# MICROSOFT EXCEL



# Closing and Opening Workbooks

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### 3 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

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

4

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|                             | Share   | Take a   |
|                             | Export  | 5 Blank workbook tour  |
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|                             | Close   |  |

# 5 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**.



# Opening an existing workbook

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

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| Microsoft Excel ConeDrive | family budget<br>home loan comparison<br>travel expenses |     |   |                    |       |       |   |
| File name:  | home loan comparison                                     |     | ~ | All Excel Files    |       |       | ~ |
|   | Тос  | ols | • | Open               | C     | ancel |   |

# 7 Opening an existing workbook

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

### Open



#### Recent



OneDrive - Personal javier.flores838@gmail.com



#### Other Web Locations



This PC



Add a Place



#### Today



travel expenses \\psf » Home » Documents » Javy's Documents



home loan comparison \\psf » Home » Documents » Javy's Documents 2



family budget \\psf » Home » Documents » Javy's Documents

#### Last Week



Cookie Sales \\psf » Home » Documents » Excel 2016

#### Older



WOO Javier Flores's OneDrive » Documents

## 8 To pin a workbook

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

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



#### • To pin a workbook 9

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

#### Today



x

x

| travel expenses<br>\\psf » Home » Documents » Javy's Documents      | 11/9/2015 4:33 PM |
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#### Last Week



Cookie Sales

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#### Older



WOO Javier Flores's OneDrive » Documents

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## 10 To pin a workbook

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

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### U 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.

### 12 Creating a new workbook from a template

- 1. Click the File tab to access Backstage view.
- 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 13

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



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#### Loan comparison calculator

 $\times$ 

Provided by: Microsoft Corporation

This template helps you compare multiple loan scenarios to ascertain which one is best for you. Contains 3 scenarios that can all be customized as required.

Download size: 152 KB



new workbook will appear with the selected template.

### 14 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 budg  | et  |                               | Q |            |    |
|  |  |   |                               |   | Category   |    |
|  |  |   |                               |   | Budgets    | 25 |
| Budget Overvie   | W Driv Lawran  | Budget Sum                                | FAMILY MONTHLY                |   | Family     | 24 |
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| RCTURE DE COLORIS DE C | Expenses<br>8.30<br>8.30 Actual Films                  |   | Planner :                     |   | Personal   | 14 |
| MORETED Norma 1<br>Report P<br>Edito Interne   | H.00<br>H.00<br>H.00<br>H.00                           |   | March 2011                    |   | Expense    | 9  |
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| Family budg  | et (monthly)   | -14                                       | Family monthly budget planner | 3 | Lists      | 8  |
|  |  |   |                               |   | Planners   | 6  |
|  |  |   |                               |   | Monthly    | 5  |

### 15 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.



## 17 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.

Workbook \*

Click the File tab to access Backstage view.
 Locate and select Convert command.

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| Info    |
| New     |
| Open    |
| Save    |
| Save As |
| Print   |
| Share   |
| Export  |
| Publish |



### 18 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.

| XII Save As   | ×                           |
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| Organize 🔻 New folder   |                             |
| <ul> <li>Desktop * * home loan comparison</li> <li>Downloads * Excel 2016</li> <li>Javy's Document</li> </ul> |                             |
| File name: family budget  | ~                           |
| Save as type: Excel Workbook  | ~                           |
| Authors: Javier Flores Tags: Add a  | a tag                       |
| Save Thumbnail  |                             |
| → Hide Folders Tools  | Save Cancel .:i             |

### 19 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.

