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.

About OneDrive

Whenever you're opening or saving a workbook, you'll have the option of using your **OneDrive**, which is the online file storage service included with your Microsoft account. To enable this option, you'll need to **sign in** to Office. To learn more, visit our lesson on **Understanding OneDrive**.

Save and Save As

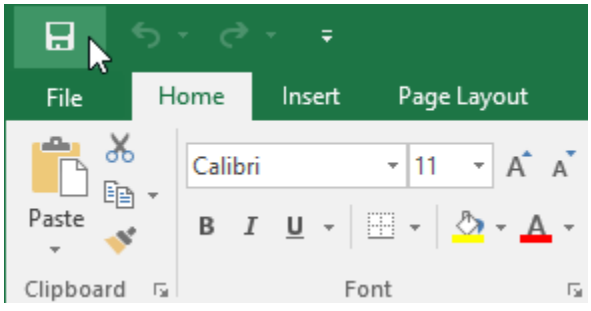
Excel offers two ways to save a file: **Save** and **Save As**. These options work in similar ways, with a few important differences:

- **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.

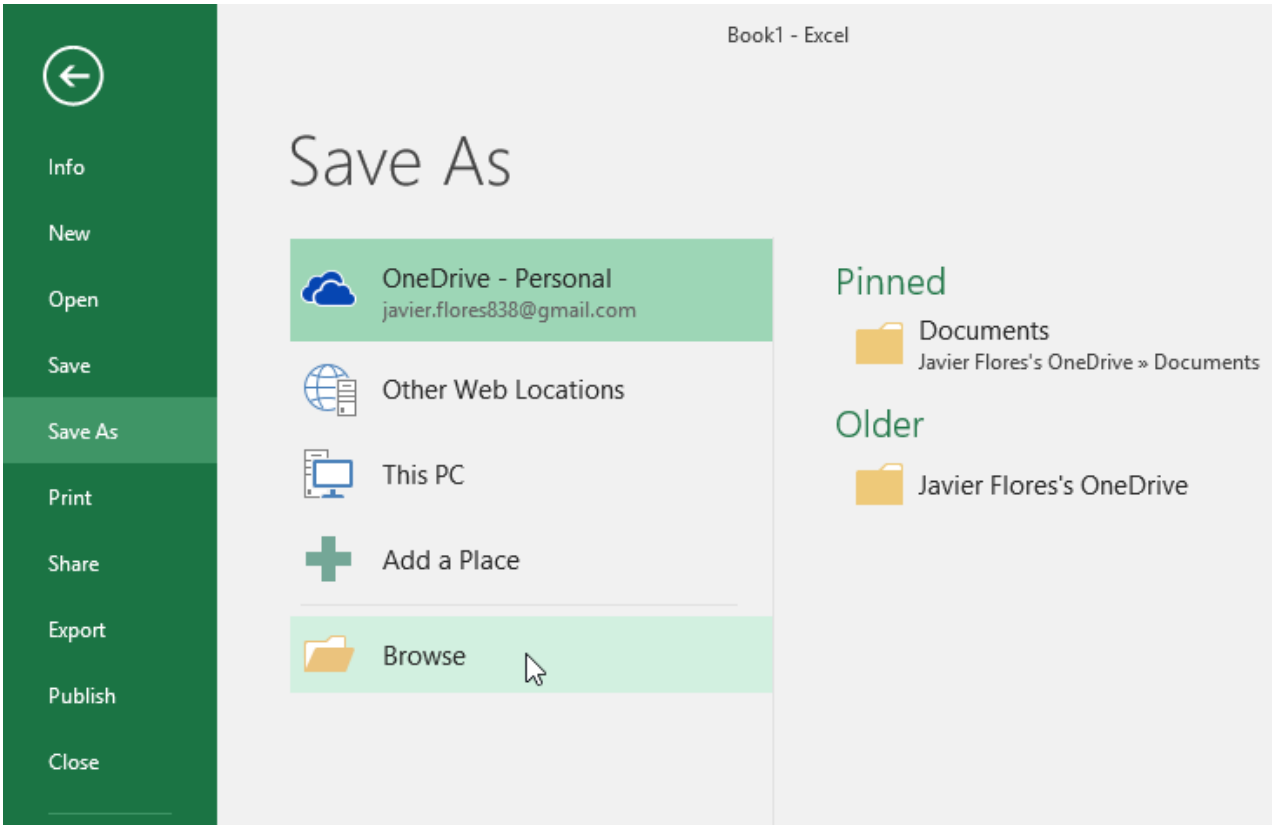
To save a workbook:

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**.

