



Technical Institute of Administration

Business Administration

9. Microsoft Excel - Working with Data - Groups and Subtotals

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9. Working with Data - Groups and Subtotals

9.1.Introduction

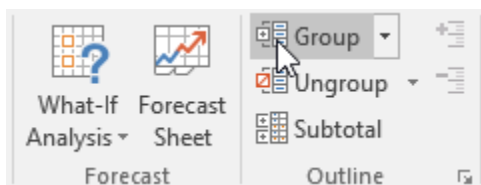
Worksheets with a lot of content can sometimes feel overwhelming and even become difficult to read. Fortunately, Excel can organize data into **groups**, allowing you to easily **show** and **hide** different sections of your worksheet. You can also summarize different groups using the **Subtotal** command and create an **outline** for your worksheet.

9.2.To group rows or columns:

1. Select the **rows** or **columns** you want to group. In this example, we'll select columns **B**, **C**, and **D**.

	A	B	C	D ↓	E
1	Homeroom #	First Name	Last Name	Payment Method	T-Shirt Size
2	105	Melissa	White	Debit Card	Small
3	105	Esther	Yaron	Pending	Small
4	135	Anisa	Naser	Check Bounced	Small
5	220-A	Brigid	Ellison	Cash	Small
6	220-A	Christopher	Peyton-Gomez	Check	Small
7	220-B	Michael	Lazar	Cash	Small
8	220-B	Malik	Reynolds	Cash	Small
9	220-B	Wendy	Shaw	Cash	Small
10	105	Nathan	Albee	Check	Medium

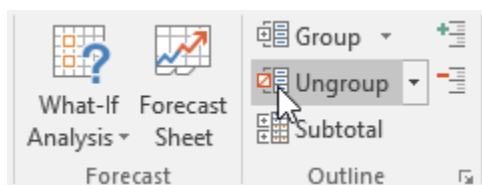
2. Select the **Data** tab on the **Ribbon**, then click the **Group** command.



3. The selected rows or columns will be **grouped**. In our example, columns **B**, **C**, and **D** are grouped.

	A	B	C	D	E
1	Homeroom #	First Name	Last Name	Payment Method	T-Shirt Size
2	105	Melissa	White	Debit Card	Small
3	105	Esther	Yaron	Pending	Small
4	135	Anisa	Naser	Check Bounced	Small
5	220-A	Brigid	Ellison	Cash	Small
6	220-A	Christopher	Peyton-Gomez	Check	Small
7	220-B	Michael	Lazar	Cash	Small
8	220-B	Malik	Reynolds	Cash	Small
9	220-B	Wendy	Shaw	Cash	Small
10	105	Nathan	Albee	Check	Medium

To **ungroup** data, select the grouped rows or columns, then click the **Ungroup** command.

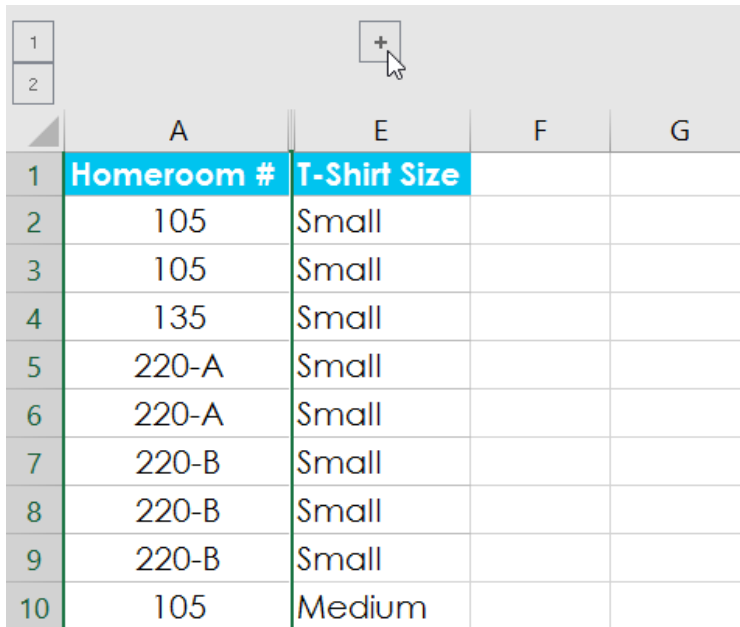


9.3.To hide and show groups:

1. To hide a group, click the minus sign, also known as the **Hide Detail** button.

	A	B	C	D	E
1	Homeroom #	First Name	Last Name	Payment Method	T-Shirt Size
2	105	Melissa	White	Debit Card	Small
3	105	Esther	Yaron	Pending	Small
4	135	Anisa	Naser	Check Bounced	Small
5	220-A	Brigid	Ellison	Cash	Small
6	220-A	Christopher	Peyton-Gomez	Check	Small
7	220-B	Michael	Lazar	Cash	Small
8	220-B	Malik	Reynolds	Cash	Small
9	220-B	Wendy	Shaw	Cash	Small
10	105	Nathan	Albee	Check	Medium

- The group will be **hidden**. To show a hidden group, click the plus sign, also known as the **Show Detail** button.



