Switching to Sheets from Microsoft® Excel® 2010
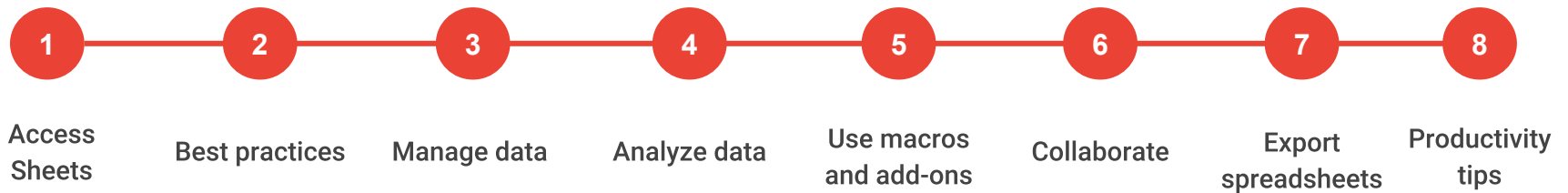
Google Cloud

Welcome to Sheets

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

1	2	3	4	5	6	7	8
Access Sheets	Best practices	Manage data	Analyze data	Use macros and add-ons	Collaborate	Export spreadsheets	Productivity tips

Differences at a glance

| Microsoft Excel	Google Sheets
Collaboration only in Excel Online	Collaborate in real-time from Sheets
Share using email	Share directly from Sheets or by email
Save using the File menu	Save automatically to Drive
Add multiple tabs to a spreadsheet	Add multiple sheets to a spreadsheet
Manage versions with version control (Excel Online only)	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 VBA	Record macros or use Google Apps Script
Create filters	Create filters and filter views
Create pivot tables manually	Create pivot tables manually or automatically with Explore
Create charts manually	Create charts manually or automatically with Explore
See recent activity	See the activity dashboard
Create notifications using conditional formatting	Create notification rules

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.
- Most Google pages—In the upper-right corner, click the App Launcher ▦ > **Sheets**.
- Android devices—Install and open the Android app.
- Apple® iOS® devices—Install and open the iOS app.
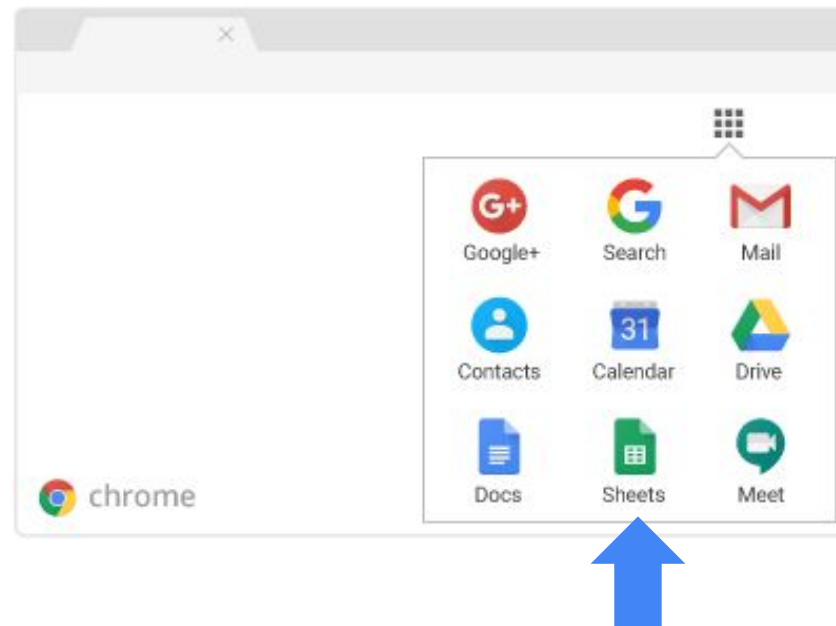
1.2 (Optional) Add multiple Google Accounts

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.
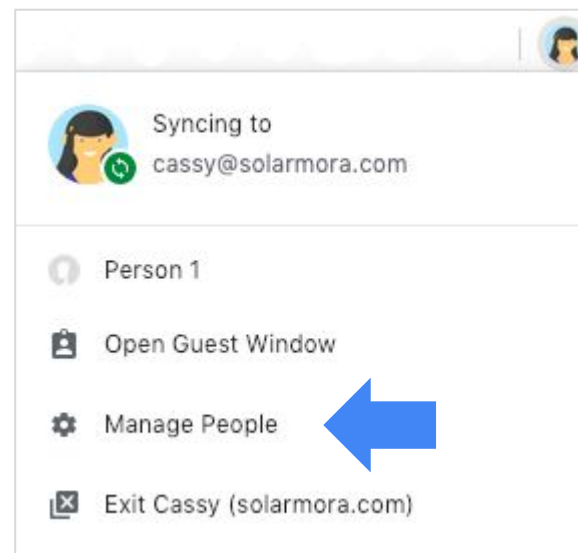
1.3 Create a browser bookmark

1. In Chrome Browser, open Sheets.
   Note: If you prefer to open spreadsheets from Google Drive, open Drive 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**.
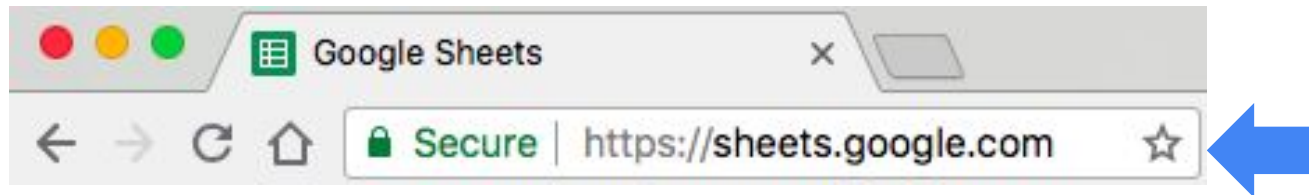
1.4 Add a Sheets desktop shortcut (Windows only)

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 in Sheets, your most recent files are automatically saved for offline use.

