



QUICK GUIDE

How To Install and Use eXpresso Off-line for Excel®

eXpresso Off-line for Excel® is an add-in that gives you offline access to your online spreadsheets. It combines the convenience of editing inside Excel® with the sharing and collaborative environment offered by eXpresso. Truly the best of both worlds.

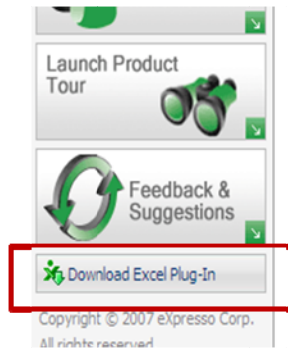
When your spreadsheets are opened in Excel using eXpresso Off-line, you will have access to all of the features of Excel, even those that are not supported by the Microsoft Office Web Components, and are therefore not available when working with the spreadsheet online in eXpresso.

This guide covers the following aspects of eXpresso Off-line:

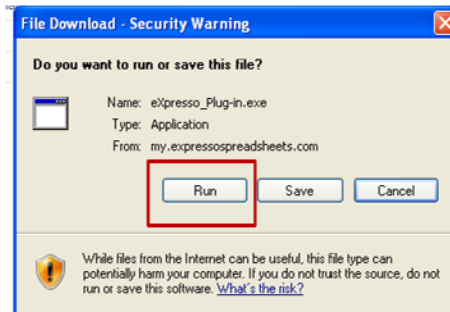
- [Install eXpresso Off-line for Excel](#)
- [Log In to eXpresso](#)
- [Open a Spreadsheet](#)
- [Save a Spreadsheet](#)
- [Upload a Spreadsheet](#)

Installation

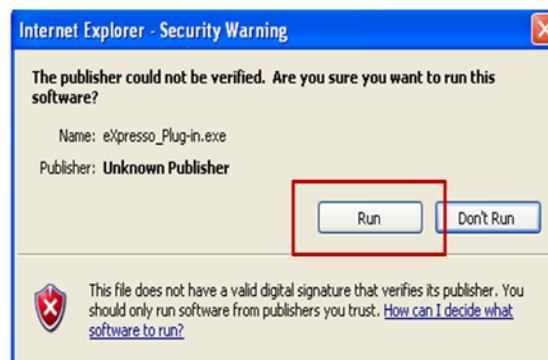
To begin, you will need to download the add-in from the eXpresso application or website. Simply log into eXpresso and click the “Download Excel Plug-In” icon located on the lower left hand navigation bar.



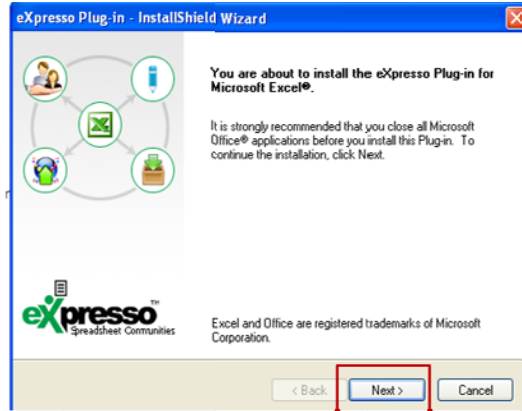
When prompted, select “Run.”



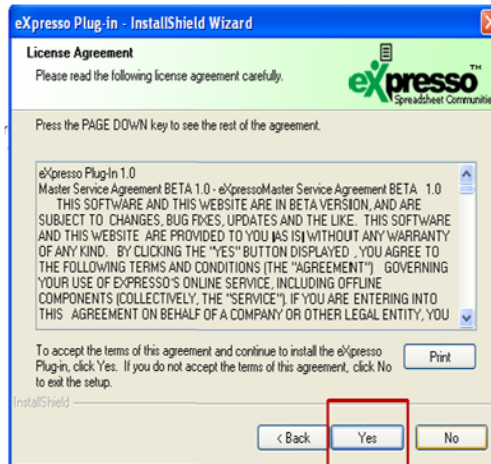
Depending on your security settings, you may have to verify that you want to “Run” the file.



