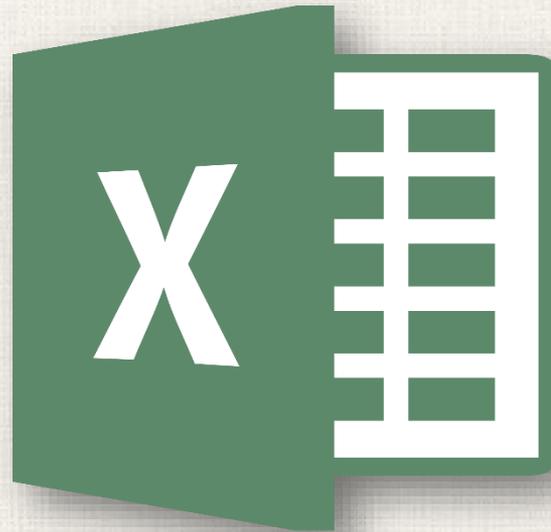


MICROSOFT EXCEL

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Closing and Opening Workbooks

Contents

- Introduction
 - To open an existing workbook
 - To pin a workbook
- Using Templates
 - To create a new workbook from a template
- Compatibility Mode
 - To convert a workbook
- Practice

Introduction

- Excel files are called **workbooks**. Whenever you start a new project in Excel, you'll need to **create a new workbook**. There are several ways to start working with a workbook in Excel. You can choose to **create a new workbook**-either with a **blank workbook** or a predesigned **template**-or **open an existing** workbook.

Creating a new blank workbook

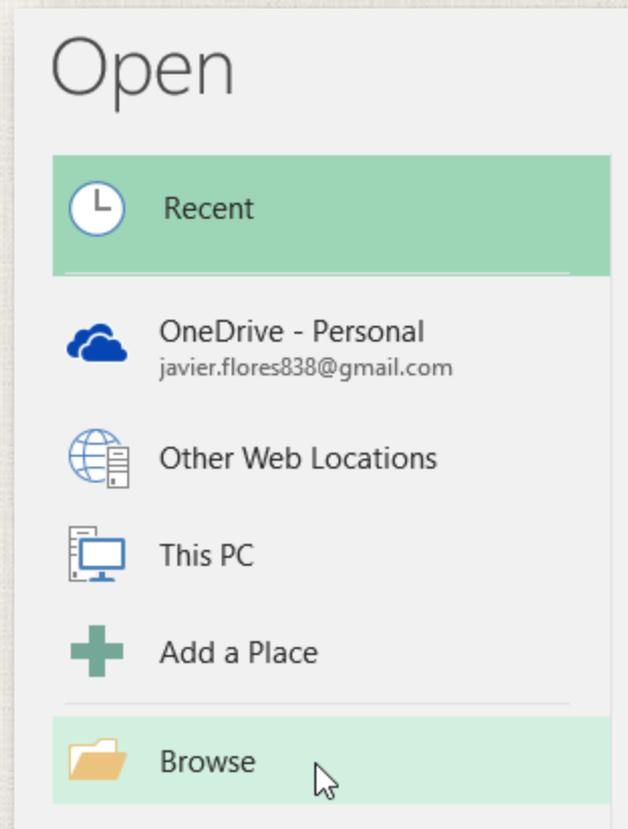
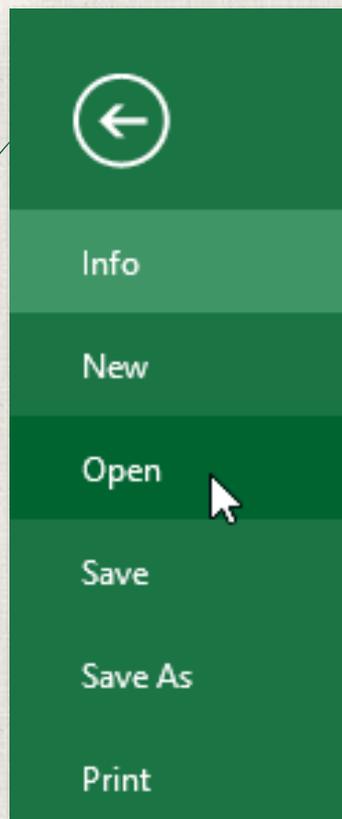
1. Select the **File** tab. **Backstage view** will appear.
2. Select **New**, then click **Blank workbook**.

The screenshot shows the Microsoft Excel Backstage view. The 'File' tab is selected, and the 'New' section is highlighted in the left-hand navigation pane. The main area displays the 'New' page with a search bar for online templates and suggested searches for Business, Personal, Industry, Small Business, and Calculators. A preview of a blank workbook is shown, with a tooltip labeled 'Blank workbook' over the grid. To the right, there is a 'Take a tour' button with a right-pointing arrow icon. The top right corner of the window shows 'Book1 - Excel'.

