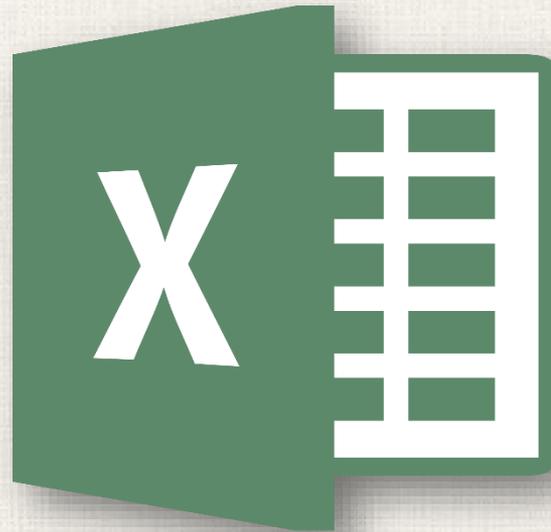


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Saving and Sharing Workbooks

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Introduction

- ▶ Whenever you create a new workbook in Excel, you'll need to know how to **save** it in order to access and edit it later. As with previous versions of Excel, you can save files **locally** to your computer. But unlike older versions, Excel 2016 also lets you save a workbook to **the cloud** using **OneDrive**. You can also **export** and **share** workbooks with others directly from Excel.

Save and Save As

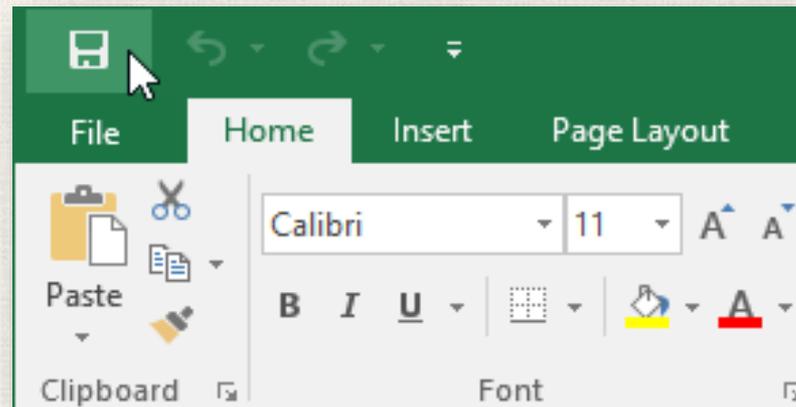
Excel offers two ways to save a file: **Save** and **Save As**. These options work in similar ways, with a few important differences:

- **Save:** When you create or edit a workbook, you'll use the **Save** command to save your changes. You'll use this command most of the time. When you save a file, you'll only need to choose a file name and location the first time. After that, you can just click the Save command to save it with the same name and location.
- **Save As:** You'll use this command to create a **copy** of a workbook while keeping the original. When you use Save As, you'll need to choose a different name and/or location for the copied version.

Saving a workbook

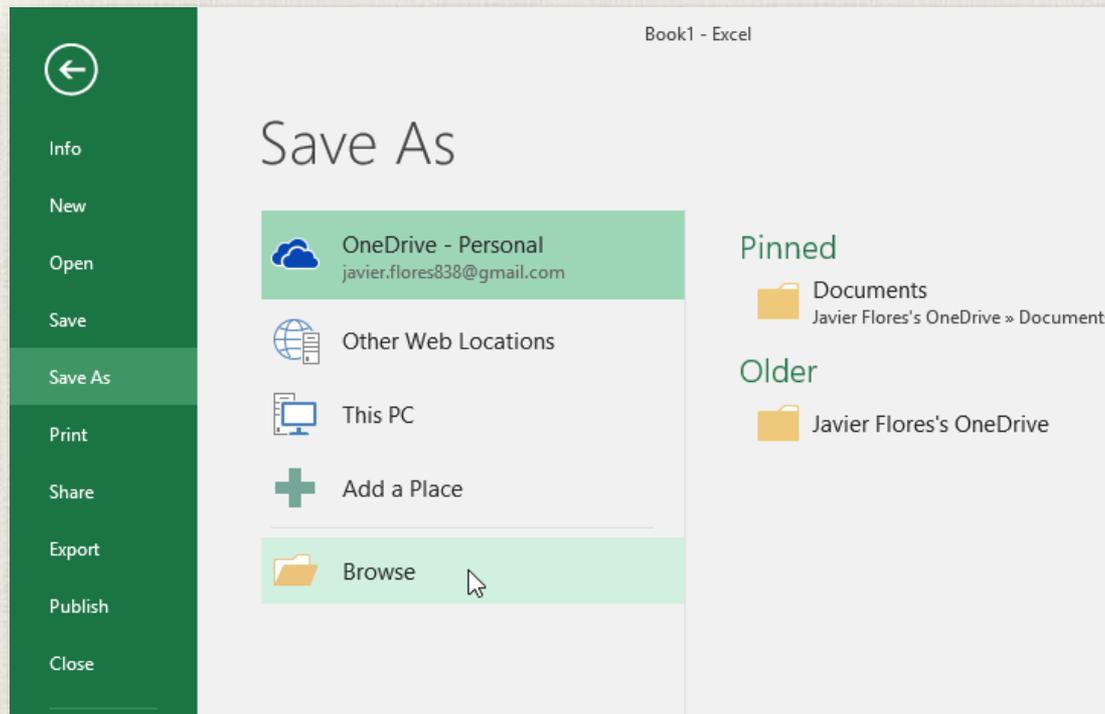
It's important to **save your workbook** whenever you start a new project or make changes to an existing one. Saving early and often can prevent your work from being lost. You'll also need to pay close attention to **where you save** the workbook so it will be easy to find later.

