

Excel 2010 to Office 365 for business



Make the switch

Microsoft Excel 2013 desktop looks different from previous versions, so here's a brief overview of new features and important changes.

Add commands to the Quick Access Toolbar

Keep favorite commands and buttons visible, even when you hide the ribbon.

Explore commands on the ribbon

Each ribbon tab has groups, and each group has a set of related commands.

Show or hide the ribbon

Choose Ribbon Display Options or press Ctrl+F1 to hide or show the ribbon.

Manage files

Open, save, print and share your files. Also change options and account settings in this view.

Get visual cues

Watch for action buttons that appear in the sheet and animations that show data changes. For example, select a chart and you'll see **Chart Tools** with two extra tabs – **Design** and **Format**.

Create sheets

Start with one sheet, and add more sheets as needed.

Show shortcut menus

Get in the habit of right-clicking your sheet, chart, or PivotTable data. Excel will show you commands that are relevant for your data.

Open a dialog box

Click the launcher icon to show more options for a group.

Show Key Tips

If you'd rather use the keyboard, press Alt to show keys that let you access commands on the ribbon.

And yes — the keyboard shortcuts you've used before will still work.

Access other tabs

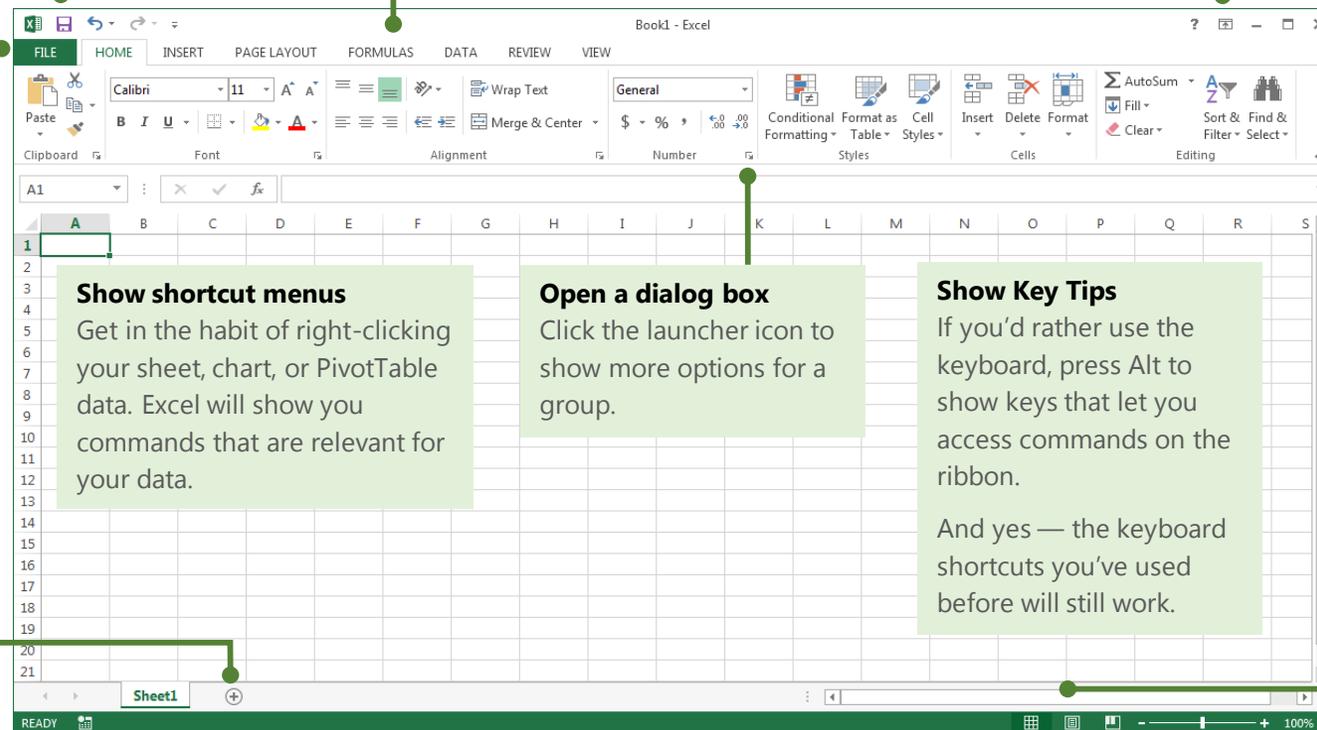
More tabs appear on the ribbon when you need them, like chart or PivotTable tabs.

