Intermediate Excel Workshop
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1 Introduction

This guide has been designed to accompany the Intermediate Excel workshop at the Empirical Reasoning Center. The example dataset was compiled by Walt Hickey at fivethirtyeight.com and contains information on 1,794 films released from 1970 to 2013. His article, “The Dollar-And-Cents Case Against Hollywood’s Exclusion of Women” examines the budgets and revenues of films that pass the Bechdel test. The Bechdel test is a popular method of measuring how female-friendly a movie is. To pass the test: 1) there must be two named female characters, 2) the two women must talk to each other, and 3) the conversation cannot be about a man.

This workshop builds off of the Introduction to Excel Workshop. For review consult the introductory step-by-step guide.

The topics covered in this workshop include:

- Deleting & Inserting columns
- Sorting & Filtering data
- Conditional statements
- Nested formulas
- Pivot Tables
2 Deleting Unnecessary Variables

When working with large datasets in Excel it is very important to stay organized. Spreadsheets can become difficult to manage when you have more columns than you can see at once. Therefore, it is useful to delete columns/variables when you know you will never need them.

2.1 Delete IMDB code variable

We have no need for the IMDB code variable in column B. To delete the entire column at once we have to highlight the entire column. To do this, click on the column letter, literally the B. You should then see the entire column is selected.

![Figure 1: Select the IMDB Code Column](image1)

Now, in the Home tab, you should see a “Delete” button in the “Cells” group. You cannot press backspace or delete on your keyboard.

![Figure 2: Delete](image2)

Then you should see the IMDB code column disappear and the Movie Title variable move to the left into column B.

![Figure 3: Data Without IMDB Code](image3)
3 Sorting

There are many reasons why you may want to sort your data. You may want a list of alphabetized names, or you may want observations organized by date so you can enter more variables.

Currently, the dataset is sorted by budget. We are going to sort this data set by year and then movie title. When you sort on two variables, the dataset is first sorted according to the first variable. But what happens when two observations have the same value? If we sort by year then there are five movies from 1971, what order should they be listed in? By adding a second variable, you tell Excel exactly what to do. For all of the movies released in the same year, we want them alphabetized by Movie Title.

To do this, we need to highlight all of the data including the variable names. Any cells that are NOT selected will remain in the exact order they are now. There are many ways to highlight the data. We will click on cell A1. Then we will press CTRL + Shift + (the right arrow). This will highlight the cells from A1 to J1.

![Figure 4: Highlight the First Row](image)

Now we want to highlight all of the rows below those cells. Now press CTRL + Shift + (the down arrow). Now all of the data should be selected.

![Figure 5: Highlight All of the Data](image)

Now we want to sort the data. In the Home tab, in the Editing group, click on the arrow next to the “Sort & Filter” button. Then choose the “Custom Sort” option.

![Figure 6: Sort & Filter](image)
You should see the following pop-up window.

![Sort & Filter Pop-Up Window](image)

Figure 7: Sort & Filter Pop-Up Window

The first thing you want to do is check “My list has headers” so your variable names are not sorted like an observation. When alphabetizing movie titles, you don’t want to move the “Movie Title” variable name to the Ms; it should stay in row 1.

![My data has headers](image)

Figure 8: My List Has Headers

Then you want to choose “Year” under the Column drop down menu. Then you want to click the plus sign to add a second variable to sort by. In the second row, choose “Movie Title” under the Column drop down menu. Then press “OK.”

![Sort by Year and Movie Title](image)

Figure 9: Sort by Year and Movie Title

Now you should notice that the dataset has been sorted.
4 Conditional Statements

A conditional statement is an if-then statement. That is, if a certain condition is met, do A; if that condition is NOT met, do B. This is often how binary variables are made.

4.1 Profitable Variable

We are interested in differentiating between profitable and unprofitable movies. We are going to create this binary variable using the “if” function. A movie was profitable if the total gross revenue is greater than or equal to the budget; otherwise, the movie was unprofitable.

We are going to name this variable in cell J1 – “Profitable.” In cell J2 we are going to enter the formula. This is a function, so it starts with an “=.” The function is called if, so the formula starts “=if(” and should display a helpful pop-up. This function requires 3 inputs: the condition, what to display if the condition is met, and what to display if the condition is not met.

The first input is the condition, which is that total gross is greater than or equal to the budget. So the formula is now “=if(I2>=E2,” with a comma to separate each input. The next input is called “value if true,” so what should this variable equal if cell I2 exceeds or equal cell E2. Because we want this to be a binary variable, the value 1 indicates true. So the formula is now “=if(I2>=E2,1,” with another comma. The last input is called “value if false,” so what should this variable equal if cell E2 exceeds cell I2. In binary variables, the value 0 indicates false. So the final formula is “=if(I2>=E2,1,0)” and press enter to see the first result.

![Figure 10: Profitable Formula](image)

Now we want to apply this formula to the rest of the column. To do this, select cell J2 and move the cursor to the bottom right corner of the cell. When the cursor looks like a small, black cross, double click the mouse. This applies the formula until the next blank cell of data.

![Figure 11: Profitable Formula](image)
5 Inserting a Variable

While, the Profitable variable identifies which movies were profitable, it does provide information on the size of the profit. For that, we would need to calculate the profit. However, I want the profit variable to be between the Total Gross and Profitable variables.

I will do this by inserting a blank column to the left of the Profitable variable. To do this highlight column J by clicking on the J.

![Figure 12: Highlight Profitable Column](image)

Then in the Home tab, in the Cell group, click on the “Insert” button.

