MICROSOFT EXCEL



Saving and Sharing Workbooks

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3 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.

4 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.

5 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.

 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.

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Info New	Save As	
Open	OneDrive - Personal javier.flores838@gmail.com	Pinned
Save Save As	Other Web Locations	Javier Flores's OneDrive » Documents
Print	This PC	Javier Flores's OneDrive
Share Export	Add a Place	
Publish	Browse	
Close		

7 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**.

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	Authors:	Javier Flores Tags: Add a tag	
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⁸ 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**.

9



Save As	Í
Print	
Share	
Export	
Publish	
Close	
Account	
Options	

10 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.

Excel Options	? >	×
General Formulas	Customize how workbooks are saved.	
Proofing	Save workbooks	
Save	Save files in this format: Excel Workbook	
Advanced	 Save AutoRecover information every 10 minutes Keep the last autosaved version if I close without saving 	
Customize Ribbon	AutoRecover file location: C:\Users\javie\AppData\Roaming\Microsoft\Excel\ Don't show the Backstage when opening or saving files]
Add-Ins	✓ Show additional places for saving, even if sign-in may be required. ✓ Save to Computer by default	
Trust Center	Default local file location: \\psf\Home\Documents Default personal templates location:	
	AutoRecover exceptions for: Book1 ~	
	Disable AutoRecover for this workbook only	
	Offline editing options for document management server files	
	Save checked-out files to: ① O The server drafts location on this computer The Office Document Cache	
	Server drafts location: \\psf\Home\Documents\SharePoint Drafts\ Browse	
	Preserve visual appearance of the workbook	
	Choose what colors will be seen in previous versions of Excel: ① <u>Colors</u>	
	OK Cancel	

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.

12 Using AutoRecover

- 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**.

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File	Н	ome		Insert	Pag	e Lay
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Document Recovery

Excel has recovered the following files. Save the ones you wish to keep.

Available Files

family budget.xlsx [Origin Version created last time t 11/11/2015 9:45 AM 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.

13 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. $\left(\boldsymbol{\epsilon} \right)$ Info New Open Save Save As Print Share Export Publish Close Account Options

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 Protect this workbook. Workbook -Inspect Workbook <u>کا</u> Before publishing this file, be aware that it contains: Check for Document properties, author's name and ssues * absolute path Manage Workbook à Check in, check out, and recover unsaved changes. Manage There are no unsaved changes. Workbook -**Recover Unsaved Workbooks** Browse recent unsaved files ptions 10 Pick what users can see when this workbook is Browser View viewed on the Web. Options

14 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 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.

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

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/	Info	Export	
/	New Open	Create PDF/XPS Document	Create a PDF/XPS Document Preserves layout, formatting, fonts, and images
	Save Save As	Change File Type	 Content can't be easily changed Free viewers are available on the web
/	Print		Create Create PDF/XPS
	Share Export		
N	Publish Close		

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**.

Publish as PDF or XPS				×
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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.

Options ? X
Page range All Page(s) From: 1 + To: 1 +
Publish what O Selection Entire workbook O Active sheet(s) Table Ignore print areas
Include non-printing information Document p <u>r</u> operties Docu <u>m</u> ent structure tags for accessibility
PDF options ISO <u>1</u> 9005-1 compliant (PDF/A) OK Cancel

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.



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

Change File Type

Workbook File Types



Workbook Uses the Excel Spreadsheet format



OpenDocument Spreadsheet Uses the OpenDocument Spreadsheet format



Hacro-Enabled Workbook Macro enabled spreadsheet

Other File Types



Text (Tab delimited) Text format separated by tabs



L T

Save As

Formatted Text (Space delimited) Text format separated by spaces

X

Template Starting point for new spreadsheets

Uses the Excel 97-2003 Spreadsheet format

Excel 97-2003 Workbook



Binary Workbook Optimized for fast loading and saving



CSV (Comma delimited) Xa, Text format separated by commas



Save as Another File Type



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**.

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This PC This PC Desktop Documents Downloads Movies Music	No items match your search.	
File name:	home loan comparison	~
Save as type:	Excel 97-2003 Workbook	~
Authors:	Javier Flores Tags: Add a tag	
	Save Thumbnail	
Hide Folders	Tools Save Cancel]

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.



²³ 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.

²⁴ 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.

Info		
New		
Open	Share	
Save	Share	Share with People
Save As		
Print	Share with People	 Step 1: Save your document to a OneDrive location Step 2: Share your document. We'll do this after you've finished saving.
Share	Email	
Export		Save to Cloud
Publish		V3
Close		

Sharing a workbook 25

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

Share

home loan comparison

Javier Flores's OneDrive » Documents

Share

-

Share with People

line in the second seco Email

Share with People

Send invitations and get sharing links.



²⁶ 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.

	~
J K	Share • ×
	Invite people <u>tyrellmason30@gmail.copm</u> Can edit Hey, got any advice on the loans we're considering?
	Javier Flores
	Merced Flores Can edit
•	Get a sharing link
	I □ □ − → + 100%

²⁷ 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.

