![knowledgebase logo]

SharePoint for fans of Excel

By Rob Pratt

Relevant to SharePoint 2007, 2010 and 2013
(including Office 365)

![combined knowledge logo]

Love Excel? You should consider using SharePoint

Over the last few years I have been asked many times who in an organisation will make the best SharePoint Site Owners? There are as with everything in SharePoint many ways to answer this question. One thing I have noticed consistently is that the best SharePoint Site Owners are often big fans of Microsoft Excel. If you enjoy a Nested IF, VLookup or a PivotTable then the chances are you will find it easier than most to turn your hand to SharePoint.

If you already have network drives and advanced Excel spreadsheets you might feel like your life is complete and are wondering why you would need SharePoint.

In the next couple of pages I will share a few thoughts on some of the limits of working in Excel and also outline how SharePoint can provide solutions to these problems.

Work per Item not per Workbook

When working with information in an Excel workbook there may be some frustrating areas that you have learned to accept and perhaps do not even think of as a problem. These limitations centre around the way Excel workbooks work as a single piece of information. With many settings such as security and history being applied to the entire workbook rather than pieces of data in the workbook being understood and managed individually.

Tracking and History

How many times have you opened an Excel file to find that it is no longer working correctly? The formulas have stopped working or even worse some information is now missing. When this happens two things come immediately to mind.

1. Who is to blame?
2. How do I fix it and get back to a healthy workbook

If you are lucky your Excel workbook will be stored on a network drive and you might be able to see who has recently changed the file and perhaps even revert back to a previous version of the file. At first that sounds like all your problems are solved but SharePoint can do this better – let us deal with the two questions separately.

Tracking - Imagine you have a workbook that you are very interested in, perhaps something you have created but other people update. By uploading that workbook into a SharePoint library it is possible for any user including you to create alerts for that workbook. Alerts will send you email notifications to warn you when people have made changes to your file and can even tell you if someone deletes a file that you have originally created. The result is that you are more informed about the activity involving files that you care about – the idea of opting into things that you like and doing it selectively is very much a SharePoint ethos. Create alerts for one file or for one thousand files it is up to you.
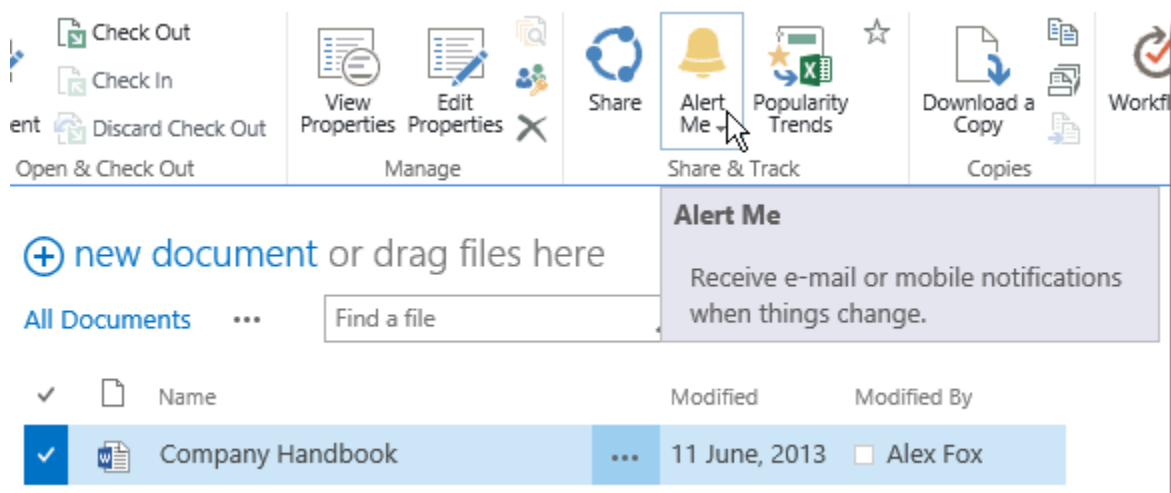
History – Instead of uploading your Excel workbook to a SharePoint document library you might want to consider converting the workbook in to another SharePoint object known as a *list*. Assuming that your data is simple and clean then converting a workbook to a list is quick and easy to do. One benefit of working with a SharePoint list is that each row in the list is now considered a separate

item. Each list item can be edited, secured and tracked independently of all the other items in that list.