Sheets: Set up offline availability (one time only)

1. Make sure you have the Google Docs Offline extension.
    a. Open Chrome Browser and in the top-right corner, click More ⋮ > **More Tools** > **Extensions**.
    b. Search for the Google Docs Offline extension.
    c. If you don't have it, open the Google Docs Offline extension and click **Add to Chrome**.
2. In Drive, click Settings ⚙ > **Settings**.
3. In **General**, next to **Offline**, check the sync offline box.
4. Click **Done**.

Make a specific file available offline:

1. Open Sheets and right-click the file you want to use offline.
2. Turn on **Available offline**.
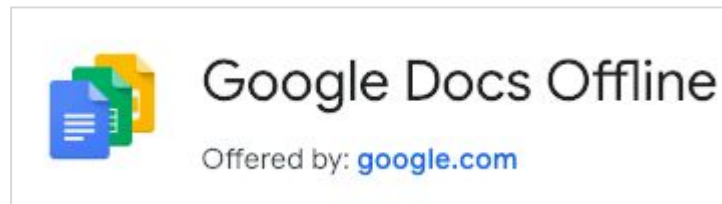
2 Best practices

2.1 Work with Excel files in Drive

There are different ways to work with 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
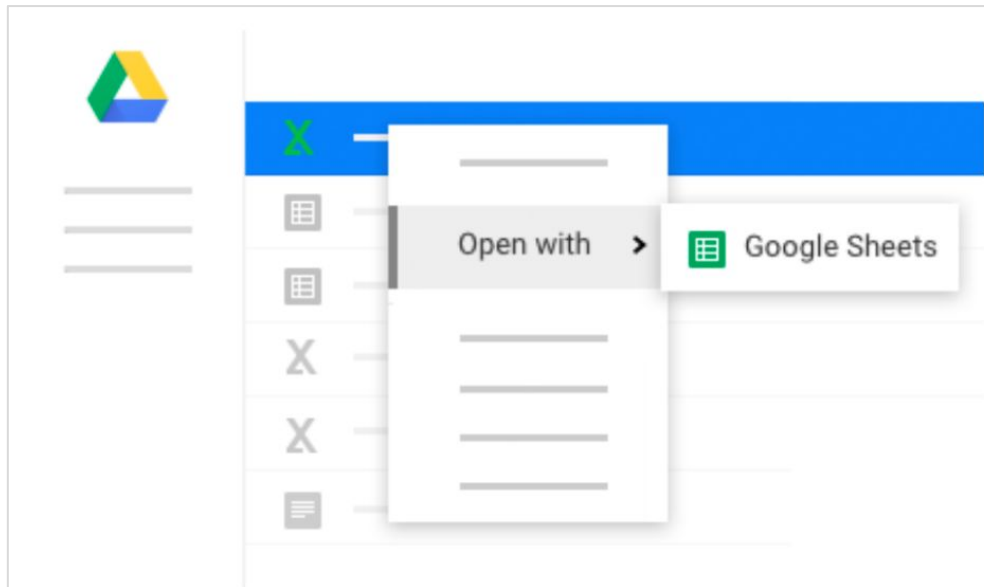
2.2 Use Excel and Sheets together

If your team uses 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.
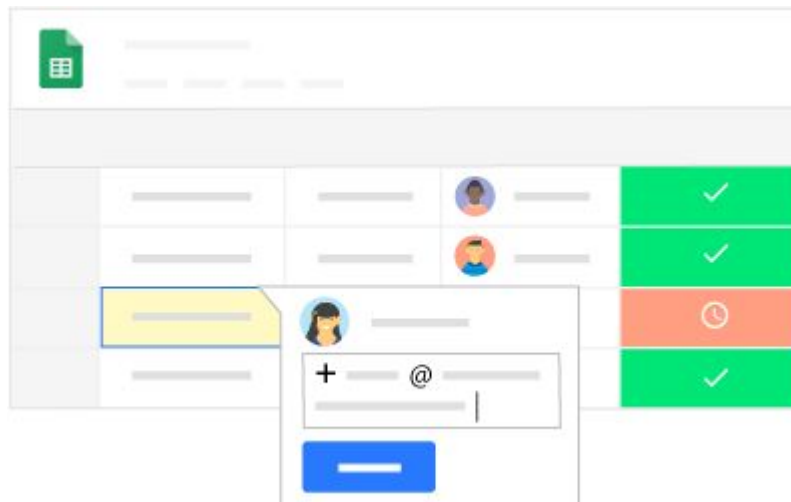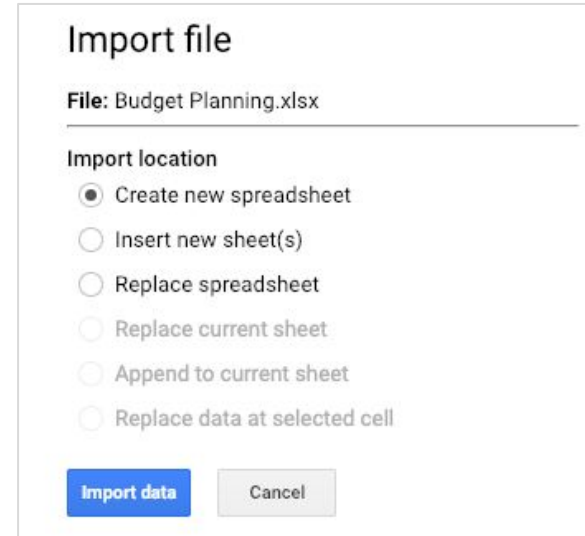
2.3 Import Excel data into Sheets

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.

Sheets: Import Excel data

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 a new spreadsheet
   - Insert as a new sheet in the existing spreadsheet
   - Replace the existing spreadsheet
5. Click **Import data**.
6. If prompted, click **Open now**.

Import file

File: Budget Planning.xlsx

Import location
- ◉ Create new spreadsheet
- ○ Insert new sheet(s)
- ○ Replace spreadsheet
- ○ Replace current sheet
- ○ Append to current sheet
- ○ Replace data at selected cell

Import data   Cancel

2.4 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.