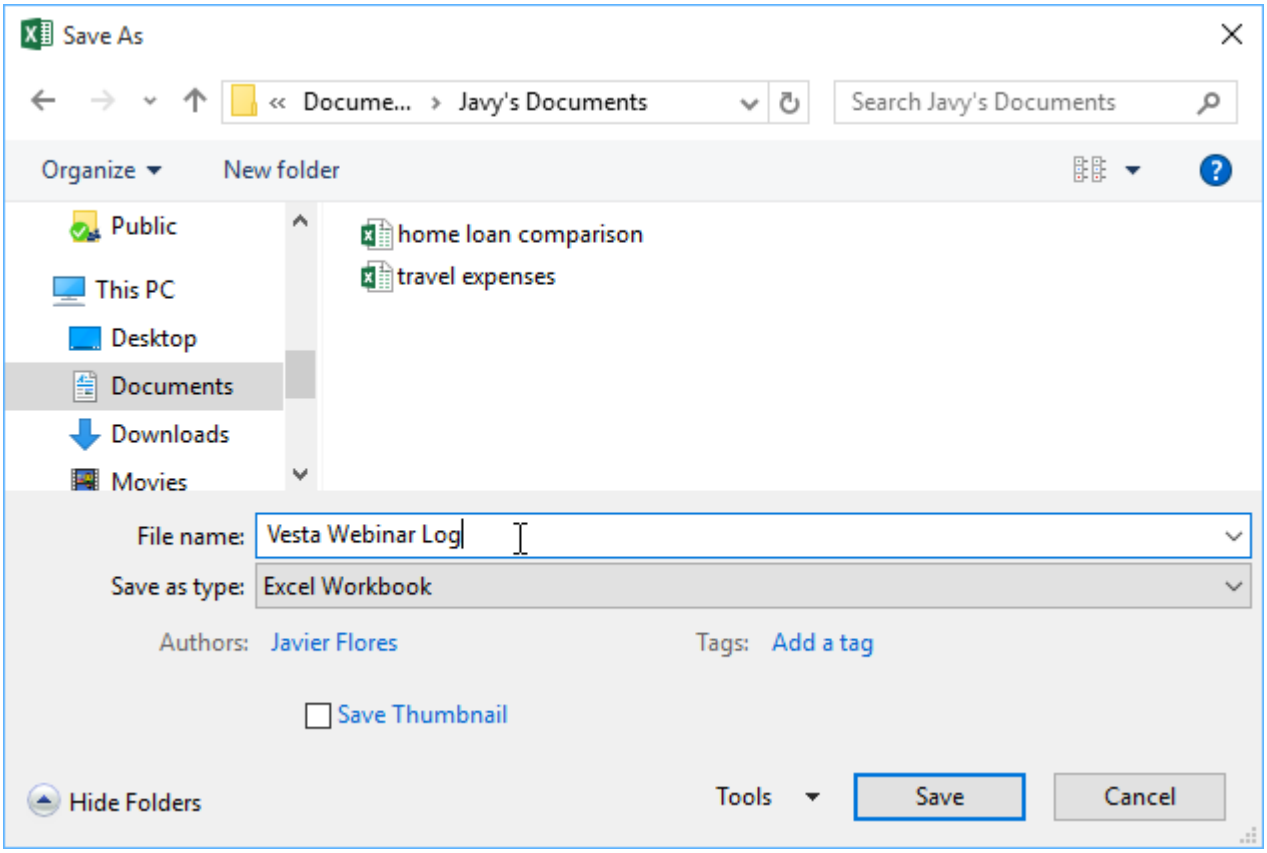


2. If you're saving the file for the first time, the **Save As** pane will appear in **Backstage view**.
3. You'll then need to choose **where to save** the file and give it a **file name**. To save the workbook to your computer, select **Computer**, then click **Browse**. Alternatively, you can click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



4.The **Save As** dialog box will appear. Select the l**ocation** where you want to save the workbook.

5.Enter a **file name** for the workbook, then click **Save**.



