



22 BENEFITS

of using Lists instead of Excel

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for data capture from multiple persons, tracking and automation

| Activity | What happens in Excel | What happens in Lists |
|--|--|--|
| 01 Data entry Columns | only Number, Date and Text types | 15 data type: Text, long text, images, location, persons, choice, multiple choice, lookup, currency, hyperlink |
| 02 Add validation to reduce data entry errors | Limited validations. | Column level and row level validations Lots of Excel-like functions available. |
| 03 Mandatory columns | Not possible | Each column can be mandatory or optional. |
| 04 Calculated columns | Difficult to implement | Easily possible. Just define the formula. |
| 05 Share with multiple people | Need to send files – too many copies to manage | Share link. Edit or read only. |
| 06 Stop sharing? | Not possible if you send the file as attachment. | Can stop sharing anytime. |
| 07 Data from multiple people | Each person sends a separate file. | Single list – multiple people can enter data at the same time. |
| 08 Copy Paste to combine data | Lot of copy paste needed to combine / consolidate data | No copy paste needed. |
| 09 Prevent people from editing each other's data | Share separate files. Requires manual copy paste to combine data. | Easy! Just change two settings and prevent people from seeing and editing each other's data. |
| 10 Column level security | Not possible. | Create a view with desired columns. Use Audience Targeting to specify who can see / edit which view. |
| 11 Lookup from other lists | VLOOKUP works. But making that column read-only is difficult. | Lookup is a column type. Refer to another list, create dropdown. Reuse common lists. |
| 12 Change from edit to view | Not possible | Easily possible. You are always in control. |
| 13 Export to Excel | Not required. It is in Excel! | Available – creates Excel file with a connection to Lists. |

| | Activity | What happens in Excel | What happens in Lists |
|----|------------------------------------|---|---|
| 14 | When data changes what happens? | Nothing! Manually combine data repeatedly. | Just refresh. You can even auto-refresh while opening the Excel file. |
| 15 | Trigger actions when data is added | Programming needed. | Easily possible using Power Automate. Actions with 300+ apps. |
| 16 | Notification when data changes | Programming needed. | Enable notifications and choose the event. |
| 17 | Create Reports | Pivot table – static | Pivot Tables, Power BI or any other BI tool which supports SharePoint list. Auto-refresh |
| 18 | Versioning | Excel versions | Field level versioning with audit trail |
| 19 | Custom views | Sort and filter only | Many views can be instantly created: Group, Filter, Sort, Calendar View, Thumbnail View and more. |
| 20 | Custom permissions | Not possible | Add only – no delete. Custom permissions can be created using SharePoint security. |
| 21 | Reminders | Not possible | Set custom reminders based upon any date column. |
| 22 | Protection | Protecting unwanted areas of file is difficult. | Create non-editable column using calculated columns. |

What next? Try it out.

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| Step 1 | Start Lists | Go to Office.com – login using Office365 ID – All apps – Lists |
| Step 2 | View sample lists | View samples, understand column types |
| Step 3 | Create a list | Start with blank list – learn all column types and options for each type |
| Step 4 | Share the list with others | Share with edit permissions – so that people can edit only their own data |
| Step 5 | Export to Excel | Create a Pivot table – add more data – try refreshing the pivot |
| Step 6 | Apply knowledge | Now think where you can use it in day-to-day work. Replace Excel templates with lists. |

Resources

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| Using Lists Video | Detailed demo and FAQ video by Dr Nitin 120 min. |
| Lists adoption guide | Templates, Playbook and more |
| Manage Lists across organization | IT Guide for deployment and management |