



Quick MAVEN Reminders

- Reminder to check your Immediate, Routine, Pending Case Report Form Workflows!
- 2023 Case Closing
 - Starting this week, DSAI staff will complete any 2023 cases that remain in the workflows by completing steps 2-4 in the Administrative Question Package. Staff will leave a note in any cases where question packages are updated.



Quick MAVEN Reminders

- If no steps are filled out:

Notes  

Kate Hamdan [khamdantest] - (Generic) 02/08/2024 05:00 PM
Completing LBOH steps 2, 3, and 4 - clearing out incomplete 2023 cases from the LBOH CRF pending review workflow. No investigation attempted or completed.

- If any steps are filled out:

Notes  

Kate Hamdan [khamdantest] - (Generic) 02/08/2024 05:03 PM
Completing LBOH step 4 - clearing out incomplete 2023 cases from the LBOH CRF pending review workflow.



Massachusetts Department of Public Health

MDPH Tuesday Infectious Disease Webinar Series

PivotTable Training for LBOH

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Overview of MAVEN Reports

- Which reports are accessible to you?
- Why are reports useful?
- What's in a report?
 - Case information
 - Tracking information
 - Timeliness
- Best reports to use for PivotTables
- How to run a report

Which Reports can you access?

Report access will vary depending on the role and responsibilities of the user in MAVEN. For example: Local Board of Health staff who is responsible for disease case investigation and following up will only have access LBOH related reports.

Examples of Commonly ran LBOH reports.

- LBOH Basic Line List
- LBOH Events by Time Period
- LBOH Count – Events Per Disease and Classification in Jurisdiction
- COVID-19 LBOH Confirmed and Probable Line List Report

Why are reports useful?

Usefulness of Reports

- Reports provide a view of all events within a jurisdiction or facility that exist in MAVEN regardless if they're recent, old, or the investigation status is pending or completed.
- Reports can be used for tracking information.
- Depending on the report type the output can be aggregate or list format.
- Timeliness of the data in reports allows for quicker response and follow-up.

Information in a Report

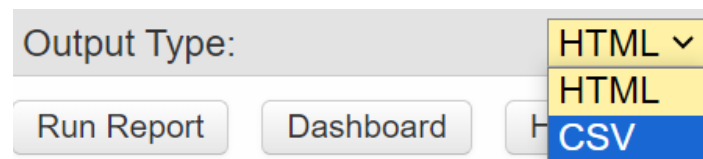
- Reports include case information, demographic information, case counts, and notes.

Best Reports for PivotTables

- The best type of report to use in a PivotTable is a case-level report formatted as a list.
- Microsoft Excel tables are already in list format and are good candidates for PivotTable source data.

CaseID	Disease	Disease Classification	Event Date	Create Date	First Name	Middle Name	Last Name	County	CRF_COMPLETE	CRF_COMPLETED_BY
100002504	MENUT	CONFIRMED	3/7/2023	3/7/2023	Tammy	T	Menutest	Middlesex County	YES	LBOH
100003870	BAB	PROBABLE	9/1/2023	12/8/2023	Frank	A	Babtest	Middlesex County	YES	LBOH
100003878	LEG	CONFIRMED	9/1/2023	12/8/2023	Joey	I	Legtest	Middlesex County	YES	LBOH

- Most MAVEN reports contain case-level information in list format. Reports can be download as CSV, Excel, and HTML files. The CSV file can be opened using Microsoft Excel.



Output Type: HTML ▼

Run Report Dashboard HTML CSV

How to run a report

- Step 1: Navigate to reports page
Select the report that you would like to run.
- Step 2: Select parameters
Parameters allow you to customize your report output. Different reports may have different options for parameters.

Most reports will include at minimum: Event Date, Report Format, Classification, and Official City.

How to run a report (cont.)

- Step 3: Run Report

When you have your parameters set, hit 'Run Report'.

If you ran the report in CSV format, a file will appear in your downloads folder or the folder where your file downloads usually default.

***Note:** Depending on the size of your report, the export may take a few minutes to complete. Please, be patient and do not navigate away from the screen while the report is running.

