How to Easily Group Dates by Month and Year in a Pivot Table

Authored by

stats writer

November 30, 2025

The Pivot table is arguably one of the most powerful features available within spreadsheet software like Excel. It serves as an indispensable tool for summarizing, analyzing, exploring, and presenting large volumes of data efficiently. While simply summarizing total sales or counts is useful, true insight often lies in understanding trends over time. When dealing with time-series data--data points recorded sequentially over time--the ability to aggregate results based on specific time periods becomes essential for robust data analysis. The standard daily data points, while granular, can often obscure higher-level patterns that emerge only when viewed monthly or annually.

Organizing data by time intervals is fundamental when seeking to identify seasonality, track performance metrics, or compare results across distinct periods. For instance, a finance department might need to compare quarterly revenue, or a sales team might look for month-over-month growth. In these scenarios, grouping by both month and year within a Pivot table provides the perfect balance of detail and summary. This method prevents the confusion of having results from different years lumped into the same month (e.g., January 2021 sales mixed with January 2022 sales), ensuring that comparisons are accurate and meaningful, allowing you to easily compare data across multiple months or years.

Fortunately, Microsoft Excel streamlines this process through its native Group function, specifically designed to handle date and time fields intelligently. This feature allows users to transform granular daily transaction records into manageable, summarized reports organized by weeks, months, quarters, or years, or even combinations thereof. The following comprehensive example shows how to use this function in practice to achieve the desired monthly and yearly aggregation.

Preparing Your Data for Grouping

Before initiating the process of creating a Pivot table, the source data must be appropriately structured. A critical requirement for effective date grouping is that the date column must be formatted correctly as a date field within Excel, not as plain text. If the dates are stored as text, Excel will be unable to recognize the temporal sequence, and the grouping options will either be unavailable or yield inaccurate results. It is always a best practice to review your source data prior to analysis, ensuring consistency and accuracy in data types.

For our practical example, we will utilize a simple sales dataset containing two primary columns: the transaction date and the total sales amount generated on that day. This structure is typical for many business analyses where daily performance needs to be tracked. The sample data covers a span of several months across multiple years, which is ideal for demonstrating the month and year grouping feature, as it requires differentiating between identical months occurring in different years. We are interested in calculating the total sales aggregated monthly, while keeping the year context separate for longitudinal comparisons.

