



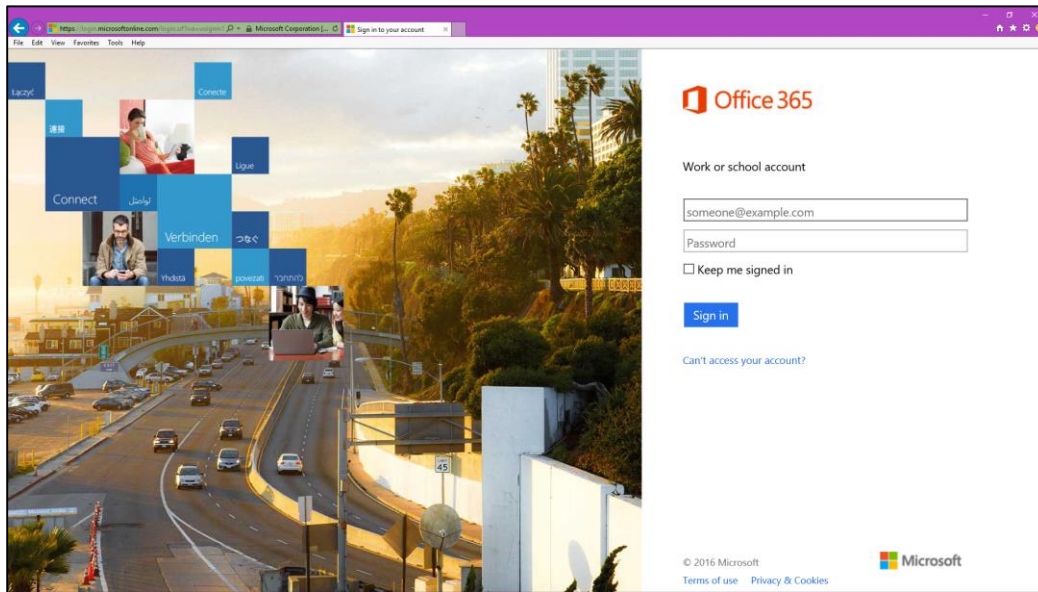
# Excel Online Guide

An Easy Step-by-Step Guide

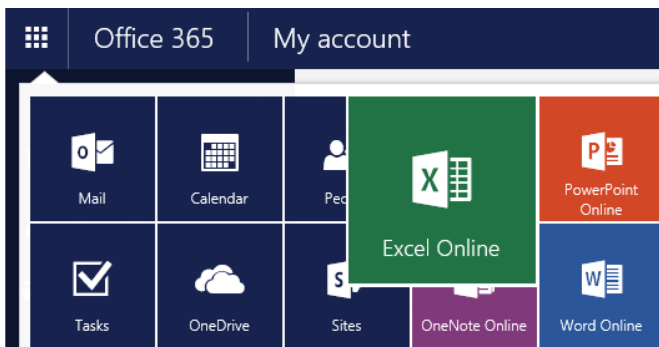
# Welcome to Excel Online

Excel when and where you need it. Easily discover, visualize, and share insights from your data.

To Access Office 365 open a web browser (Internet Explorer, FireFox, Chrome or any other Web Browser). Enter <http://portal.microsoftonline.com>



Enter your E-Mail Address and your Office 365 password and click sign in.




