Techniques for Grouping Data by Date in Excel

If you have a large data set that includes transaction dates, you may want to aggregate amounts by certain dates. The problem is that you have a separate date for each day of the year. This makes any meaningful analysis difficult.

It would help if just the month or year could be extracted so that data could be accumulated. Well, there are functions for that. There's a year function, a month function and a day function that will extract the year, month and day from a date.

The syntax is the same for all functions. Using =year as an example, the syntax is =year(cell with date). The example below uses 7/15/2015.

	A	B	C
1	7/15/2015	=year(A1)	
2			

The result:

	A	B	C
1	7/15/2015	2015	
2			

If the month was desired, then the function would be =month(A1) as shown below.

B1			f_x	=MONTH(A1)	
	A	B	C	D	E
1	7/15/2015	7			
2					

Many times, I want to present information summarized by month and year. This can be accomplished using the functions, above and combining them with a concept called concatenation. Concatenation is the process of joining two pieces of text data.

There are two ways in Excel to concatenate data. The first is to use the =concatenate function. This function asks you to input the data to be joined together as demonstrated below.

	A	B	C	D	E
1	7/15/2015	=concatenate(			
2		CONCATENATE(**text1**, [text2], ...)			
3					

In this case, text1 will be year(A1)

	A	B	C	D	E
1	7/15/2015	=CONCATENATE(YEAR(A1),			
2		CONCATENATE(text1, **[text2]**, [text3], ...)			
3					

Text2 will be month(A1)

	A	B	C	D	E
1	7/15/2015	=CONCATENATE(YEAR(A1),month(A1)			
2		CONCATENATE(text1, **[text2]**, [text3], ...)			
3					

Close the parentheses and hit Enter.

	A	B
1	7/15/2015	20157
2		

The year and month are now displayed.

The second method is to use the & as a concatenation shortcut. It is displayed below.

	A	B	C	D
1	7/15/2015	=year(A1)&month(A1)		
2				

Press Enter.

	A	B
1	7/15/2015	20157
2		

The same result is displayed.

The =year, =month and =day functions may be used whenever you want to isolate a portion of a date. If you want to combine a year and month, month and year or day and month, concatenation may be utilized to obtain this data. It is an easy way to isolate and group data by date in Excel.