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					

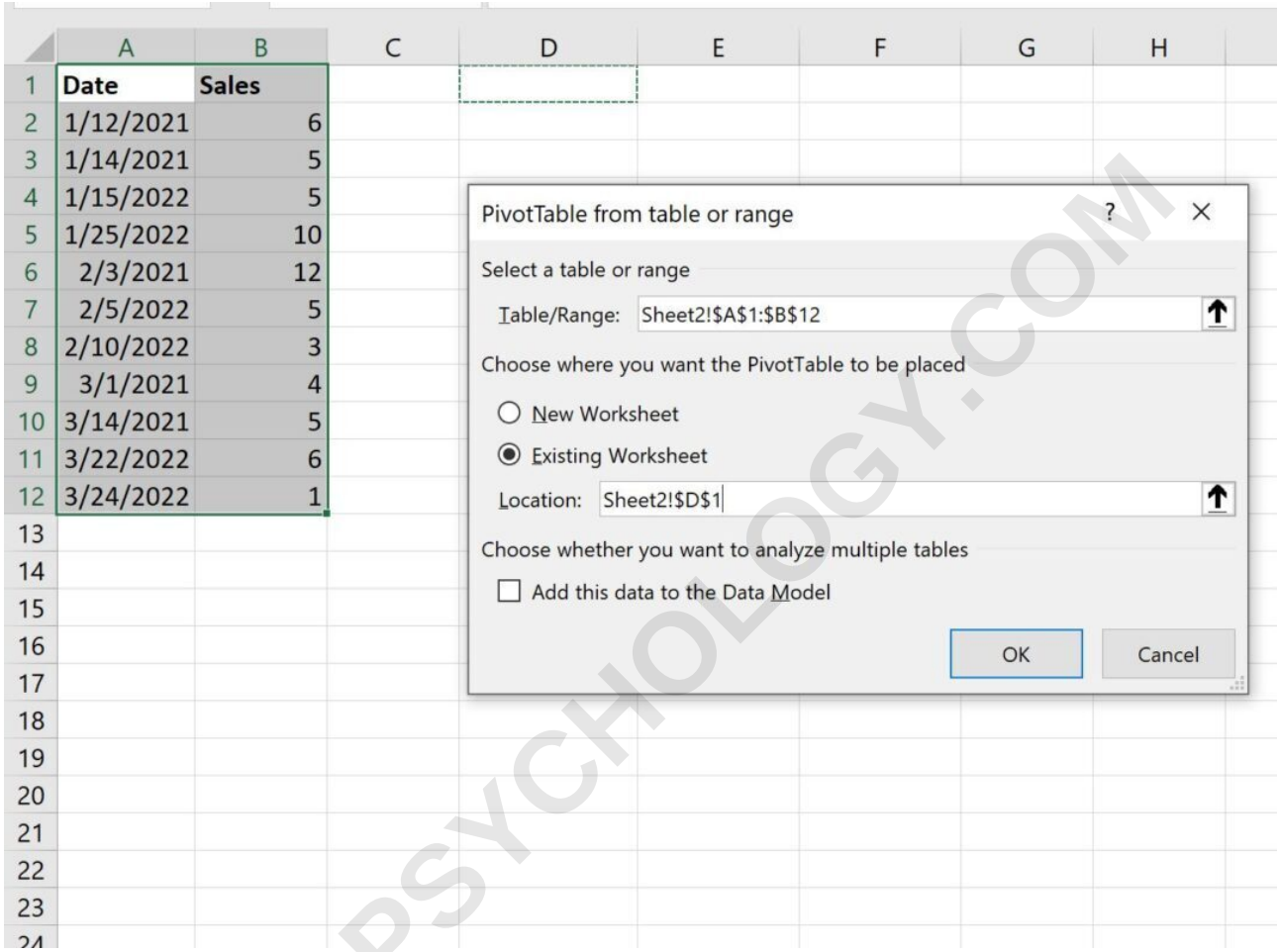
Step-by-Step Guide: Generating the Initial Pivot Table

The first step in transforming this raw data into a summarized report is the creation of the Pivot table itself. This involves selecting the entire range of data to be analyzed and instructing Excel where to place the resulting table. It is crucial to include the column headers (in this case, "Date" and "Sales") in the selection, as these headers become the field names used within the Pivot Table Fields pane. Failing to select the headers will lead to generic field names and confusion during the configuration stage.

To begin, highlight the cells containing your dataset, specifically the range **A1:B12**, ensuring all date and sales entries are included. Once the range is selected, navigate to the **Insert** tab located along the top ribbon of the Excel interface. Within the leftmost section of this tab, you will find the **PivotTable** button. Clicking this button opens a configuration dialog box that prompts the user to confirm the data range and specify the location for the new table.

In the subsequent window that appears, known as the "Create PivotTable" dialog box, you must confirm the data source and choose whether to place the Pivot Table on a New Worksheet or an Existing Worksheet. For demonstration purposes, and to keep the source data visible alongside the summary, we will choose to insert the Pivot Table in cell **D1** of the **current worksheet**. This placement ensures that the raw data (A1:B12) and the analysis tool (starting at D1) are

immediately accessible without switching tabs. After confirming these settings, click **OK** to generate the initial blank Pivot Table structure and open the Pivot Table Fields pane on the right side of the screen.



Configuring Rows and Values

Once the blank Pivot Table structure is established, the next critical phase involves defining which fields will serve as the dimensions (Rows/Columns) and which will serve as the measurable metrics (Values). In the context of time-series analysis, the date field invariably belongs in the **Rows** area to structure the data chronologically, while the quantitative metric (Sales, Count, Revenue, etc.) belongs in the **Values** area, as this is the metric we wish to summarize or aggregate.

In the Pivot Table Fields pane located on the right side of the screen, identify the available fields: **Date** and **Sales**. To structure our analysis by time, drag the **Date** field down into the **Rows** area. Simultaneously, drag the **Sales** field into the **Values** area. By default, Excel will automatically apply the **Sum** aggregation function to the Sales field, calculating the total sales for each distinct date

entry present in the source data. If your data contained non-numeric entries or if you intended to count the number of transactions rather than summing the amounts, you might need to manually change the value field settings from Sum to Count.