1. Locate and select the **Save** command on the **Quick Access Toolbar**.



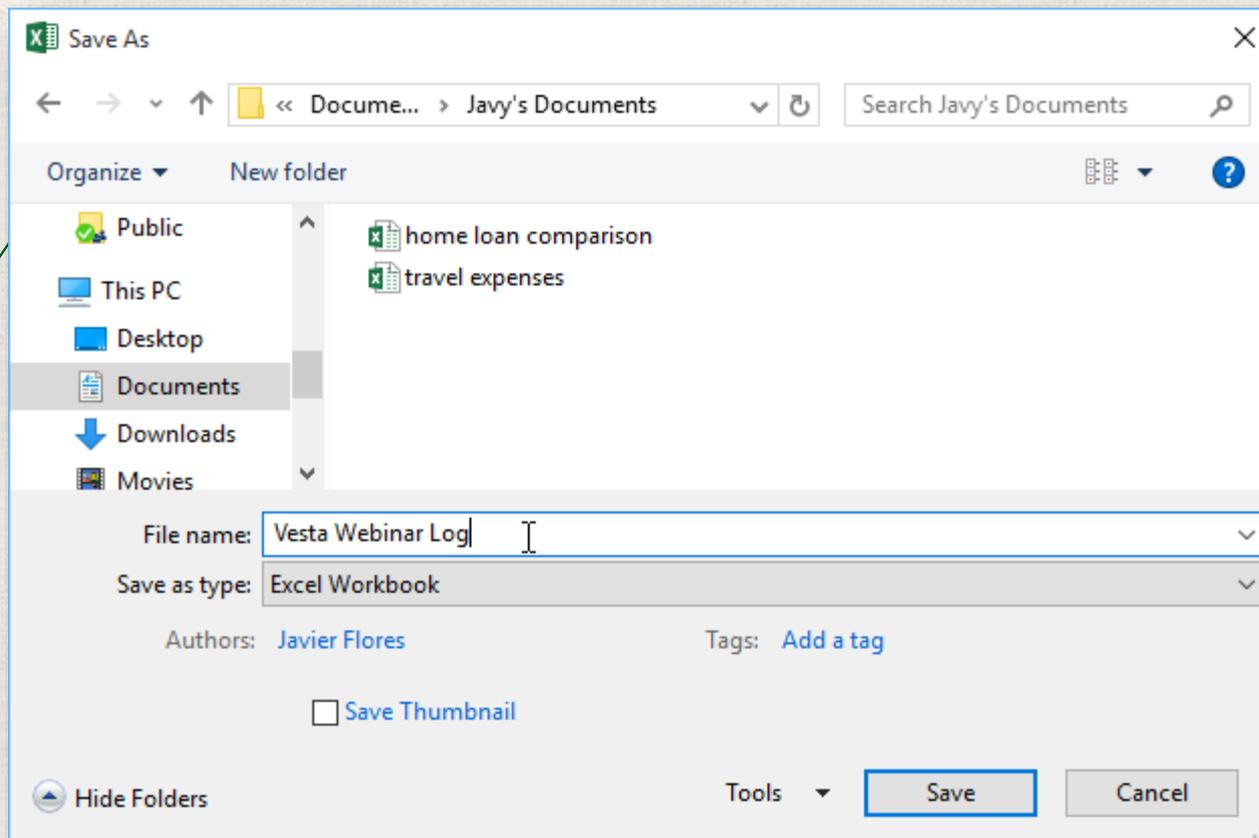
Saving a workbook

2. If you're saving the file for the first time, the **Save As** pane will appear in **Backstage view**.
3. You'll then need to choose **where to save** the file and give it a **file name**. To save the workbook to your computer, select **Computer**, then click **Browse**. Alternatively, you can click **OneDrive** to save the file to your OneDrive.



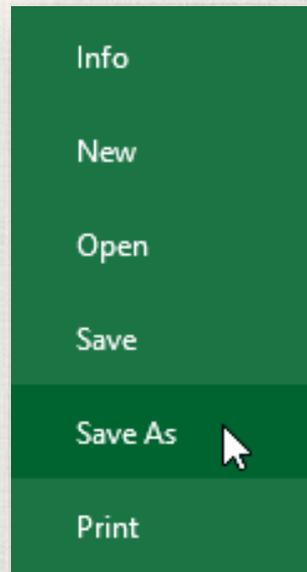
Saving a workbook

4. The **Save As** dialog box will appear. Select the **location** where you want to save the workbook.
5. Enter a **file name** for the workbook, then click **Save**.



Using Save As to make a copy

- If you want to save a **different version** of a workbook while keeping the original, you can create a **copy**. For example, if you have a file named **Sales Data**, you could save it as **Sales Data 2** so you'll be able to edit the new file and still refer back to the original version.
- To do this, you'll click the **Save As** command in Backstage view. Just like when saving a file for the first time, you'll need to choose **where to save** the file and give it a new **file name**.