	A	E	F	G
1	Homeroom #	T-Shirt Size		
2	105	Small		
3	105	Small		
4	135	Small		
5	220-A	Small		
6	220-A	Small		
7	220-B	Small		
8	220-B	Small		
9	220-B	Small		
10	105	Medium		

9.4.Creating subtotals

The **Subtotal** command allows you to automatically **create groups** and use common functions like SUM, COUNT, and AVERAGE to help **summarize** your data. For example, the **Subtotal** command could help to calculate the cost of office supplies by type from a large inventory order. It will create a hierarchy of groups, known as an **outline**, to help organize your worksheet.

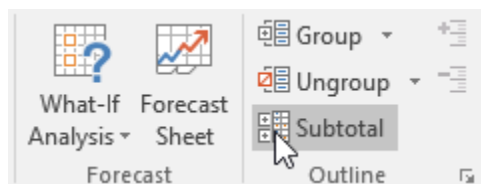
9.4.1. To create a subtotal:

In our example, we'll use the Subtotal command with a T-shirt order form to determine how many T-shirts were ordered in each size (Small, Medium, Large, and X-Large). This will create an **outline** for our worksheet with a **group** for each T-shirt size and then **count** the total number of shirts in each group.

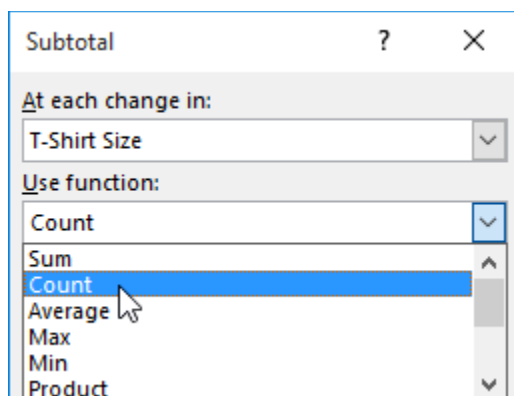
- First, **sort** your worksheet by the data you want to subtotal. In this example, we'll create a subtotal for each T-shirt size, so our worksheet has been sorted by T-shirt size from smallest to largest.

	A	B	C	D	E
1	Homeroom #	First Name	Last Name	Payment Method	T-Shirt Size
2	105	Melissa	White	Debit Card	Small
3	105	Esther	Yaron	Pending	Small
4	135	Anisa	Naser	Check Bounced	Small
5	220-A	Brigid	Ellison	Cash	Small
6	220-A	Christopher	Peyton-Gomez	Check	Small
7	220-B	Michael	Lazar	Cash	Small
8	220-B	Malik	Reynolds	Cash	Small
9	220-B	Wendy	Shaw	Cash	Small
10	105	Nathan	Albee	Check	Medium
11	105	Christiana	Chen	Check Bounced	Medium
12	105	Sidney	Kelly	Check	Medium
13	110	Matt	Benson	Money Order	Medium
14	110	Gabriel	Del Toro	Cash	Medium

2. Select the **Data** tab, then click the **Subtotal** command.



3. The **Subtotal** dialog box will appear. Click the drop-down arrow for the **At each change in:** field to select the **column** you want to subtotal. In our example, we'll select **T-Shirt Size**.
4. Click the drop-down arrow for the **Use function:** field to select the **function** you want to use. In our example, we'll select **COUNT** to count the number of shirts ordered in each size.



5. In the **Add subtotal to:** field, select the **column** where you want the **calculated subtotal** to appear. In our example, we'll select **T-Shirt Size**. When you're satisfied with your selections, click **OK**.

The screenshot shows the 'Subtotal' dialog box with the following settings:

- At each change in:** T-Shirt Size
- Use function:** Count
- Add subtotal to:** T-Shirt Size (selected)
- ☒ Replace current subtotals
- ☐ Page break between groups
- ☒ Summary below data

The 'OK' button is highlighted.

6. The worksheet will be **outlined** into **groups**, and the **subtotal** will be listed below each group. In our example, the data is now grouped by T-shirt size, and the number of shirts ordered in that size appears below each group.

1	2	3		A	B	C	D	E
			1	Homeroom #	First Name	Last Name	Payment Method	T-Shirt Size
			2	105	Melissa	White	Debit Card	Small
			3	105	Esther	Yaron	Pending	Small
			4	135	Anisa	Naser	Check Bounced	Small
			5	220-A	Brigid	Ellison	Cash	Small
			6	220-A	Christopher	Peyton-Gomez	Check	Small
			7	220-B	Michael	Lazar	Cash	Small
			8	220-B	Malik	Reynolds	Cash	Small
			9	220-B	Wendy	Shaw	Cash	Small
			10				Small Count	8
			11	105	Nathan	Albee	Check	Medium
			12	105	Christiana	Chen	Check Bounced	Medium
			13	105	Sidney	Kelly	Check	Medium
			14	110	Matt	Benson	Money Order	Medium
			15	110	Gabriel	Del Toro	Cash	Medium
			16	135	James	Panarello	Check	Medium
			17	135	Chantal	Weller	Debit Card	Medium
			18	220-A	Chevonne	Means	Money Order	Medium
			19	220-B	Samantha	Bell	Check	Medium
			20	220-B	Avery	Kelly	Debit Card	Medium
			21				Medium Count	10

9.4.2. To view groups by level:

When you create subtotals, your worksheet is divided into different **levels**. You can switch between these levels to quickly control how much information is displayed in the worksheet by clicking the **Level** buttons to the left of the worksheet. In our example, we'll switch between all three levels in our outline. While this example contains only three levels, Excel can accommodate up to eight.