After successfully dragging these fields, the following initial Pivot table is automatically populated. Note that the Row Labels currently display every individual date from the source dataset, providing a daily breakdown. This granular view confirms that the fields have been placed correctly, but it still lacks the desired monthly and yearly aggregation that is necessary for effective data analysis.

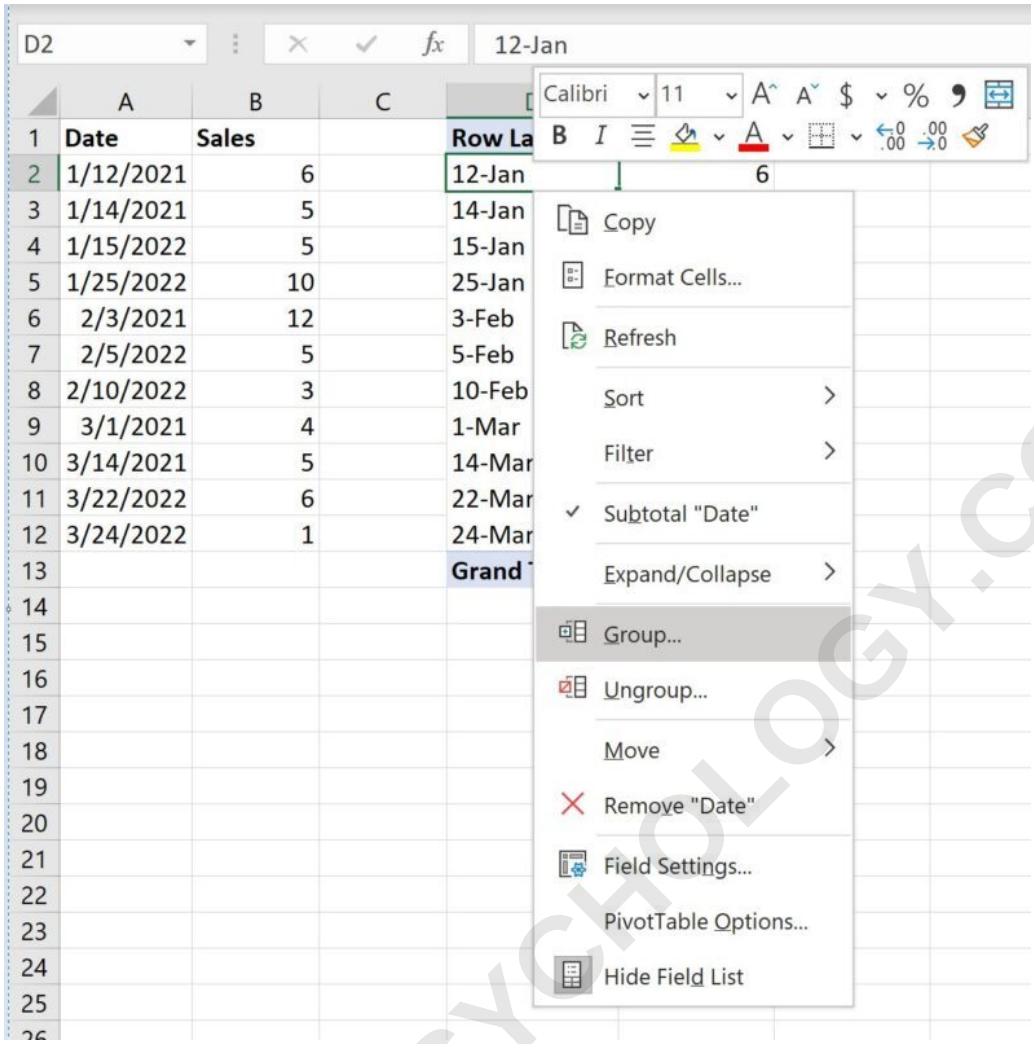
The following pivot table will automatically be populated:

	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						

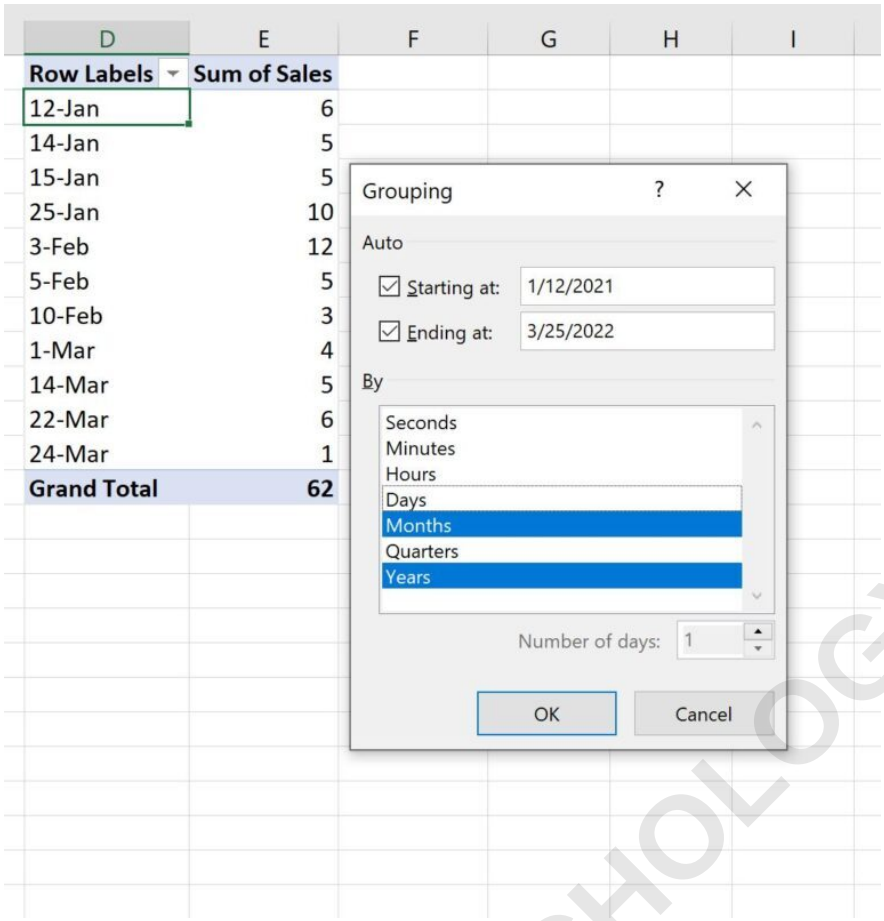
Executing the Grouping by Month and Year

The core mechanism for achieving the desired aggregation lies within the Group function, which is specifically designed to handle date fields. Unlike manual grouping, which is laborious and prone to error, the Pivot Table grouping feature intelligently parses the date field and offers various temporal groupings. To access this feature, you must focus the Pivot Table's attention on the date field itself.

To group the data by month and year, right-click directly on any of the date values displayed in the Row Labels column of the Pivot table (e.g., right-click on the cell containing the date). This action brings up a context menu with several options pertinent to data manipulation within the table. Then click **Group** in the dropdown menu.

