# Switching to Sheets from Microsoft Excel

# Overview: Differences between Sheets and Excel

Now that you've switched from Microsoft Excel to Google Workspace, learn how to use Google Sheets as your new spreadsheet program.

What you need:

10 minutes

Google Workspace account

Get Sheets: Web (sheets.google.com), Android, or iOS

Note: Comparisons are based on Microsoft Office versions 2010, 2013, and 2016.

In Microsoft Excel	In Sheets*
Collaborate in Excel for the web	Collaborate in real-time from Sheets
Share using Excel for the web or a shared workbook	Share directly from Sheets
Save automatically using SharePoint or OneDrive	Save automatically to Drive
Manage versions with History or Version History in OneDrive	Manage versions with version history
Add formulas and use Formula AutoComplete for suggestions	Add formulas and use formula suggestions that appear as you enter text
Record macros or use VBE	Record macros or use Google Apps Script
Create filters	Create filters and filter views
Insert recommended pivot tables or create one manually	Create pivot tables manually or automatically with Explore
Create charts manually	Create charts manually or automatically with Explore
Set notifications in OneDrive	Set notifications in Sheets

<sup>\*</sup>Sheets instructions are web-only.

# 1. Access Sheets

## 1.1 Get Sheets on your devices

You can open Sheets in any of the following ways:

- Any web browser—Go to sheets.google.com.
- Google Drive—Click New Google Sheets and create from scratch or from a template.

Sheets.

- Most Google pages—In the upper-right corner, click the App Launcher
- Android devices—Install and open the <u>Android app</u>.
- Apple iOS devices—Install and open the iOS app.



Note: The instructions in this guide are web only.

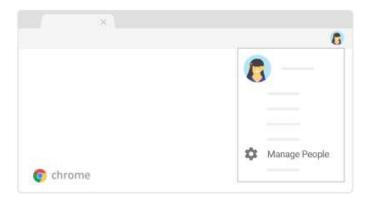
# 1.2 (Optional) Add multiple Google Accounts

Have multiple Google Accounts? Quickly switch between them with Chrome profiles.

Note: Don't have Chrome Browser yet? See instructions on how to install Chrome.

- 1. In Chrome Browser, in the top-right corner next to the address bar, click your profile image.
- 2. Click Manage People.
- 3. Click Add Person.
- 4. Enter a name, choose an image, and click Add.
- 5. Sign in with the Google Account you're adding. All settings and bookmarks automatically sync.
- 6. Click your profile image and choose a different profile to switch between accounts.

If you're unsure which account you're currently using, click your name and see which profile is at the top.



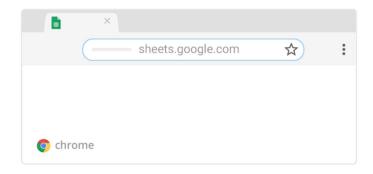
#### 1.3 Create a browser bookmark

1. In Chrome Browser, open Sheets.

Note: If you prefer to open spreadsheets from Google Drive, open <u>Drive</u> instead.

- 2. In the top-right corner, click More Bookmarks.
- 3. Make sure that Show Bookmarks Bar has a check next to it.
- 4. In the address bar, click Bookmark 🛱.

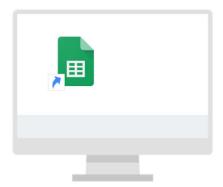
If you're not using Chrome, follow your browser's instructions to bookmark sheets.google.com.



## 1.4 Add a Sheets desktop shortcut (Windows only)

If you're using Microsoft Windows, you can add a shortcut to Sheets on your desktop.

- 1. Go to your desktop and right-click.
- 2. Choose New Shortcut.
- 3. For the location, enter https://sheets.google.com.
- 4. (Optional) To name your shortcut, enter a name.
- 5. Click Finish.

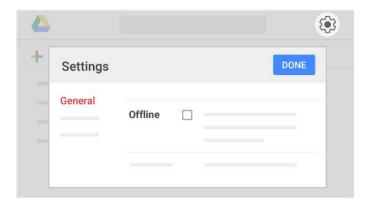


# 1.5 Work offline (Chrome only)

When you turn on offline access, your most recent files are automatically saved for offline use.

- 1. Install the Google Docs Offline extension.
- 2. In <u>Drive</u>, click Settings Settings.
- 3. In the Offline section, check the Create, open and edit your recent Google Docs, Sheets, and Slides files on this device while offline box.
- 4. Click Done.
- 5. Right-click a file and turn on Available offline.

To learn how to access files offline from your desktop or mobile, see <u>Access stored Drive files without</u> the internet.

