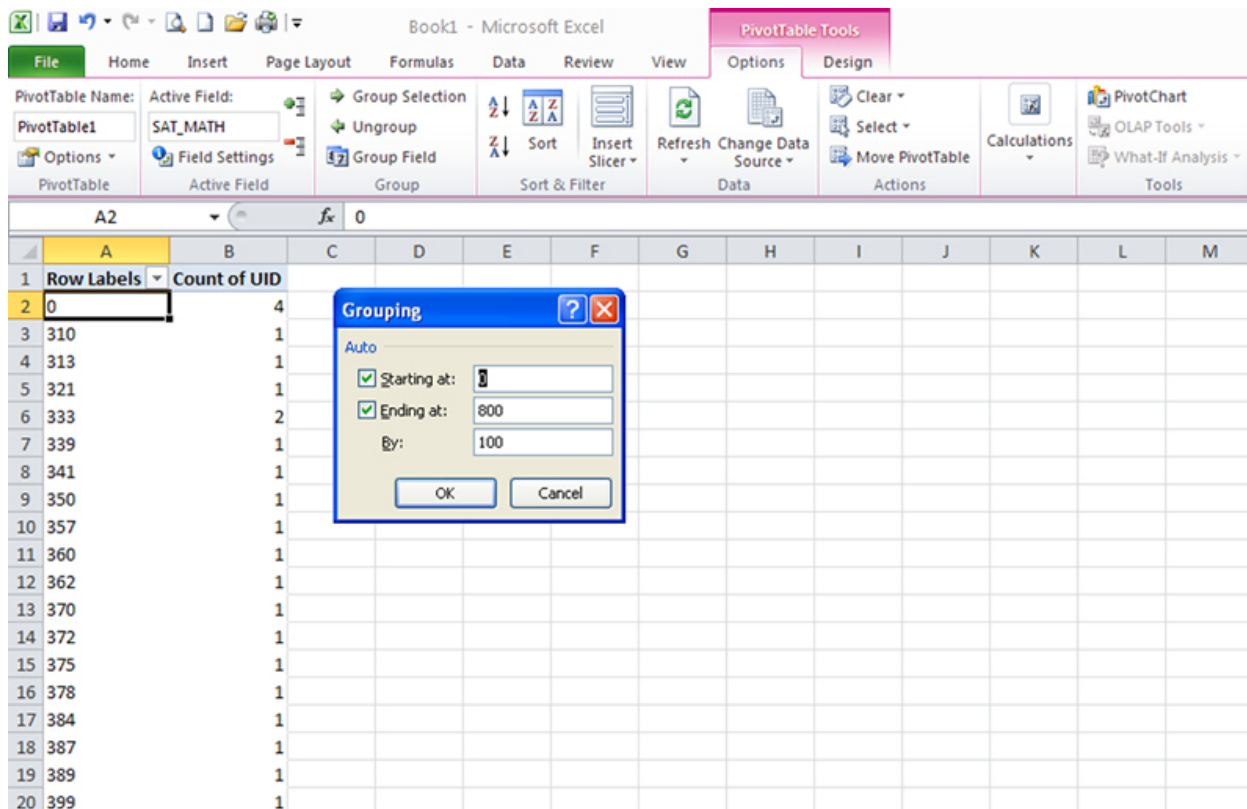


Using Auto Grouping in Excel

There are times when you may need to reformat your data within Excel. Recently I was working on a report for which I needed to categorize SAT Math score into groups. I had been in the habit of generating each group individually until I stumbled upon a feature called Auto Grouping. The Auto Grouping feature allows you to enter a minimum value, a maximum value, and an increment to automatically display your observations into a specified range. This works with numeric variables that do not have any blank values.

1. There are times when you may need to reformat your data within Excel. Recently I was working on a report for which I needed to categorize SAT Math score into groups. I had been in the habit of generating each group individually until I stumbled upon a feature called Auto Grouping. The Auto Grouping feature allows you to enter a minimum value, a maximum value, and an increment to automatically display your observations into a specified range. This works with numeric variables that do not have any blank values.



The screenshot shows the Microsoft Excel interface with the PivotTable Tools ribbon active. The PivotTable Name is 'PivotTable1' and the Active Field is 'SAT_MATH'. The 'Grouping' dialog box is open, showing the 'Auto' tab with the following settings: 'Starting at' is 0, 'Ending at' is 800, and 'By' is 100. The data table below shows SAT Math scores in column A and their counts in column B.

Row Labels	Count of UID
0	4
310	1
313	1
321	1
333	2
339	1
341	1
350	1
357	1
360	1
362	1
370	1
372	1
375	1
378	1
384	1
387	1
389	1
399	1

2. This may produce ranges that may not be exactly how you want your report to appear. In this case you can override these default values and enter a minimum value, a maximum value and an increment of your choosing.

The screenshot shows the Microsoft Excel interface with the PivotTable Tools ribbon active. The PivotTable is named 'PivotTable1' and has 'SAT_MATH' as the Active Field. The PivotTable data is as follows:

Row Labels	Count of UID
0	4
310	1
313	1
321	1
333	2
339	1
341	1
350	1
357	1
360	1
362	1
370	1
372	1
375	1
378	1
384	1
387	1
389	1
399	1

A 'Grouping' dialog box is open, showing the following settings:

- Auto: Starting at: 0
- Ending at: 800
- By: 50

3. Enter your desired values. Select okay and your values will be automatically displayed in your specified range.

This screenshot is identical to the one above, showing the same PivotTable and the 'Grouping' dialog box with the same settings (Starting at: 0, Ending at: 800, By: 50).

4. When the Replace window appears, leave the Find What box blank and enter 0 in the Replace With box. Click the Replace All button.

Row Labels	Count of UID
0-49	4
300-349	7
350-399	12
400-449	13
450-499	13
500-549	10
550-599	12
600-649	7
650-699	11
700-749	8
750-800	20
Grand Total	117

5. Now that you have your values in the desired range you can decide to keep or remove any particular values. In this case, I decided to remove observations for which no SAT Math value was provided.

Row Labels	Count of UID
300-349	7
350-399	12
400-449	13
450-499	13
500-549	10
550-599	12
600-649	7
650-699	11
700-749	8
750-800	20
Grand Total	113

This process also makes it easier if you need to repeat the same pivot table for slight variations of the population.