	A	B	C
1			
2			
3			
4			
5			
6			
7			

Opening an existing workbook

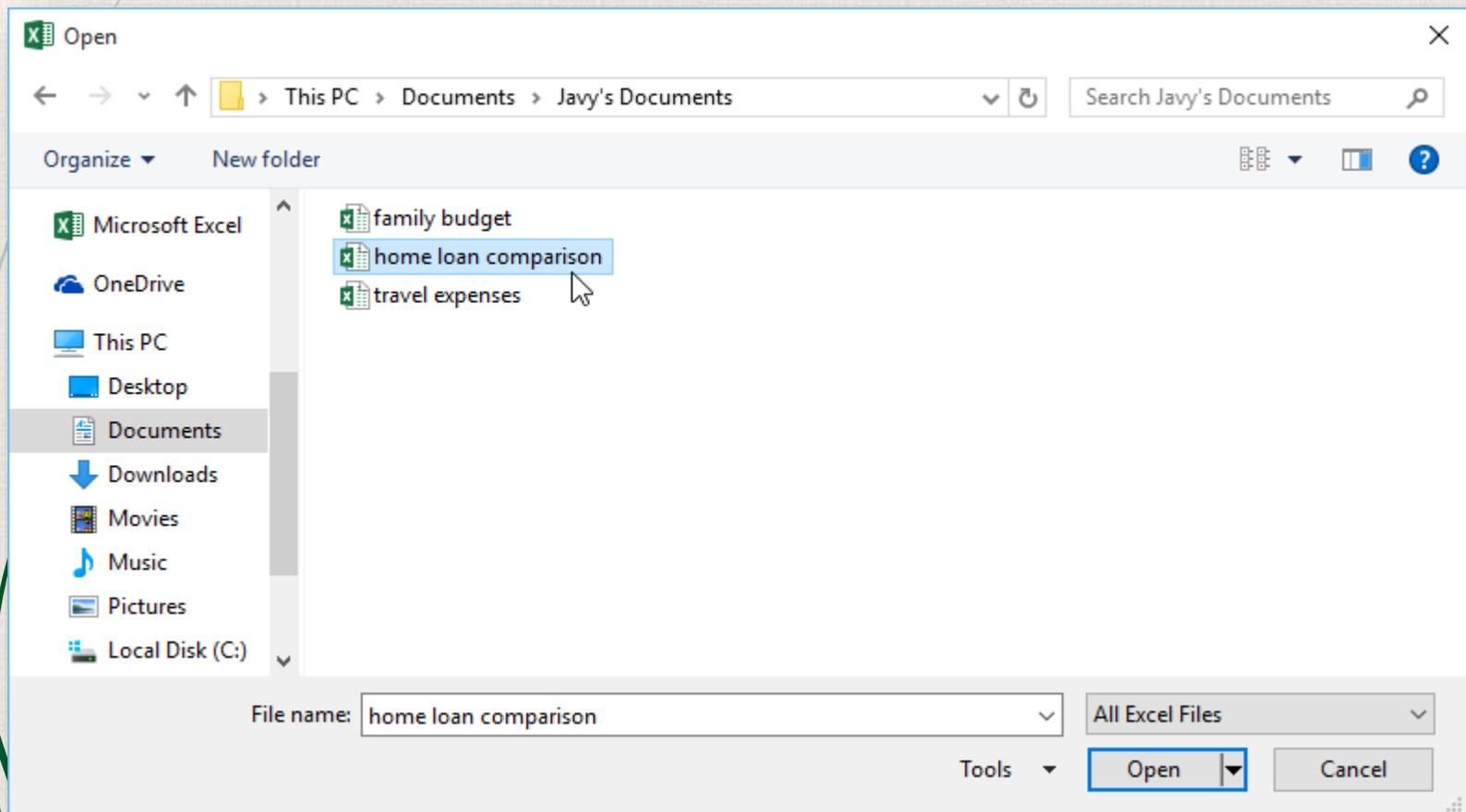
1. Navigate to **Backstage view**, then click **Open**.
2. Select **Computer**, then click **Browse**. Alternatively, you can choose **OneDrive** to open files stored on your **OneDrive**.