Change views

Work faster in the view of your choice: Normal, Page Layout, or Page Break Preview.

Zoom in or out

Drag the zoom slider to change the zoom level.



What is Office 365 for business?

Just as Office 2010 was a suite of desktop apps, your Office 365 for business subscription gives you a suite of powerful online services—including the latest version of Office desktop apps. Office 365 lets you:

- Install Office desktop apps on as many as five computers.
- Create, view and edit documents from anywhere using Office Online.
- Work offline and your changes automatically sync when you're back online.
- Use mobile Office apps on your Windows Phone, Android, iPad, or iPhone.

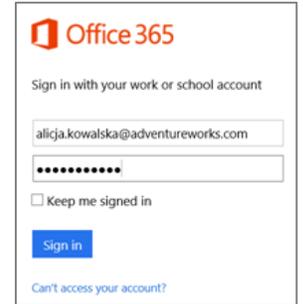
How do I use Excel in Office 365?

You can use the Excel 2013 desktop app, Excel Online, or device-specific Excel apps. So how do you decide which to use? If you're using a computer, Excel 2013 has the most features. On a device, the Excel mobile app has the most features. However, for many tasks, the web-based Excel Online may meet your needs.

	Excel 2013*	Excel Online	Excel mobile app
Use it if	<ul style="list-style-type: none"> • Your Office 365 plan includes it. • You want offline access. 	You need a quick way to read and make simple edits.	You want the most editing features available on your device.
Runs on	Laptops and desktops	Your browser	Specific devices
How to get it	Comes with some, but not all Office 365 plans (*Excel 2011 for Mac)	Browse from OneDrive or Sites	Windows Phone iPad iPhone Android phone and tablet

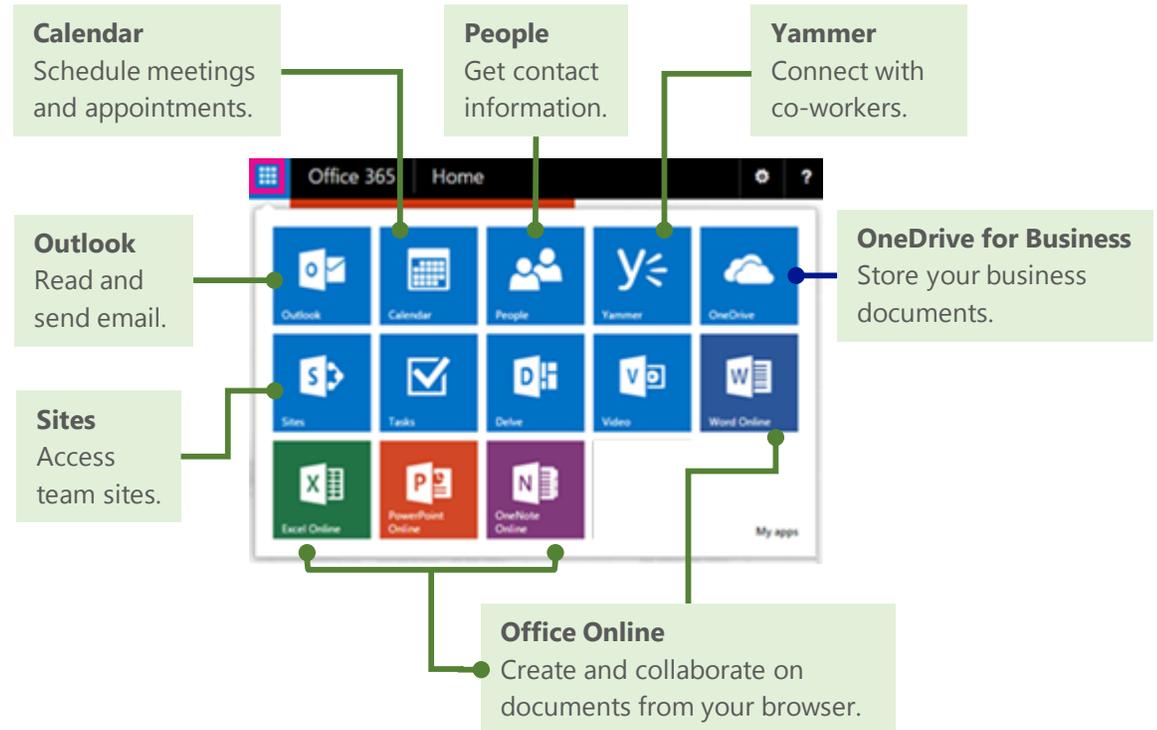
How do I sign in to Office 365?