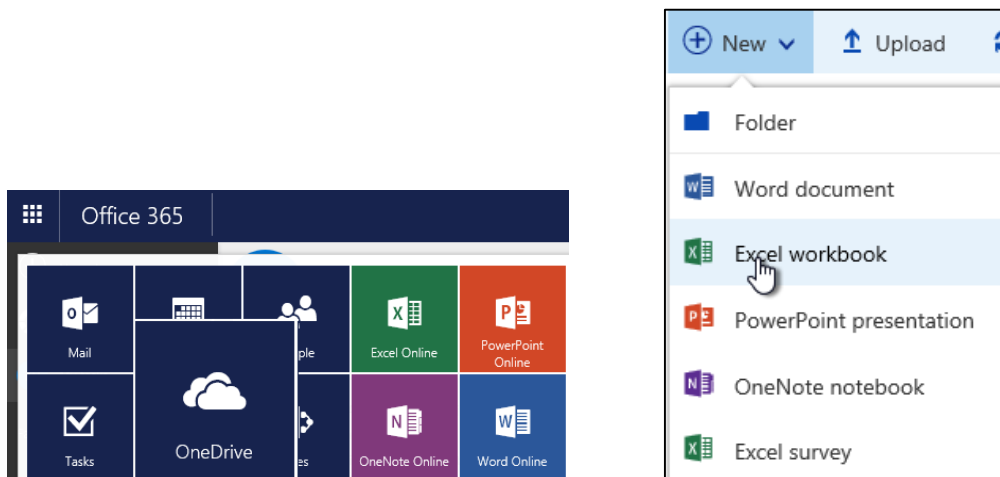
Select Excel Online

# Create a document from OneDrive for Business

You can create new Office documents directly from OneDrive for Business.

Not sure where to create your document? See [Should I save my documents to OneDrive for Business or a team site?](#)

1. Sign in to Office 365 with your work or school account at <http://portal.office.com>. For example, ellen@mednax.com. If you're not sure what your work account is, check the welcome email message that asked you to sign in the first time.
2. At the top of the page, select the app launcher , and then select **OneDrive**.

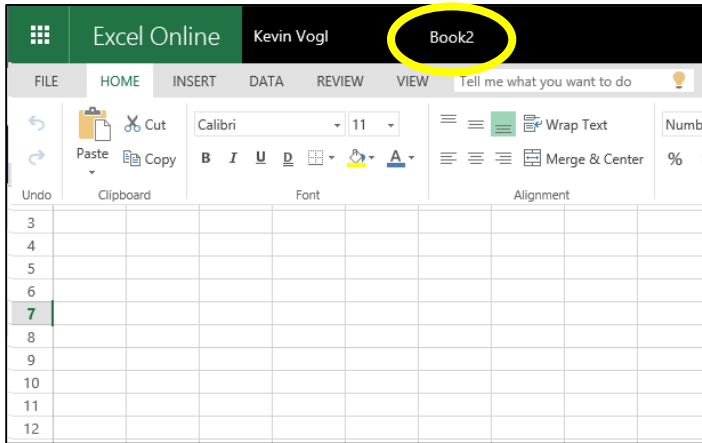


Click **New**, and then choose the type of document you want to create.

The new document opens in the Office Online program you selected. For example, selecting **Excel document** opens Excel Online.

**Tip** There's no save button, because the document is saved for you automatically.

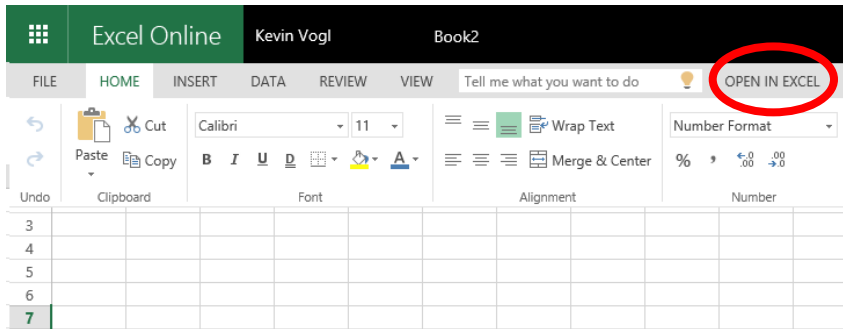
1. To rename the document, click its name in the title bar, type the new name you want, and then press ENTER.



2. When you're done and you want to go back to where the file is saved, click your name, next to the file name.

(Or, click the back button in your browser to go back to where your document is saved. If you click Back, click refresh to see your new document in the file list.)