6

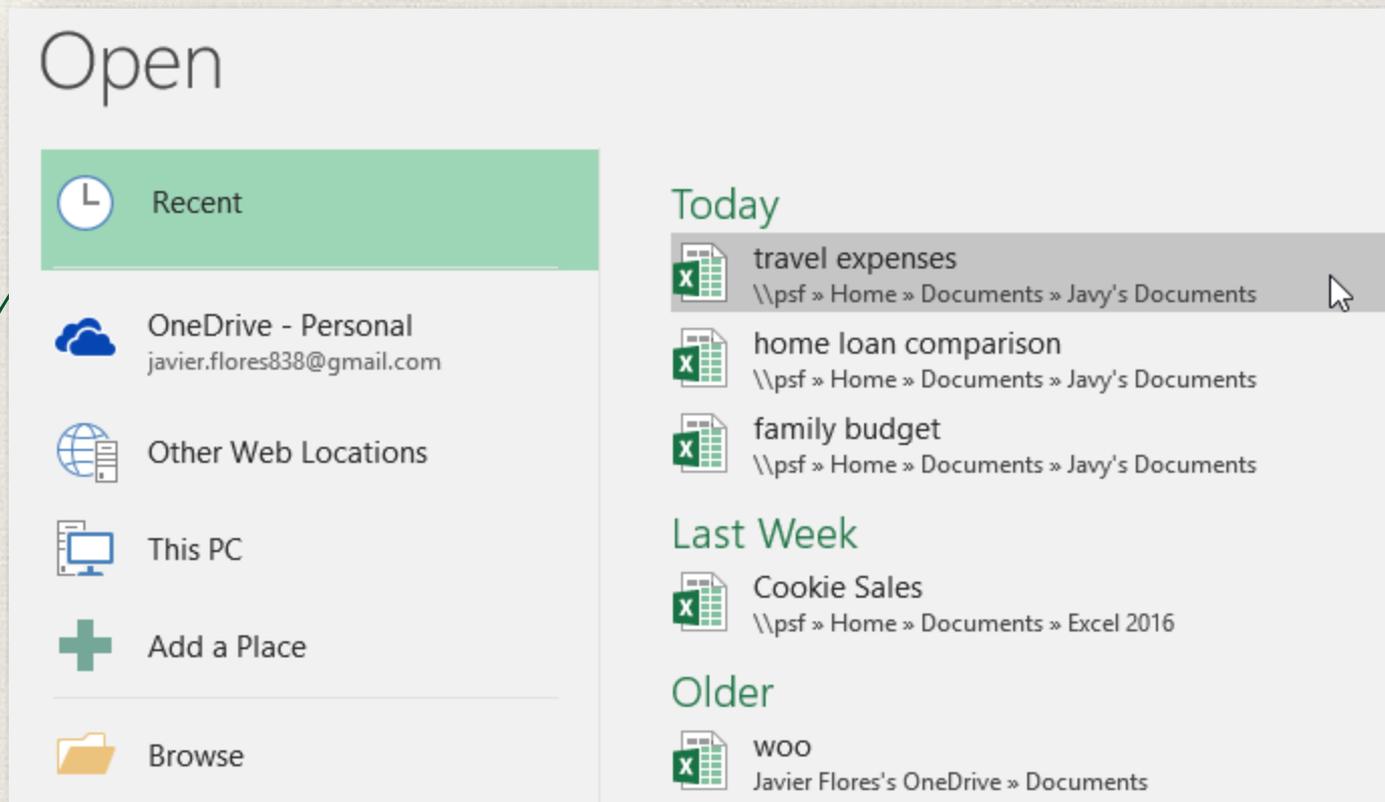
Opening an existing workbook

3. The **Open** dialog box will appear. Locate and select your **workbook**, then click **Open**.



Opening an existing workbook

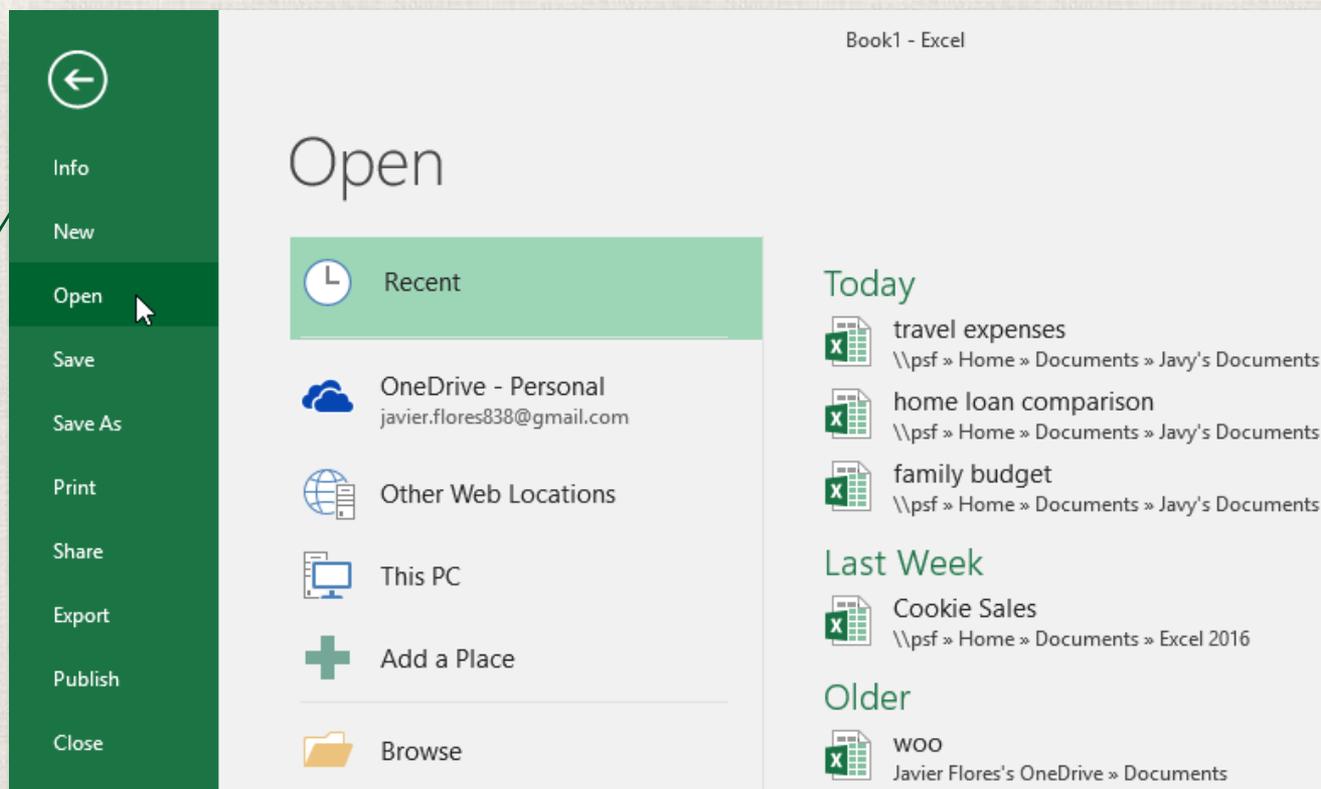