![Figure 13: Insert](image)

You should see a blank column J and the Profitable variable now in column K.

![Figure 14: Inserted a Blank Column](image)
5.1 Calculate Profit

Now in column J we want to calculate a Profit variable. In cell J1 label the variable “Profit.” In cell J2 enter the formula “=I2-E2” and apply it to the rest of the column.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>1970 Beyond the Valley of the Dolls</td>
<td>PASS</td>
<td>1</td>
<td>5997681</td>
<td>5978683</td>
<td>5978683</td>
<td>low</td>
<td>107957386</td>
<td>-2</td>
<td>-2</td>
</tr>
</tbody>
</table>

Figure 15: Calculate Profit

6 Nested Formulas

What if you need to satisfy two conditions? For example, categorical variables with more than two categories would require two conditions. As well, some definitions of binary variables would require two conditions.

It is easier to make a profitable movie when the budget is low. So, we are interested in making a stricter definition of profitable – “successful.” The successful variable should equal “successful” if the movie was profitable and the budget category is not low, “unsuccessful” otherwise.

Start by labeling this variable in cell L1, “successful.” In cell L2, we will start the formula with “=if(” however we need to specify that we have two conditions. To do this, we will nest another function inside this “if” function. The “And()” function allows us to list two conditions that both must be true. The formula is now “=if(and(“ followed by the two conditions. The two conditions are that the profitable value is “1” and the budget category is not low. The formula is now “=if(and(K2=1,H2<>"low"), "successful","unsuccessful").” The “< >” indicates not equal to. Now that the logical condition is done, we have to enter value if true and value if false like the profitable variable. However, rather than a binary variable we can use text.

So, if the condition is true the movie is successful, otherwise unsuccessful. So the formula should be “=if(and(K2=1,H2<>"low"), ”successful”,”unsuccessful”).” The text must always be within quotation marks. Press enter and apply the formula to the rest of the column.

| A | B | C | D | E | F | G | H | I | J | K | L | M | N | O |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2 | 1970 Beyond the Valley of the Dolls | PASS | 1 | 5997681 | 5978683 | 5978683 | low | 107957386 | 101995755 | 2 | 2 |

Figure 16: Calculate “Successful”
7 Filtering

Often you may want to limit your analyses to a subset of your data. That is, you may want to exclude some observations. You can do this using filtering. In this case, we want to filter out all of the movies that were unsuccessful.

To do this, highlight all of your data. Then, click on the “Sort & Filter” button and choose “Filter.”

You should see an arrow for a drop-down menu next to each variable label. Each of these drop-down menus allows you to filter the data by a variable value.

To filter out the unsuccessful movies, click on the arrow next to the Successful variable. You should see the possible values that this variable could take. By unchecking unsuccessful, all rows for unsuccessful movies will be hidden.

To remove the filter click on the “Sort & Filter” button and unclick the filter option.

7.1 Calculations with Filtered Data

The filter feature only changes what data is visible. Functions using filtered data would still include the hidden data because the data is still present, just not visible. However, you can copy and paste filtered data to its own worksheet or use the limited autocalculations.
8 Pivot Tables

Similar to the built-in functions, Excel can help automate tables.

8.1 Example I

The first step is the click on the pivot table option in the Insert tab.

![Figure 20: Pivot Table]

Then the “Create PivotTable” window should pop up where you select the data to make the pivot table. We want the pivot table to be placed in another sheet, so we should click on the option for “New Worksheet.”

![Figure 21: Create PivotTable]
Once we have selected data and the location to make the pivot table, we can click “OK.” We will get a blank pivot table.

Figure 22: Empty Pivot Table

On the right of the excel window we could see a variety of options we could choose for the pivot table. We start from the top with the pivot table fields. We could choose different fields to add to our pivot table. These fields are all the column titles from the data we chose. (That is why we want to have clear and informative variable labels, so it is easier for us to make the pivot table.)

Figure 23: Pivot Table Fields
In this case, we want Year as the row labels and Bechdel Test as the column labels. In order to do this we can just drag the fields to the areas below.

![Pivot Table Quadrants](image)

Figure 24: Pivot Table Quadrants

Now if we look at the pivot table, we have row and column labels displayed.

![Pivot Table with Labels](image)

Figure 25: Pivot Table with Labels

The next step would be to choose a value that we want to summarize. The possible values that we could summarize would be budget, revenues, or profit. In this case, we want to summarize profit. Thus we drag “Profit” down to the Values area.

![Pivot Table Values](image)

Figure 26: Pivot Table Values
This table shows the total sum of profit for all movies by year and Bechdel Test result. We could also choose to display the average profit instead of the sum. To do this, click on “Sum of Profit” in the Values area. In the drop-down menu, select “Value Field Settings.” In the pop-up window, click “Summarize Values By.” Then from the drop down menu, choose “Average.”

![Figure 27: Pivot Table Values](image)

Click “OK,” and you will get the pivot table showing the average profit by year and Bechdel Test result.

![Figure 28: Final Pivot Table](image)

You can copy and paste pivot tables to format them for a report. Or you could create a chart!
8.2 Example II

You can also continuously edit and change your pivot table. Let’s create a pivot table to compare the number of films by budget category and Bechdel Test result.

In this case, we want Bechdel Test as the row labels and Budget Category as the column labels. Now we simply want to know how many observations fall into each category. For this, we can change the calculation from average to count.

Then the final Pivot Table should look like the following figure.