**SharePoint replacing Excel for Unit X contact lists** 03/08/2013 09:44 AM



**Jamila Bouget** to: Unit X Staff



Dear colleagues,

As you may know, Unit X management has agreed to use SharePoint as the new medium to organize its contact lists. The transition of Unit X contact lists from Excel to SharePoint is currently under way and should be completed by the end of February 2012. Since many of you are not familiar with SharePoint, the purpose of this document is to explain how our unit will benefit from SharePoint and to describe how to use it. SharePoint offers several benefits and requires three easy steps to use.

**What is SharePoint?**

SharePoint is a web-based collaboration tool that will enable Unit X to organize its contact lists in a more efficient way than Excel. It combines the main functionalities of Access and Excel with the easy access of a webpage.

**How can Unit X benefit from SharePoint?**

Unit X can benefit from SharePoint’s unique advantages: it can organize information better than Excel, it is easier to use, and it is easier to maintain.

*How can SharePoint organize information better than Excel?*

SharePoint can organize information better than Excel in two ways. First, SharePoint allows users to group information in one location. Because contact lists are important information that the unit needs in order to operate, it is better to have these lists in one location. The lists contain crucial information on country partners, coordinating agencies, donors, the board of directors, etc. Currently, these lists are kept in different Excel sheets/files and saved on different locations on the shared drive (the N drive). This process is unnecessarily complicated and often leads to staff using an outdated version of a list — an error we cannot afford to make. Second, SharePoint eliminates duplicates of contacts between lists, which is almost impossible to do in Excel. As a result of these advantages over Excel, using SharePoint will help to simplify the process and improve our unit’s effectiveness significantly.

*How is SharePoint easier to use?*

SharePoint is easier to use than Excel because it has a central database for the contact lists. Users only need to go to one location instead of opening many different files.

*How is SharePoint easier to maintain?*

SharePoint is easier than Excel to maintain because the information is stored in one central, web-based location. The person responsible for maintaining SharePoint only needs to go to this central location to make updates.

**How should we use SharePoint?**

To use SharePoint, follow these three simple steps:

1. Log on to the Unit X SharePoint main page (see link here).
2. Click on the appropriate database link.
3. Select the view needed.

**What do I do if I have questions?**

If you have further questions, please contact Jamila Bouget at 3-xxxx or [jbxxxxxxx@worldbank.org](mailto:jbxxxxxxx@worldbank.org).

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