- ❖ If you've opened the desired workbook recently, you can browse your **Recent Workbooks** rather than search for the file.



To pin a workbook

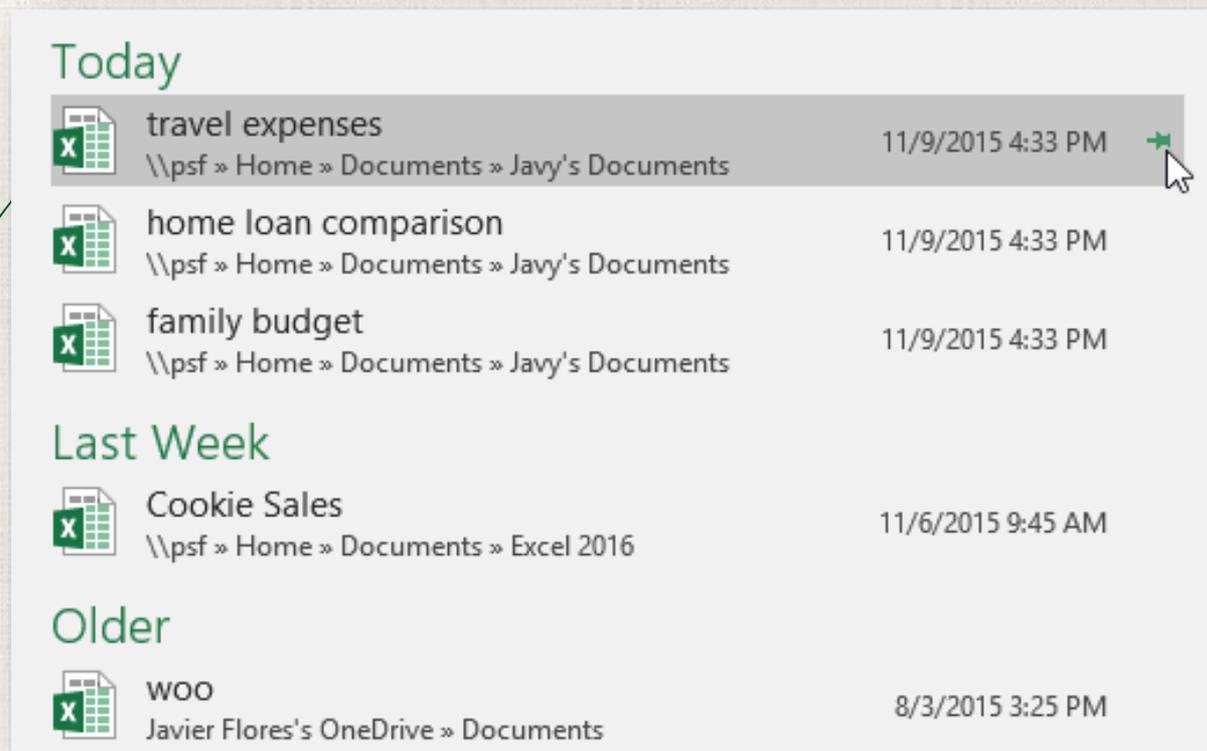
If you frequently work with the **same workbook**, you can **pin it** to Backstage view for faster access.