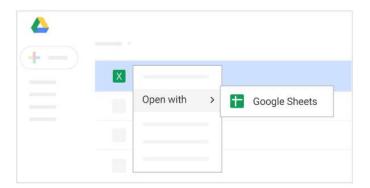


# 2. Sheets and Excel best practices

#### 2.1 Work with Excel files in Drive

There are different ways to work with Microsoft Excel files. You can:

- Import Excel data into Sheets. Learn more
- Convert Excel files to Sheets. Learn more
- Edit Excel files in Drive without converting them. Learn more
- Convert Sheets files to Excel or other formats. Learn more



#### 2.2 Use Excel and Sheets together

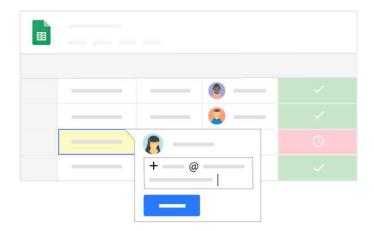
If your team uses Microsoft Excel and Sheets, here are some best practices for when to use each product.

Convert existing Excel spreadsheets to Sheets if:

- You need to collaborate or simultaneously edit with your team.
- Your dataset is 5 million cells or fewer.

Continue working in your existing Excel spreadsheets if:

- Your dataset is greater than 5 million cells.
- You're using the Hyperion add-on with Excel.
- If you use rare chart types, such as 3D pyramid charts or pie-of-pie charts.



## 2.3 Edit Excel files in Sheets

Open an Excel file from Drive and edit it in Sheets. Any changes you make are saved in the original Excel format.

#### Chrome Browser only

- 1. Make sure the Office Editing for Docs, Sheets, & Slides extension is not installed:
  - Open Chrome Browser and in the top-right corner, click More
     Tools Extensions.
  - 2. If you see the Office Editing for Docs, Sheets, & Slides extension, click Remove.
- 2. In Drive, double-click an Excel file.

A preview of your file opens.

3. At the top, click Open with Google Sheets.

You can now edit, share, view version history, collaborate in real-time with others, and more. All changes you make are saved to the original Microsoft Office file.

#### 2.4 Import Excel data into Sheets

You can import data from an Excel file to a new (or existing) Sheets file. Your Excel file won't be changed, even as you change the Sheets file.

- 1. In Sheets, create a new or open an existing spreadsheet.
- 2. Click File Import.
- 3. Choose the Excel file and click Select.
- 4. Choose an import option:
  - Create new spreadsheet
  - Insert new sheet(s)
  - Replace spreadsheet

- 5. Click Import data.
- 6. If prompted, click Open now.



#### 2.5 Convert Excel files to Sheets

Instead of importing data, you can convert an Excel file to Sheets and keep working on it in Sheets. Your Excel file won't be changed.

1. Open Driveand double-click an Excel file.

A preview of your file opens.

- 2. At the top, click Open with Google Sheets.
- 3. Click File Save as Google Sheets.

To automatically convert all future uploads of Office files to Google Sheets:

- 1. In Drive, at the top, click Settings Settings.
- 2. Next to Convert uploads, turn on Convert uploaded files to Google Docs editor format.

Note: Previously uploaded files will not be converted.

In Drive, you'll see the Excel file and the new Sheets file. You can keep the Excel file or delete it. If you keep the Excel file, to avoid confusion, you can rename it to something like [Archived] My doc.xls.

Tip: Use these icons to quickly differentiate Sheets and Excel files in Drive:





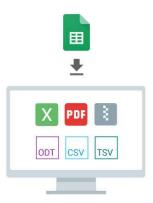
#### 2.6 Share a copy of a Sheets file in Excel format

You can work on a spreadsheet in Sheets and then send a copy by email as an Excel file (or a PDF).

- 1. In Sheets, open the file.
- 2. Click File Email as attachment.
- 3. Under Attach as, choose Microsoft Excel.
- 4. Enter the email address, subject, and message.
- 5. (Optional) Check the Send a copy to myself box.
- 6. Click Send.

You can also download a copy of the Sheets file in Excel, PDF, CSV, ODS, or other formats.

- 1. In Sheets, click File Download as.
- 2. Select the file format you want to download.

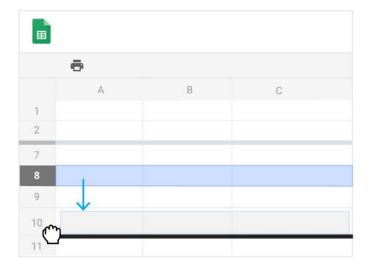


# 3. Manage data in Sheets

## 3.1 Perform basic operations

Most basic operations work the same way in Sheets and Microsoft Excel, such as:

- Moving rows and columns
- Adding or removing rows or columns
- Adding functions (function names are the same)
- Printing spreadsheets
- Copying and pasting data

