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David Ringstrom • Mar. 13, 2018



Have you ever had one of those days, where everything seems to be harder to accomplish than it should be? Let's say that you're cleaning up a spill on your kitchen floor, one that seems to spread ever further, despite your efforts to contain it. Many users unwittingly adopt a similar approach to spreadsheet design by spreading data out horizontally instead of vertically. In this article I'll explain several reasons why keeping your data as vertical as possible can have a dramatic improvement on your experience in Microsoft Excel.

A blank Excel spreadsheet is like a city with no natural barriers whose suburbs just

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The first rule of thumb is to keep as much data in list form as possible. This means working down the columns, as opposed to across rows. If you're entering stock prices for the last 30 days, this data should span rows 2 through 31, as opposed to columns A through AD. Row 1 should always be reserved for titles (often referred to as headers in Excel). Many of Excel's features function best when the first row of a list is comprised of column titles. Going horizontal in Excel is like tying your shoelaces together with ever bigger and tighter knots.

You'll still be able to move forward, but with ever more effort. Conversely, the discipline of going vertical unlocks the hidden capacity of Excel to function like a database. Indeed, many users take the "spread" part of spreadsheet a bit too literally. Here's a sample of what you can do with data that is stored going down columns as opposed to across rows:

- Easily extract or summarize data by way of look-up formulas such as VLOOKUP, INDEX/MATCH, SUMIF, SUMIFS, and more.
- Use the Recommended Pivot Tables feature on the Insert menu in Excel 2013 and later to ask Excel to suggest ways to summarize the data.
- Use Excel's Table feature on the Insert menu of all versions of Excel to manage the list more effectively.
- Use the Filter command on Excel's Data menu to instantly collapse the list to only show rows that meet specific criteria. Or, in Excel 2013 and later use Slicers with tables to filter the data with a single mouse click.
- Sort the data as needed by way of the Sort command on Excel's Data menu. Granted, Excel does offer the ability to sort sideways, but this often falls into the category of "not that you would, but you could."
- Use look-up formulas that populate worksheets on demand, rather than brute force building out a worksheet for every scenario. For instance, many users create financial reporting spreadsheets that have one worksheet for each month of the

year. This works until it doesn't, in that now any changes to the structure of the

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the same away again once you experience the power of using Excel more like a database than a spreadsheet, with a special emphasis on "spread". Further, spin off multiple worksheets or copies of files judiciously, so that your work doesn't grow exponentially when it's time to make changes across those worksheets or workbooks.

Accounting

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