Changing the default save location

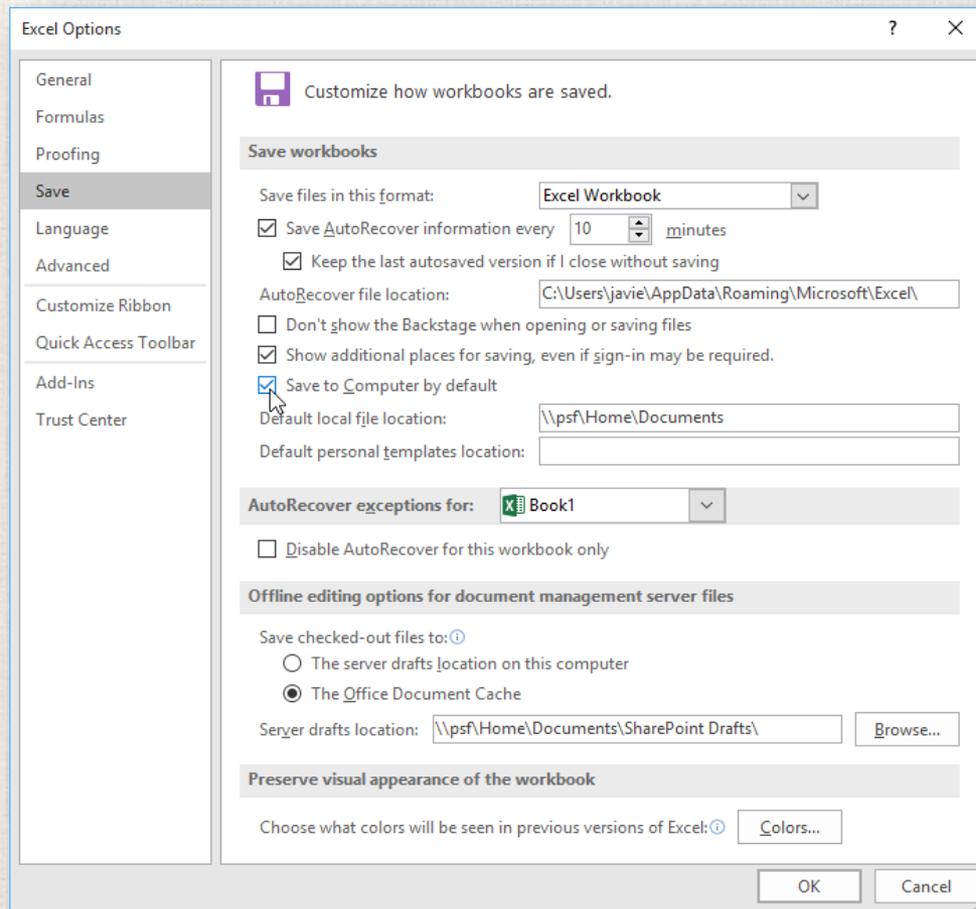
If you don't want to use **OneDrive**, you may be frustrated that OneDrive is selected as the default location when saving. If you find it inconvenient to select **Computer** each time, you can change the **default save location** so **Computer** is selected by default.

1. Click the **File** tab to access **Backstage view**.
2. Click **Options**.



Changing the default save location

3. The **Excel Options** dialog box will appear. Select **Save**, check the box next to **Save to Computer by default**, then click **OK**. The default save location will be changed.

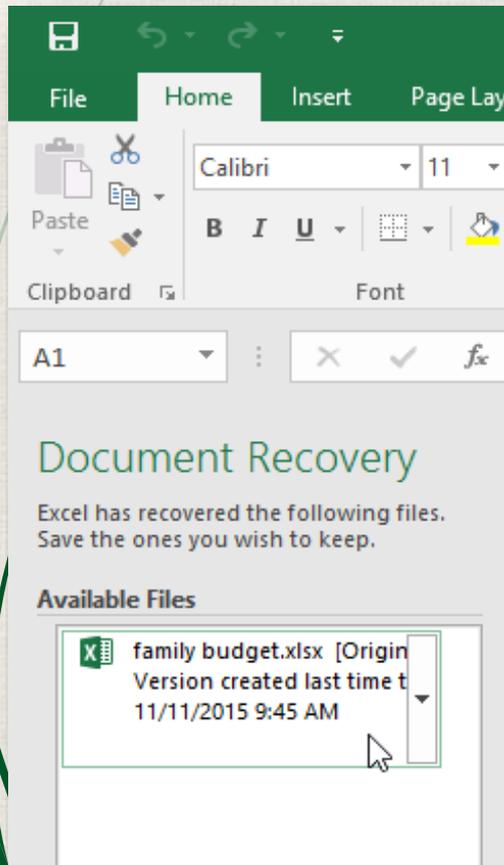


AutoRecover

- Excel automatically saves your workbooks to a temporary folder while you are working on them. If you forget to save your changes or if Excel crashes, you can restore the file using **AutoRecover**.

Using AutoRecover

1. Open Excel. If **AutoSaved versions** of a file are found, the **Document Recovery** pane will appear.
2. Click to **open** an available file. The workbook will be **recovered**.



By default, Excel autosaves every 10 minutes. If you are editing a workbook for less than 10 minutes, Excel may not create an autosaved version.

Using AutoRecover

❖ If you don't see the file you need, you can browse all autosaved files from **Backstage view**. Just select the **File** tab, click **Manage Versions**, then choose **Recover Unsaved Workbooks**.

family budget [Last saved by user] - Excel

Info

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

- Protect Workbook**
Control what types of changes people can make to this workbook.
- Inspect Workbook**
Before publishing this file, be aware that it contains:
 - Document properties, author's name and absolute path
- Manage Workbook**
Check in, check out, and recover unsaved changes.
 - There are no unsaved changes.
- Recover Unsaved Workbooks**
Browse recent unsaved files
- Browser View Options**
Pick what users can see when this workbook is viewed on the Web.