1. From your web browser, go to <https://portal.office.com>.
2. Enter your work or school account and password, and then choose **Sign in**. For example:
j.doe@contoso.com or j.doe@contoso.onmicrosoft.com



Find your way around

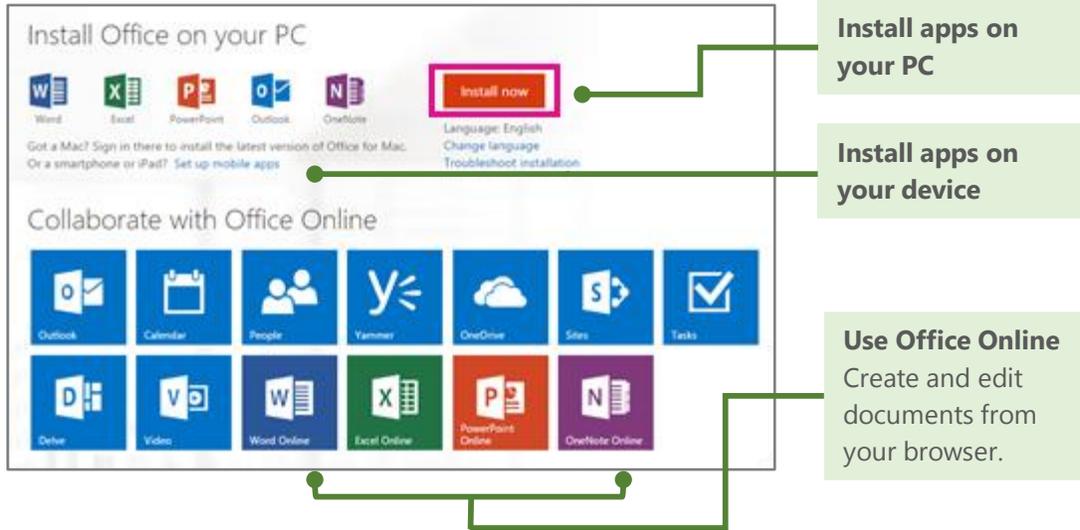
From anywhere in Office 365, click the app launcher  for quick access to all services, including all the Office Online apps:



Install Office 2013 desktop apps

If Office is not already on your computer, you can install it from Office 365.

1. Sign in to Office 365, and then choose **Install now**.



The screenshot shows the Office 365 installation page. At the top, it says "Install Office on your PC" and lists icons for Word, Excel, PowerPoint, Outlook, and OneNote. A red box highlights the "Install now" button. Below this, there are options for language and troubleshooting. A green line connects the "Install now" button to a callout box that says "Install apps on your PC". Another green line connects the "Install now" button to a callout box that says "Install apps on your device". Below the "Install now" button, there is a section titled "Collaborate with Office Online" which shows icons for Outlook, Calendar, People, Yammer, OneDrive, Sites, and Tasks. A green line connects this section to a callout box that says "Use Office Online Create and edit documents from your browser."