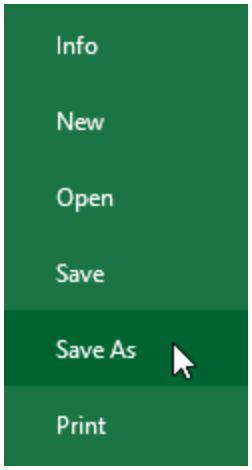
6. The workbook will be **saved**. You can click the **Save** command again to save your changes as you modify the workbook.

You can also access the **Save** command by pressing **Ctrl+S** on your keyboard.

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.

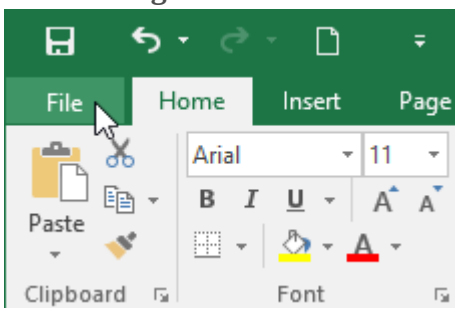
To do this, you'll click the **Save As** command in Backstage view. Just like when saving a file for the first time, you'll need to choose **where to save** he file and give it a new **file name**.



To change the default save location:

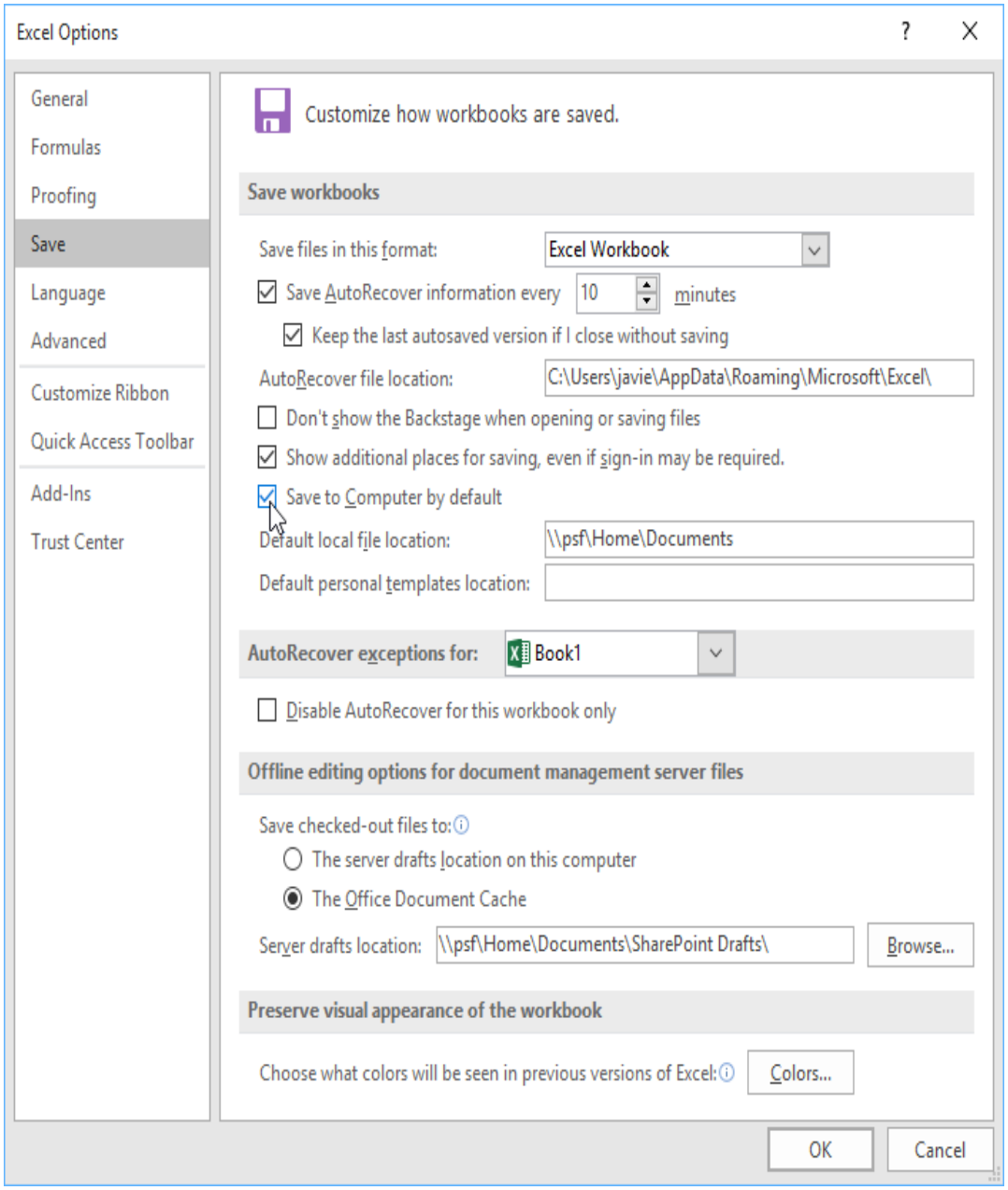
If you don't want to use **OneDrive**, you may be frustrated that OneDrive is selected as the default location when saving. If you find it inconvenient to select **Computer** each time, you can change the **default save location** so **Computer** is selected by default.