1. Navigate to **Backstage view**, then click **Open**. Your **recently edited workbooks** will appear.



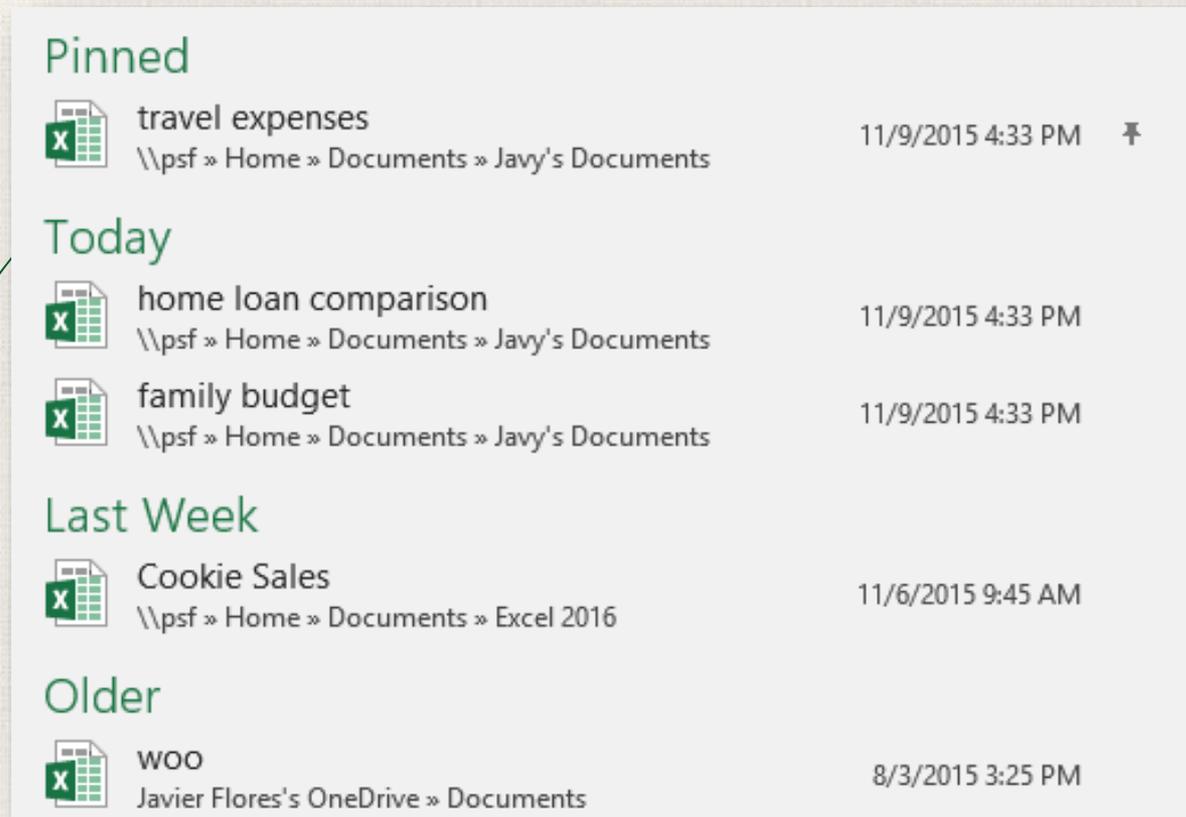
To pin a workbook

2. Hover the mouse over the **workbook** you want to pin. A **pushpin icon** will appear next to the workbook. Click the **pushpin icon**.