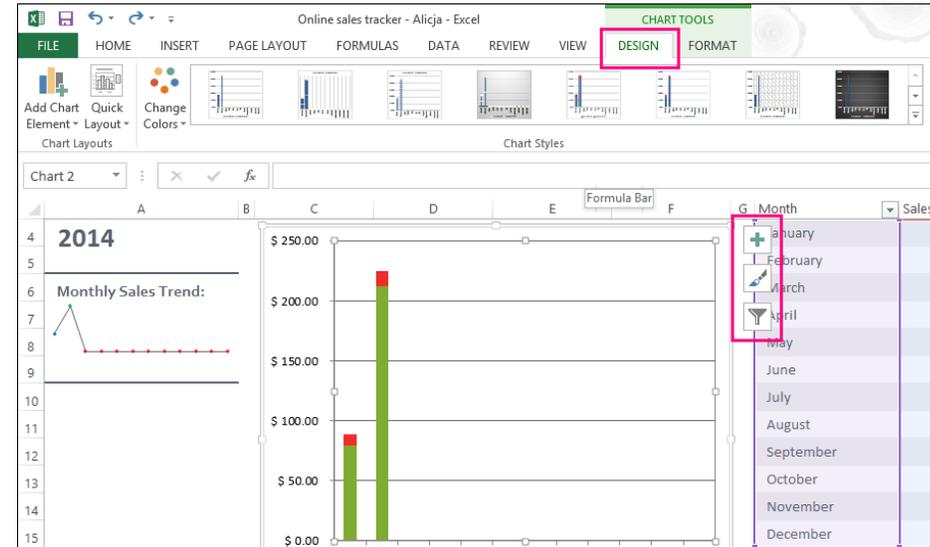
2. Choose **Run**, and then follow the rest of the installation instructions.



For more information, see [Install Office using Office 365 for business](http://go.microsoft.com/fwlink/p/?LinkId=272460) (<http://go.microsoft.com/fwlink/p/?LinkId=272460>).

What's new on the Excel 2013 ribbon?

Select a chart and options appear next to the chart along with the conditional **Design** tab for **Chart Tools** on the ribbon. Choose the buttons to fine-tune your chart.

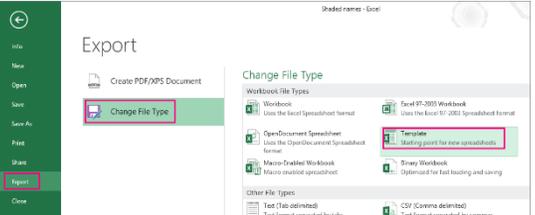
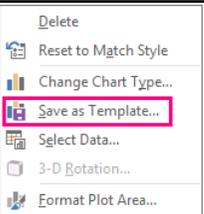
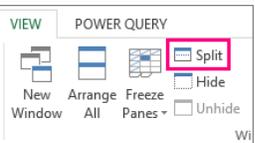


The **Insert** tab has new buttons that help you choose the best charts and PivotTables. And now you can easily create timelines and slicers with the **Filters** group.



Things you might be looking for in Excel 2013

Use the list below to find some of the more common tools and commands in Excel 2013. See also [Changed functionality in Excel 2013](http://go.microsoft.com/fwlink/p/?LinkId=396711) (<http://go.microsoft.com/fwlink/p/?LinkId=396711>).

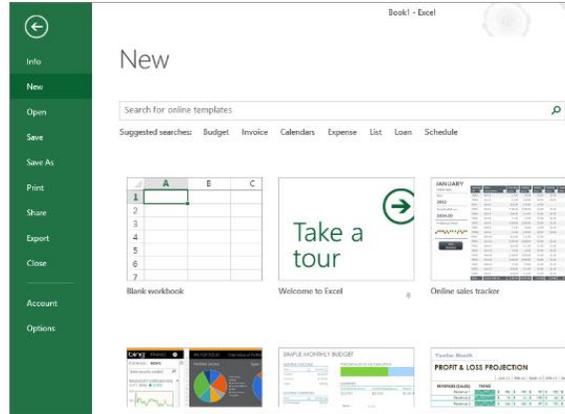
Task	In Excel 2010	In Excel 2013
Open, save, or print a workbook	Choose the File tab, then click the option. 	Choose the File tab, then the option. 
Set up options (such as default font, colors, auto-save)	Choose File , then Options , and set your options. 	Choose File , then Options , and set your options.
Compare workbooks side by side	Open each workbook, then click View > Arrange All . All workbooks were in the same window.	Open each workbook. Each one has in its own window to move independently or you can choose View > View Side by Side . 
Fill out a column with patterned data	Select each cell and enter the data.	Flash Fill recognizes the pattern and automatically fills the remaining cells.
Save an open workbook as a template	<ol style="list-style-type: none"> 1. Choose Office > Save As. 2. Type the name for the template in the File name box. 3. Choose Excel Template or Excel Macro-Enabled Template in the Save as type box. 4. Click Save. 	First create a folder to store your templates. Then choose File > Export > Change File Type > Template . See Save a workbook as a template (http://go.microsoft.com/fwlink/p/?LinkId=396712). 
Save a chart as a template	Choose the chart, and then Choose Chart Tools > Design > Save as Template .	Right-click the chart, and then choose Save as Template . 
Split the workbook	Use the Split box controls. 	Select the cell where you want to place the split, and then choose View > Split . 