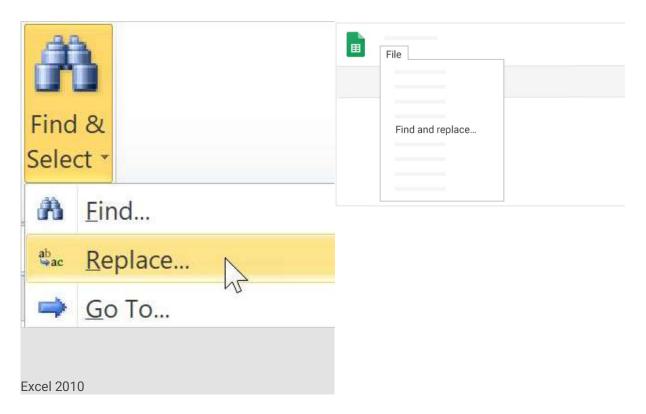


#### 3.2 Search for data

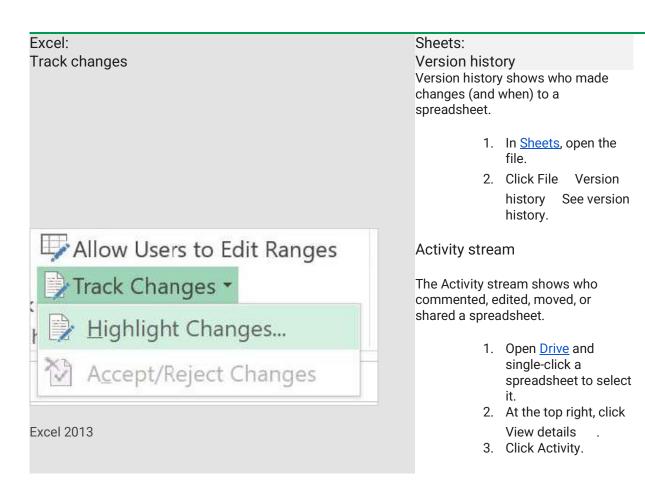


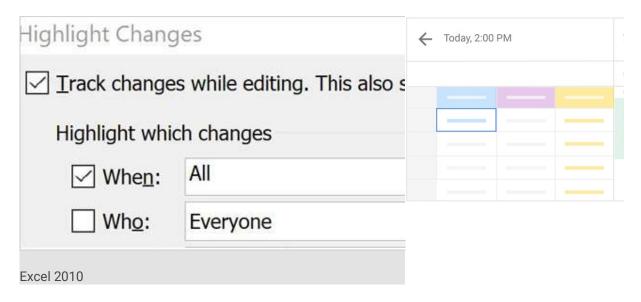
#### Sheets: Find and replace

- In <u>Sheets</u>, open a spreadsheet and click Edit Find and replace.
- 2. Next to Find, enter the text or numbers that you want to find.
- 3. Next to Replace with, enter the new data.
- 4. Next to Search, choose the sheets that you want to search.
- (Optional) To refine your search, select additional options.
   You can make your search casesensitive, find exact matches, use regular expressions, or search within formulas.
- 6. Choose an option to replace the data:
  - To replace instances one at a time, click Find Replace.
  - To replace all instances, click Replace all.



## 3.3 See changes to data





#### 3.4 Restrict data sharing

Sheets: Restrict sharing options

- 1. In a spreadsheet you own, click Share.
- 2. Click Advanced.
- 3. Check one or both of these boxes:
  - Prevent editors from changing access and adding new people
  - Disable options to download, print, and copy for commenters and viewers
- 4. Click Save changes.
- 5. Click Done.



# 3.5 Use keyboard shortcuts

Sheets: See a complete list of shortcuts

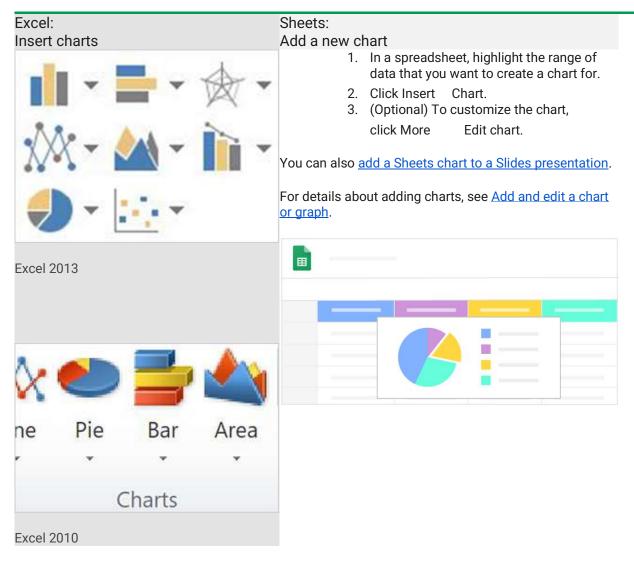
- 1. Open Sheets.
- 2. For Windows and Chrome OS, press Ctrl+/.

3. For Mac, press  $\mathbb{H}+/.$ 

For more details, see Keyboard shortcuts for Google Sheets.

# 4. Analyze data in Sheets

#### 4.1 Add charts



#### 4.2 Get automatic charts

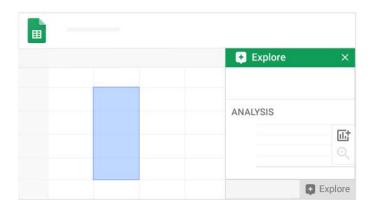
Get summaries and charts of your data with the click of a button in Sheets. It's kind of like having an expert in data analysis sitting next to you.