To pin a workbook

3. The workbook will stay in Recent Workbooks. To **unpin** a workbook, simply click the pushpin icon again.

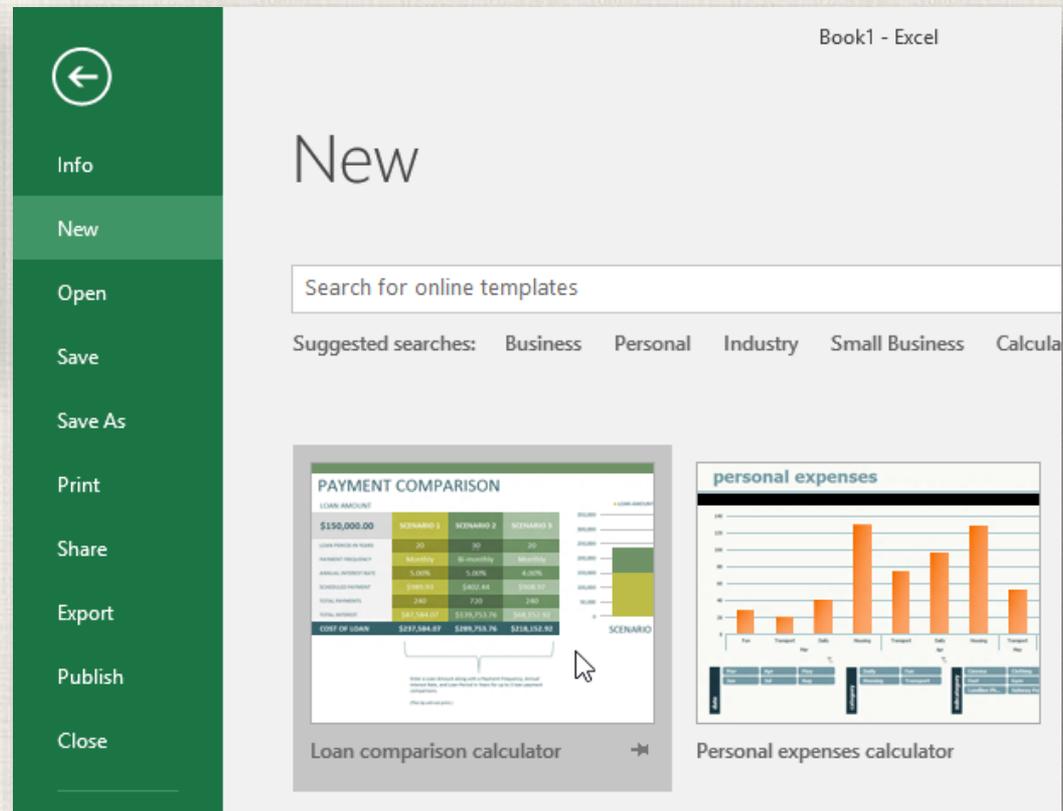
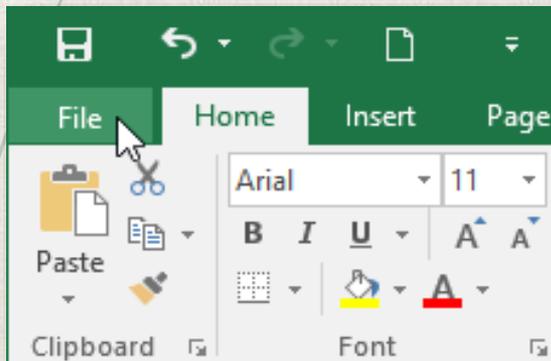


Using Templates

- A **template** is a **predesigned spreadsheet** you can use to create a new workbook quickly. Templates often include **custom formatting** and **predefined formulas**, so they can save you a lot of time and effort when starting a new project.

Creating a new workbook from a template

1. Click the **File** tab to access **Backstage view**.
2. Select **New**. Several templates will appear below the **Blank workbook** option.
3. Select a **template** to review it.



Creating a new workbook from a template

4. A **preview** of the template will appear, along with **additional information** on how the template can be used.
5. Click **Create** to use the selected template.

PAYMENT COMPARISON

LOAN AMOUNT: \$150,000.00

	SCENARIO 1	SCENARIO 2	SCENARIO 3
LOAN PERIOD IN YEARS	30	30	30
NUMBER OF PAYMENTS	Monthly	Bi-monthly	Quarterly
ANNUAL INTEREST RATE	5.00%	5.00%	4.00%
MONTHLY PAYMENT	\$602.55	\$602.54	\$602.57
TOTAL PAYMENTS	240	240	240
TOTAL REPAYMENT	\$144,612.00	\$144,612.00	\$144,612.00
COST OF LOAN	\$217,584.07	\$218,753.70	\$218,152.32

Download size: 152 KB

Create

6. A new workbook will appear with the **selected template**.

Creating a new workbook from a template

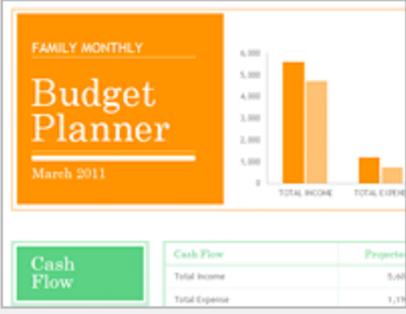
- You can also browse templates by **category** or use the **search bar** to find something more specific.