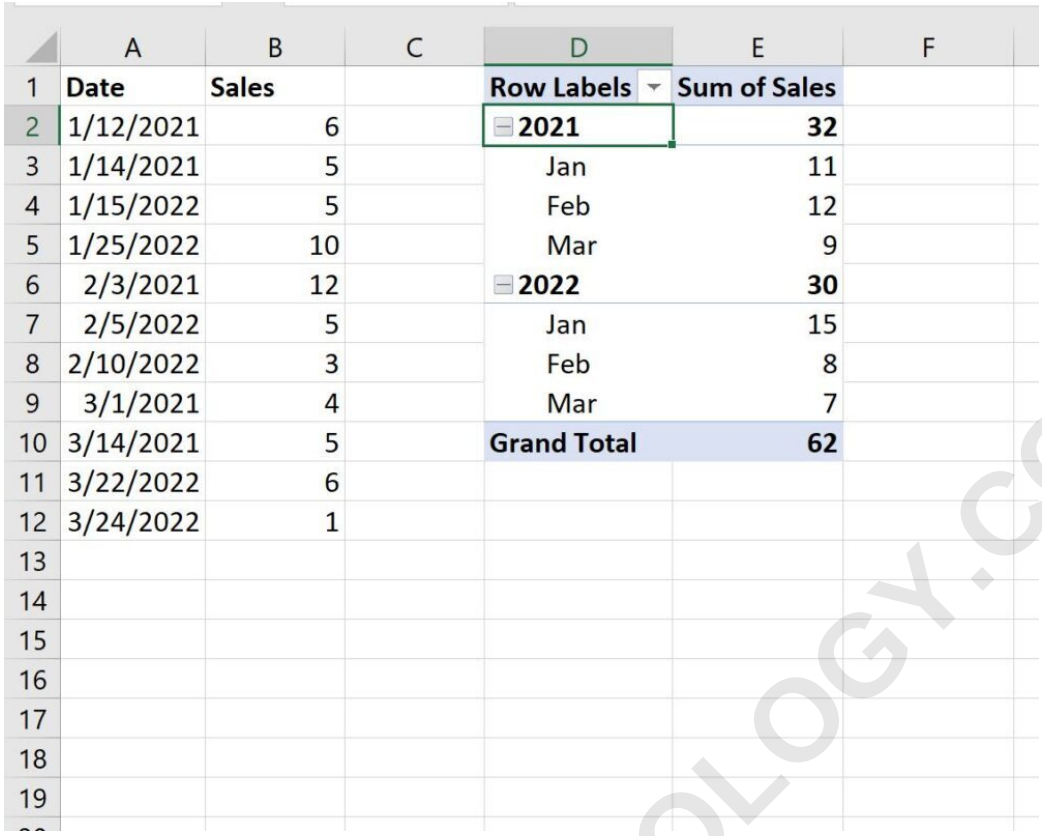


Within the Grouping dialog box, Excel presents a list of time periods under the "By" section, including Seconds, Minutes, Hours, Days, Months, Quarters, and Years. Since our goal is to analyze sales data grouped simultaneously by both month and the corresponding year, we must select **Months** and **Years** in combination. Ensure both of these options are highlighted. Note that if only "Months" were selected, the results would incorrectly aggregate January 2021 sales with January 2022 sales, which is typically undesirable in accurate time-series data analysis. Once both **Months** and **Years** are selected, click **OK**.



Interpreting the Grouped Results

Following the execution of the grouping command, the Pivot table undergoes a radical transformation, presenting the sales data aggregated into clear chronological categories. The resulting table is highly effective because it allows for immediate comparison of performance metrics across defined intervals. The sales in the pivot table will automatically be grouped by month and year, providing a concise summary:



	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 total sum of sales, meticulously organized first by the overarching year, and then broken down by the individual months within that year. This hierarchical arrangement facilitates several types of complex data analysis. For instance, you can easily collapse the individual month details to view only the yearly totals, or expand a specific year to examine monthly volatility. This flexibility is a hallmark of using the Pivot Table's Group function for time-series data.

From the results generated by grouping the source dataset, we can extract specific, aggregated insights instantaneously. For example, focusing on the first year present in the data, we observe the following summarized totals:

A total of **11** sales were made across the month of January 2021.
A total of **12** sales were made across the month of February 2021.

This consolidated view eliminates the noise of daily transactions, enabling managers and analysts to swiftly identify peak performance periods, understand seasonal dips, and generate robust trend reports without needing complex formulas or external tools. And so on.

Advanced Considerations for Date Grouping

While grouping by month and year is the most common temporal aggregation, the Group function

offers additional powerful options that can enhance specialized data analysis tasks. For instance, selecting Quarters alongside Years is highly valuable for financial reporting and business performance reviews, where quarterly results are the standard measure of success. Similarly, combining Days with Months can be useful for detailed week-over-week comparisons, although this often results in a more expansive table.

Another crucial aspect of utilizing the grouping feature is understanding the **Start at** and **End at** settings within the Grouping dialog box. By default, Excel uses the earliest and latest dates in your source data to define the boundaries of the grouping. However, for specialized reporting, such as fiscal year analysis starting in July, analysts can manually adjust the "Start at" date to align the Pivot Table with custom reporting cycles. This is particularly important for companies whose reporting year does not align with the calendar year (January to December).

Finally, analysts should be aware that once a field is grouped, the original date field effectively disappears from the Pivot Table Fields list, replaced by the new grouping fields (e.g., "Years" and "Months"). If you need to revert to the original daily view or apply different groupings, you must right-click one of the grouped fields in the Pivot Table and select **Ungroup**. This action restores the original date field, allowing for re-grouping based on different time intervals, such as Weeks or Quarters, thereby maintaining maximum analytical flexibility.