Sheets: Convert Excel files to Sheets

1. Open Drive and click **New** > **File upload**.
2. Select your Excel file and click **Open**. Your file will be uploaded to Drive.
3. Right-click the file and select **Open with** > **Google Sheets**.
   Your file will be converted to Sheets. You might see small formatting differences.

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:

 Sheets   Excel

2.5 Convert Sheets files to Excel

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

Sheets: Convert Sheets files to Excel

1. In Sheets, click **File** > **Email as attachment**.
2. Under **Attach as**, choose **Microsoft Excel**.
3. Enter the email address, subject, and message.
4. (Optional) To email a copy to yourself, check the
   Send a copy to myself box.
5. 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.

2.6 Edit Excel files in Drive (without Office)

With Drive, even if you don't have Microsoft® Office®, you can open an Excel file from Drive. Any changes you make get saved in the original Excel format.

You can do this only in Chrome Browser on Windows.

Sheets: Edit Excel files in Drive

1. Install the Office Editing for Docs, Sheets & Slides Chrome extension.
2. Open Drive and then open an Excel file.
3. The file opens in Docs, Sheets, or Slides, but keeps the Excel extension. All changes are saved in Excel.

Office Editing for Docs, Sheets & Slides
Offered by: google.com
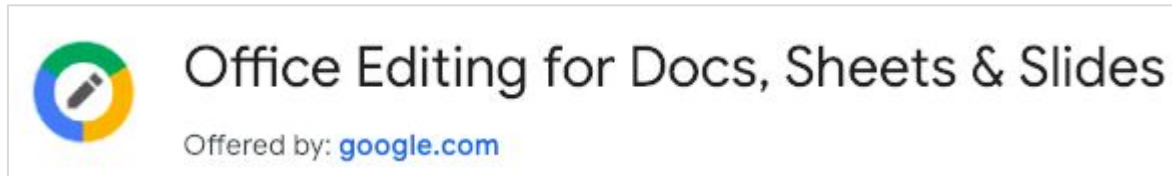
3 Manage data

3.1 Perform basic operations

Most basic operations work the same way in Sheets and 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
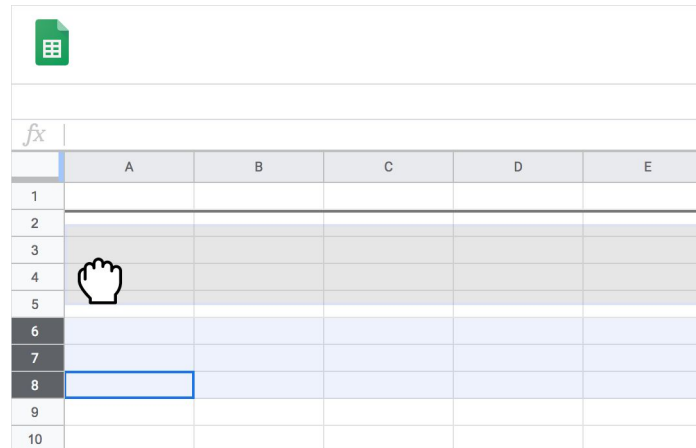
3.2 Search for data

Excel: Find and select
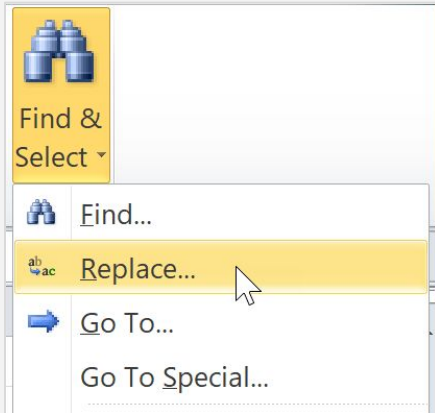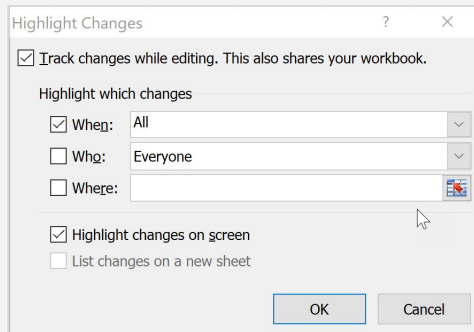
Sheets: Find and replace

1. In Sheets, open the file and click **Edit** > **Find and replace**.
2. Enter the word you want to find.
3. (Optional) To replace the word, enter the new word.
4. (Optional) To narrow your search, specify:

   - Where to search (all sheets, this sheet, a specific range).
   - How to search (match case, match the entire cell, use regular expressions, or search in formulas).

5. Click **Find**, **Replace**, or **Replace All**.
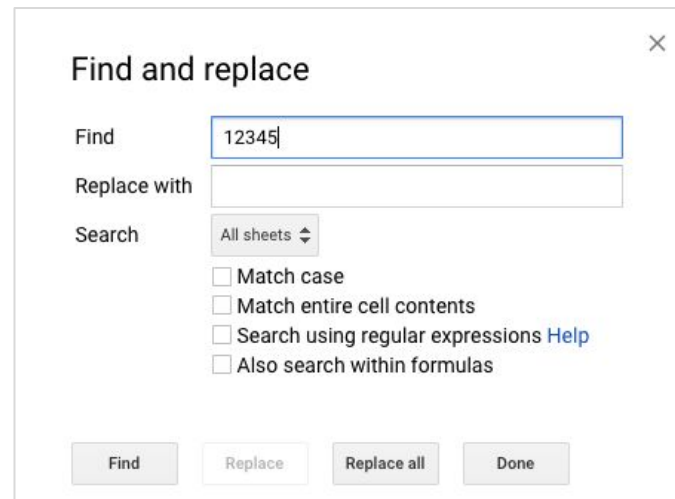
3.3 See changes to data

Excel: Track changes
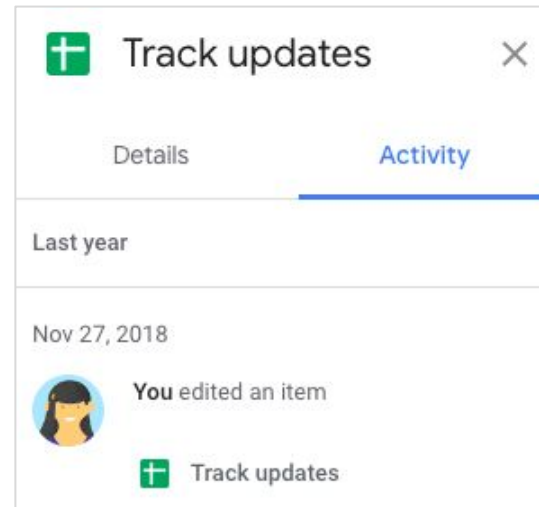
Sheets: Version history and activity stream

Version history shows who made changes (and when) to a spreadsheet.