1. Click the **lowest level** to display the least detail. In our example, we'll select **level 1**, which contains only the **grand count**, or total number of T-shirts ordered.

1	2	3		A	B	C	D	E
			1	Homeroom #	First Name	Last Name	Payment Method	T-Shirt Size
			33				Grand Count	27
			34					
			35					

2. Click the **next level** to expand the detail. In our example, we'll select **level 2**, which contains each subtotal row but hides all other data from the worksheet.

1	2	3		A	B	C	D	E
			1	Homeroom #	First Name	Last Name	Payment Method	T-Shirt Size
	+		10				Small Count	8
	+		21				Medium Count	10
	+		27				Large Count	5
	+		32				X-Large Count	4
	-		33				Grand Count	27

- Click the **highest level** to view and expand all of your worksheet data. In our example, we'll select **level 3**.

1	2	3		A	B	C	D	E
			1	Homeroom #	First Name	Last Name	Payment Method	T-Shirt Size
			2	105	Melissa	White	Debit Card	Small
			3	105	Esther	Yaron	Pending	Small
			4	135	Anisa	Naser	Check Bounced	Small
			5	220-A	Brigid	Ellison	Cash	Small
			6	220-A	Christopher	Peyton-Gomez	Check	Small
			7	220-B	Michael	Lazar	Cash	Small
			8	220-B	Malik	Reynolds	Cash	Small
			9	220-B	Wendy	Shaw	Cash	Small
			10				Small Count	8
			11	105	Nathan	Albee	Check	Medium
			12	105	Christiana	Chen	Check Bounced	Medium
			13	105	Sidney	Kelly	Check	Medium

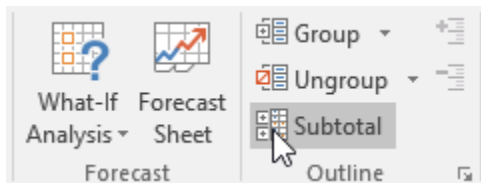
You can also use the **Show** and **Hide Detail** buttons to show and hide the groups within the outline.

1	2	3		A	B	C	D	E
			1	Homeroom #	First Name	Last Name	Payment Method	T-Shirt Size
	+		10				Small Count	8
	+		21				Medium Count	10
			22	105	Derek	MacDonald	Cash	Large
			23	110	Kris	Ackerman	Money Order	Large
			24	110	Regina	Olivera	Pending	Large
			25	135	Jordan	Weller	Money Order	Large
			26	135	Alex	Yuen	Wrong Amount	Large
			27				Large Count	5
			32				X-Large Count	4
			33				Grand Count	27

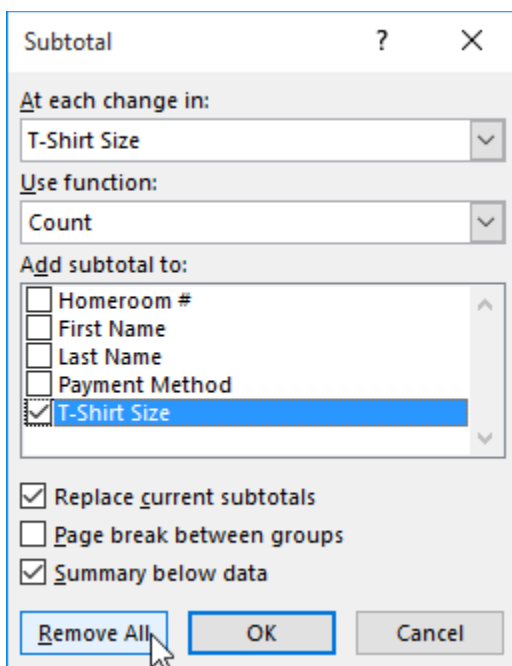
9.4.3. To remove subtotals:

Sometimes you may not want to keep subtotals in your worksheet, especially if you want to reorganize data in different ways. If you no longer want to use subtotaling, you'll need **remove it** from your worksheet.

1. Select the **Data** tab, then click the **Subtotal** command.



2. The **Subtotal** dialog box will appear. Click **Remove All**.



3. All worksheet data will be **ungrouped**, and the subtotals will be **removed**.

To remove all groups without deleting the subtotals, click the **Ungroup** command drop-down arrow, then choose **Clear Outline**.