Creating and saving workbooks

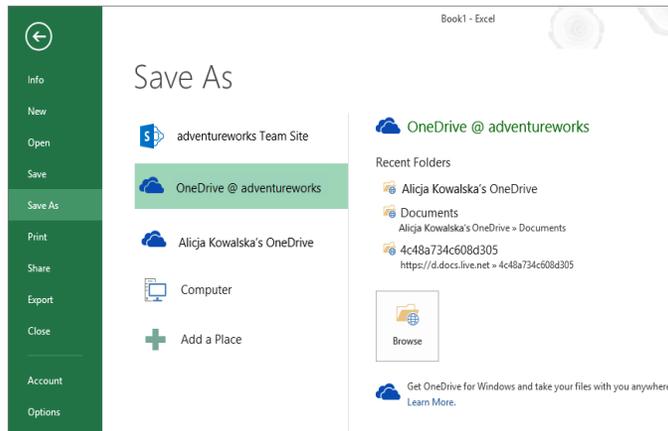
No matter if you start from your Excel desktop app or from Office 365, you can create a workbook and then store it in your OneDrive for Business or SharePoint document library.

Create a workbook using Excel 2013

Excel 2013 provides templates you can use to create new workbooks or you can start with a blank workbook. You can also learn more from the [Excel 2013 Quick Start Guide](http://go.microsoft.com/fwlink/p/?LinkId=272044) (<http://go.microsoft.com/fwlink/p/?LinkId=272044>).



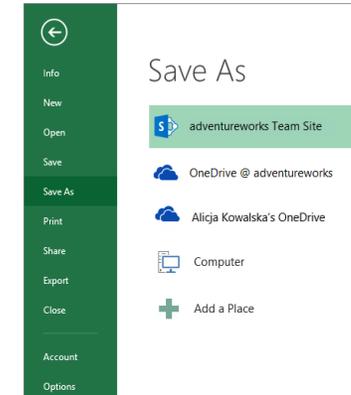
Save to OneDrive for Business



OneDrive for Business is your online file storage. Workbooks saved here are private until you share them with others. Plus, you can access them from almost anywhere.