1. In Sheets, open the file.
2. Click **File** > **Version history** > **See version history**.

The Activity stream shows who commented, edited, moved, or shared a spreadsheet.

1. Open Drive and single-click a spreadsheet to select it.
2. At the top right, click View details ⓘ.
3. Click **Activity**.
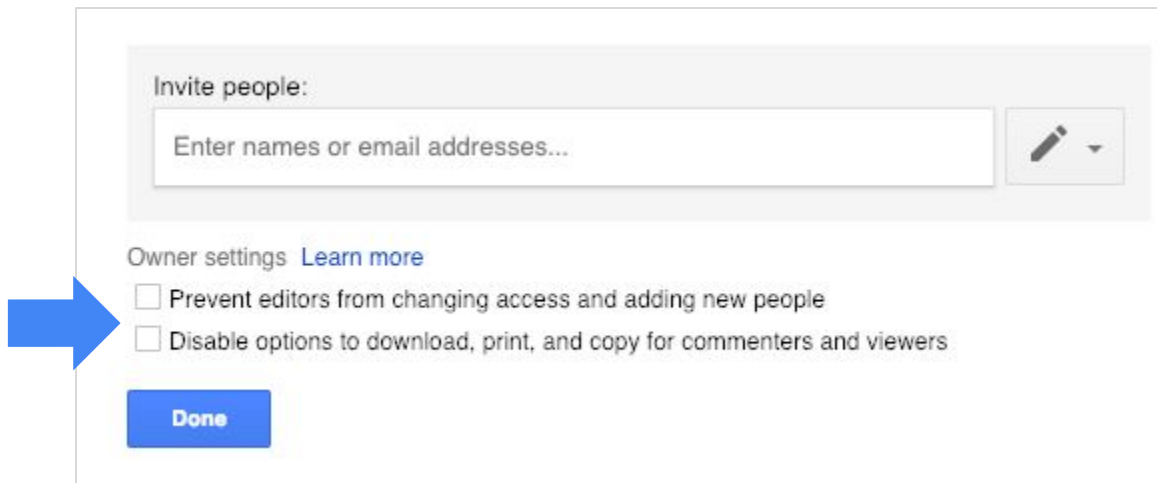
3.4 Restrict data sharing

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 ⌘+/.

For more details, see Keyboard shortcuts for Google Sheets.

Common actions	
Select column	Ctrl + Space
Select row	Shift + Space
Select all	Ctrl + a
Undo	Ctrl + z
Redo	Ctrl + y Ctrl + Shift + z
Find	Ctrl + f
Find and replace	Ctrl + h
Fill range	Ctrl + Enter
Fill down	Ctrl + d
Fill right	Ctrl + r
Save *(every change is saved automatically in Drive)*	Ctrl + s
Open	Ctrl + o
Print	Ctrl + p
Copy	Ctrl + c
Cut	Ctrl + x

4 Analyze data

Google Cloud

4.1 Add charts
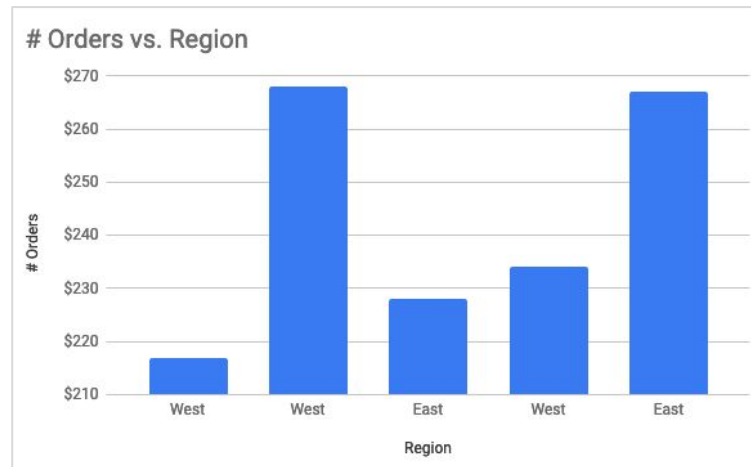
Excel: Insert charts
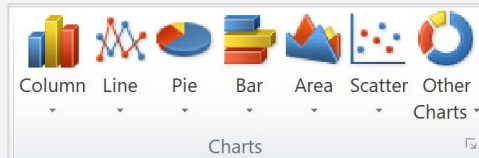
Sheets: Add a new chart

1. In a spreadsheet, highlight the range of data that you want to create a chart for.
2. Click **Insert** > **Chart**.
3. (Optional) To customize the chart, click More ⋮ > **Edit chart**.

You can also add a Sheets chart to a Slides presentation.

For details about adding charts, see Add and edit a chart or graph.

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 ▣.
    *   Ask a question about your data under **Answers**. The results can include charts. To add one, point to it and click Insert chart ▣.