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



2. Click **Options**.

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.

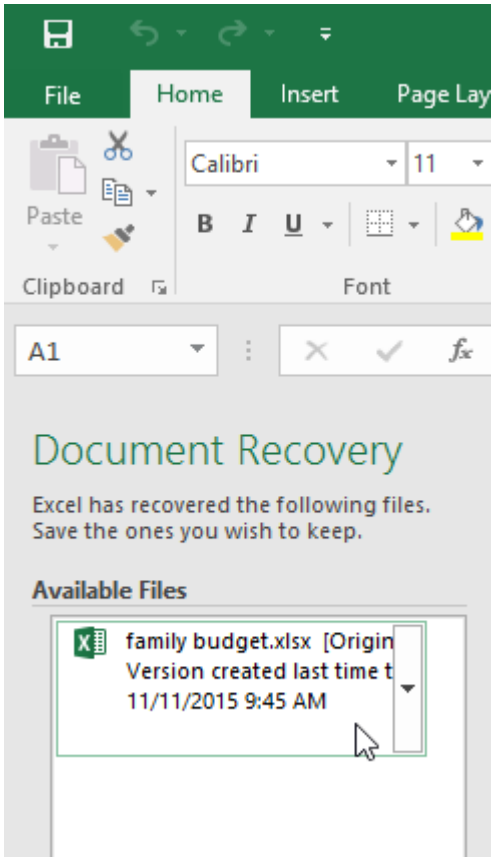


AutoRecover

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**.

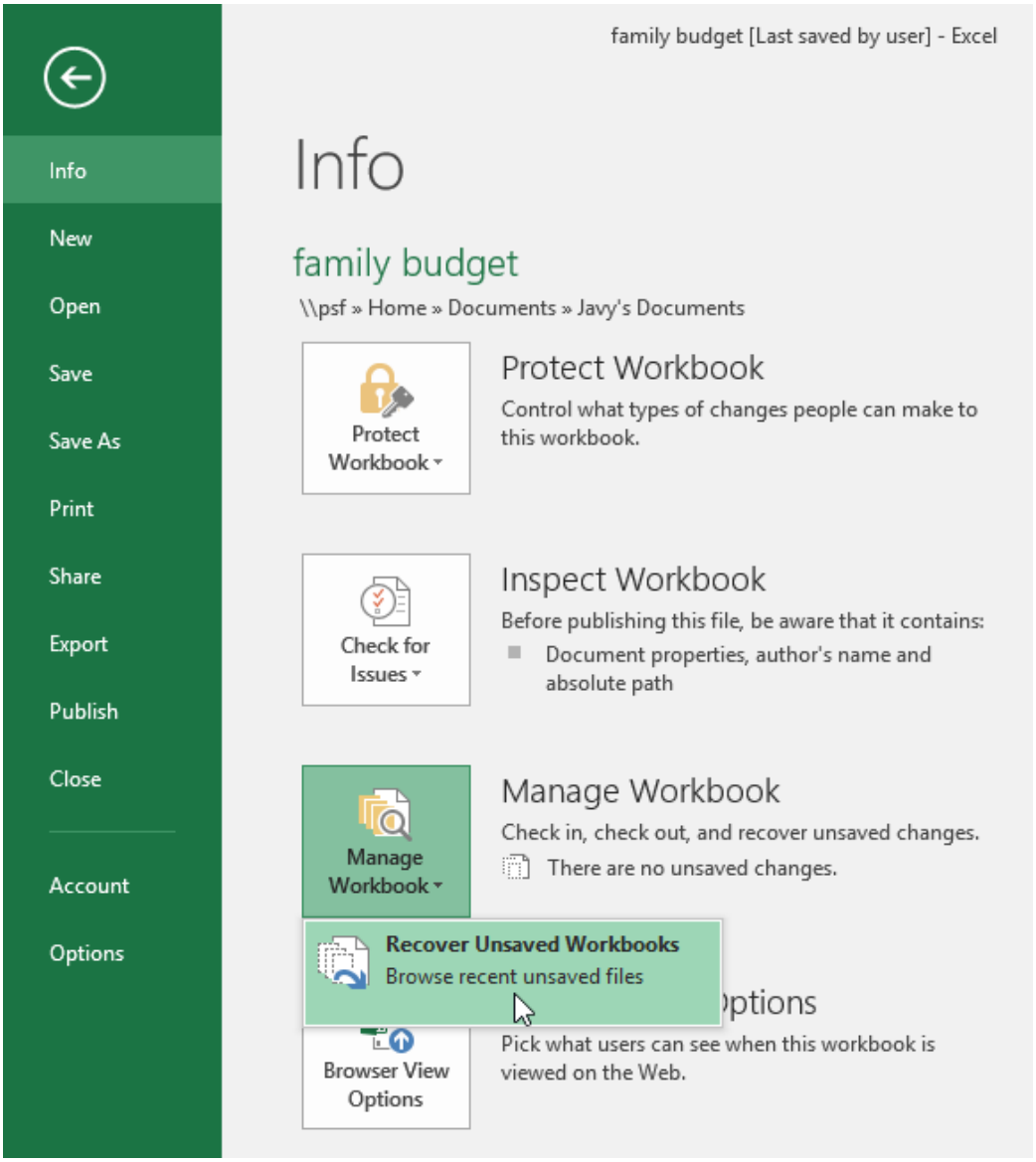
To use AutoRecover:

1. Open Excel. If **autosaved versions** of a file are found, the **DocumentRecovery** 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.

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**.



Exporting workbooks

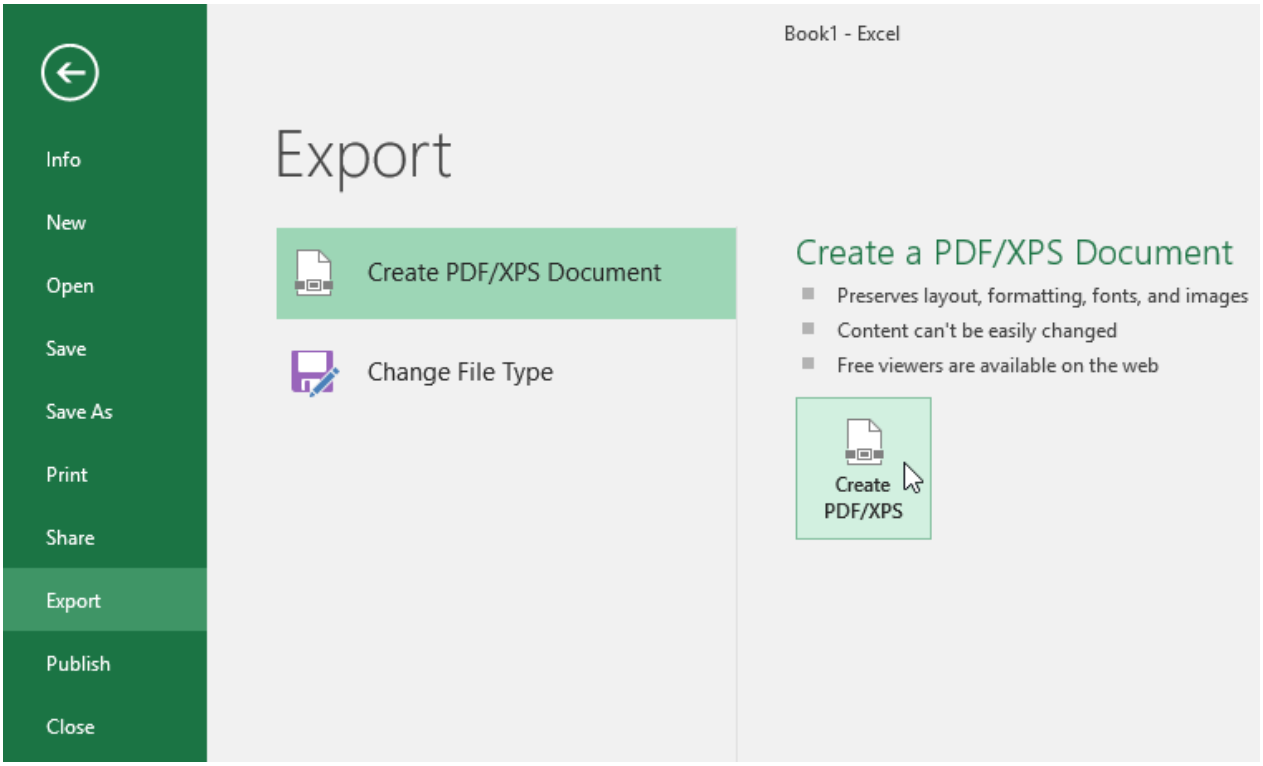
By default, Excel workbooks are saved in the **.xlsx** file type. However, there may be times when you need to use **another file type,** such as a **PDF** or **Excel 97-2003 workbook**. It's easy to **export** your workbook from Excel to a variety of file types.