Sheets: Get automatic charts

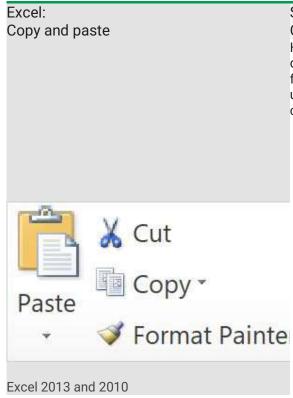
1. In a spreadsheet, select a range of cells, columns, or rows. Otherwise, you'll get insights based on where your cursor is.

- 2. At the bottom, click Explore 🗣.
- 3. Choose an option:
  - Point to a chart and click Insert chart ...

Tip: To customize a chart, click More Edit chart Customize.



#### 4.3 Add charts to Docs and Slides

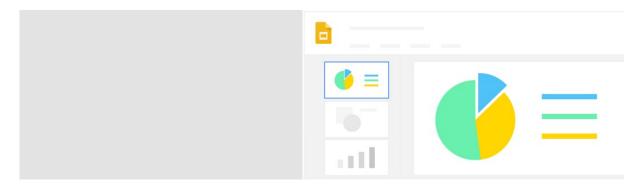


#### Sheets:

#### Copy and paste

Help people visualize data in a presentation or document by adding charts from Sheets. If the source data changes, you can update the chart with the click of a button.

- 1. In Sheets, open the spreadsheet and in the chart, click More Copy chart.
- 2. In <u>Docs</u> or <u>Slides</u>, paste the chart.
- 3. Choose an option:
  - To update the chart if the source data changes, keep Link to spreadsheet selected. Then, if source data changes, at the top of the chart, click Update.
  - To keep the chart unlinked (not updated), select Paste unlinked.
- 4. Click Paste.



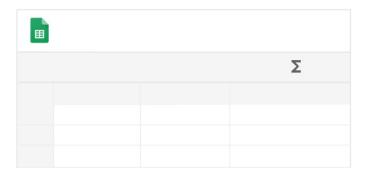
# 4.4 Functions in Sheets and Excel

Most Excel functions are the same in Sheets. For a list of common functions, see the <u>Sheets Cheat</u> Sheet.

Some unique functions in Sheets:

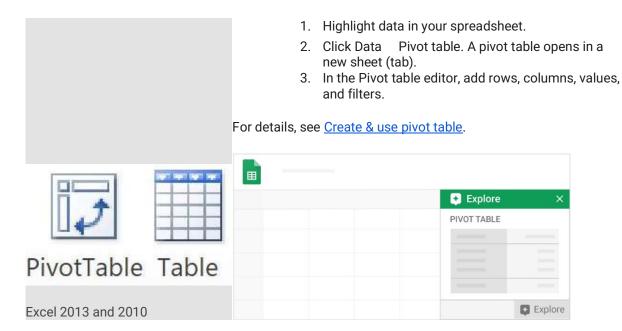
FILTER	Returns a filtered version of the source range, returning only rows or columns that meet specified conditions.
SORTN	Returns a specified number of items in a data set after a sort.
SPARKLINE	Creates a miniature chart in a single cell.
QUERY	Runs a Google Visualization API Query Language query across data.
GOOGLEFINANCE	Gets current or historical securities information from Google Finance.
GOOGLETRANSLATETranslates text from one language into another.	
IMPORTRANGE	Imports a range of cells from a specified spreadsheet.

For a list of all functions in Sheets, see the Google Sheets function list.