Exporting workbooks

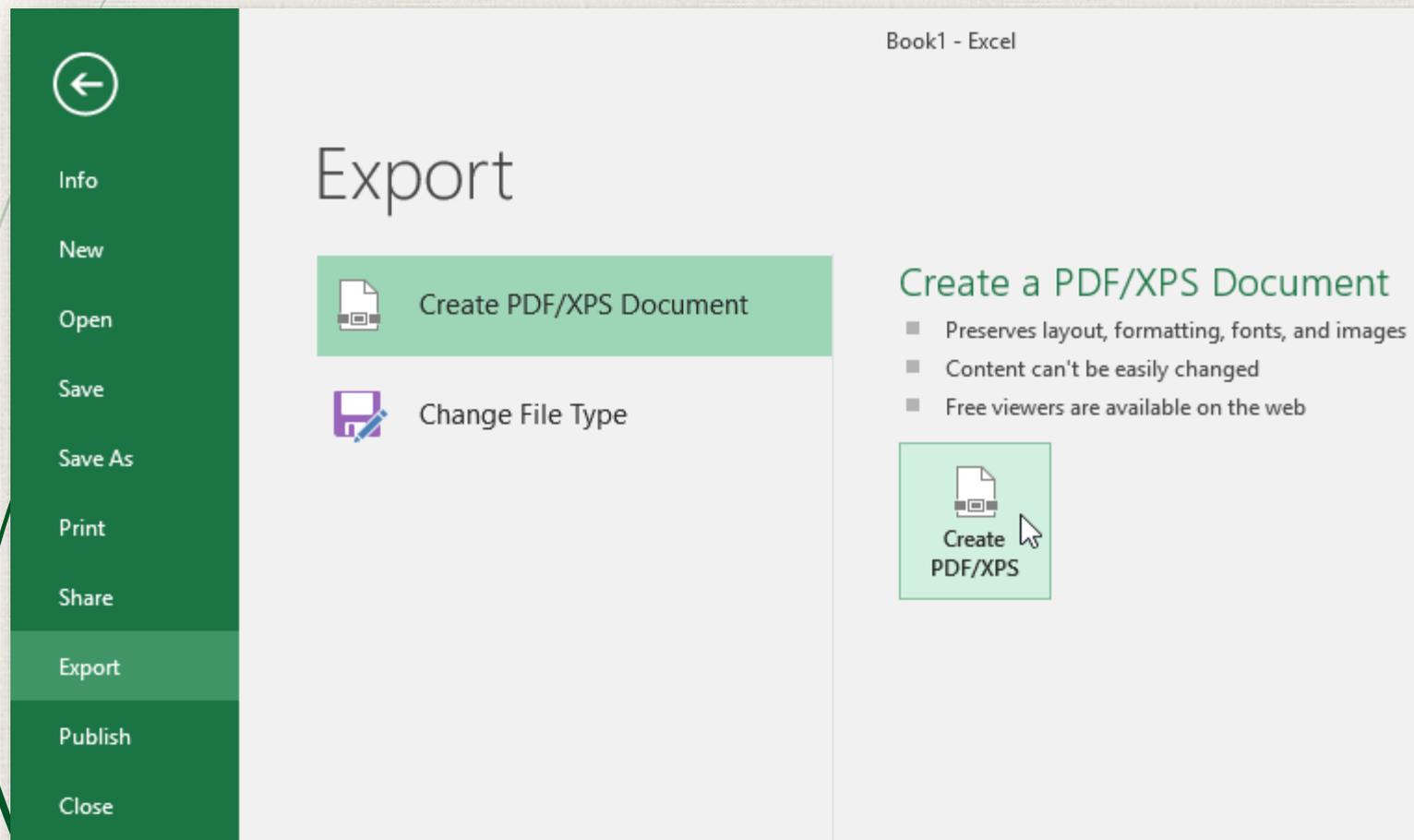
- By default, Excel workbooks are saved in the **.xlsx** file type. However, there may be times when you need to use **another file type**, such as a **PDF** or **Excel 97-2003 workbook**. It's easy to **export** your workbook from Excel to a variety of file types.

Exporting a workbook as a PDF file

- Exporting your workbook as an **Adobe Acrobat document**, commonly known as a **PDF file**, can be especially useful if you're sharing a workbook with someone who does not have Excel. A PDF will make it possible for recipients to view but not edit the content of your workbook.

