Outlining Data in Excel

Outlining data makes your data easier to view. In this example, we will total rows of related data and collapse a group of columns.

1. First, sort the data on the Company column.

|	A	B	C	D	E
1	Last Name	Sales	Product Type	Company	
2	Jones	$1,390.00	DF-3	Kung Food	
3	Williams	$1,243.00	FD-2	Kung Food	
4	Johnson	$9,339.00	DC-1	Kung Food	
5	Jones	$7,433.00	DF-7	Kung Food	
6	Brown	$3,255.00	FD-2	Pancakes on the Rocks	
7	Williams	$1,930.00	A-34	Pancakes on the Rocks	
8	Williams	$1,064.00	EE-2	Peace A Pizza	
9	Brown	$4,865.00	EEE-45	Peace A Pizza	
10	Smith	$9,698.00	F-3334	Peace A Pizza	
11	Smith	$1,675.00	EEE-312	Wok N Roll	
12	Johnson	$1,480.00	DC-1	Wok N Roll	
13	Smith	$1,891.00	EEE-312	Wok N Roll	
14	Jones	$9,213.00	FG-5	Wok N Roll	
15	Williams	$1,486.00	A-34	Wok N Roll	
16					
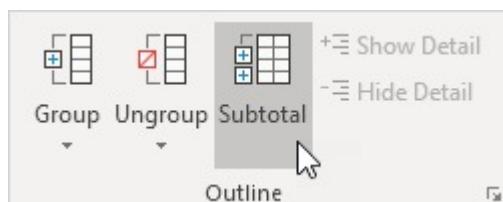
2. On the Data tab, in the Outline group, click Subtotal.
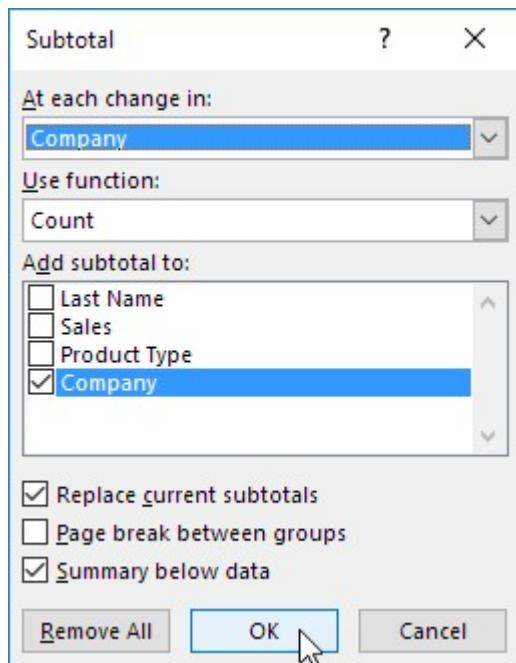
3. Select the Company column, the column we use to outline our worksheet.

4. Use the Count function.

5. Check the Company check box.

6. Click OK.

Result:

1 2 3		A	B	C	D
	1	Last Name	Sales	Product Type	Company
	2	Jones	$1,390.00	DF-3	Kung Food
	3	Williams	$1,243.00	FD-2	Kung Food
	4	Johnson	$9,339.00	DC-1	Kung Food
	5	Jones	$7,433.00	DF-7	Kung Food
	6			**Kung Food Count**	4
	7	Brown	$3,255.00	FD-2	Pancakes on the Rocks
	8	Williams	$1,930.00	A-34	Pancakes on the Rocks
	9			**Pancakes on the Rocks Count**	2
	10	Williams	$1,064.00	EE-2	Peace A Pizza
	11	Brown	$4,865.00	EEE-45	Peace A Pizza
	12	Smith	$9,698.00	F-3334	Peace A Pizza
	13			**Peace A Pizza Count**	3
	14	Smith	$1,675.00	EEE-312	Wok N Roll
	15	Johnson	$1,480.00	DC-1	Wok N Roll
	16	Smith	$1,891.00	EEE-312	Wok N Roll
	17	Jones	$9,213.00	FG-5	Wok N Roll
	18	Williams	$1,486.00	A-34	Wok N Roll
	19			**Wok N Roll Count**	5
	20			**Grand Count**	14
	21				

7. To collapse a group of cells, click a minus sign. You can use the numbers to collapse or

expand groups by level. For example, click the 2 to only show the subtotals.