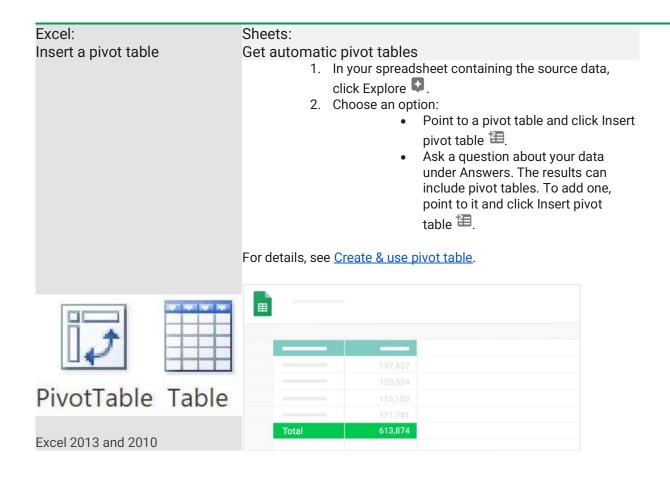


# 4.5 Add pivot tables

Excel:	Sheets:
Insert a pivot table	Add a new pivot table



## 4.6 Get automatic pivot tables



# 5. Use macros and add-ons

#### 5.1 Automate tasks with macros

Excel 2013 and 2010

#### Excel: Sheets: Individual messages Macros and Google Apps Script Automate repetitive tasks with macros in Sheets. Or, if you need custom functions, menus, or windows, you can create them with Google Apps Script. Review macro best practices • Limit the number of actions in a macro for optimum performance. • Use macros for frequently repeated operations that don't need much configuration. Use unique macro shortcuts. You can have up to 10 shortcuts per sheet. Open additional macros from Tools Macros. Reduce macro duplication by applying a macro created for a single cell to a range of cells by selecting the full range of cells and then activating the macro. Macro scripts are specific to individual sheets and can only be used in Sheets—they won't work in Google Docs, Forms, or Slides. Record a macro: 1. In Sheets, open a spreadsheet and click Tools Macros Record macro. 2. Select the type of cell reference to use. 3. Complete the task you want to record and click Save. 4. Name the macro and click Save. 5. Click Tools Macros your macro to run the macro. File Page Layou Home Insert Tools Record Macro Use Relative References Record macro Macros ► Visual Macros Macro Security Basic Code

#### Create a script:

- 1. Click Tools Script editor.
- 2. Create your script.

For more information, see <u>Overview of Google Apps</u> Script, or read more about custom functions and macros.

#### 5.2 Convert Excel macros to Google Sheets

# Excel: Edit macros Project - VBAProject ☐ ■ VBAProject (Bill paying checklist1) Sheet1 (Budget Planning C ThisWorkbook Excel 2010 and 2013

Sheets:

Recreate macros in Sheets

You can convert macros in Microsoft Excel spreadsheets to Google Sheets by re-creating them using Google Apps Script. Apps Script powers macros in Sheets, just like Microsoft Visual Basic for Applications does for Excel.

Re-create and edit a macro in Sheets using Apps Script:

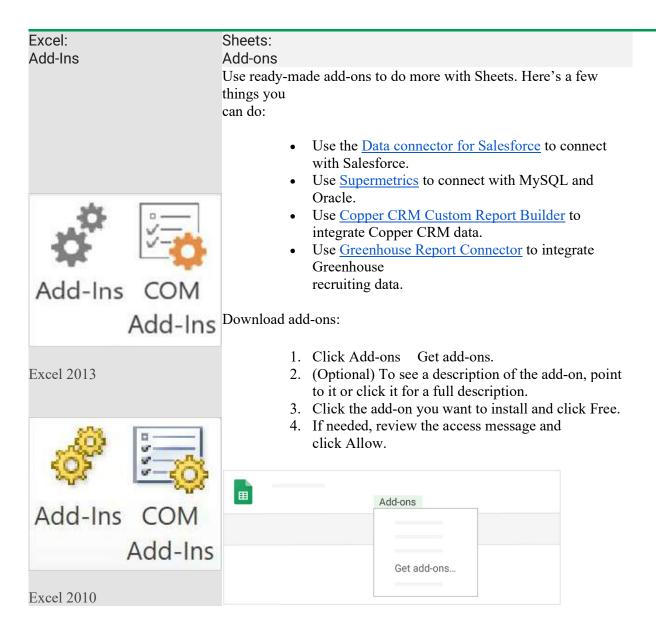
- 1. Make a note of the macros in your original Excel spreadsheet that you need to re-create in Sheets.
- 2. In <u>Sheets</u>, open a spreadsheet and click Tools Macros Record macro.
- 3. Select the type of cell reference to use and click Save.
- 4. Complete the task that you want to record and click Save.
- 5. Enter a name for the macro and, optionally, a shortcut number and click Save.
- 6. Click Tools Macros Manage macros to edit your script.
- 7. Next to the macro that you want to edit, click More Edit script.
- 8. In the macros.gs section, make your changes to the code. If needed, use the Sheets Apps Script documentation or search online for the JavaScript concept that you need.
- 9. Click Save macro and close the tab to return to your spreadsheet.
- 10. Repeat steps 2–7 for any additional macros that you want to re-create from your original spreadsheet.

Activate a macro in Sheets

- 1. Click Tools Macros *your saved macro*. You can also run your macro by using its keyboard shortcut.
- 2. If it's the first time you run the macro, allow authorization.

