

How can I group data by month and year in a pivot table using Excel?

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RECOMMENDED CITATION

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The process of grouping data by month and year in a pivot table using Excel involves organizing data from a larger dataset into specific time periods, such as months and years. This can be achieved by creating a pivot table, which is a powerful tool in Excel that allows for the manipulation and analysis of data in a structured and organized manner. By using the group function in the pivot table, the data can be grouped by month and year, allowing for a more comprehensive and concise understanding of trends and patterns within the data. This approach can be particularly useful for financial or sales data, where analyzing data by specific time periods is essential for making informed decisions.

Excel: Group by Month and Year in Pivot Table

Often you may want to group data by month and year in a pivot table in Excel.

Fortunately this is easy to do using the pivot table Group function.

The following example shows how to use this function in practice.

Example: Group by Month and Year in Pivot Table

Suppose we have the following dataset in Excel that shows the total sales made by some company during various days:

	A	B	C	D	E
1	Date	Sales			
2	1/12/2021	6			
3	1/14/2021	5			
4	1/15/2022	5			
5	1/25/2022	10			
6	2/3/2021	12			
7	2/5/2022	5			
8	2/10/2022	3			
9	3/1/2021	4			
10	3/14/2021	5			
11	3/22/2022	6			
12	3/24/2022	1			
13					
14					
15					
16					
17					

To group the sales by month and year, we can first create a pivot table.

Highlight the cells in the range A1:B12, then click the Insert tab along the top ribbon, then click PivotTable.

In the new window that appears, we'll choose to insert the Pivot Table in cell D1 of the current worksheet:

	A	B	C	D	E	F	G	H
1	Date	Sales						
2	1/12/2021	6						
3	1/14/2021	5						
4	1/15/2022	5						
5	1/25/2022	10						
6	2/3/2021	12						
7	2/5/2022	5						
8	2/10/2022	3						
9	3/1/2021	4						
10	3/14/2021	5						
11	3/22/2022	6						
12	3/24/2022	1						
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								

