Understanding Complex Results An Introduction to Visualization and pandas

Nick DeRobertis¹

 1 University of Florida Department of Finance, Insurance, and Real Estate

January 27, 2021

DeRobertis (UF) Visualization January 27, 2021 1/24

Table of Contents

Visualization Introduction

2 Tables with Pandas DataFrames

Graphing using Pandas

Why Visualize?

• So far we've had one main output from our model, number of years

Salaries and wealth over time have also been outputs, but we haven't
had a good way of understanding that output. It's a bunch of
numbers.

• This is where visualization comes in. We have some complex result, and want to make it easily interpretable.

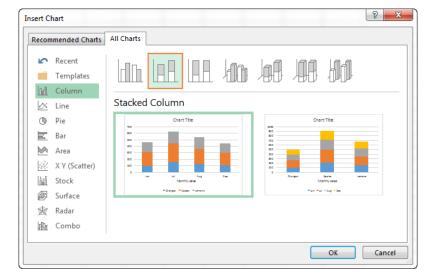
What we Have so Far

Retirement Info

Time	Salaries	Wealths
1	61,200	31,050
2	62,424	48,208
3	63,672	66,537
4	64,946	86,100
5	76,182	109,451
6	77,705	134,350
7	79,259	160,882
8	80,844	189,137
9	82,461	219,209
10	96,727	254,352
11	98,662	291,735
12	100,635	331,480
12	100,635	331,48

DeRobertis (UF) Visualization January 27, 2021 4

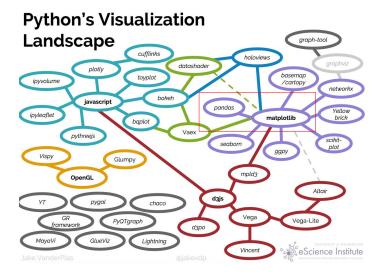
Visualization in Excel



DeRobertis (UF) Visualization January 27, 2021 5 / 24

Intro

An Overwhelming Number of Options in Python



DeRobertis (UF) Visualization January 27, 2021 6/24

Explaining Python Visualization in This Class

• Ultimately, we will be creating graphs using matplotlib but we won't use it directly.

• Instead, we will use pandas

• pandas is actually creating its graphs using matplotlib for us, but it is simpler to use.

DeRobertis (UF) Visualization January 27, 2021 7/24

Visualization in Excel

Adding Graphs to the Dynamic Salary Retirement Excel Model

- I will now go back to the "Dynamic Salary Retirement Model.xlsx" Excel model to add visualization
- I have also uploaded the completed workbook from this exercise as "Dynamic Salary Retirement Model Visualized.xlsx"
- Follow along as I go through the example.

DeRobertis (UF) Visualization January 27, 2021 8/24

Table of Contents

Visualization Introduction

Tables with Pandas DataFrames

Graphing using Pandas

DeRobertis (UF) Visualization January 27, 2021 9/24

Some Setup Before we can Visualize in Python

- pandas does **a lot** more than just graphing. We will use it throughout the rest of the class.
- Previously we've worked with lists, numbers, strings, and even our custom types (our model dataclasses)
- pandas provides the DataFrame as a new type that we can use.
- Before we can get to graphing, we must learn how to use the DataFrame.

DeRobertis (UF) Visualization January 27, 2021 10 / 24

What is a DataFrame?

A DataFrame is essentially a table. It has rows and columns, just like in Excel.

Some Features of the DataFrame

- Add or remove columns or rows
- Group by and aggregate
- Load in and output data from/to Excel and many other formats
- Merge and join data sets
- Reshape and pivot data
- Time-series functionality
- Slice and query your data
- Handle duplicates and missing data

DeRobertis (UF) Visualization January 27, 2021 11/24

A Basic DataFrame Example

```
>>> import pandas as pd
>>> df = pd.DataFrame()
>>> df['Sales'] = [1052, 212, 346]
>>> df['Category'] = ['Aprons', 'Apples', 'Bowties']
df
```

Sales Category 0 1052 Aprons 1 212 Apples 2 346 Bowties

DeRobertis (UF) Visualization January 27, 2021 12 / 24

Introduction to Pandas

Creating and Using Pandas DataFrames

- I will now go through the notebook in "Intro to Pandas and Table Visualization.ipynb"
- Follow along as I go through the example.
- We will complete everything up until DataFrame Styling

