

Microsoft Excel - Grouping the Pivot Table



Grouping the Pivot Table.

It is possible to group information in a Pivot Table together, this in turn will enable you to perform more complex summary functions such as subtotals.

In the Pivot Table below we have fourteen different companies which we wish to separate into four regions (north, south, east & west).

Ungrouped.

	A	B	C	D	E
1	Drop Page Fields Here				
2					
3	Average of Amount	Expense			
4	Vendor	bill	salary	stock	Grand Total
5	A.B. Properties	1,416.67			1,416.67
6	Ace Power & Light	566.00			566.00
7	Andy Lubert		2,916.67		2,916.67
8	AR Office	5,000.00			5,000.00
9	Carol Stansen		1,877.39		1,877.39
10	City of Franklin	420.61			420.61
11	James Gregory		1,458.33		1,458.33
12	Jim Parsons		1,378.13		1,378.13
13	Karen Bush		1,020.83		1,020.83
14	Lisa La Flamme		1,691.67		1,691.67
15	Mary Fuller		1,458.33		1,458.33
16	Ralph J Cook Garbage	200.00			200.00
17	SW Wholesale			15,649.50	15,649.50
18	Wheelin's Gas Co.	600.00			600.00
19	Grand Total	1,345.00	1,684.76	15,649.50	1,926.91

Grouped.

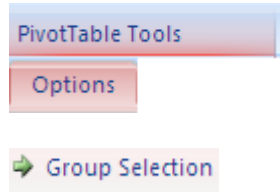
The above screen displays all the companies together with grand totals.

1. To group the "Vendors" together, highlight the vendors that you wish to group.

	A	B	C	D	E
1	Drop Page Fields Here				
2					
3	Average of Amount	Expense			
4	Vendor	bill	salary	stock	Grand Total
5	A.B. Properties	1,416.67			1,416.67
6	Ace Power & Light	566.00			566.00
7	Andy Lubert		2,916.67		2,916.67
8	AR Office				5,000.00
9	Carol Stansen				1,877.39
10	City of Franklin				420.61
11	James Gregory				1,458.33
12	Jim Parsons				1,378.13
13	Karen Bush		1,020.83		1,020.83
14	Lisa La Flamme		1,691.67		1,691.67
15	Mary Fuller		1,458.33		1,458.33
16	Ralph J Cook Garbage	200.00			200.00
17	SW Wholesale			15,649.50	15,649.50
18	Wheelin's Gas Co.	600.00			600.00
19	Grand Total	1,345.00	1,684.76	15,649.50	1,926.91

Select the Vendors that you wish

- From the **Pivot Tools**, click on the **Options** tab. Select the **Group** selection.



followed by **Group Selection**.

Result.

	A	B	C	D	E	F
1						
2						
3	Average of Amount	Expense				
4	Vendor2	Vendor	bill	salary	stock	Grand Total
5	Group1	A.B. Properties	1,416.67			1,416.67
6		Ace Power & Light	566.00			566.00
7		Andy Lubert		2,916.67		2,916.67
8	AR Office	AR Office				5,000.00
9	Carol Stansen			1,877.39		1,877.39
10	City of Franklin		420.61			420.61
11	James Gregory			1,458.33		1,458.33
12	Jim Parsons			1,378.13		1,378.13
13	Karen Bush	Karen Bush		1,020.83		1,020.83
14	Lisa La Flamme	Lisa La Flamme		1,691.67		1,691.67
15	Mary Fuller	Mary Fuller		1,458.33		1,458.33
16	Ralph J Cook Garbage	Ralph J Cook Garbage	200.00			200.00
17	SW Wholesale	SW Wholesale			15,649.50	15,649.50
18	Wheelin's Gas Co.	Wheelin's Gas Co.	600.00			600.00
19	Grand Total		1,345.00	1,684.76	15,649.50	1,926.91

Group 1

An extra column titled "Vendor2" has been inserted, the default name for a group is "Group" and index number.

The default name can be changed, this is done by highlighting the name and entering a new name for the group in the formula bar.

	A	B	C	D	E	F
1	Drop Page Fields Here					
2						
3	Average of Amount		Expense			
4	Vendor2	Vendor	bill	salary	stock	Grand Total
5	North	A.B. Properties	1,416.67			1,416.67
6		Ace Power & Light	566.00			566.00
7		Andy Lubert		2,916.67		2,916.67
8	East	AR Office	5,000.00			5,000.00
9		Carol Stansen		1,877.39		1,877.39
10		City of Franklin	420.61			420.61
11		James Gregory		1,458.33		1,458.33
12	South	Jim Parsons		1,378.13		1,378.13
13		Karen Bush		1,020.83		1,020.83
14		Lisa La Flamme		1,691.67		1,691.67
15	West	Mary Fuller		1,458.33		1,458.33
16		Ralph J Cook Garbage	200.00			200.00
17		SW Wholesale			15,649.50	15,649.50
18		Wheelin's Gas Co.	600.00			600.00
19	Grand Total		1,345.00	1,684.76	15,649.50	1,926.91

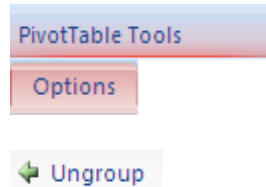
Removing Group Level.

