GETTING STARTED

1. Go to https://www.office.com. Log in using your work username and password. At the top of the screen, you will see the different programs you can use as weel as your recent documents. If the document you're looking for isn't on the list, click "See more in One Drive."

2. To start a new project, click the program you want to use – for instance, Excel. This opens a new window and you can choose the kind of Excel document you want to create.

3. Notice that this document is created in "Excel Online." That means that it lives on the internet, not in your hard drive. You can access it from any computer by logging into Office 365, and you can share it with other people to allow them to see or make changes in real time. It is almost just like the Excel spreadsheets that you're used to.

4. Start by naming your document. Click the word "Book" in the center of the black bar at the top of the screen and change the name.

5. Your changes will save automatically. You can also revert to an earlier version of your document. See "Restore Previous Version" for instructions.

NOTES:

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Making a Dynamic Chart in Excel

1. Open a new Excel document and name it.

2. At the bottom of the page you'll see a tab that says "Sheet 1." You can click on the words "Sheet 1" and rename the tab. For this sheet, name the tab **Data**.

3. Click the small + button next to the tab to create another tab. Name the second tab **Lists**. Finally, create a third tab and name it **SEMI LOGS**. The bottom of your sheet should look like this:

4. Click on the Data tab. This is where you'll put the raw data that you will be using for your chart. This data can come from multiple sources – from another Excel spreadsheet, from an online form that you set up, or even entered manually.

For this chart, our data will come from an Easy Trac report. Simply copy the data, and paste it into cell A1 of the Data tab.

5. Click on the Lists tab. This is where you'll make lists of information that can be pulled into your chart on the SEMI LOGS tab. We will use two pieces of information: the provider name, and the type of service. This information has to match what is in the Data tab EXACTLY, so it's best to cut and paste.

Fill in the names of the providers in Column A and the types of service in Column B:

	A	B	C
1	Allison Fleischer	Direct Service	
2	Aubrey La Rezza	Student not present	
3	Cathy Saporito	Other	
4	Chelsey Mulvenna	Health Related Evaluation Service	
5	HAELIM PARK	Service Provider not present	
6	Katherine Chiumento		
7	Kelly Worthy		
8	Oliana Collado		
9	Samantha Giebner		
10	Sheila Mulvenna		
11	Stephanie Roth		
12	Whitney Hill		
13			

6. Click on the SEMI LOGS tab. This is where you'll make your dynamic chart. You'll start by making a dropdown list of the providers.

Click the button at the top that says "Edit in Excel."

Click in the cell where you want your drop down list to appear. At the top of the sheet click the Data tab, and then click Data Validation and choose Data Validation.

In the popup box's "Allow" section, choose Lists.

In the "Source" section write: =Lists!A1:A15

Click OK.

Now your cell has a little grey arrow. When you click the little grey arrow, you can choose from all the providers.

Click File at the top of the page and Save, which will save the changes in your One Drive. You can now go back to Excel Online to continue working, or you can continue to edit the desktop version.

7. Now you will write a formula to tell the spreadsheet to count how many logs each provider has. In the cell where you want to logs to appear write:

=COUNTIF(Data!G:G,'SEMI LOGS'!B3)

This tells the spreadsheet "Count each time the information in Column G of the Data tab matches the information In cell B3 on the SEMI LOGS tab." Choose different providers to see the number change.

2		
3	Service Provider:	Katherine Chiumento
4	Number of Logs:	1
5	Direct Service	1
6	Student not present	0
7	Other	0
8	Health Related Evaluation Service	0
9	Service Provider not present	0
10		

2		
3	Service Provider:	Cathy Saporito
4	Number of Logs:	60
5	Direct Service	49
6	Student not present	7
7	Other	4
8	Health Related Evaluation Service	0
9	Service Provider not present	0
10		
11		
12		

In the cells below, write a formula that will tell you how many times the provider logged each type of service. It looks like this:

=COUNTIFS(Data!G:G, 'SEMI LOGS'!B$3, Data!F:F, 'SEMI LOGS'!A5)

You can write the formula in cell B5 and then grab the little green box in the bottom right corner of the cell. Drag it down to fill the formula into the cells below.

fx =COUNTIFS(Data!G:G, 'SEMI LOGS'!B$3, Data!F:F, 'SEMI LOGS'!A5)

	A	B	C	D	E	F
1						
2						
3	Service Provider:	Cathy Saporito	**Formula is here.**			
4	Number of Logs:	60				
5	Direct Service	49	**Grab here and pull down.**			
6	Student not present					
7	Other					
8	Health Related Evaluation Service					
9	Service Provider not present					
10						

8. Finally, let's create a chart to illustrate the data. Select the data you want included in the chart, then click the "Insert" tab at the top. Choose the type of chart you want.

The chart will be inserted into your spreadsheet. You can drag it to wherever you want it.

Notice when you change the name in B5, the data in the chart will change.

Finishing Up

1. Protect your ranges. Click on the tab that says "Edit in Excel."

Click in the cell that has the dropdown menu. Then click the Review Tab and select "Allow Users to Edit Ranges." Click "New."

Type in a password, then click "Permissions." Click Add, add the people who will be allowed to edit the cell, and then check "Allow." Click OK.

Click on the Data tab at the bottom of the spreadsheet. Protect this sheet by choosing "Protect Sheet" from the Review tab. Do the same for the Lists tab.

2. Hide your extra tabs. Right click on the Data tab at the bottom of the spreadsheet and choose "Hide." Do the same for the Lists tab.

3. Share your spreadsheet. Click the green "Share" button at the top right of the page. Choose who you want to share the spreadsheet with. Decide if those people will be allowed to edit the spreadsheet.

Restoring a Previous Version

NOTES:

If you realized you've made a big mistake, sometimes the easiest way to fix it is to just go back to an older version of the spreadsheet.

1. Go back to Office 365 and click "One Drive."

2. Right click on your document and choose "Version History."

3. Choose the version you want. Right click the 3 little dots, and choose "Restore."