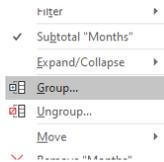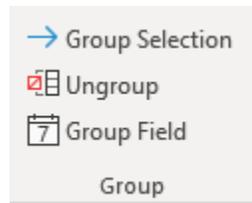# PivotTable Grouping by Fiscal Year

1. In the **PivotTable Field** pane, add the desired date field in the Rows area.
2. If Automatic grouping is turned on, the dates should appear in two columns- Months and Days.
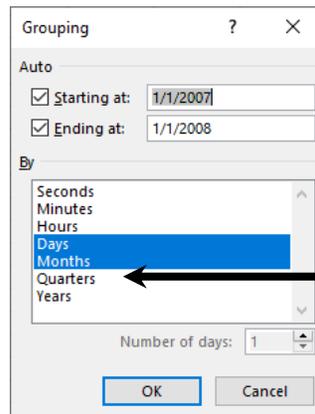3. Right click either of these columns and choose *Group* from the menu.
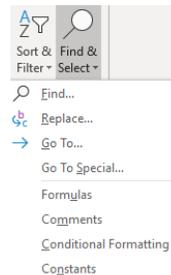

- OR –

On the **Analyze Tab** in the **Group Group**, click the **[Group Selection]** button.
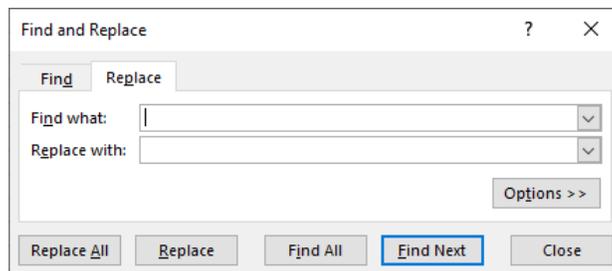

4. In the Grouping window, check the *Quarters* checkbox and click the **[OK]** button.

5. On the PivotTable Design Tab / Layout Group ? Subtotals drop-down choose Do Not Show Subtotals. (If necessary)
6. On the **Home Tab** in the **Editing Group**, click the **[Find & Select]** drop-down and choose *Replace* from the menu. *Ctrl H*

Sort & Find &
Filter Select

Find...

Replace...

Go To...

Go To Special...

Formulas

Comments

Conditional Formatting

Constants

7. In the *Find* field type in- **Qtr3.** (to start the fiscal year in July)
8. In the *Replace* field type in – **Quarter1** (or however you want the name displayed)
9. Tap the **[Replace All]** button.

Find and Replace   ?   ×

Find   Replace

Find what: |

Replace with:

Options >>

Replace All   Replace   Find All   Find Next   Close

- Repeat for each of the remaining quarters accordingly.
10. Sort the Quarters using the Sort & Filter drop-down arrow of the Quarters field heading.

3 Quarters   Months   Ord

Sort Oldest to Newest

Sort Newest to Oldest

More Sort Options...
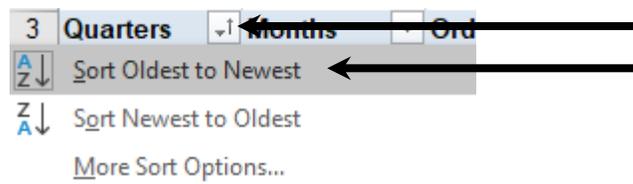
- Choose Oldest to Newest.
- If the Sorting is not applied correctly- then select each quarter cell and hover over the border until the cursor changes to the move cursor and drag into correct position.
- Repeat to arrange the quarters correctly.