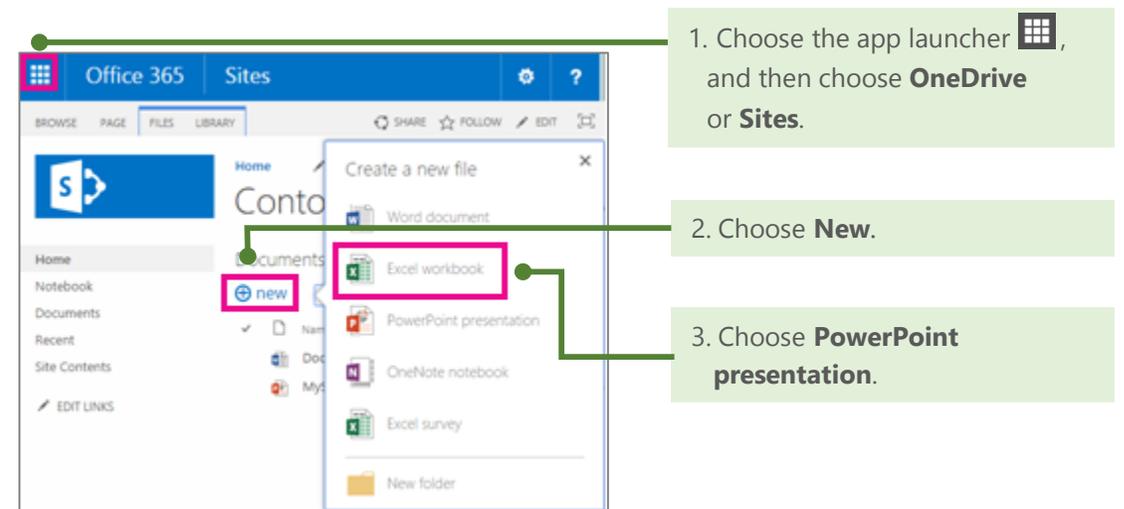
Save to SharePoint document library

SharePoint sites include a document library by default. You can save workbooks here and anyone with access to that site can see and collaborate on documents and workbooks.



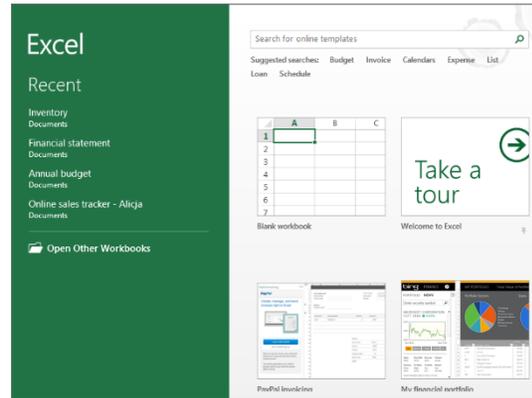
Create a workbook from Office 365

You don't need the Excel desktop app to create a new workbook. If you've got OneDrive for Business or a SharePoint document library, you can create a workbook from there. Excel Online lets you co-edit and automatically saves your workbook to that location.



Opening and deleting workbooks

You'll notice differences when you first open Excel 2013. You can choose from a blank workbook, a list of available templates, your **Recent** workbooks with their location, or **Open Other Workbooks** to get to your OneDrive for Business and a team site document libraries.



Open a workbook from Excel 2013

Choose the location of your workbook, and then open it.

SharePoint
Open your workbook from a SharePoint team site.

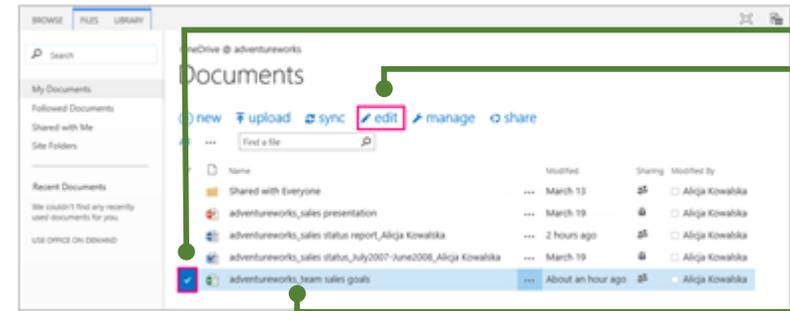
OneDrive for Business
Use this location to get to your online storage.

Recent Workbooks
Get quick access to workbooks in their default locations.

OneDrive.com
Sign in with a Microsoft account to access personal workbooks.

Open a workbook from Office 365

Quickly open a workbook from OneDrive for Business or a SharePoint team site.



Excel 2013
Select a workbook and then choose **Edit** to open in Excel 2013.

Excel Online
Choose the workbook name to automatically open in Excel Online.

Delete a workbook from Office 365

Deleting workbooks from OneDrive for Business and SharePoint is just as simple.