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

4.3 Add charts to Docs and Slides

Excel: Copy and paste
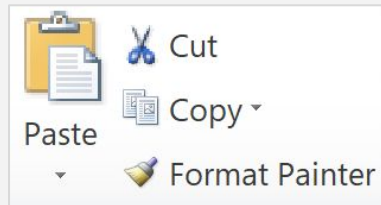
Sheets: Copy and paste

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 Docs or Slides, 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**.
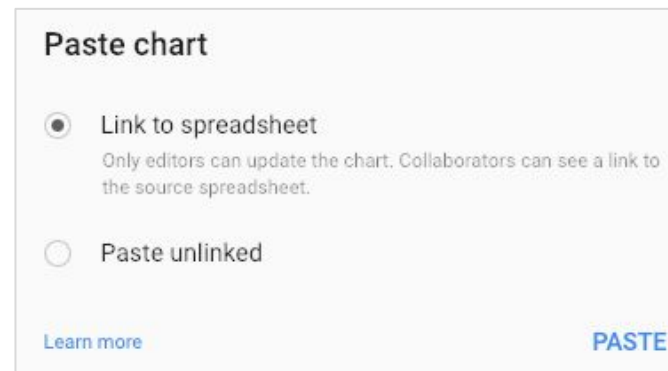
4.4 Functions in Sheets and Excel

Most Excel functions are the same in Sheets. For a list of common functions, see the Sheets Cheat 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.
- GOOGLETRANSLATE—Translates 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.
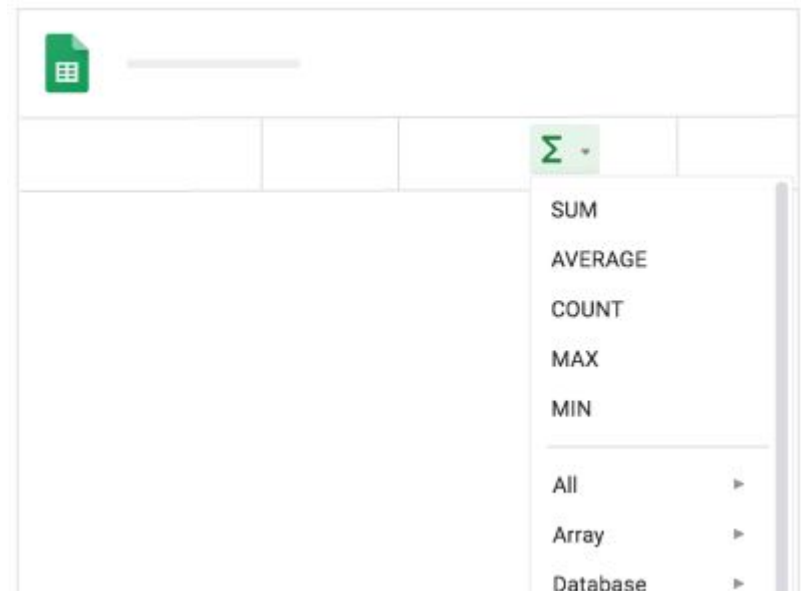
4.5 Add pivot tables

Excel: Insert a PivotTable
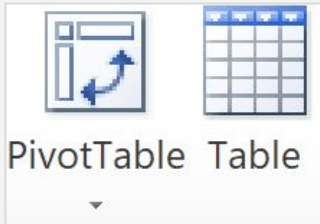
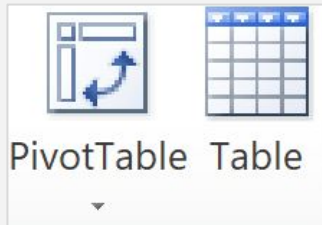PivotTable Table

Sheets: Add a new pivot table

1. Highlight data in your spreadsheet.
2. Click **Data** > **Pivot table**. A pivot table opens in a new sheet (tab).
3. In the Pivot table editor, add rows, columns, values, and filters.

For details, see [Create & use pivot tables](#).

	A	B
	Region	AVERAGE of # Orders
	East	$258
	North	$255
	South	$244
	West	$240
	Grand Total	**$249**

4.6 Get automatic pivot tables

Excel: Insert a PivotTable

Sheets: Get automatic pivot tables

1. In your spreadsheet containing the source data, click Explore ⬧.
2. Choose an option:
   - Point to a pivot table and click Insert pivot table 🔢.
   - Ask a question about your data under **Answers**. The results can include pivot tables. To add one, point to it and click Insert pivot table 🔢 .

For details, see Create & use pivot tables.

5 Use macros and add-ons

5.1 Automate tasks with macros

5.2 Do more with add-ons

Google Cloud

5.1 Automate tasks with macros

Excel: Record Macro
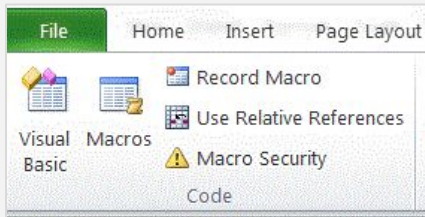
Create a script:

1. Click **Tools** > **Script editor**.
2. Create your script.

For more information, see
Overview of Google Apps Script.

Sheets: 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.
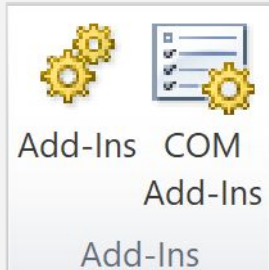
Record a macro:

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.
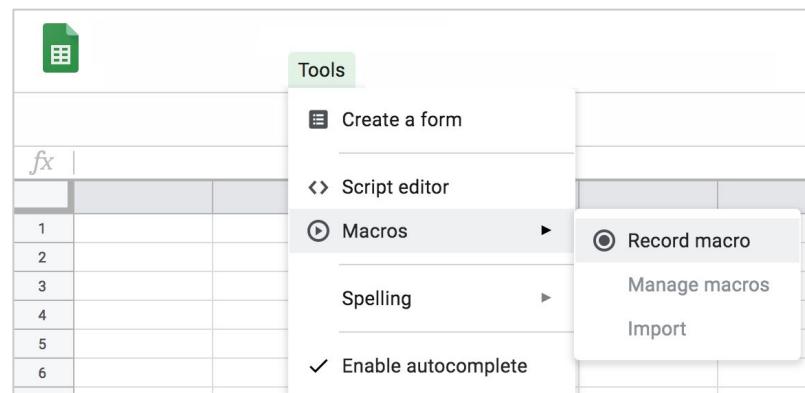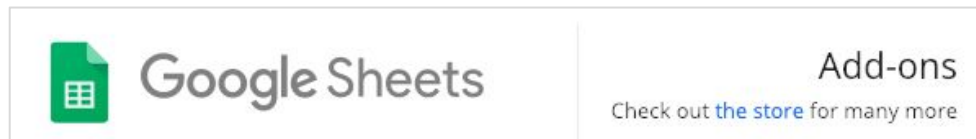
5.2 Do more with add-ons

Excel: Add-ins

Sheets: Add-ons

Use ready-made add-ons to do more with Sheets. Here's a few things you can do:

- Use the Data connector for Salesforce to connect with Salesforce.
- Use Supermetrics to connect with MySQL and Oracle.
- Use Copper CRM Custom Report Builder to integrate Copper CRM data.
- Use Greenhouse Report Connector to integrate Greenhouse recruiting data.