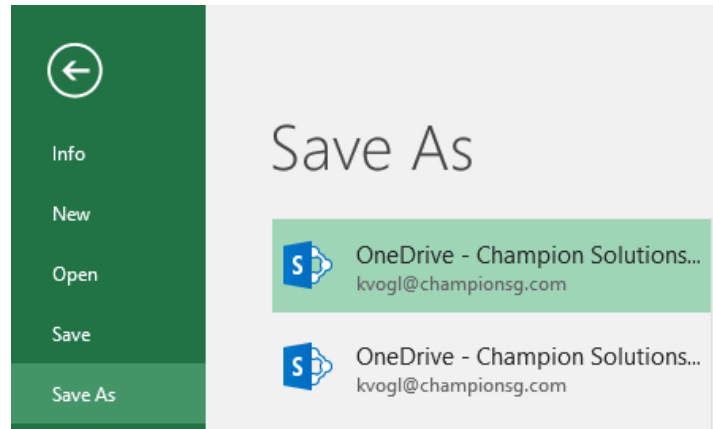
**Tip** If you want access to all app features, you can switch to the full Office app. For example, in Excel Online, click **Open in Excel** to continue working on the document in Excel.



## Create a document from an Office desktop app

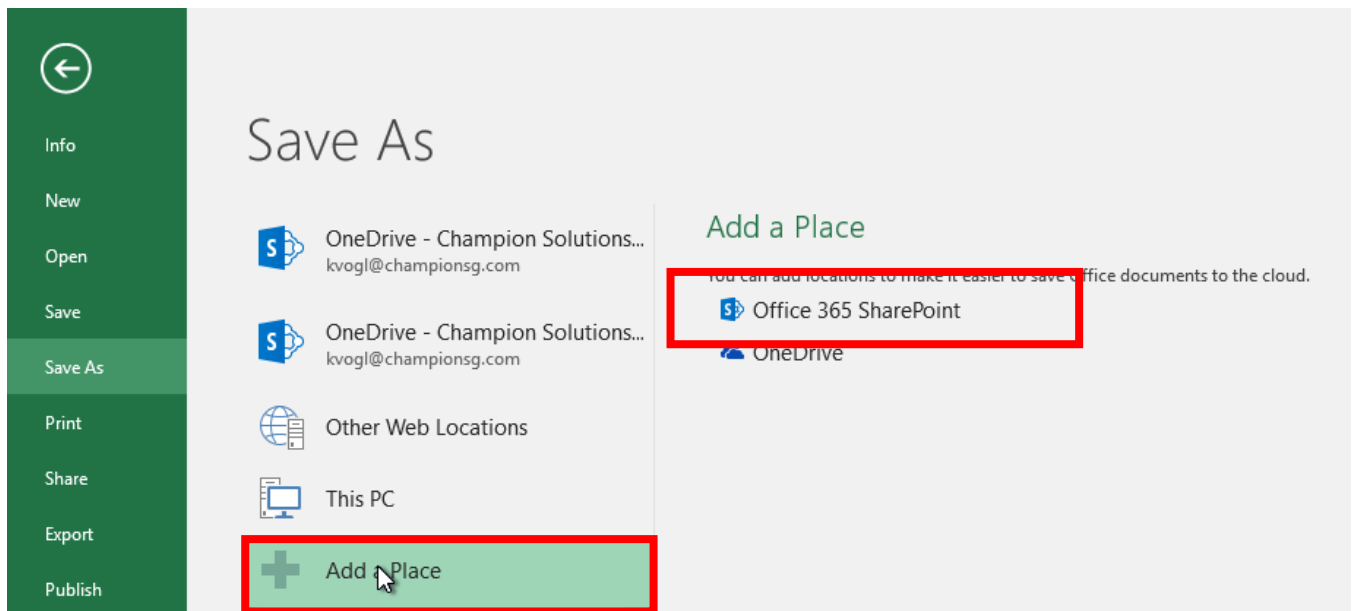
You can also start in an Office desktop app, such as Word, Excel, or PowerPoint, and create and save a document straight to OneDrive for Business.

1. Start a document as usual in an Office desktop app (**File > New**, and pick a template).
2. When you're ready to save the document, click **File > Save As > OneDrive - YourCompanyName**. For example, OneDrive - Contoso.




