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Digital Area for Networking  
Teachers and Educators



Co-funded by  
the European Union



# Data Analysis Using Pivot Tables

## Grouping

WEEK 11

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# Data Analysis Using Pivot Tables

## Grouping

If you've ever experimented with pivot tables on your own, you've probably found that when you insert a date field into the ROWS or COLUMNS section of a pivot table, you don't see the list of unique dates for that field as you'd expect, but you see the months. This is because the data of one month was automatically grouped into one row for the given month. It makes sense because you are rarely interested in such detail as individual days. Nevertheless, you do not have to accept the grouping of data by months and you can change it to another type of grouping or cancel grouping.

In this chapter we will learn how to group field values. We'll find that grouping varies by field data type:

- date-type fields,
- number-type fields,
- text-type fields.

## Grouping Date Fields

Grouping date fields is completely self-explanatory. Companies are not interested in financial results for individual days, rather they are interested in financial results for individual months, quarters or years, and Excel is ready for this.

If you have a date field in the ROWS or COLUMNS section of the pivot table and you want to see the data grouped in a different way than is set up, click on any date value in the pivot table and click the **GROUP FIELD** button on the **PIVOT TABLE ANALYZE** context tab. In the **GROUPING** dialog box, choose the desired time units by which you want to group the date. It is possible to select several time units by clicking the mouse.



# Data Analysis Using Pivot Tables

The 'Grouping' dialog box is shown on the left, with the 'By' property set to 'Months' and 'Number of days' set to 1. The 'Starting at' date is 01.01.2016 and the 'Ending at' date is 01.01.2017. The PivotTable on the right shows the results of grouping by date, with 'Sum of Quantity' as the value field.

Row Labels	Sum of Quantity
Qtr1	16198
I	5655
II	4926
III	5617
Qtr2	16001
IV	5238
V	5437
VI	5326
Qtr3	16194
VII	5480
VIII	5506
IX	5208
Qtr4	16158
X	5506
XI	5228
XII	5424
<b>Grand Total</b>	<b>64551</b>

Figure 1 Dialog box Grouping and an example of grouping by date field

You can ungroup a group by clicking on any grouped value and clicking on the **UNGROUP** button on the **PIVOT TABLE ANALYZE** context tab.

## Grouping Number Fields

Number fields can be grouped in a similar way to date fields, but the **GROUPING** dialog box looks different. In this box, using the **BY** property, you set the size of the number interval that will form groups of numbers.

The 'Grouping' dialog box is shown on the left, with the 'By' property set to 5, 'Starting at' set to 20, and 'Ending at' set to 39. The PivotTable on the right shows the results of grouping by number, with 'Count of Quantity' as the value field.

Row Labels	Count of Quantity
20-24	577
25-29	498
30-34	559
35-39	556
<b>Grand Total</b>	<b>2190</b>

Figure 2 Dialog box Grouping and an example of grouping by number field



# Data Analysis Using Pivot Tables

## Grouping Text Fields

For text fields, grouping works quite differently than for date or number fields. In principle, it is not possible to make any text intervals here, so there is no dialog box for grouping here, and grouping must be done only manually.

If you want to group several text values in the rows or columns of the pivot table, you must select them in a block by clicking with the SHIFT or CTRL keys, and then clicking the **GROUP SELECTION** button on the **PIVOT TABLE ANALYZE** context tab. The default group name GroupX can be renamed by simply rewriting it.

After the first group is created, the remaining values remain ungrouped, so you can continue grouping further in the same way. Just select the values at the value level and not at the group level.

Row Labels	Sum of Quantity
<b>Men</b>	<b>38086</b>
David	12668
Milan	13078
Pavel	12340
<b>Women</b>	<b>26465</b>
Jitka	13959
Monika	12506
<b>Grand Total</b>	<b>64551</b>

Figure 3 An example of manual grouping by text field



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Project Number: 2020-1-CZ01-KA226-HE-094368