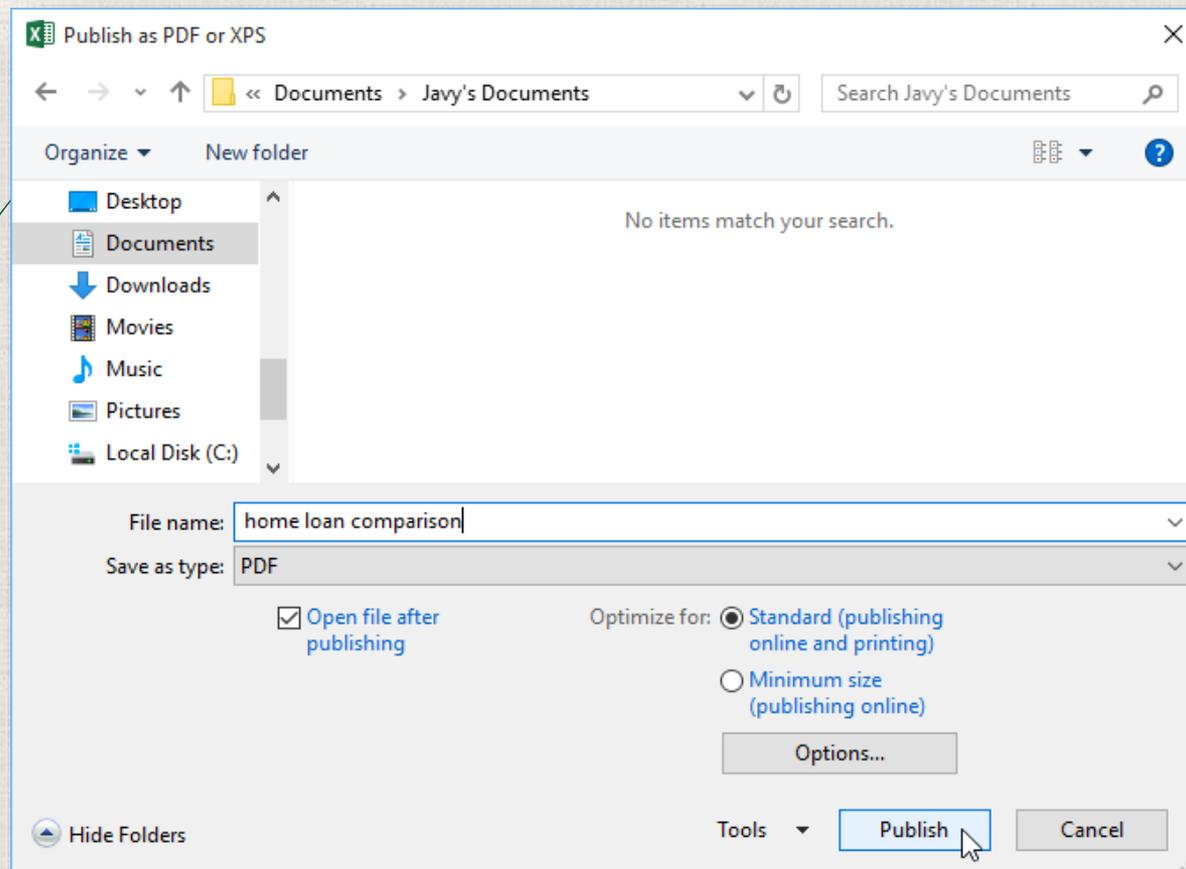
Exporting a workbook as a PDF file

1. Click the **File** tab to access **Backstage view**.
2. Click **Export**, then select **Create PDF/XPS**.



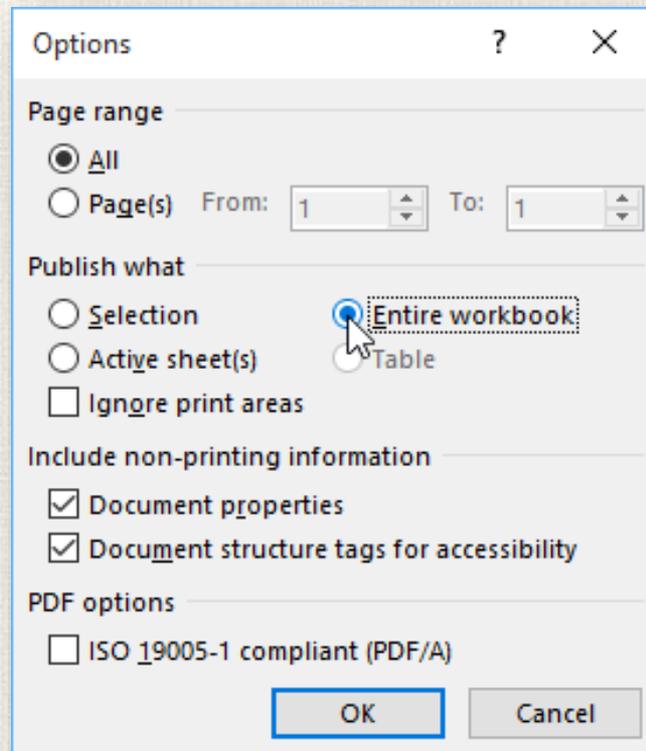
Exporting a workbook as a PDF file

3. The **Save As** dialog box will appear. Select the **location** where you want to export the workbook, enter a **file name**, then click **Publish**.



Exporting a workbook as a PDF file

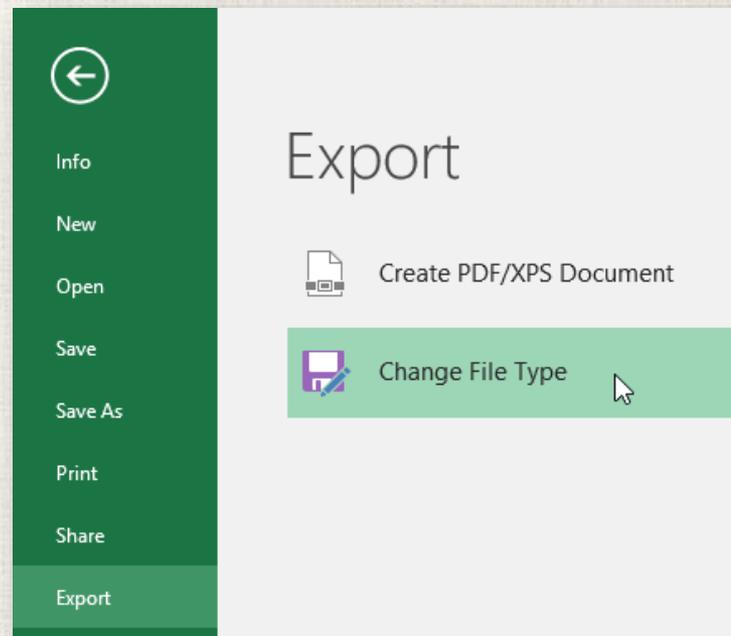
- ❖ By default, Excel will only export the **active worksheet**. If you have multiple worksheets and want to save all of them in the same PDF file, click **Options** in the **Save As** dialog box. The **Options** dialog box will appear. Select **Entire workbook**, then click **OK**.