3. Give the file a name, and then click **Save**.

**Tips** If you don't see **OneDrive - YourCompanyName**, click **Add a Place > Office 365 SharePoint**. Then sign in to Office 365 with your work or school account.



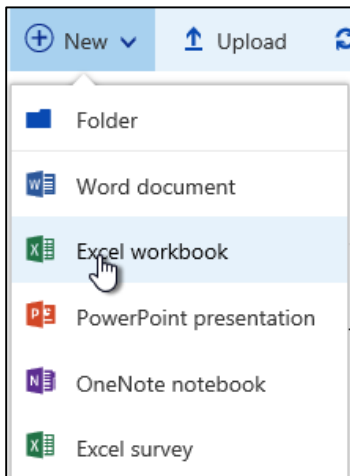
Once you add OneDrive for Business as a place in one Office app, you can save files from all your Office apps.

If you're signed in to Office 365, and your subscription includes Office, you can install the latest version of the desktop apps. At the top of the page in Office 365, go to **Settings**  **> Office 365 Settings > Software**.

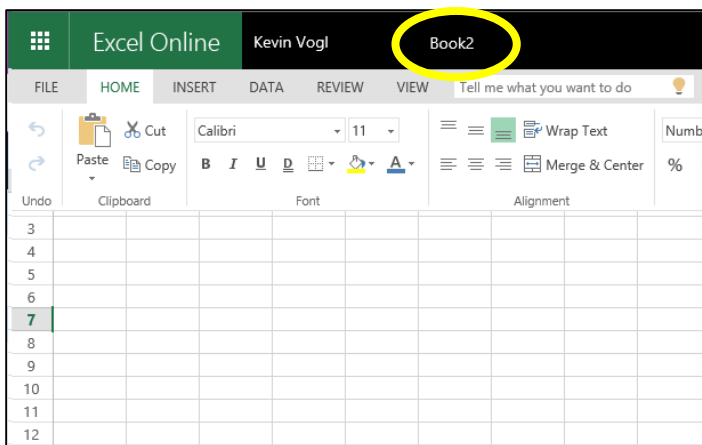
# Basic tasks in Excel Online

## Create an online workbook

1. From your OneDrive, click **New** > **Excel workbook**.

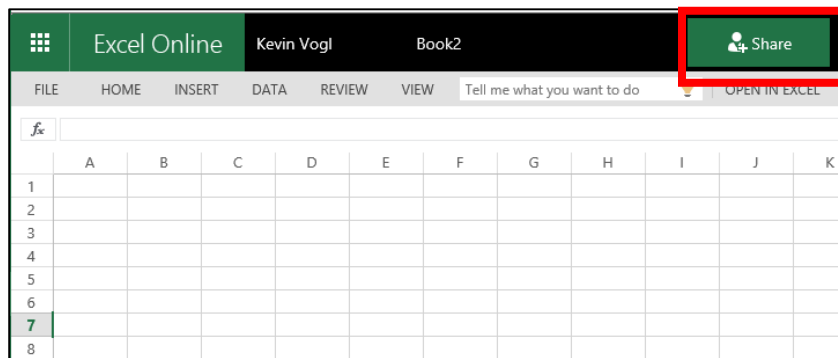


2. To rename the workbook, click the default file name and type a new one.



## Share workbooks online

To share a workbook, click **Share** and type email addresses of people you want to share with or get a link you can email to your contacts.



## Edit in the browser

If you try to enter data, set up a formula, add charts, or apply basic formatting and nothing happens, you're probably in read-only view. Here's how you can switch to editing view:

Click **Edit Workbook** > **Edit in Excel Online**.

For more advanced editing options, click **Edit in Excel**.

Excel Online saves your work automatically however, if you change your mind about any changes you've just made, use **Undo** or press Ctrl+Z.

## Work together on the same worksheet

When you're working with others in Excel Online, you can edit the worksheet as you usually would. When others edit the worksheet, Excel Online shows their presence and the updates right away. This only works when everyone is working in Excel Online. If anyone opens the workbook in Excel desktop, others won't be able to edit the workbook at the same time in Excel Online.