If you ran the report in HTML format, a new screen will appear in your web browser with your report.

Please make sure to delete the file from your downloads or default folder once you have moved or stored it appropriately.

Overview of PivotTables

- What are PivotTables and why are they useful?
- How to set up a PivotTable
 - Navigating Excel
 - Set up your data
 - Inserting a Pivot Table
- Summarizing data with a PivotTable
- Tips and tricks
 - Updating a PivotTable
 - Saving your results
 - Adding charts
 - More resources

Why use a PivotTable?

F	G	H	I
Age (in years)	Gender	Is case Hispanic?	Race
60.0219	Female	No	White
85.1116	Male	No	White
70.3655	Female	No	White
53.3142	Male	No	White
79.4552	Male	Unknown	White
67.9398	Male	No	White
55.1321	Female	No	White
83.3922	Female	Unknown	White
55.4771	Male	Yes	White
58.6502	Female	Unknown	White,Other
28.898	Male	No	White,Other
32.9062	Female	No	White,American Indian
30.8583	Female	No	White
31.8905	Female	Unknown	White
21.2375	Female	No	White
49.41	Male	No	White
32.7912	Male	No	White
40.0075	Female	No	White

- Looking at a data set like this one, how would you answer the following questions:
 - How many cases have their gender listed as "female"?
 - What percent of cases identify as Hispanic?
 - What's the age distribution of cases?

What are PivotTables?

- A **pivot table** is a table of aggregated, grouped values
- A **PivotTable** is Microsoft's function to create pivot tables
 - Made as a part of Microsoft Excel
 - Other spreadsheet software may have similar functions under a different name
 - Easily aggregates (adds, finds the average of etc.) another table or a set of data by one or more categories
 - For example, a PivotTable could count a list of cases by year and town
- Aggregation can include sums, averages, or other statistics
- Groups can be nearly anything included in the data set
- Can make graphs/charts too
- Useful because it's a fast way to look at data

Example PivotTable

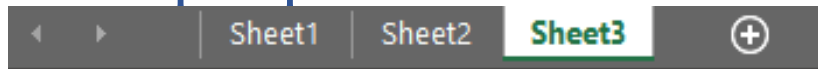
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1														
2														
3	Count of Event Date	Column Labels												
4	Row Labels	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Grand Total
5	2020	1	99	652	99	18	6	10	8	27	46	129		1095
6	2021	116	44	22	17	10	4	6	18	26	17	28	99	407
7	2022	154	21											175
8	Grand Total	270	66	121	669	109	22	12	28	34	44	74	228	1677

Navigating Excel

- Excel is a part of the Microsoft Office software
- For this webinar we are using Microsoft Excel for Microsoft 365 v. 2312 on Windows
 - If you have an older version, you should still have PivotTables (PivotTables were added to Excel in 1994!)
 - Web version of Excel also has PivotTables
- Basic steps for PivotTables will be the same
 - Some parts might have slightly different names, colors, buttons, depending on your version of Excel

Terms

- Excel
 - Refers to Microsoft Excel, a software program sold by Microsoft that creates spreadsheets
- Workbook
 - An Excel file. The file can contain multiple spreadsheets within it.
- Sheet
 - An individual spreadsheet within the workbook
 - Some people call them "tabs" because they look like this at the bottom:



- Ribbon
 - Menu at the top of all Microsoft programs
- Tab
 - Sections within the Ribbon