1. Select the workbook you want to delete.

2. Choose **Manage**.

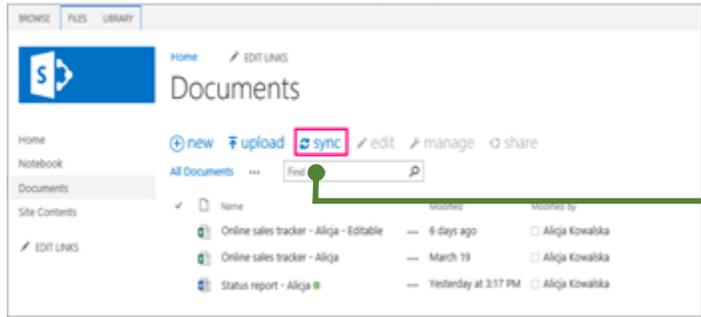
3. Choose **Delete**.

Working offline with Excel

Need to work somewhere without an Internet connection? You can sync documents or entire folders to your computer before you go. When you're back online, your changes will automatically sync.

Sync a library

You can sync the entire library of your OneDrive for Business and SharePoint team site.



1. Choose the app launcher , and then choose **OneDrive** or **Sites**.

2. Choose **Sync**.

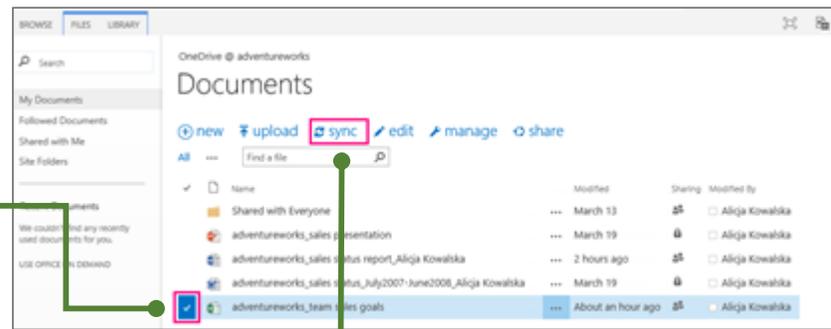
Sync a document or folder

You can sync only the documents or folders you're working on.

1. Choose the app launcher , and then choose **OneDrive** or **Sites**.

2. Select a document or folder.

3. Choose **Sync**.

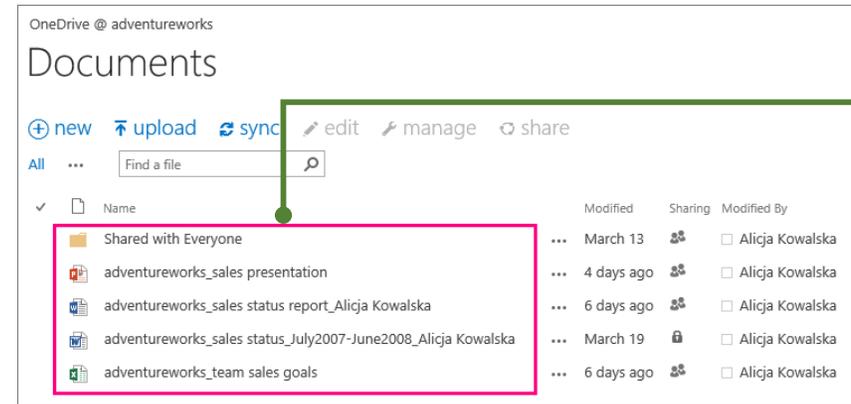


How does Sync work?

The first time you sync, it takes a little longer to download your documents on your desktop or other device. You can now work offline and not lose your changes.

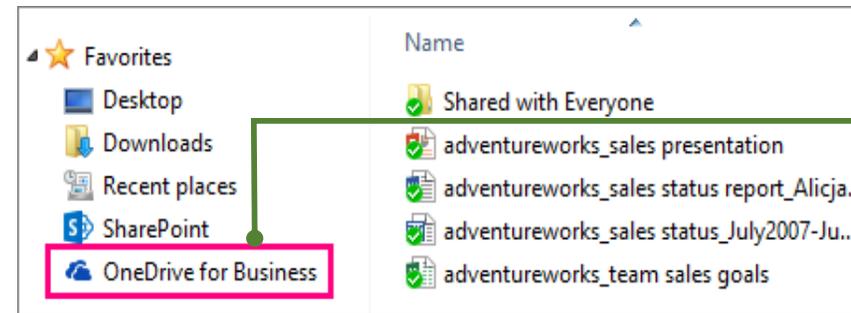
Anytime you make a change, those changes are automatically uploaded.