# Top tips for working in Excel Online

## Copy and Paste in Excel Online

A simple thing like copy and paste might have you flummoxed in a browser-based program. You can copy and paste text, but only if you use keyboard shortcuts. And text you copied outside of Excel Online will probably be pasted as plain text, which means that formatting (things like bold, italics, and hyperlinks) needs to be re-applied. For best results, use keyboard shortcuts, not the right-click menu or Clipboard commands in Excel Online. Press CTRL+C to copy, CTRL+X to cut, or CTRL+V to paste the text (Windows); or press ⌘+C, ⌘+X, or ⌘+V (Mac). If paste isn't working, you're probably looking at Reading view. Switch to Editing view: Go to **Edit Workbook** > **Edit in Excel Online**.

## Reapply formatting

To reapply text formatting like bold or italics, select the text you pasted, click **Home**, and then click the formatting you want. If you're pasting a hyperlink, you'll have to reconstruct it:

1. Right-click the cell, and then click **Hyperlink**.
2. In the **Display Text** box, type text you want to show in the cell.
3. In the **URL** box, type the web address of the link (URL).

## Format numbers

When you type numbers in your worksheet, Excel Online automatically applies the General number format but you can change this to [show specific number formats](#) like dates, currency, or even fractions.

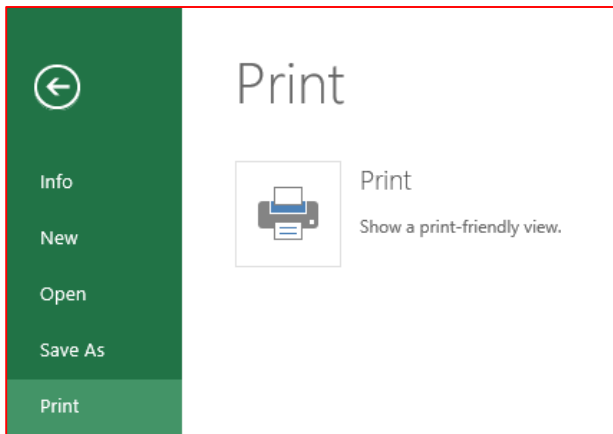
For example, if you're working on your quarterly budget, you can use the **Currency** number format to show your numbers as monetary values. You can set dates to display either as a long date like Saturday, December 14, 2013 or a short date 12/14/13. Here's how:

1. Select the column, or cells you want to format.
2. Click **Number Format** and pick the format you want.

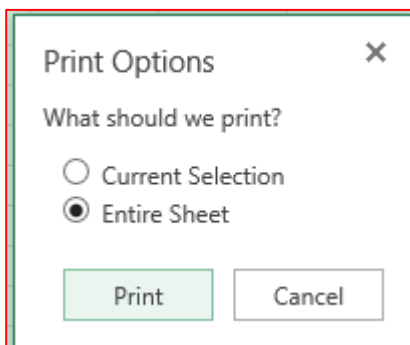
## Print in Excel Online

1. Select the cells or chart you want to print, and then go to **File** > **Print**. To print the whole worksheet, don't select anything before going to the Print command.





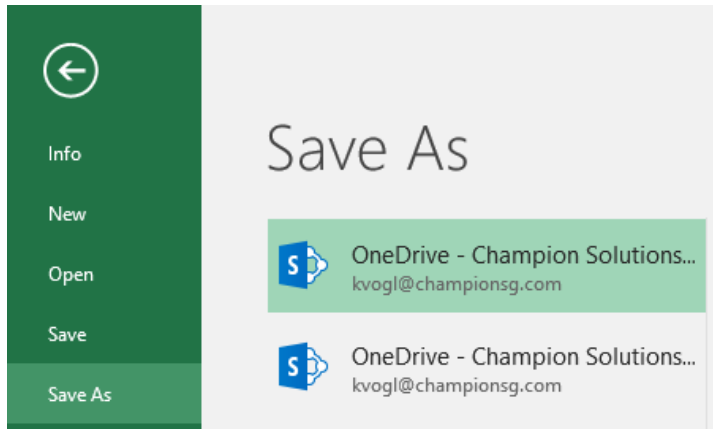
2. Click **Print** for a preview.
3. If you change your mind about printing a selected area, choose the **Entire Sheet** print option and click **Print**.
4. If the final print preview looks right, click **Print**.