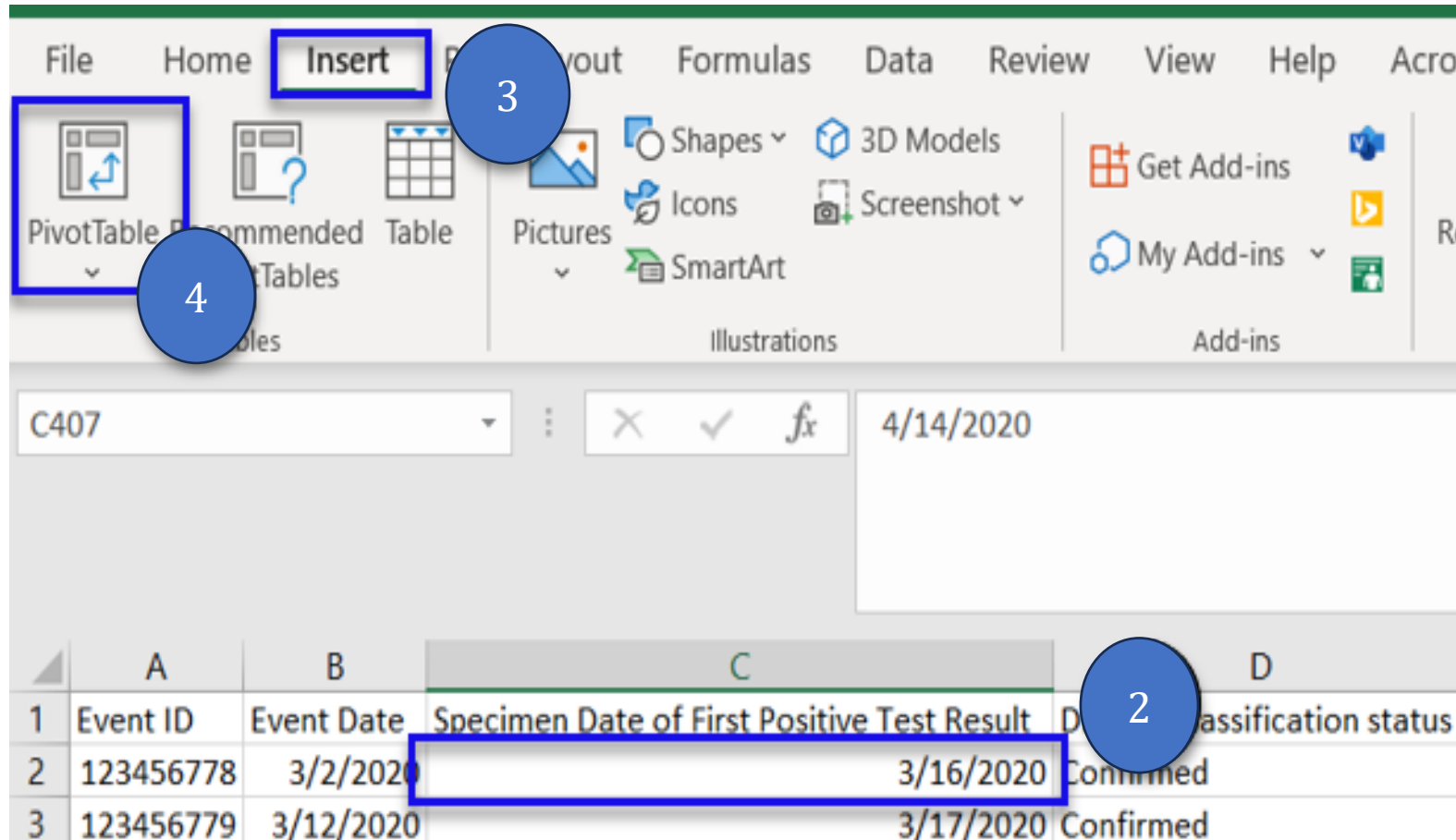
Terms

- CSV
 - Stands for "comma separated values"
 - Is a file type that works with Excel and other programs
 - Is a simpler format and does not have all the functions
 - For example, you cannot save multiple sheets in one CSV file
- XLSX
 - The newer format type for Excel
 - Has all the functionality that Excel has to offer
 - Upgrade of the XLS format

Set up your data

- PivotTables are only as good as the data within them
- Considering deleting or not selecting columns you won't use
 - Do the same for titles, footnotes, or other "extras"
- Seeing a lot of missing or incorrect values? Make sure your cases in MAVEN are filled out completely