Download add-ons:

1. Click **Add-ons** > **Get add-ons**.
2. (Optional) To see a description of the add-on, point to it or click it for a full description.
3. Click the add-on you want to install and click **Free**.
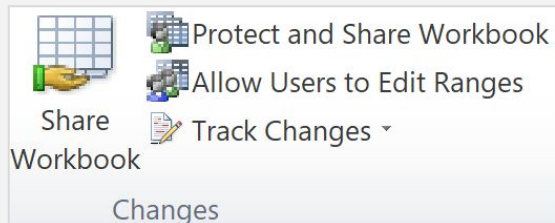4. If needed, review the access message and click **Allow**.

Google Sheets — Add-ons — Check out the store for many more

6 Collaborate

Google Cloud

6.1 Share spreadsheets

Excel: Share workbook

Sheets: Share with specific people or using a link

Share with specific people:

1. Open the file you want to share (that you own or have edit access to).
2. Click **Share**.
3. Enter the email addresses or groups that you want to share with.
4. Choose what kind of access you want to give people: **Can edit**, **Can comment**, or **Can view**.
5. Click **Send**.

Share using a link:

1. Open the file and click **Share**.
2. At the top right, click **Get shareable link**.
3. Next to Anyone with the link, click the Down arrow ▼ and choose the level of access you want to give people.
4. Copy and paste the link in an email or any place you want to share it.

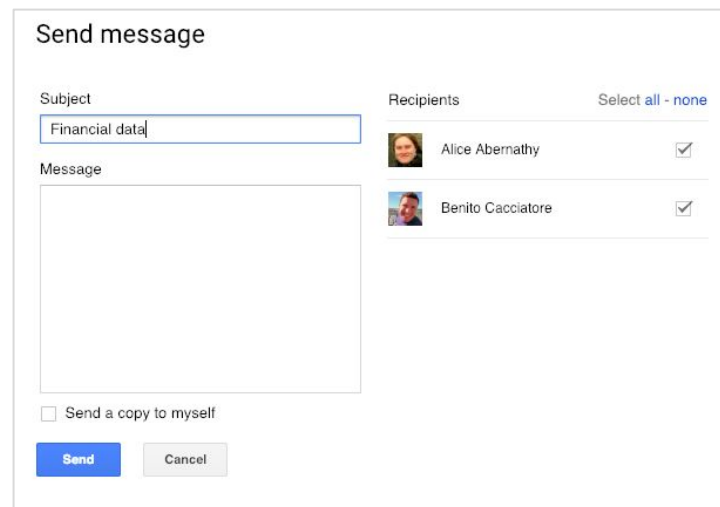For more details, see Share files from Google Drive.

6.3 Email collaborators

Excel: Send Using E-mail
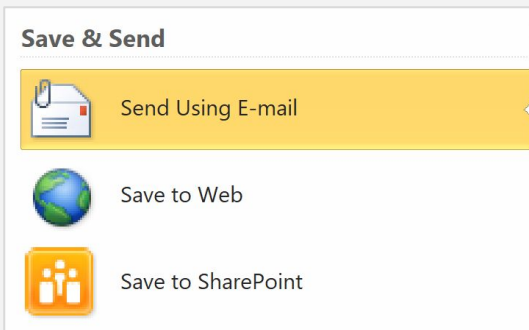
Sheets: Email collaborators

To follow up on a conversation that's too long for comments, email collaborators right from Sheets.

1. Click **File** > **Email collaborators**.
2. (Optional) To remove a collaborator from the email, uncheck the box next to their name.
3. Add a subject and message.
4. (Optional) To send a copy of the email to yourself, check the **Send a copy** box.
5. Click **Send**.

# 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.

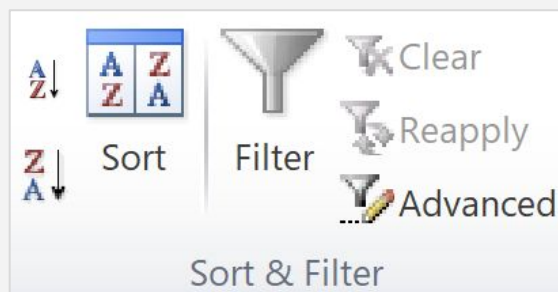3. (Optional) To make the version the active version, click **Restore this version**.

Name a version:

1. Select **File** > **Version history** > **Name current version**.
2. Enter a name and click **Save**.
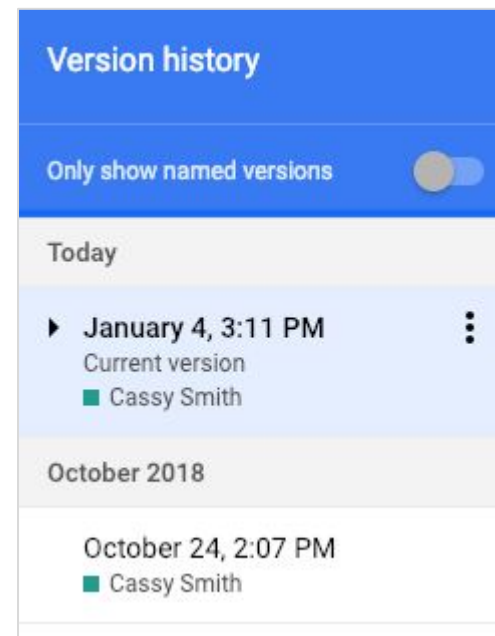
6.5 Create filters and filter views

Excel: Filter data

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 Sort & filter your data and Create, name, and save a filter view.