PivotTable from table or range

Select a table or range

Table/Range: Sheet2!\$A\$1:\$B\$12

Choose where you want the PivotTable to be placed

☐ New Worksheet

☒ Existing Worksheet

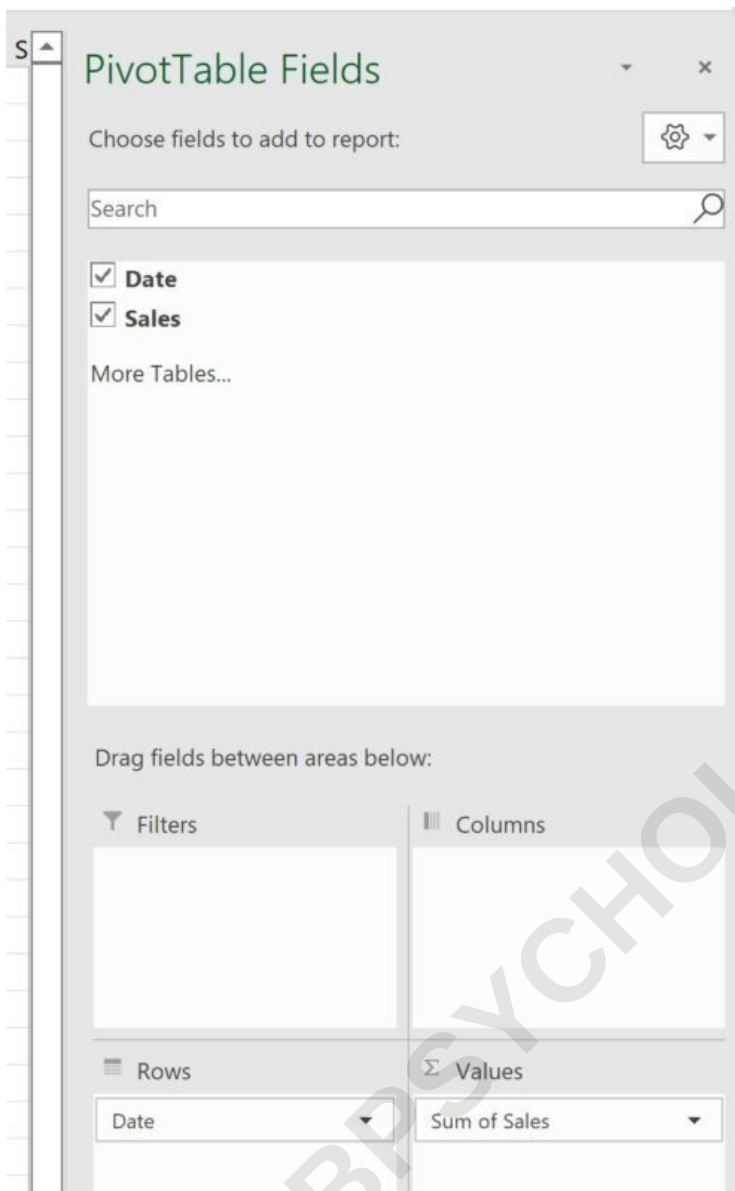
Location: Sheet2!\$D\$1

Choose whether you want to analyze multiple tables

☐ Add this data to the Data Model

OK Cancel

In the window that appears on the right side of the screen, drag Date to Rows and Sales to Values:



The following pivot table will automatically be populated:

	A	B	C	D	E	F
1	Date	Sales		Row Labels ▼	Sum of Sales	
2	1/12/2021	6		12-Jan	6	
3	1/14/2021	5		14-Jan	5	
4	1/15/2022	5		15-Jan	5	
5	1/25/2022	10		25-Jan	10	
6	2/3/2021	12		3-Feb	12	
7	2/5/2022	5		5-Feb	5	
8	2/10/2022	3		10-Feb	3	
9	3/1/2021	4		1-Mar	4	
10	3/14/2021	5		14-Mar	5	
11	3/22/2022	6		22-Mar	6	
12	3/24/2022	1		24-Mar	1	
13				Grand Total	62	
14						
15						
16						
17						
18						

To group the data by month and year, right click on any of the dates in the pivot table.

Then click Group in the dropdown menu.

D2 Calibri 11 A \$ % , []

	A	B	C	
1	Date	Sales		Row Labels
2	1/12/2021	6		12-Jan
3	1/14/2021	5		14-Jan
4	1/15/2022	5		15-Jan
5	1/25/2022	10		25-Jan
6	2/3/2021	12		3-Feb
7	2/5/2022	5		5-Feb
8	2/10/2022	3		10-Feb
9	3/1/2021	4		1-Mar
10	3/14/2021	5		14-Mar
11	3/22/2022	6		22-Mar
12	3/24/2022	1		24-Mar
13				Grand Total
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				
25				
26				

Context Menu:

- Copy
- Format Cells...
- Refresh
- Sort >
- Filter >
- Subtotal "Date" ✓
- Expand/Collapse >
- Group...
- Ungroup...
- Move >
- Remove "Date" ✗
- Field Settings...
- PivotTable Options...
- Hide Field List

D	E	F	G	H	I
Row Labels	Sum of Sales				
12-Jan	6				
14-Jan	5				
15-Jan	5				
25-Jan	10				
3-Feb	12				
5-Feb	5				
10-Feb	3				
1-Mar	4				
14-Mar	5				
22-Mar	6				
24-Mar	1				
Grand Total	62				

Grouping ? X

Auto

☒ Starting at: 1/12/2021

☒ Ending at: 3/25/2022

By

Seconds
Minutes
Hours
Days
Months
Quarters
Years

Number of days: 1

OK Cancel

The sales in the pivot table will automatically be grouped by month and year:

	A	B	C	D	E	F
1	Date	Sales		Row Labels	Sum of Sales	
2	1/12/2021	6		2021	32	
3	1/14/2021	5		Jan	11	
4	1/15/2022	5		Feb	12	
5	1/25/2022	10		Mar	9	
6	2/3/2021	12		2022	30	
7	2/5/2022	5		Jan	15	
8	2/10/2022	3		Feb	8	
9	3/1/2021	4		Mar	7	
10	3/14/2021	5		Grand Total	62	
11	3/22/2022	6				
12	3/24/2022	1				
13						
14						
15						
16						
17						
18						
19						

We can now see the sum of sales, grouped by month and year.

For example:

A total of 11 sales were made in January 2021. A total of 12 sales were made in February 2021.

And so on.

Additional Resources

The following tutorials explain how to perform other

common operations in Excel:

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