New

Home



Family budget (monthly)



Family monthly budget planner

Category

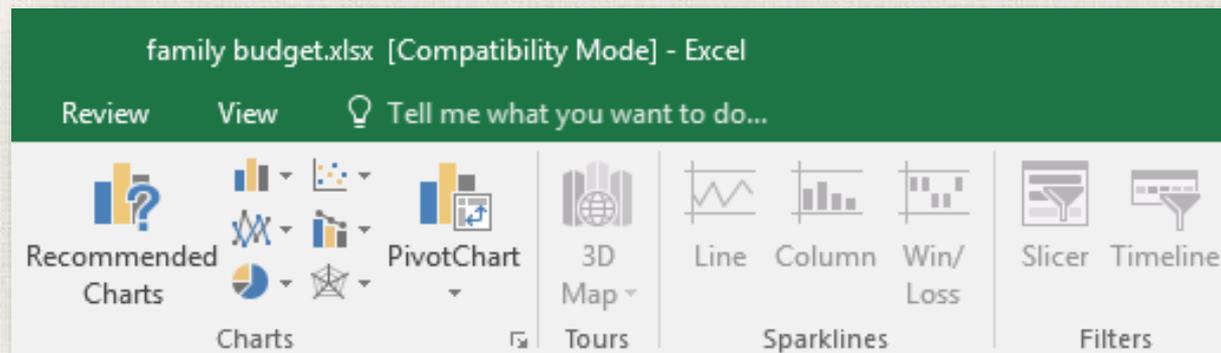
Budgets	25
Family	24
Household	15
Personal	14
Expense	9
Calculator	8
Charts	8
Lists	8
Planners	6
Monthly	5

Compatibility Mode

- Sometimes you may need to work with workbooks that were created in earlier versions of Microsoft Excel, such as Excel 2003 or Excel 2000. When you open these types of workbooks, they will appear in **Compatibility Mode**.
- Compatibility Mode **disables** certain features, so you'll only be able to access commands found in the program that was used to create the workbook. For example, if you open a workbook created in Excel 2003, you can only use tabs and commands found in Excel 2003.

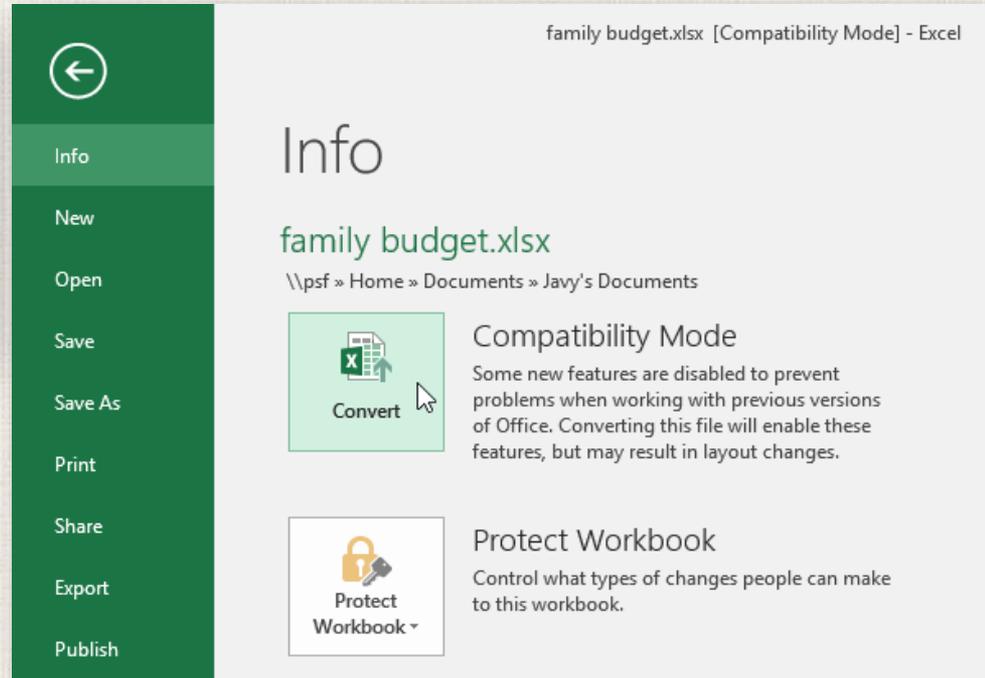
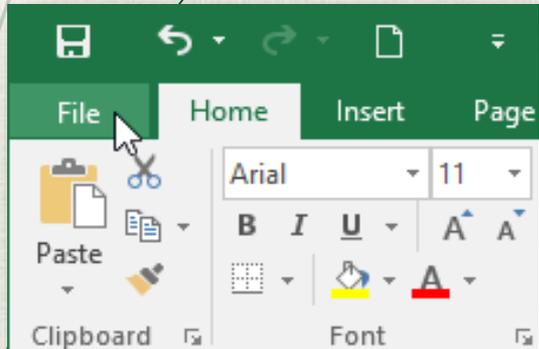
Compatibility Mode

- In the image below, you can see that the workbook is in Compatibility Mode, which is indicated at the top of the window to the right of the file name. This will disable some Excel 2016 features, and they will be grayed out on the Ribbon.
- In order to exit Compatibility Mode, you'll need to **convert** the workbook to the current version type. However, if you're collaborating with others who only have access to an earlier version of Excel, it's best to leave the workbook in Compatibility Mode so the format will not change.