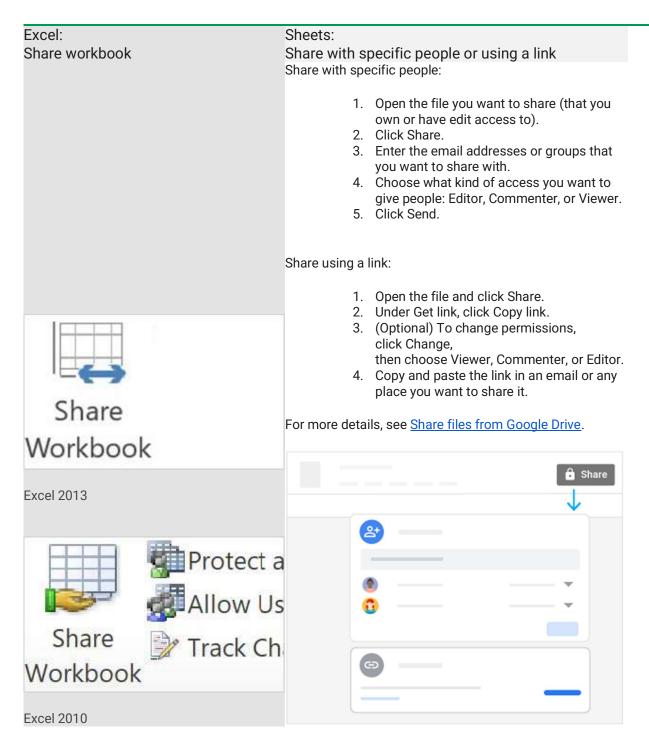
Tip: For more about how the Apps Script library can mimic common Visual Basic for Applications (VBA) functions, go to Simplifying Migration from VBA to Google Apps Script.

#### 5.3 Do more with add-ons

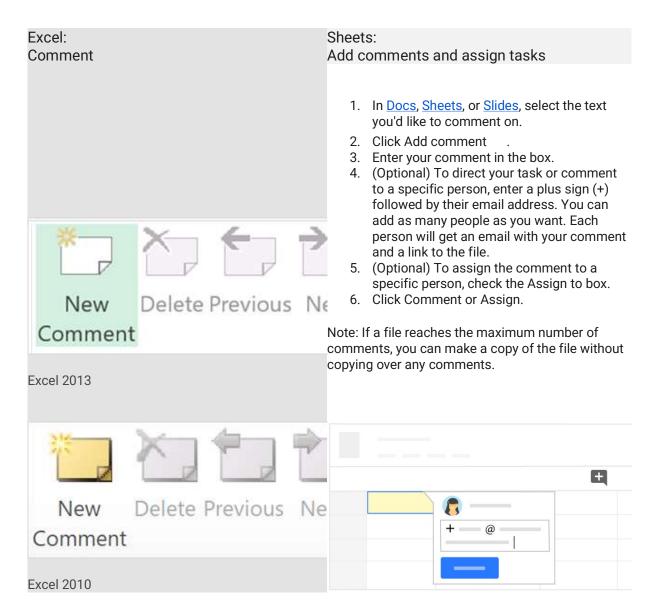


# 6. Collaborate in Sheets

#### 6.1 Share spreadsheets

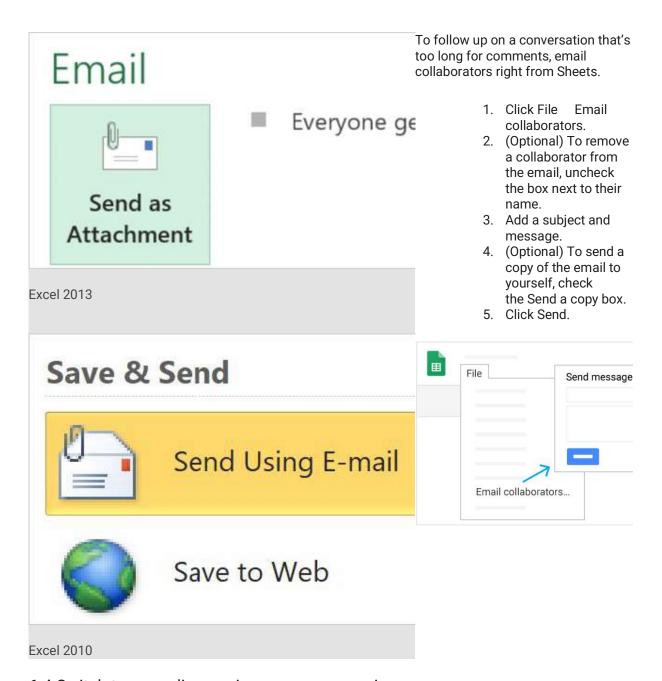


6.2 Add comments and assign tasks



#### 6.3 Email collaborators

Excel:	Sheets:
Send as Attachment	Email collaborators



6.4 Switch to an earlier version or name a version

If you own the spreadsheet or have edit access to it, you can see past versions and restore them.

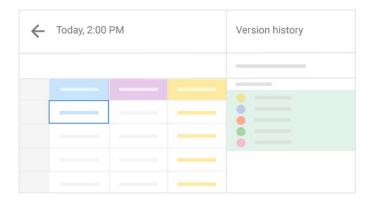
Sheets: See versions or restore a version:

- 1. Select File Version history See version history.
- 2. (Optional) To see only named versions in the list, click Only show named versions.
- 3. Click a timestamp to see a previous version of the file.

Below the timestamp, you'll see:

• The names of anyone who edited the document.

- A color next to each person's name. The edits they made appear in that color.
- 4. (Optional) To make the version the active version, click Restore this version.