How to create a PivotTable



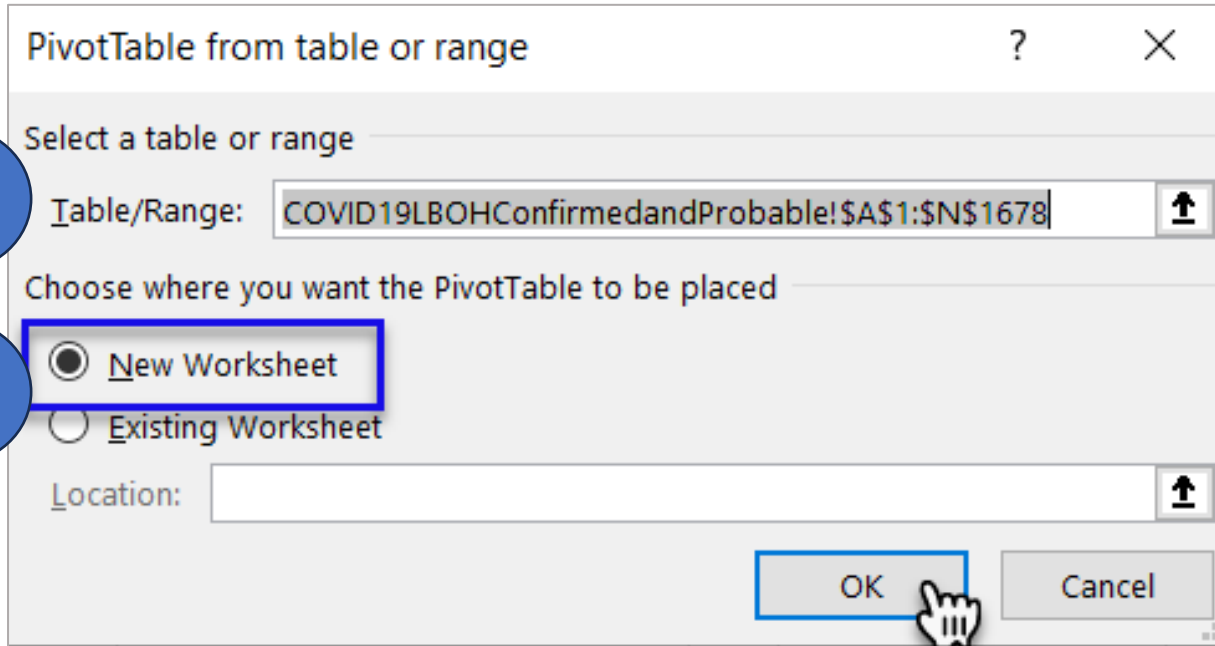
1. Open your Workbook and go to the Sheet with your data
2. Place cursor in one of the fields in the spreadsheet
3. Go to the Ribbon and click on Insert tab
4. Click on PivotTable button

How to create a PivotTable

A new window will open

5. Confirm PivotTable settings

1. Table/ Range includes all your data
2. Select where you want the new PivotTable to be placed (we recommend a new sheet)



New PivotTable

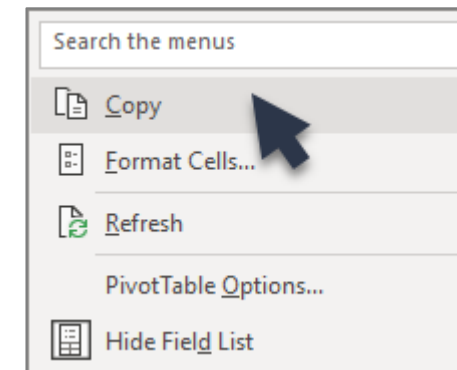
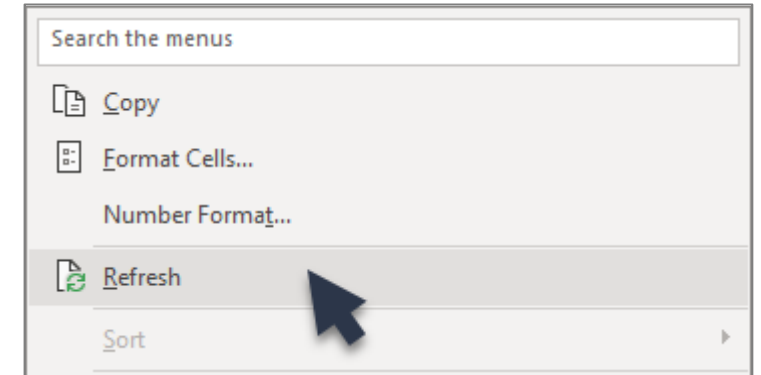
The screenshot shows the Microsoft Excel interface. On the left, a worksheet grid is visible with columns A through G and rows 1 through 26. A blue box highlights the area from row 4 to row 25, column A to column F, labeled "PivotTable4". Inside this box, a text box says "To build a report, choose fields from the PivotTable Field List". Below this, there is a small icon of a PivotTable and a circular inset showing a list of fields with checkboxes, one of which is checked. A blue text box at the bottom of the PivotTable area says "Area where your PivotTable will be".