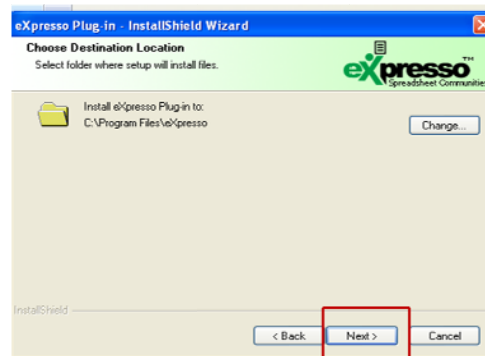
Make sure that all of your Microsoft Office applications are closed, then click “Next” when prompted to continue the installation.



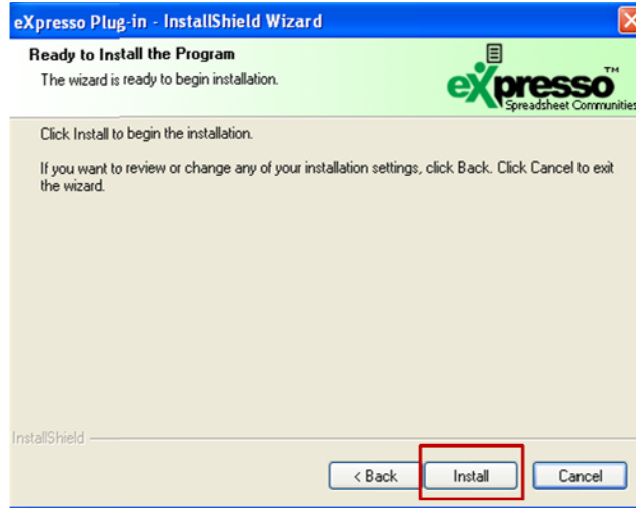
Click “Yes” to accept the license agreement.



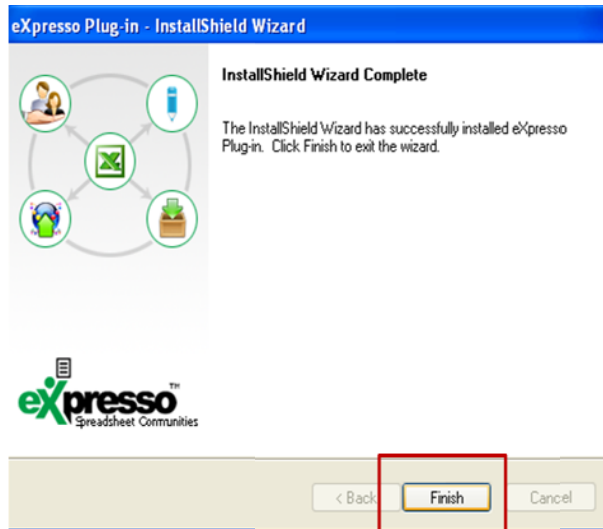
Click “Next” to install the Plug-In to the default folder.



Click “Install” to continue with the installation.



Click “Finish” to complete the installation.

