groups in my area. The resource is available to students in INTE

6720 and the LDT program. I will monitor the video's usage and look for ways to increase visibility over time.