Exporting a workbook to other file types

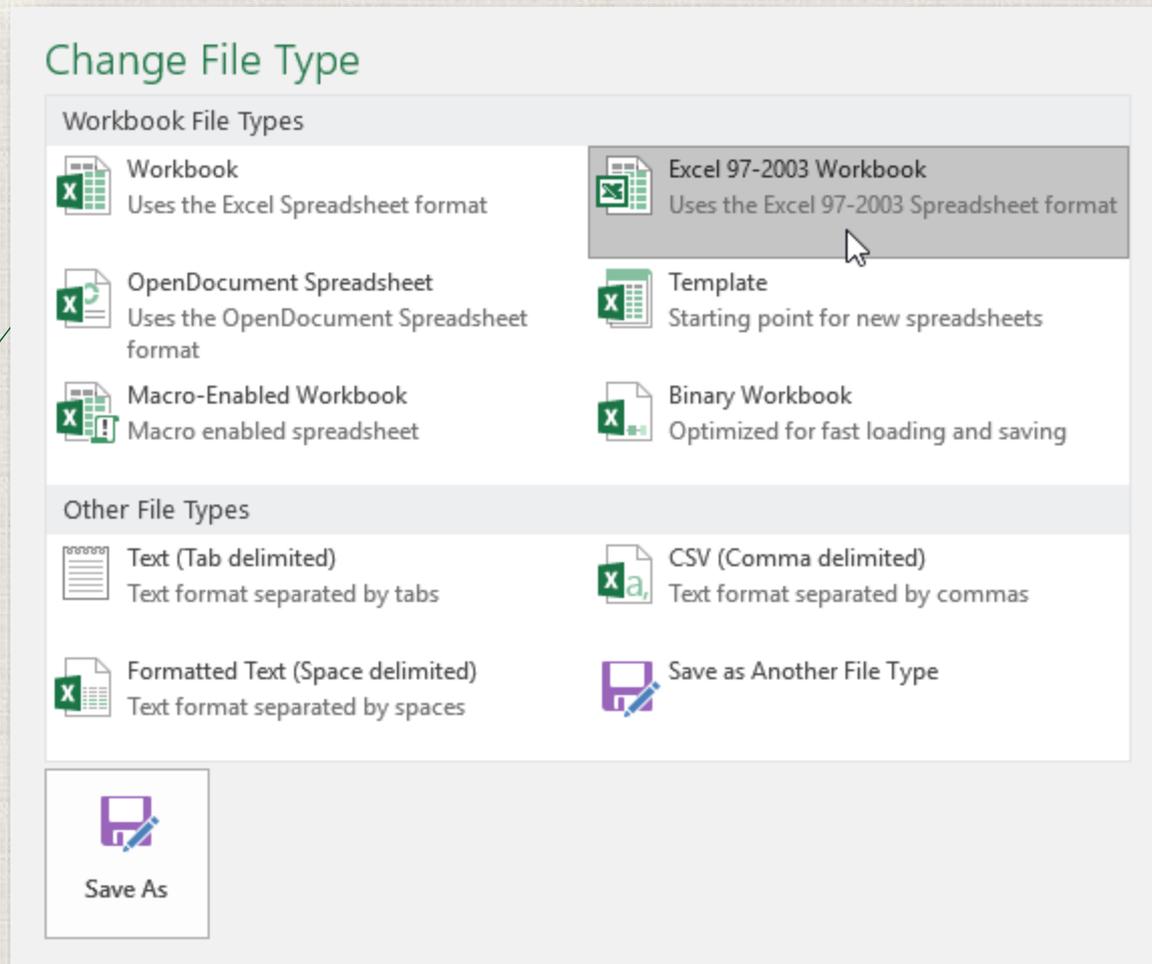
You may also find it helpful to export your workbook to other file types, such as an **Excel 97-2003 workbook** if you need to share with people using an older version of Excel, or a **.CSV file** if you need a **plain-text version** of your workbook.

1. Click the **File** tab to access **Backstage view**.
2. Click **Export**, then select **Change File Type**.



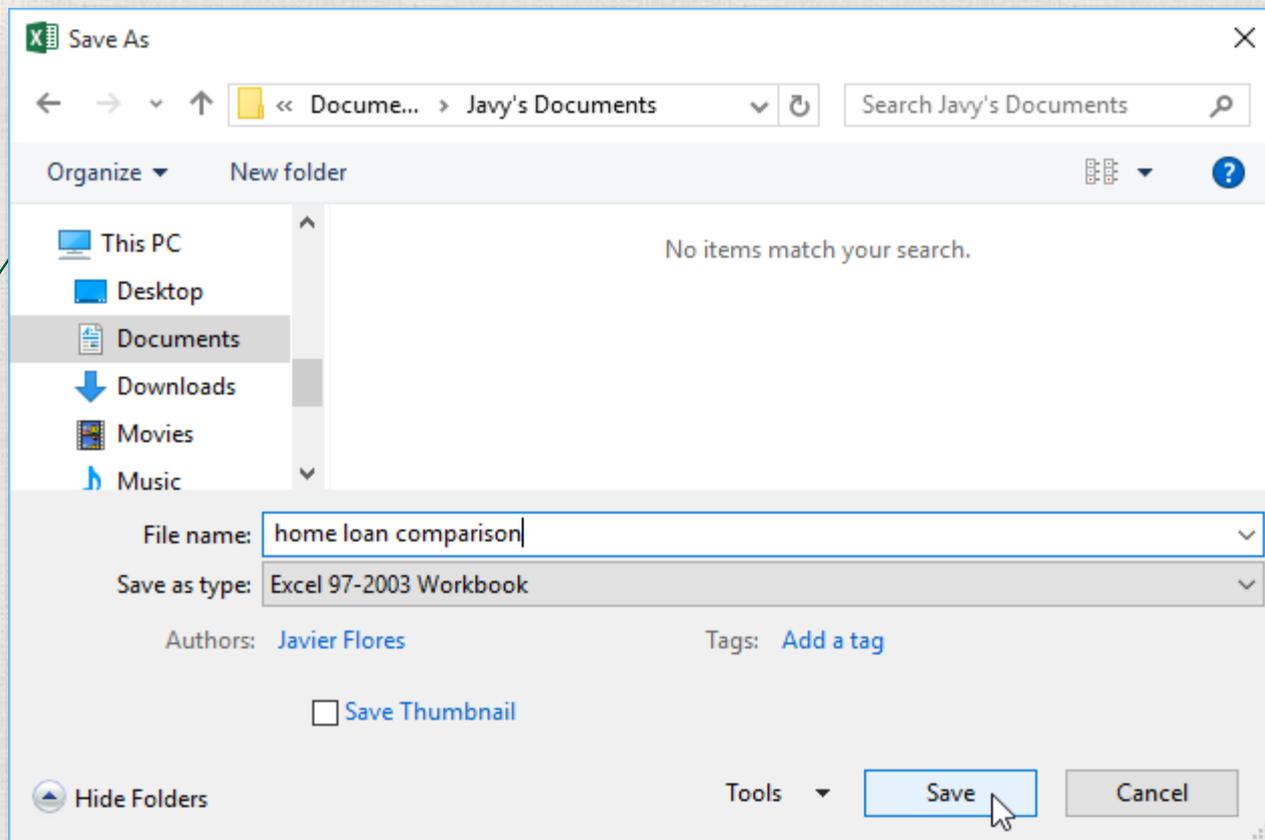
Exporting a workbook to other file types