6.6 Protect content

Excel: Protect Sheet or Workbook

Protect Sheet   Protect Workbook
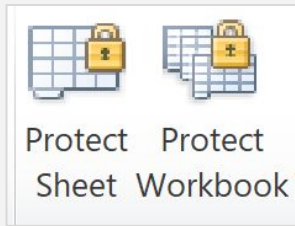
Sheets: Protected sheets and ranges

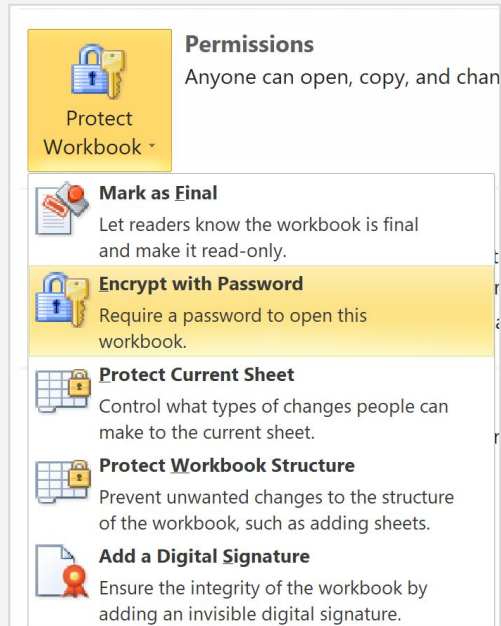If you have sensitive content in a spreadsheet, you can restrict people from updating it.

1. Open the sheet and click **Data** > **Protected sheets and ranges**.
2. Click **+Add a sheet or range**.
3. Click **Range** to protect a range of content or **Sheet** to protect a whole sheet.
4. Click **Set permissions** and choose whether to show a warning or restrict who can edit the content.
5. Click **Done**.

For details, see Protect content in a spreadsheet.

Protected sheets & ranges   ✕

Enter a description

| Range | Sheet |

F2:F5

Set permissions   Cancel
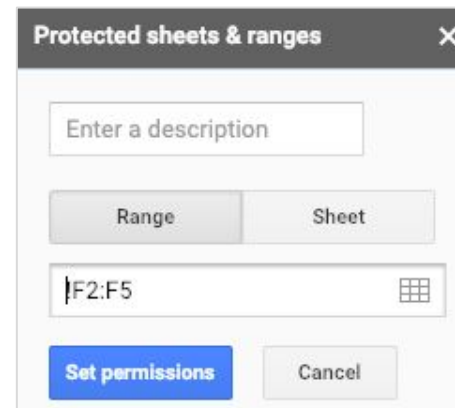
# 6.7 Limit sharing, downloading, printing, or copying

Excel: Encrypt with Password

Sheets: 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**.
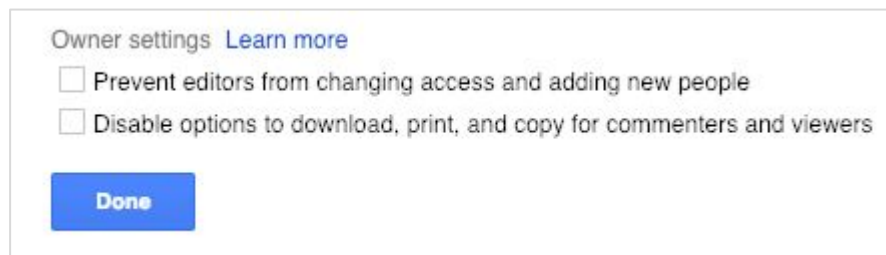
6.8 Set an expiration date for sharing

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.
6. Click **Save changes** > **Done**.

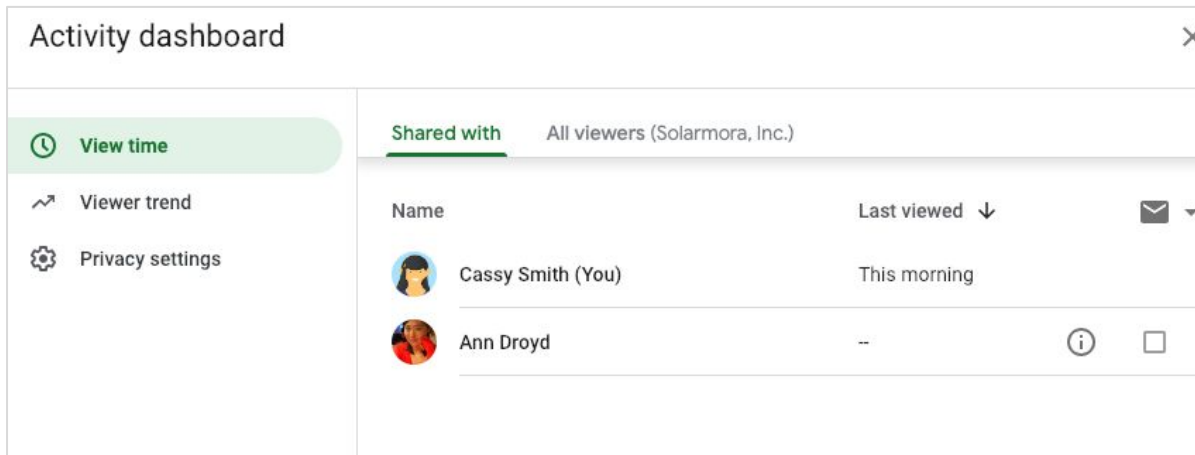Note: You can't set the expiration for the current day. If you need to restrict access immediately, just unshare the file.
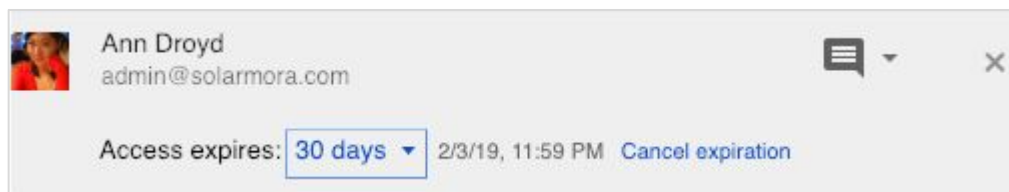
6.9 See who's viewed a spreadsheet

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: Print
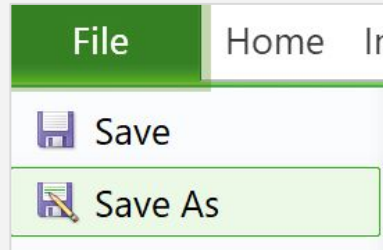

Sheets: Print

To print your spreadsheet, click **File** > **Print** or Print 🖨 .