DeRobertis (UF) Visualization January 27, 2021 13 / 24

Intro Pandas Lab

Getting Started with Pandas

- Work off of the Jupyter notebook Pandas and Visualization Labs.ipynb
- 2 Complete the lab exercises in the first section entitled "Pandas"

Resources: Slide 26

DeRobertis (UF) Visualization January 27, 2021 14 / 24

Styling Pandas DataFrames

• It is possible to add styling to our displayed tabular data by styling the DataFrame

• The styling is very flexible and essentially allows you to do anything

 Out of the box, it is easy to change colors, size, and positioning of text, add a caption, do conditional formatting, and draw a bar graph over the cells.

DeRobertis (UF) Visualization January 27, 2021 15 / 24

Introduction to Pandas

Creating and Using Pandas DataFrames

- I will now go through the next section in "Intro to Pandas and Table Visualization.ipynb"
- Follow along as I go through the example.
- This time we are covering the remainder of the notebook starting from "DataFrame Styling"

DeRobertis (UF) Visualization January 27, 2021 16 / 24

Pandas Styling Lab

Styling Pandas DataFrames

- Keep working with the same lab Jupyter Notebook
- Complete the lab exercises in the second section entitled "Pandas Styling"

Resources: Slide 27

DeRobertis (UF) Visualization January 27, 2021 17 / 24

Table of Contents

Visualization Introduction

2 Tables with Pandas DataFrames

Graphing using Pandas

DeRobertis (UF) Visualization January 27, 2021 18/24

A Minimal Plotting Example

```
Line Graphs using pandas
>>> %matplotlib inline
>>> ret_df.plot.line(x='Time', y='Salaries')

    Salaries

250000
225000
200000
175000
150000
125000
100000 -
 75000
```

DeRobertis (UF)

10

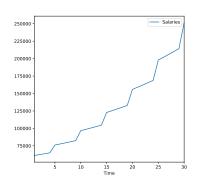
15

20

25

Basic Graph Types: Line Graphs

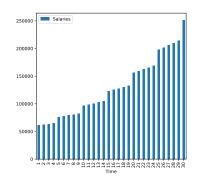




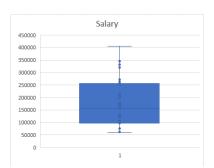
 DeRobertis (UF)
 Visualization
 January 27, 2021
 20 / 24

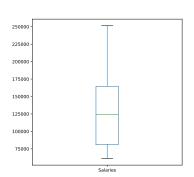
Basic Graph Types: Bar Graphs





DeRobertis (UF) Visualization January 27, 2021 21/24





 DeRobertis (UF)
 Visualization
 January 27, 2021
 22 / 24

Introduction to Graphing

Graphing Using Pandas

- I will now go through "Intro to Graphics.ipynb"
- Follow along as I go through the entire example notebook.

DeRobertis (UF) Visualization January 27, 2021 23 / 24

Intro Visualization Lab

Introduction to Graphing with Pandas

- Meep working with the same lab Jupyter Notebook
- Complete the lab exercises in the final section entitled "Graphics"

Resources: Slide 28

DeRobertis (UF) Visualization January 27, 2021 24 / 24

Lecture Resources

Lecture Resources

- Slides Understanding Complex Results
- 2 Lecture Notes Understanding Complex Results
- Opnic Salary Retirement Model Visualized
- Intro to Pandas and Table Visualization
- 10 Minutes to Pandas (Official Intro)
- Pandas Official Styling Guide
- Intro to Graphics
- Pandas Official Visualization Guide
- Opnic Salary Retirement Model Visualized
- Pandas and Visualization Labs

Intro Pandas Lab Resources

Getting Started with Pandas Resources

- Pandas and Visualization Labs
- Slides Understanding Complex Results
- 10 Minutes to Pandas (Official Intro)

Exercise: Slide 14

Pandas Styling Lab Resources

Styling Pandas DataFrames Resources

- Pandas and Visualization Labs
- Slides Understanding Complex Results
- Pandas Official Styling Guide

Exercise: Slide 17

Intro Visualization Lab Resources

Introduction to Graphing with Pandas Resources

- Pandas and Visualization Labs
- Slides Understanding Complex Results
- Pandas Official Visualization Guide

Exercise: Slide 24