## Integrate seamlessly with Excel

You create a workbook in Microsoft Excel. You want to post it on a website so that other people can interact with the live data, maybe even enter some data. What if you want to collaborate with someone who has a different version of Excel than you do? Wouldn't it be great if you could work on it together, right there on the website? Excel Web App makes this scenario possible.

In Microsoft Excel 2016 you can start using Excel Web App by saving your workbook to your OneDrive. On the **File** tab, click **Save As**, and then click **OneDrive - YourCompanyName**.

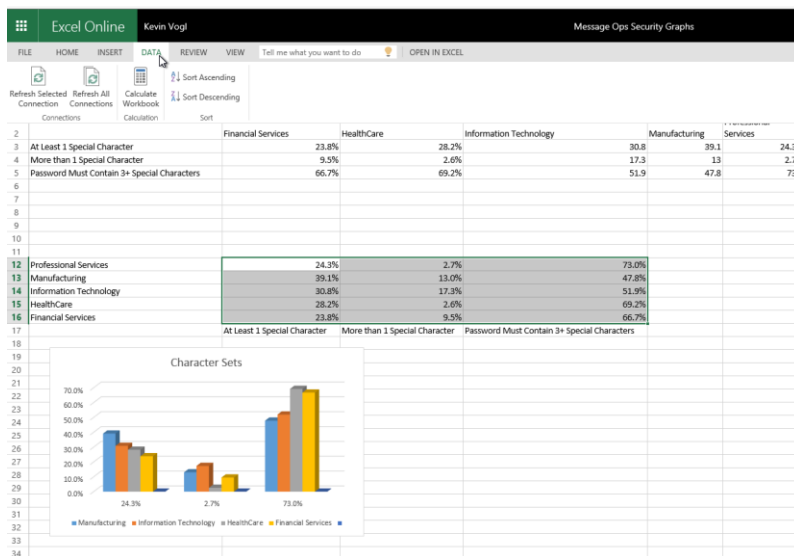


Now, your workbook is available to view and edit in the browser, or re-open in Excel.

**Note** Workbooks don't have to be created in Excel 2010 to be opened in Excel Web App. For best compatibility, use Office Excel 2003 or later, or use Excel for Mac 2008 version 12.2.9 or Excel for Mac 2011. If you're using Excel 2003, install the most recent service pack and save workbooks on your computer as .xlsx files. Then upload the workbook to a SharePoint site where Office Web Apps programs are configured.

## View a workbook in the browser

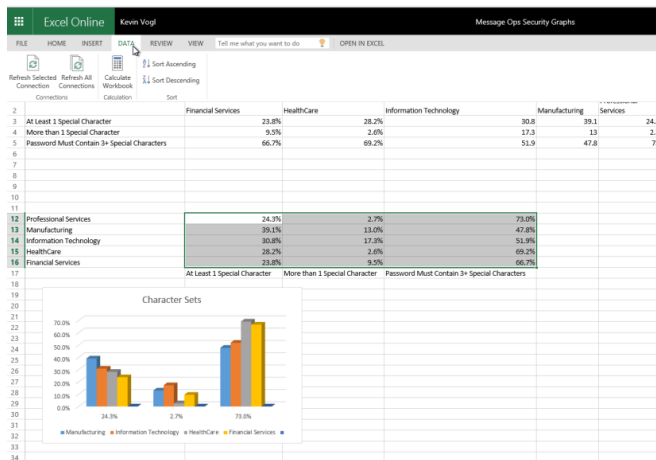
When you open your workbook in SharePoint, Excel Web App opens the workbook in the browser, where you can move around the workbook, sort, filter, expand and collapse PivotTables, and even recalculate the workbook.