1 2 3		A	B	C	D
	1	Last Name	Sales	Product Type	Company
+	6			Kung Food Count	4
+	9			Pancakes on the Rocks Count	2
+	13			Peace A Pizza Count	3
+	19			Wok N Roll Count	5
−	20			Grand Count	14
	21				

Note: click the 1 to only show the Grand Count, click the 3 to show everything.

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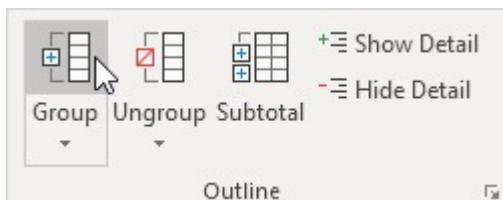
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To collapse a group of columns, execute the following steps.

8. For example, select column A and B.

9. On the Data tab, in the Outline group, click Group.

10. Click the minus sign above column C (it will change to a plus sign).
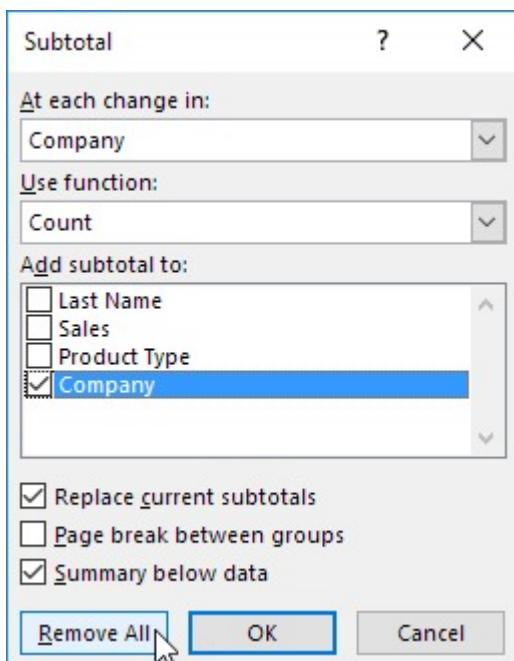
Result:

1 2 3		C	D	E	F
	1	Product Type	Company		
·	2	DF-3	Kung Food		
·	3	FD-2	Kung Food		
·	4	DC-1	Kung Food		
·	5	DF-7	Kung Food		
−	6	Kung Food Count	4		
·	7	FD-2	Pancakes on the Rocks		
·	8	A-34	Pancakes on the Rocks		

−	9	Pancakes on the Rocks Count		2	
·	10	EE-2	Peace A Pizza		
·	11	EEE-45	Peace A Pizza		
·	12	F-3334	Peace A Pizza		
−	13	Peace A Pizza Count		3	
·	14	EEE-312	Wok N Roll		
·	15	DC-1	Wok N Roll		
·	16	EEE-312	Wok N Roll		
·	17	FG-5	Wok N Roll		
·	18	A-34	Wok N Roll		
−	19	Wok N Roll Count		5	
−	20	Grand Count		14	
	21				

11. To remove the outline, click any cell inside the data set and on the Data tab, in the Outline group, click Subtotal, Remove all.

Subtotal   ?   ✕

At each change in:

Company

Use function:

Count

Add subtotal to:

☐ Last Name
☐ Sales
☐ Product Type
☑ Company

☑ Replace current subtotals
☐ Page break between groups
☑ Summary below data

[Remove All]   [OK]   [Cancel]

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