You can choose which sheets to print, what features to include, and which layout you want.
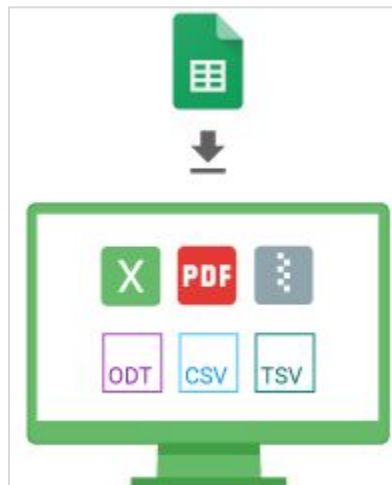
7.2 Download in different formats

Excel: Save As
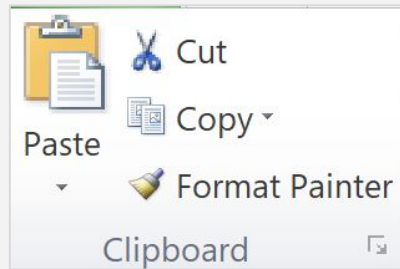

Sheets: Download

To download your spreadsheet so you can open it in other programs, click **File** > **Download as** and choose one of the following formats:

- Microsoft Excel (.xlsx)
- OpenDocument format (.odt)
- PDF document (.pdf)
- Web page (.html, zipped)
- Comma-separated values (.csv)
- Tab-separated values (.tsv)

7.3 Make a copy

Excel: Copy a sheet

Sheets: 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.

To make a copy of your spreadsheet, click **File** > **Make a copy**. You can rename the copy, change where you save it in Drive, and optionally share it with the same collaborators.

7.4 Email a copy

Excel: Send Using E-mail

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.

1. 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 Productivity tips

Google Cloud

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**.
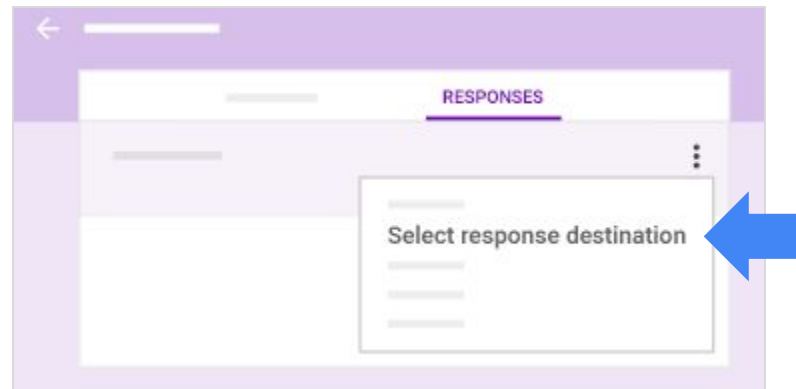
8.2 Save time with templates

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.
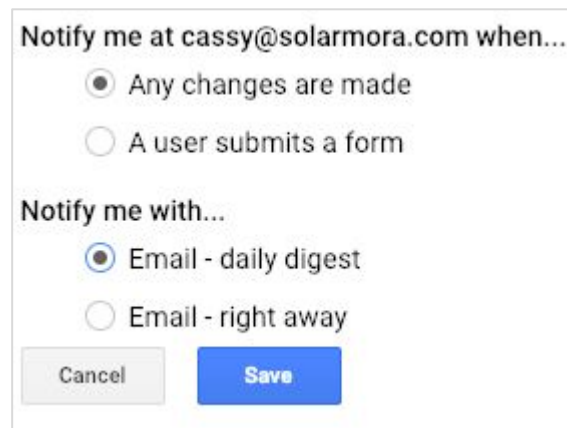

Website paid traffic report by Supermetrics

Weekly time sheet
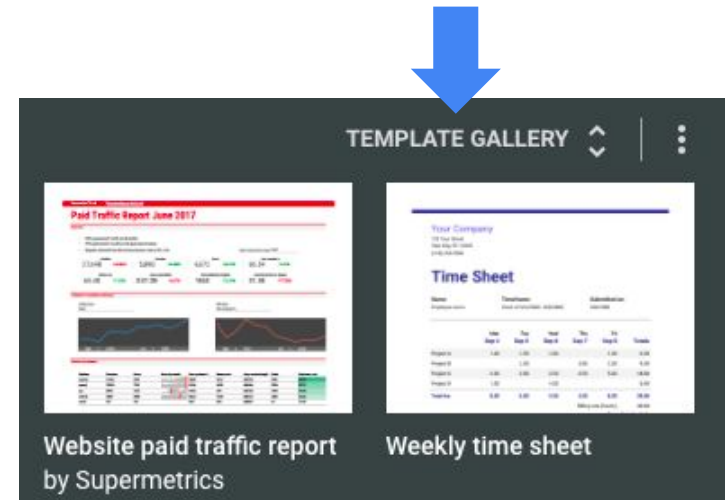
8.3 Find out if someone changes a spreadsheet

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**.

    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.

3. (Optional) To delete checkboxes, select the checkboxes you want to remove and press **Delete**.

Next steps

1. Help us improve this guide:

   Submit feedback

2. Get more training resources at the G Suite Learning Center (gsuite.google.com/learning-center), such as:

   - Cheat sheets

   - Product FAQ

   - Productivity tips

   - Customer examples

   Visit the Learning Center

G Suite Learning Center