3. Select a common **file type**, then click **Save As**.



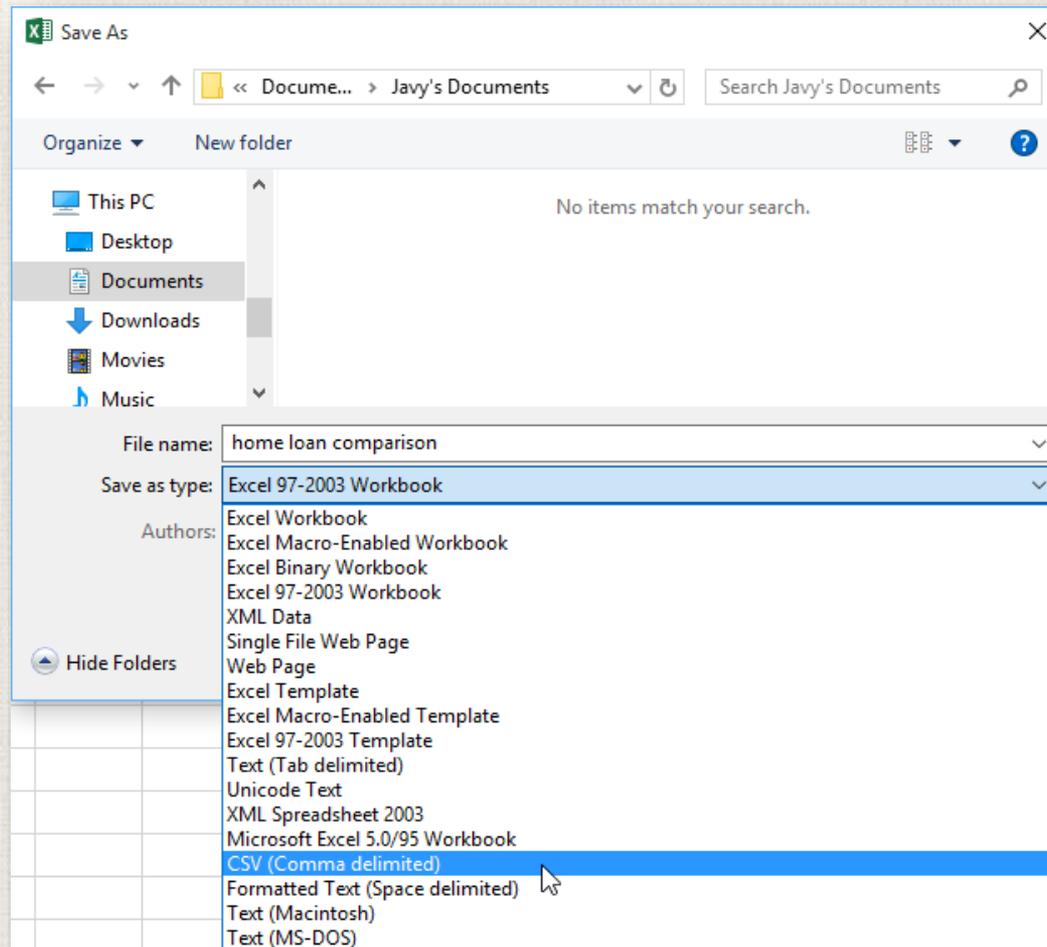
Exporting a workbook to other file types

4. The **Save As** dialog box will appear. Select the **location** where you want to export the workbook, enter a **file name**, then click **Save**.



Exporting a workbook to other file types

- ❖ You can also use the **Save as type:** drop-down menu in the **Save As** dialog box to save workbooks in a variety of file types.

