



DATA LAYOUT MISTAKES CHEAT SHEET



Tabular Layout Video & Practice File: <https://bit.ly/tabformat24file>

✗ Semi-Report Layout: Hinders Using PivotTables

Order Date	OrderID	Salesperson	UK		USA		Total	
			Units	Amount	Units	Amount	Units	Amount
1/1/2021	10392	Fuller			13	1440	13	1440
1/2/2021	10397	Gloucester	17	7167			17	7167
1/2/2021	10771	Bromley	18	3440			18	3440
1/3/2021	10395	Gillingham	9	2123			9	2123
1/6/2021	10396	Finchley			7	1904	7	1904
Grand Total			44	12730	20	3344	64	16074

Issues:

1. Partially summarized data
2. Total columns
3. Grouped sections
4. Multi-row headers
5. Empty columns

Why Avoid?

- Blank columns and duplicate column labels make this format difficult to use with PivotTables.
- Changing the summary level (e.g., from regions to years) requires significant manual adjustment.
- Subtotals and totals risk double counting.

✗ Report Format: Limits In-Depth Analysis

Unhelpful Sales System Report - All bells no whistle!

Period: 2021 to 2022
Regions: UK and USA

Sales for UK 2021			Sales for UK 2022		
Units	Order Amount	Units	Order Amount	Units	Order Amount
Bromley	232	24757	Bromley	228	40397
Coghill	81	4029	Coghill	39	4657
Farnham	170	14056	Farnham	44	5893
UK Total	483	42842	UK Total	311	50946

Sales for USA 2021			Sales for USA 2022		
Units	Order Amount	Units	Order Amount	Units	Order Amount
Bromley	58	7554	Bromley	27	3654
Coghill	885	120626	Coghill	520	46506
Farnham	699	89663	Farnham	506	73361
USA Total	1642	217843	USA Total	1053	123520

Grand Total			Grand Total		
Units	Order Amount	Units	Order Amount	Units	Order Amount
2125	260685	1364	174467		

Issues:

1. Summarized data
2. Fixed format

Why Avoid?

- Lacks the granular data needed for detailed analysis.
- Inflexible layout that cannot be easily altered or repurposed.
- Hard to analyze trends or outliers due to the lack of raw data.

✗ Flat-Data Table: Restricts PivotTable Summarization

Order Date	OrderID	Salesperson	UK Units	UK Order Amt	USA Units	USA Order Amt	Total Units	Total Order Amt
1/1/2021	10392	Fuller			13	1440	13	1440
1/2/2021	10397	Gloucester	17	716			17	716
1/2/2021	10771	Bromley	18	344			18	344
1/3/2021	10393	Finchley			16	2556	16	2556
1/3/2021	10394	Finchley			10	4420	10	4420

Issues:

1. Partially summarized data
2. Total columns

Why Avoid?

- Limits flexibility with PivotTables since the data is already split by categories.
- Requires numerous formulas to summarize the data in different ways, which is time-consuming and prone to errors.

✗ Data Entry Format: Hinders Excel Functions Usage

Salesperson	Region	Jan 2024		Feb 2024		Mar 2024			
		Units	Order Amt	Region	Units	Order Amt	Region	Units	Order Amt
Bromley	USA	11	2714	USA	16	2019	USA		
Bromley	UK	32	1311	UK			UK		
Callahan	USA	69	6951	USA	38	2100	USA	89	6210
Callahan	UK			UK			UK		
Coghill	USA	38	15101	USA	72	14156	USA	81	10645
Coghill	UK	18	855	UK	19	331	UK		
Grand Total		168	26931		145	18606		170	16855

Issues:

1. Suitable for data entry only
2. Multiple columns for different categories.

Why Avoid?

- Makes it difficult to use functions like SUMIFS and COUNTIFS effectively.
- Manual data entry layout hinders further analysis and reporting capabilities.



EASILY FIX THESE LAYOUTS WITH POWER QUERY

<https://bit.ly/pq-unpivot>



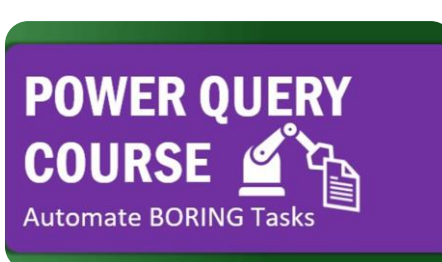
✓ Tabular Data Layout: Perfect for Data Analysis

Country	Salesperson	Order Date	OrderID	Units	Order Amount
USA	Fuller	1/1/2021	10392	13	1440
UK	Gloucester	1/2/2022	10397	17	717
UK	Bromley	1/2/2021	10771	18	344
USA	Finchley	1/3/2022	10393	16	2557
USA	Finchley	1/3/2021	10394	10	442
UK	Gillingham	1/3/2022	10395	9	2123
USA	Finchley	1/6/2022	10396	7	1904

Row Labels	2021	2021	2022	2022	Total Units	Total Order Amount
	Units	Order Amount	Units	Order Amount		
UK	18	344	26	2840	44	3184
Bromley	18	344			18	344
Gillingham			9	2123	9	2123
Gloucester			17	717	17	717
USA	23	1882	23	4461	46	6343
Finchley	10	442	23	4461	33	4903
Fuller	13	1440			13	1440
Grand Total	41	2226	49	7300	90	9526

Benefits:

1. Facilitates easy use of PivotTables and functions like SUMIFS and COUNTIFS.
2. Allows for flexible data summarization and analysis.
3. Enhances productivity and reduces the complexity of data manipulation.



10X PRODUCTIVITY

<https://bit.ly/moth-pq-course>



Key Rules

- Each record is in a single row.
- Columns contain one type of data (e.g., dates, regions, sales).
- No blank rows or columns.
- Column labels are in one cell per column and occupy a single row.
- No subtotals or grand totals within the data.