After you sync OneDrive for Business or a team SharePoint site, you get an associated folder on your device Favorites with the documents that you have synced.



OneDrive for Business

Lists the documents in your OneDrive for Business library.



Your desktop

Shows the location containing copies of the documents you synced from your OneDrive for Business library.

Working with others

Share workbooks

Wherever your workbook is stored, it's easy to share it with others—whether they're part of or outside of your organization. When you share, the people who need to review or edit get an email with a link to the workbook. With just a quick click, reviewers can open it from nearly anywhere and on practically any device.

1. Select your workbook.

2. Choose **Share**.

3. Enter your reviewer's name or email address.

4. Choose **Share**.

The screenshot shows the OneDrive interface with a list of documents. The document 'adventureworks_team sales goals' is selected. A 'Share' dialog box is open, showing options to invite people, get a link, and include a personal message. The 'Share' button is highlighted.

Excel Online

Does a coworker not have Excel on their computer? Or do they use a Mac? No problem! With Excel Online, you can do basic co-edits in the same document at the same time.

No Save button?
Don't worry, Excel Online automatically saves your workbook.

Need more options?
Open in Excel 2013 to use advanced options such as charts and PivotTables.

Share
If everyone is working in Excel Online, you can co-edit the same workbook simultaneously.

The screenshot shows the Excel Online interface with the ribbon and a 'Share' button in the top right corner. The ribbon includes options like Paste, Copy, Font, Alignment, Number, Tables, Cells, and Editing.

Excel Online shows who is editing and what changes they have made.

Who's editing
See the names of others editing if they have signed in.

Changes
See who has changed what cells in the workbook.

Month	Sales profit/loss	Shipping profit/loss	Total profit/loss
January	\$ 79.00	Alicja Kowalska	\$ 89.00
February	\$ 212.30		\$ 224.60
March	\$ 0.00		\$ 0.00

The screenshot shows the Excel Online interface with a table titled 'Year to Date Profit/Loss'. The table has columns for Month, Sales profit/loss, Shipping profit/loss, and Total profit/loss. The cell containing 'Alicja Kowalska' is highlighted, indicating that she is editing that cell.

Working from mobile devices

Whether you use a Windows Phone, Android device, iPhone, tablet, or iPad, you can view and edit Excel workbooks stored on a SharePoint site or OneDrive for Business.

All you need is the Office Mobile app to get to your workbooks. Now you can view and make last minute changes to a workbook right on your phone or tablet.



Set up your device

For mobile, it's all about the apps and the work or school account you use for Office 365 for business to your device. Find and install the right app for your device from your device's app store. For step-by-step instructions, see:

- [Set up a mobile device using Office 365 for business](http://go.microsoft.com/fwlink/p/?LinkId=396709) (<http://go.microsoft.com/fwlink/p/?LinkId=396709>)
- Set up Office 365 for business on your:
 - [Windows Phone](http://go.microsoft.com/fwlink/p/?LinkId=396654) (<http://go.microsoft.com/fwlink/p/?LinkId=396654>)
 - [iPhone](http://go.microsoft.com/fwlink/p/?LinkId=396655) (<http://go.microsoft.com/fwlink/p/?LinkId=396655>)
 - [iPad](http://go.microsoft.com/fwlink/p/?LinkId=524315) (<http://go.microsoft.com/fwlink/p/?LinkId=524315>)
 - [Android phone and tablet](http://go.microsoft.com/fwlink/p/?LinkId=525632) (<http://go.microsoft.com/fwlink/p/?LinkId=525632>)

Need more info?

- Check out the [Office 365 for business learning center](http://go.microsoft.com/fwlink/p/?LinkId=392570) (<http://go.microsoft.com/fwlink/p/?LinkId=392570>) for additional quick start guides and how-to videos.
- Find more tips for [switching to Office 365](http://go.microsoft.com/fwlink/p/?LinkId=398049) (<http://go.microsoft.com/fwlink/p/?LinkId=398049>).