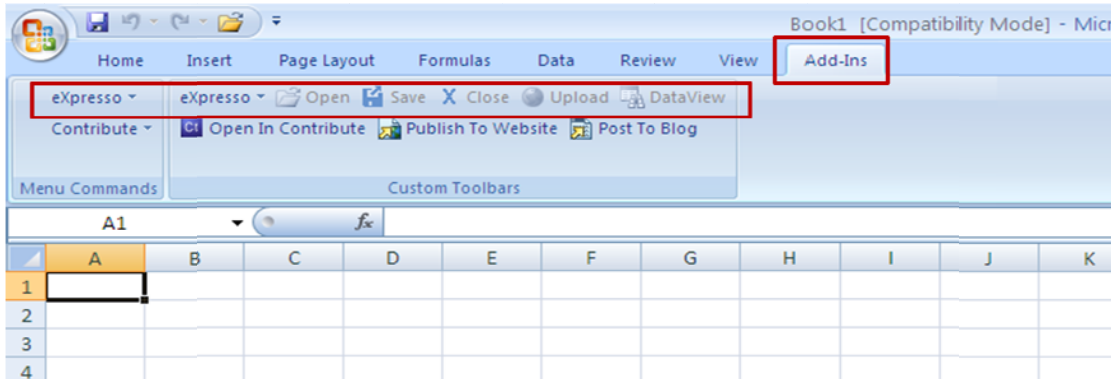


Congratulations. Your installation is complete.

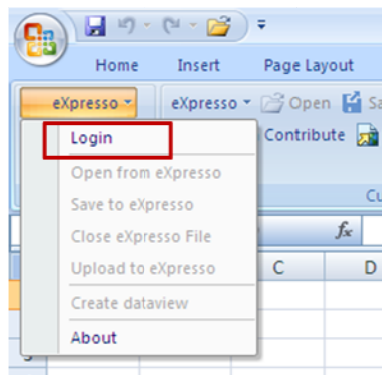
Using eXpresso Off-line for Excel

Log In to eXpresso

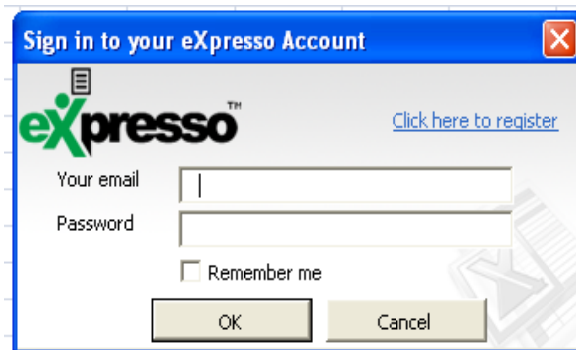
Once you have installed the add-in, you will be able to access it from the Add-Ins tab in Microsoft Excel.



You can now log into eXpresso directly from your desktop Excel.



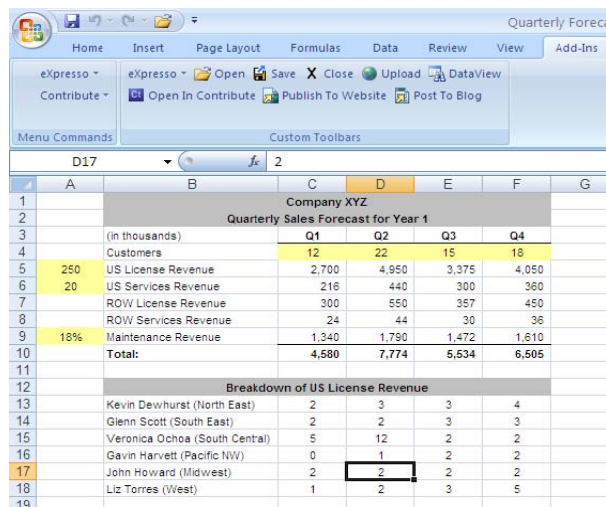
Enter the same email address and password that you used to create your eXpresso account.



Open a Spreadsheet

Select “Open” to open spreadsheets that are already stored on eXpresso. Note: You will be able to access all of the spreadsheets that you own unless they have been locked in eXpresso by another user. You will only be able to access spreadsheets that have been shared with you if the owner gave you the “Edit” privilege and did not limit your edit rights to a particular portion of the spreadsheet. If you would like to work on a shared spreadsheet offline and you don’t see it in the list of spreadsheets displayed by the add-in, contact the owner of the spreadsheet and request the unlimited Edit privilege.

Once you have opened the spreadsheet using the add-in, you can use every feature available in Microsoft Excel. Although some features of Excel, like charts and graphs are not displayed when working with the spreadsheet online in eXpresso, they are still saved as part of the spreadsheet and will be displayed when the spreadsheet is opened using the Plug-in.