We use the same method as applying the grouping feature as to remove the group level, but selecting the Ungroup option instead of the Group.

1. From the **Pivot Tools**, Select **Options**.

followed by

Ungroup Selection.



Displaying Grouping Subtotals.

Once you have grouped the Pivot table information it is possible to insert a Subtotal for each of the grouping levels.

	A	B	C	D	E	F
1	Drop Page Fields Here					
2						
3	Average of Amount		Expense			
4	Vendor2	Vendor	bill	salary	stock	Grand Total
5	North	A.B. Properties	1,416.67			1,416.67
6		Ace Power & Light	566.00			566.00
7		Andy Lubert		2,916.67		2,916.67
8	East	AR Office	5,000.00			5,000.00
9		Carol Stansen		1,877.39		1,877.39
10		City of Franklin	420.61			420.61
11		James Gregory		1,458.33		1,458.33
12	South	Jim Parsons		1,378.13		1,378.13
13		Karen Bush		1,020.83		1,020.83
14		Lisa La Flamme		1,691.67		1,691.67
15	West	Mary Fuller		1,458.33		1,458.33
16		Ralph J Cook Garbage	200.00			200.00
17		SW Wholesale			15,649.50	15,649.50
18		Wheelin's Gas Co.	600.00			600.00
19	Grand Total		1,345.00	1,684.76	15,649.50	1,926.91

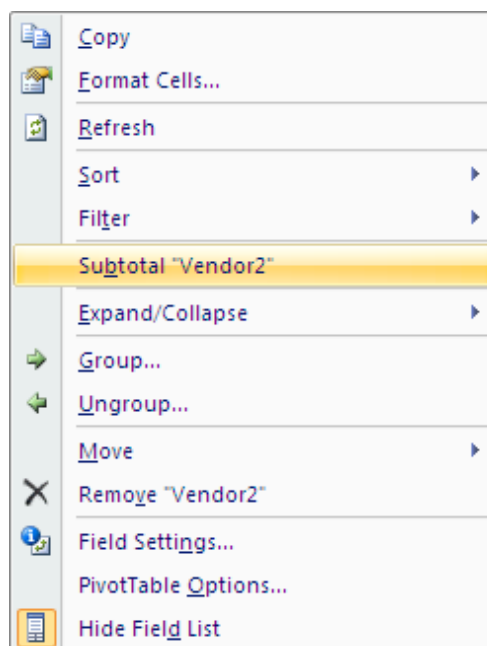
The above example includes the grouping levels for “North, East, South & West”.

The grouping level column has the column heading “Vendor2”, this heading was automatically given when the grouping level was applied to the “Vendors”.

To display the Subtotal for each of the grouping levels, place the cursor over the “Vender2” column.

Right-Click on the mouse, a shortcut menu will be displayed.

Select the shortcut menu option **Subtotal** “Vendor2”.



	A	B	C	D	E	F
1	Drop Page Fields Here					
2						
3	Average of Amount		Expense			
4	Vendor2	Vendor	bill	salary	stock	Grand Total
5	North	A.B. Properties	1,416.67			1,416.67
6		Ace Power & Light	566.00			566.00
7		Andy Lubert		2,916.67		2,916.67
8	North Total		1,351.23	2,916.67		2,366.65
9	East	AR Office	5,000.00			5,000.00
10		Carol Stansen		1,877.39		1,877.39
11		City of Franklin	420.61			420.61
12		James Gregory		1,458.33		1,458.33
13	East Total		1,990.69	1,663.40		1,803.10
14	South	Jim Parsons		1,378.13		1,378.13
15		Karen Bush		1,020.83		1,020.83
16		Lisa La Flamme		1,691.67		1,691.67
17	South Total			1,363.54		1,363.54
18	West	Mary Fuller		1,458.33		1,458.33
19		Ralph J Cook Garbage	200.00			200.00
20		SW Wholesale			15,649.50	15,649.50
21		Wheelin's Gas Co.	600.00			600.00
22	West Total		400.00	1,458.33	15,649.50	2,564.76
23	Grand Total		1,345.00	1,684.76	15,649.50	1,926.91

A subtotal has now been added for each of the four grouping levels.

We have also added a colour (design styles) to the pivot table report to improve the presentation.