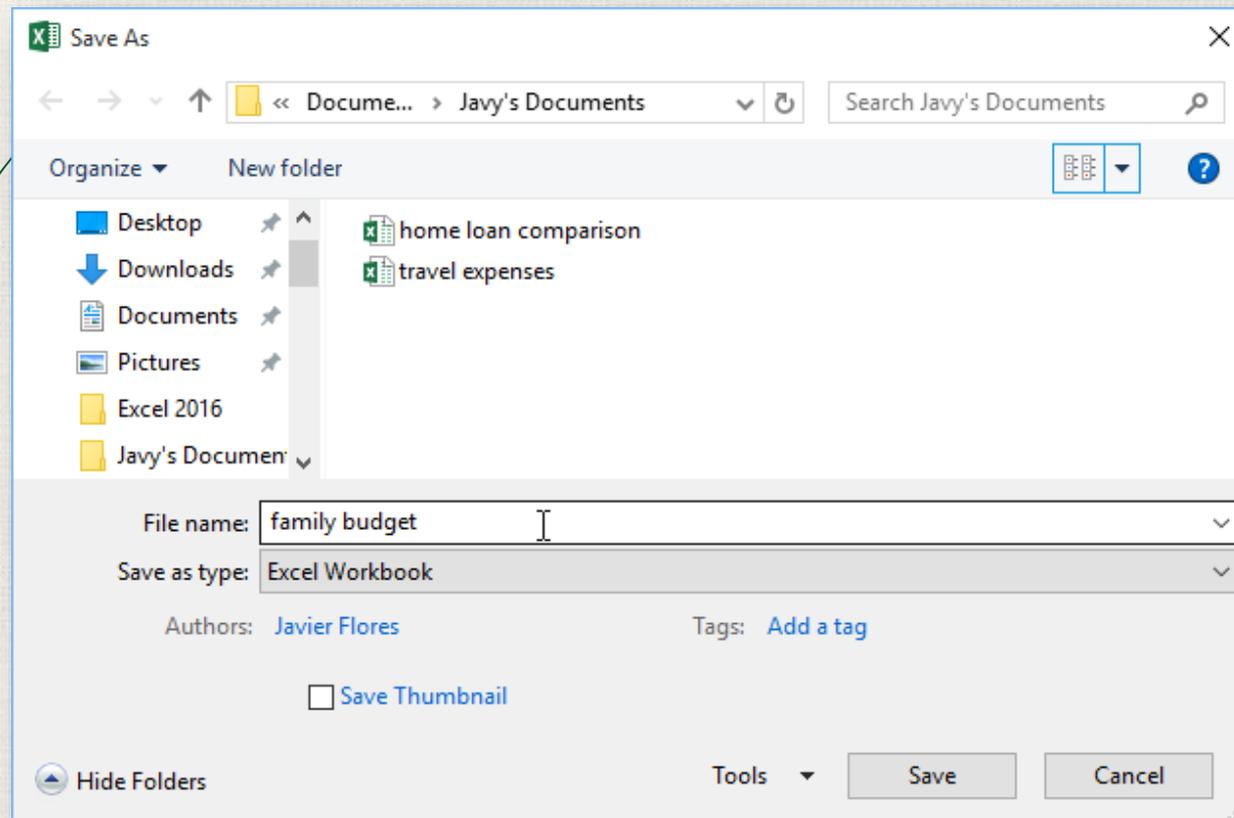
Converting a workbook

- If you want access to all of the Excel 2016 features, you can **convert** the workbook to the 2016 file format.
- Note that converting a file may cause some changes to the **original layout** of the workbook.
 1. Click the **File** tab to access Backstage view.
 2. Locate and select **Convert** command.



Converting a workbook

3. The **Save As** dialog box will appear. Select the **location** where you want to save the workbook, enter a **file name** for the workbook, and click **Save**.
4. The workbook will be converted to the newest file type.



Practice

- Open our **practice workbook**.
- Notice that our workbook opens in **Compatibility Mode**. **Convert** the workbook to the 2016 file format. A dialog box will appear asking if you would like to close and reopen the file in order to see the new features. Choose **Yes**.
- Lastly, in the Backstage view, **pin** a file or folder.



THE END

THE END