#### Name a version:

- 1. Select File Version history Name current version.
- 2. Enter a name and click Save.

#### 6.5 Create filters and filter views



#### Sheets:

#### Filters and filter views

To filter out data in a spreadsheet, create a filter. If you want filters that don't affect anyone else's view, create filter views.

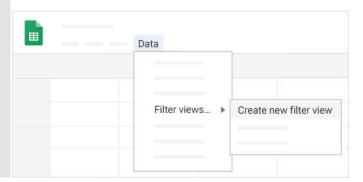
#### Create a filter:

- 1. Select a range of cells.
- 2. Click Data Create a filter.
- 3. Go to the top of the range and click Filter to see the filter options.

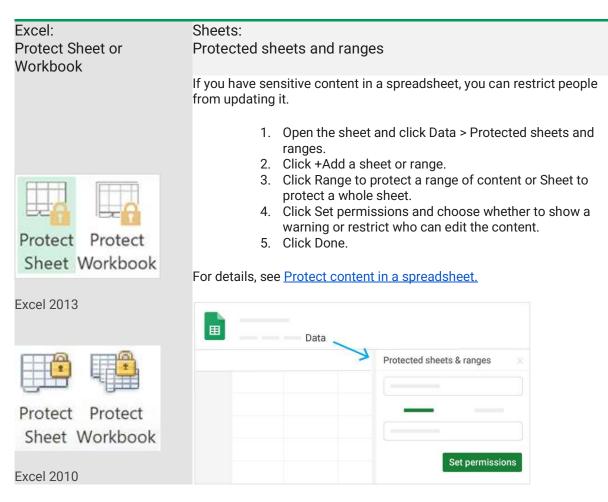
#### Create a filter view:

- 1. Click a cell that has data.
- 2. Click Data Filter views Create new filter view.
- 3. In a column header, click a list and select the data you want to filter. Or, in the search box, enter text to search for the data you want to filter.
- 4. Click OK.
- 5. In the Name box, enter a name for your filter view
- 6. Click Data Filter views to open your filter view anytime.

For more information, see <u>Sort & filter your data</u> and <u>Create</u>, <u>name</u>, <u>and save a filter view</u>.



#### 6.6 Protect content

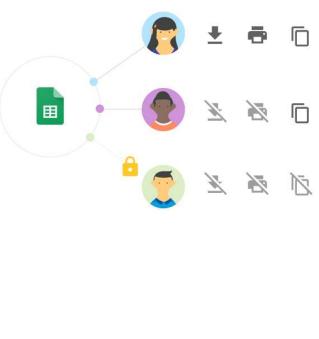


## 6.7 Limit sharing, downloading, printing, or copying

Excel:	Sheets:
Encrypt with Password	Limit sharing options
	If you have sensitive content in a spreadsheet, you can prevent people from downloading, printing, or copying it.



- 1. At the top of the spreadsheet, click Share.
- 2. At the bottom, click Advanced.
- 3. Check the Disable options to download, print, & copy for commenters and viewers box.
- 4. Click Done.



## 6.8 Set an expiration date for sharing

#### Sheets: Set sharing expirations

When you're working with people outside of your organization, such as clients or agencies, you might want to restrict their access to certain files when your projects are complete.

#### Set an expiration date:

- 1. At the top of the spreadsheet, click Share.
- 2. If the file isn't already shared, share it.
- 3. Click Advanced.
- 4. Hover over a person's name and click Set expiration
- 5. Change the access expiration date.

Note: You can't set the expiration for the current day. If you need to restrict access immediately, just unshare the file.

6. Click Save changes Done.



# 6.9 See who's viewed a spreadsheet

Sheets: See who's viewed a spreadsheet

In Sheets, if you have edit access to a spreadsheet, you can see:

- Who it's shared with
- Who viewed it
- A chart of viewers over time

To see the Activity dashboard, at the top right, click Activity dashboard ...

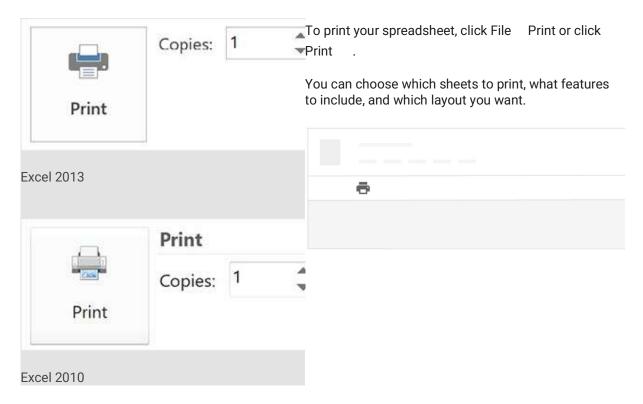
If you don't want your view history to appear in the Activity dashboard, you can change the privacy settings.