On the right, the "PivotTable Fields" task pane is open. It has a title "PivotTable Fields" and a subtitle "Choose fields to add to report:". Below this is a search box. A list of fields is shown with checkboxes: "Event ID", "Event Date", "Specimen Date of First Positive Test Result", "Disease classification status", "Name", and "Age". A blue text box next to this list says "Field choices based on what was in the table or data you selected". Below the list is a section titled "Drag fields between areas below:". This section contains four areas: "Filters", "Columns", "Rows", and "Values". A blue text box in the center of this section says "Area where you can add fields to your PivotTable from the list above".

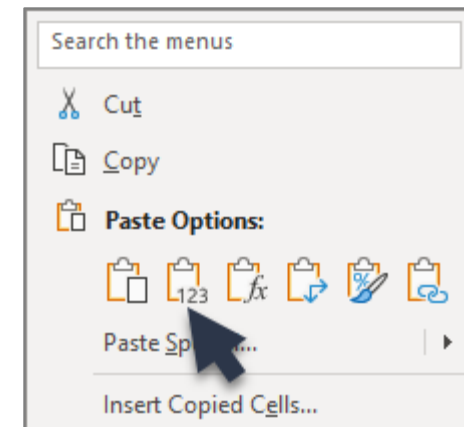
At the bottom of the Excel window, the sheet tabs are visible. The first tab is "Sheet1" and the second is "COVID19LBOHConfirmedandProbable". A blue box highlights the "Sheet1" tab, and a blue text box next to it says "Navigate between sheets at the bottom of the page".

Tips and Tricks

- Refresh the data in your PivotTable
 - If you correct or update data in your data table, you want it to show on the PivotTable
 - Right-click on the PivotTable and choose Refresh
 - Remember! Making corrections and updates in MAVEN is the only way to make sure that the data are correct every time you run your reports
- Save your results
 - If you don't want your table to be changed or want to change the formatting, consider saving your PivotTable as a separate table
 - Select the whole table, copy it, go to a new place in your workbook, and paste it, choosing "Values" in the Paste Options



1



2

Tips and Tricks

- Add charts with PivotCharts
 - Once you have mastered PivotTables, you can move on to PivotCharts
 - Same format, windows, and basic functions as PivotTables
 - Fast way to make a chart

Pivot Table Resources

- Previous MAVEN Webinars
 - [Beginner level introduction](#) (7 minutes)
 - [Intermediate session](#) (1 hour and 5 minutes)
- [StoryMap](#)
- YouTube tutorials
 - [Beginner level PivotTable tutorial](#) (13 minutes)
- Microsoft documentation
 - [Overview of PivotTables and PivotCharts](#)
 - [Create a PivotTable to analyze worksheet data](#)
 - More advanced:
 - [Create a PivotChart](#)
 - [Calculate values in a PivotTable](#)
- This recording will be available on MAVEN Help soon.
- Use YouTube and Google to search for other tutorials and resources!

Pivot Table Demonstration

- Practice scenario – start to finish
 - Run a report
 - Opening Excel
 - Adding a PivotTable
 - Finding answers with the PivotTable
 - Saving results