You can also use the **Find** command to search for words or phrases. As with a web page, you can select content on a worksheet and copy it so that it's available to paste in another application.

## Edit in the browser

If you want to make changes in the workbook, click **Edit in Browser** to change data, enter or edit formulas, and apply basic formatting.



In Editing view, you can type and format text as usual, and you can use cut, copy, paste and undo/redo commands. Enter a formula by going to the cell where you want to enter the formula, typing an equal-sign (=), and then typing the formula or function.

You can also add tables and hyperlinks. Go to the **Insert** tab to add these. If you want to add a chart, select the range of cells to be charted, and then go to the **Insert** tab and select the type of chart you want.

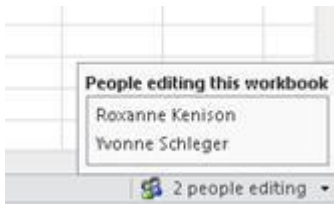
Excel Web App saves your workbook automatically while you work on it. You don't have to save your changes. If you make changes that you don't want to keep, use the **Undo** command or press CTRL+Z (Windows) or ⌘+Z (Mac).

## Work with other people

If you make your workbook available for other people to edit, your friends or colleagues can work on the workbook at the same time as you. This works well for workbooks where you are collecting information from a group of people, such as a list of information or a group project. No more e-mailing a list around or waiting for your teammate to check it back in on the server.

While you are editing the workbook, Excel Web App shows you whether other people are also working on the workbook.

1. Store the workbook on a website where your colleagues can access it, such as your team's SharePoint library.
2. Invite other people to work on the workbook.
3. In SharePoint, copy the web address of the workbook that appears in the browser and then paste the web address into a message.
4. Edit the workbook in Excel Web App. You are able to see who else is working with you in the status bar.



# Excel Web App at a glance

The diagram illustrates the Excel Web App interface with six numbered callouts:

- 1:** Points to the main data table showing security metrics for various industries.
- 2:** Points to the top navigation bar with options: Edit Workbook, Print, Share, Data, and a menu icon.
- 3:** Points to the 'Data' dropdown menu.
- 4:** Points to a bar chart titled 'Character Sets' comparing data across industries.
- 5:** Points to the 'VIEW' tab in the ribbon.
- 6:** Points to the bottom right corner of the spreadsheet area.

	Financial Services	HealthCare	Information Technology	Manufacturing	Professional Services
At Least 1 Special Character	23.8%	28.2%	30.8%	39.1%	24.3
More than 1 Special Character	9.5%	2.6%	17.3	13	2.7
Password Must Contain 3+ Special Characters	66.7%	69.2%	51.9	47.8	73

	Professional Services	Manufacturing	Information Technology	HealthCare	Financial Services
At Least 1 Special Character	24.3%	2.7%	73.0%	39.1%	23.8%
More than 1 Special Character	2.7%	13.0%	47.8%	30.8%	9.5%
Password Must Contain 3+ Special Characters	73.0%	47.8%	51.9%	28.2%	66.7%

1. In the browser view of a workbook, you can navigate through the workbook, sort, filter, expand and collapse PivotTables, and even recalculate the workbook.
2. The data you are viewing is live. You can refresh a PivotTable, or refresh the whole workbook.
3. Click **Edit in Browser** to edit the workbook in the browser; click **Open in Excel** to work on it in the Excel desktop application.
4. When you edit the workbook in your browser, you can enter data and formulas, create tables and charts, and do some formatting. To enter formulas, type equal-sign (=), and then the formula or function. For help with Excel functions, see the [Excel functions \(by category\)](#).
5. Excel Web App has the look and feel of Excel.
  - Click the **File** tab to save a copy of the workbook or download a snapshot that contains just values and formatting, no live data.
  - The **Home** tab has commands for formatting text and cells, adding rows and columns, and recalculating data.
  - Use the **Insert** tab to add charts, tables and hyperlinks to your worksheets.
  - Excel Web App saves your work automatically. Use **Undo** to get rid of changes you don't want to keep.
6. If other people are working on the workbook, you can see who they are by clicking in the bottom right corner of the browser window.