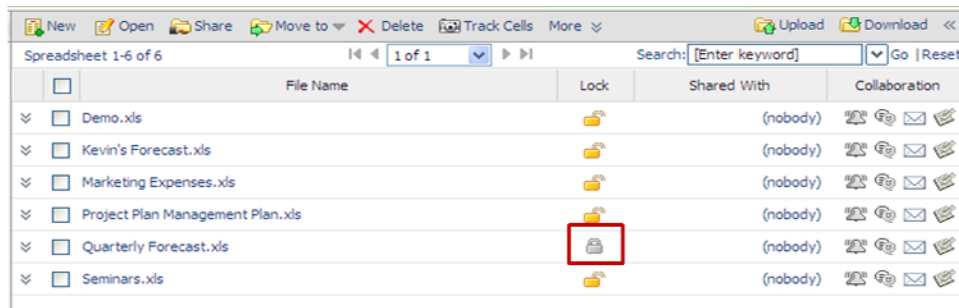
The screenshot shows a Microsoft Excel window with the title 'Quarterly Foreca'. The ribbon includes Home, Insert, Page Layout, Formulas, Data, Review, View, and Add-Ins. The Add-Ins tab is active, showing options like 'eXpresso', 'Open', 'Save', 'Close', 'Upload', 'DataView', 'Contribute', 'Open In Contribute', 'Publish To Website', and 'Post To Blog'. The spreadsheet data is as follows:

	A	B	C	D	E	F	G
1			Company XYZ				
2			Quarterly Sales Forecast for Year 1				
3		(in thousands)	Q1	Q2	Q3	Q4	
4		Customers	12	22	15	18	
5	250	US License Revenue	2,700	4,950	3,375	4,050	
6	20	US Services Revenue	216	440	300	360	
7		ROW License Revenue	300	550	357	450	
8		ROW Services Revenue	24	44	30	36	
9	18%	Maintenance Revenue	1,340	1,790	1,472	1,610	
10		Total:	4,580	7,774	5,534	6,505	
11							
12			Breakdown of US License Revenue				
13		Kevin Dewhurst (North East)	2	3	3	4	
14		Glenn Scott (South East)	2	2	3	3	
15		Veronica Ochoa (South Central)	5	12	2	2	
16		Gavin Harvett (Pacific NW)	0	1	2	2	
17		John Howard (Midwest)	2	2	2	2	
18		Liz Torres (West)	1	2	3	5	
19							

Save a Spreadsheet

Once you have finished making your changes, select “Save” to save the changes on the eXpresso server.

Important Note: While you are working with the spreadsheet in eXpresso Off-line, it will be locked for editing on the eXpresso server. This means, that if you have shared the spreadsheet with a contact, he/she will be able to view, but will not be able to edit the spreadsheet while it is open off-line.



	File Name	Lock	Shared With	Collaboration
☐	Demo.xls	🔒	(nobody)	👤📧📧📧
☐	Kevin's Forecast.xls	🔒	(nobody)	👤📧📧📧
☐	Marketing Expenses.xls	🔒	(nobody)	👤📧📧📧
☐	Project Plan Management Plan.xls	🔒	(nobody)	👤📧📧📧
☐	Quarterly Forecast.xls	🔒	(nobody)	👤📧📧📧
☐	Seminars.xls	🔒	(nobody)	👤📧📧📧

Upload a Spreadsheet

You can create new spreadsheets in Excel or upload spreadsheets from your PC to eXpresso using the Upload feature. (Hint: Use “Save” to save changes to a spreadsheet that already exists on the eXpresso server, use “Upload” to add a spreadsheet to eXpresso.) Create a new spreadsheet or open one from your PC, then click “Upload” and name your spreadsheet.

Please note: At this time eXpresso supports only files with an .xls extension. If you are using Office 2007, you will need to first save your spreadsheet as an “Excel 97-2003 Workbook.”