Imagine if someone edited one of the items in your SharePoint list and the data was now incorrect. You could click on that item, review its history and restore a previous version. This would have no impact of the rest of the items in the list.
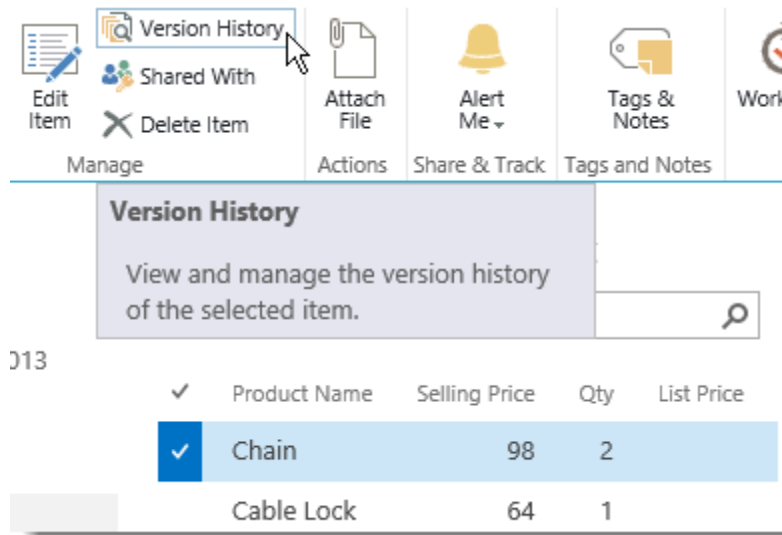
Security

Now that your information is stored as a SharePoint list each item can be secured individually. SharePoint 2013 makes this process slightly easier that previous versions thanks to the new **Shared With** option that shows you a report on who currently has access to the selected list item. Shared With can also be used to customise the items permissions to allow specific people to view or edit the item.
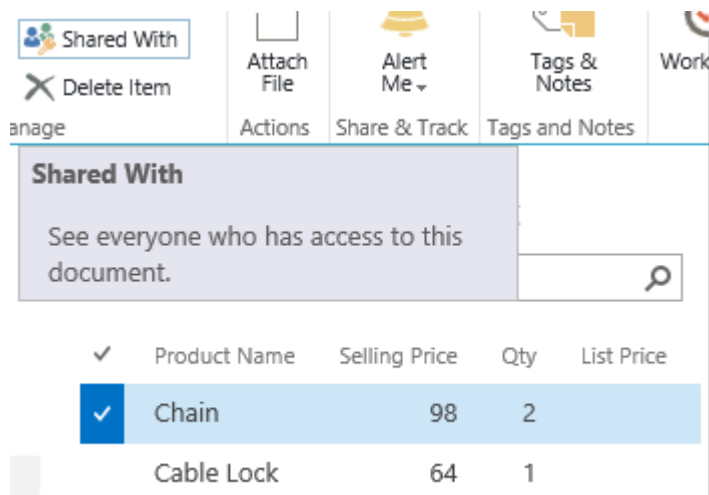
Formulas

Excel will probably always be the ultimate program for creating formulas but SharePoint can also use formulas as well. When working in a SharePoint list it is easy for someone who has knowledge of using formulas in Excel to start creating calculated columns in SharePoint. The example below shows an IF statement being used to apply a 20% discount if a total is over 100 or charge full price if the total is less than 100.

Calculations in List Items

Formula:

```
if([Qty]*[Selling Price]>100,[Qty]
*[Selling Price]*0.8,[Qty]*
[Selling Price])
```

Insert Column:

Created
List Price
Modified
Product Name
Qty
Selling Price
Title

Notice that formulas in SharePoint are often easier to read than in Excel as column names are used to refer to the data instead of cell references such as A1.

✓	Product Name	Selling Price	Qty	List Price	Total	+
	Chain	10	2		20	
	Cable Lock	100	2		160	

Grand Totals

Although you can't use SharePoint calculated columns to show totals (calculate totals for a column) it is possible to do so by using another SharePoint component known as *Views*.

In the example below a view has been modified to group the list items by Product Name and total the order quantities.

✓	Product Name	Selling Price	Qty	List Price	Total
			Sum= 10		
▷ **Product Name : Cable Lock** (2)					
◢ **Product Name : Chain** (2)					
			Sum= 6		
	Chain	10	2		20
	Chain	91	4		291.2

Summary

In summary SharePoint includes functionality that can make day to day tasks quicker and easier. Components such as libraries, lists, views, columns and alerts can seems overwhelming at first but I'm sure Excel felt the same way when you first used it.

SharePoint will not replace Excel as Excel still contains much unique functionality but by using both SharePoint and Excel together what you can achieve is greatly increased.

Not every Excel workbook will benefit from being stored in a SharePoint document library or being converted to a SharePoint list, some business processes are simple and just don't need the rich set of tools that SharePoint provides.

Brought to you by Support+   Available as an app, for Office 365 and on Premises

support+

Just In Time Training and Support for your entire organisation offering 1000's of help topics for over 30 key business applications.

Find out more and try it now for free at www.combined-knowledge.com

knowledgebase

Find more SharePoint tips, whitepapers and guides, plus a wide range of training courses, webinars and events at: www.combined-knowledge.com

combinedknowledge

Suggest a topic

If you have a suggested topic you would like to see covered in a whitepaper like this one, drop us an email:
solutions@combined-knowledge.com

knowledgebase