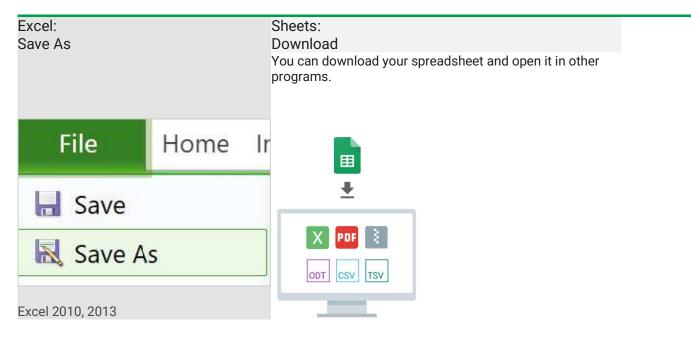
# 7. Export spreadsheets

# 7.1 Print spreadsheets

Excel:	Sheets:
Print	Print



# 7.2 Download in different formats



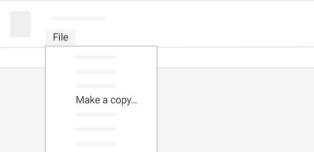
# 7.3 Make a copy

Excel:	Sheets:
Move or Copy	Make a copy

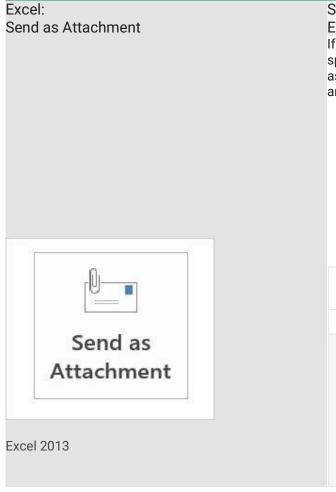


Copying a spreadsheet is useful for creating templates. For example, if you write a lot of project plans, make copies of one plan. Then, update each copy for a new project without having to format it again.

- 1. Click File Make a copy.
- 2. (Optional) You can rename the copy, change where you save it in Drive, and share it with the same collaborators.



## 7.4 Email a copy

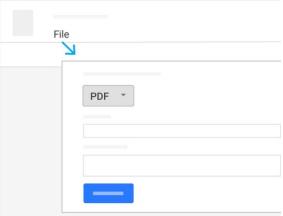


#### Sheets:

#### Email as attachment

If you need to collaborate with someone on your spreadsheet in your old program or format, such as PDF or Excel, you can email it as an attachment.

- Open the spreadsheet and click File Email as attachment.
- 2. Select a format.
- 3. Enter the email addresses or groups you want to send copies to.
- 4. Add a message.
- 5. Click Send.





# 8. Get Sheets productivity tips

## 8.1 Import data from Forms

Analyze data from Google Forms by sending it to Sheets.

- 1. In Forms, open the form with the data you want to import.
- 2. At the top, click Responses.
- 3. Click More Select response destination.
- 4. Create a new spreadsheet or select an existing one.
- 5. Click Create or Select.

#### 8.2 Save time with templates

If you're creating the same types of files over and over, such as expense reports and purchase orders, save time with a template.

Sheets: Choose an existing template:

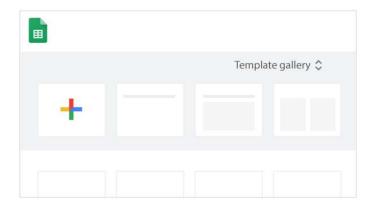
- 1. Open Sheets and at the top, click Template Gallery.
- 2. Click the template you want to open it.

#### Create your own template:

- 1. Open Sheets and at the top, click Template Gallery.
- 2. At the top of the gallery, click your organization's name.
- 3. Click Submit Template.

- 4. Click Select a spreadsheet, and choose the template file you created, and then click Open.
- 5. Select a category for your file.
- 6. Click Submit.

Your new template appears in the Template Gallery under your organization's name.

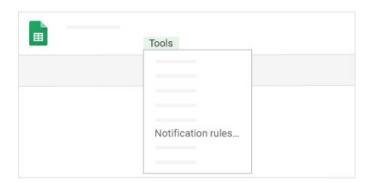


# 8.3 Find out if someone changes a spreadsheet

Notification rules let you know when any changes are made to a spreadsheet.

Sheets: Create notification rules:

- 1. In Sheets, open the spreadsheet where you want to set notifications.
- 2. Click Tools Notification rules.
- 3. Select when and how you want to receive notifications.
- 4. Click Save.



#### 8.4 Add checkboxes to cells

Use checkboxes to make Sheets more interactive. You can use checkboxes with charts, filters, pivot tables, and formulas.

Sheets: Add or remove checkboxes:

1. In Sheets, open a spreadsheet and select the cells where you want checkboxes.

- 2. Click Insert Checkbox.
- 3. (Optional) To delete checkboxes, select the checkboxes you want to remove and press Delete.

Note: In formulas, unselected checkboxes have a value of FALSE (exclude) and selected checkboxes have a value of TRUE (include). You can see the value in the Formula bar. You can also change this value.