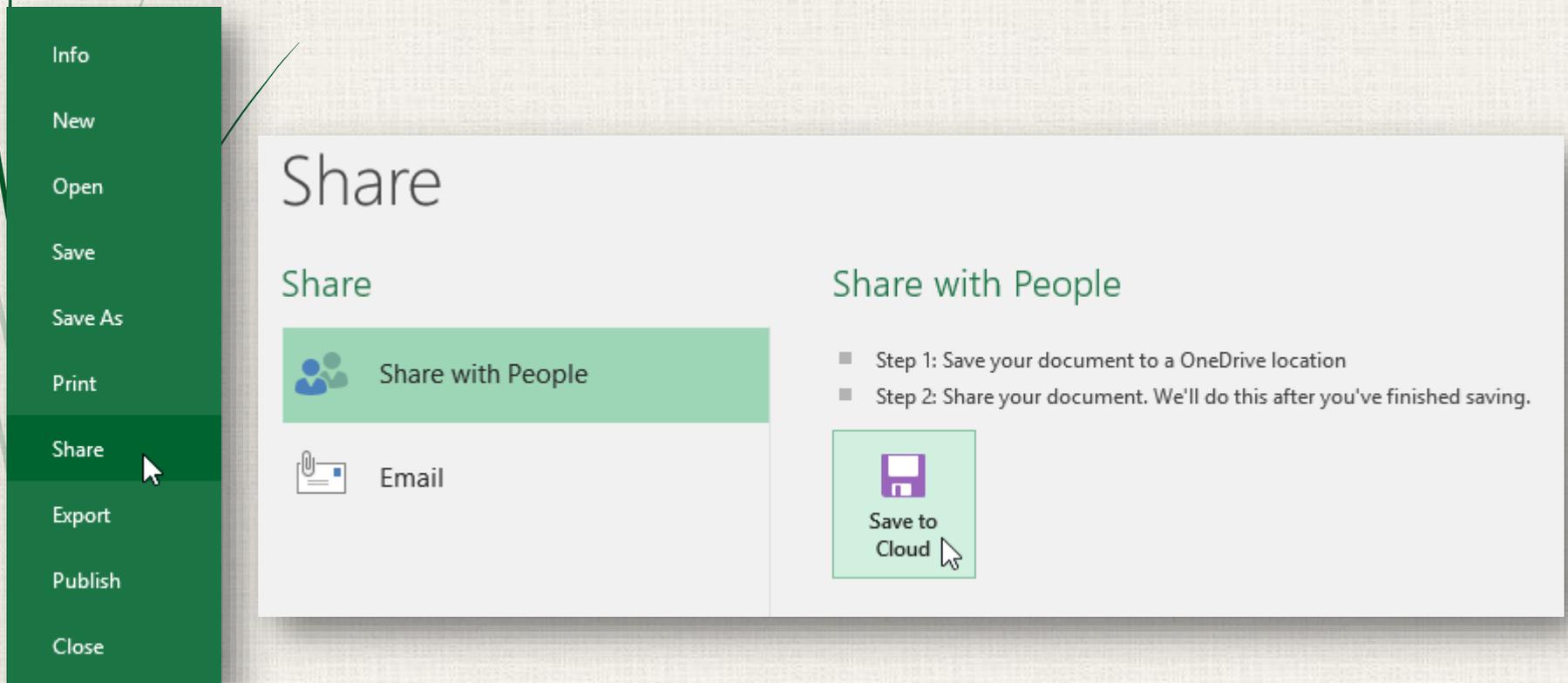


Sharing workbooks

- Excel makes it easy to **share and collaborate** on workbooks using **OneDrive**. In the past, if you wanted to share a file with someone you could send it as an email attachment. While convenient, this system also creates **multiple versions** of the same file, which can be difficult to organize.
- When you share a workbook from Excel, you're actually giving others access to the **exact same file**. This lets you and the people you share with **edit the same workbook** without having to keep track of multiple versions.

Sharing a workbook

1. Click the **File** tab to access **Backstage view**, then click **Share**.
2. The **Share** pane will appear. If you have not already done so, you will be prompted to save your document to **OneDrive**. Note that you may need to navigate back to the Share pane after saving.



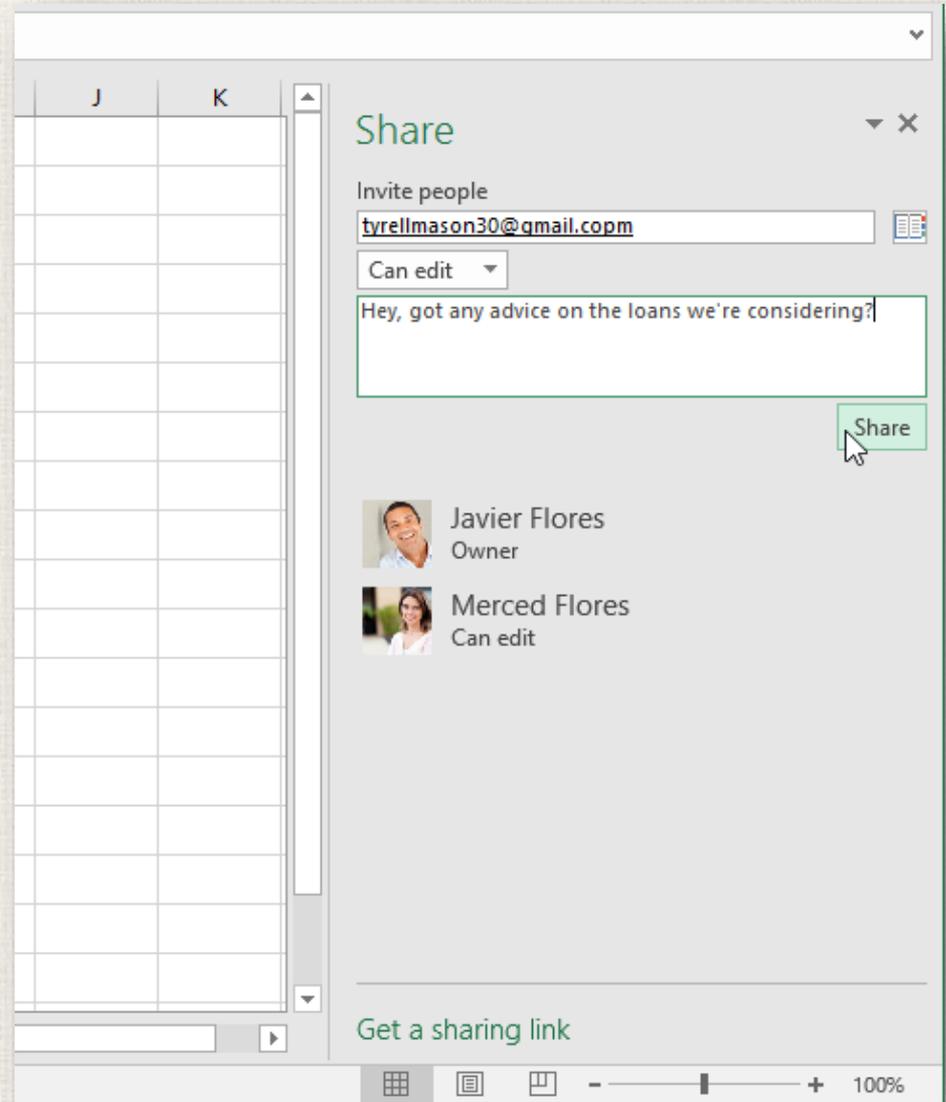
Sharing a workbook

3. On the **Share** pane, if your document is saved to OneDrive, click the **Share with People** button.



Sharing a workbook

4. Excel will return to Normal view and open the **Share** panel on the right side of the window. From here, you can invite people to share your document, see a list of who has access to the document, and set whether they can edit or only view the document.



Practice

- Open our **practice workbook**.
- Using the **Save As** option, create a copy of the workbook and name it **Saving Practice Challenge**. You can save the copy to a folder on your computer or to your **OneDrive**.
- **Export** the workbook as a **PDF** file.



THE END

THE END