To export a workbook as a PDF file:

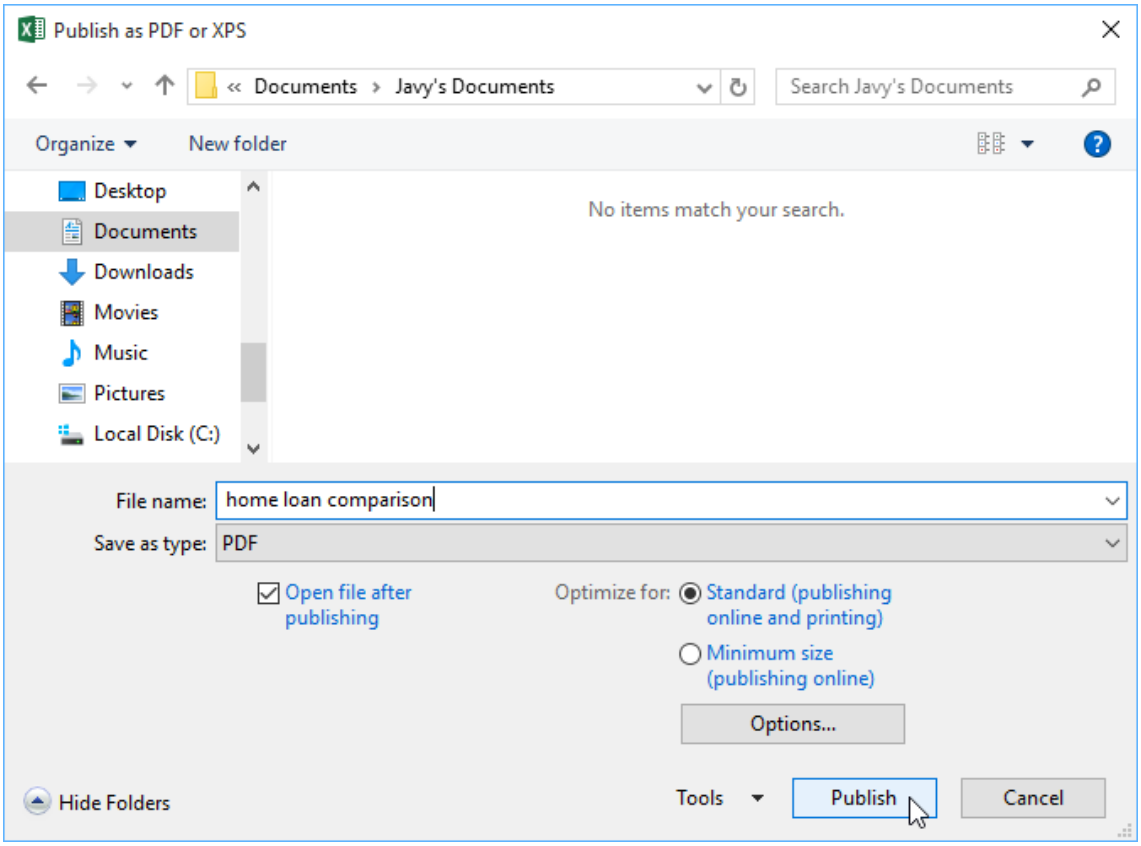
Exporting your workbook as an **Adobe Acrobat document**, commonly known as a **PDF file**, can be especially useful if you're sharing a workbook with someone who does not have Excel. A PDF will make it possible for recipients to view but not edit the content of your workbook.

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

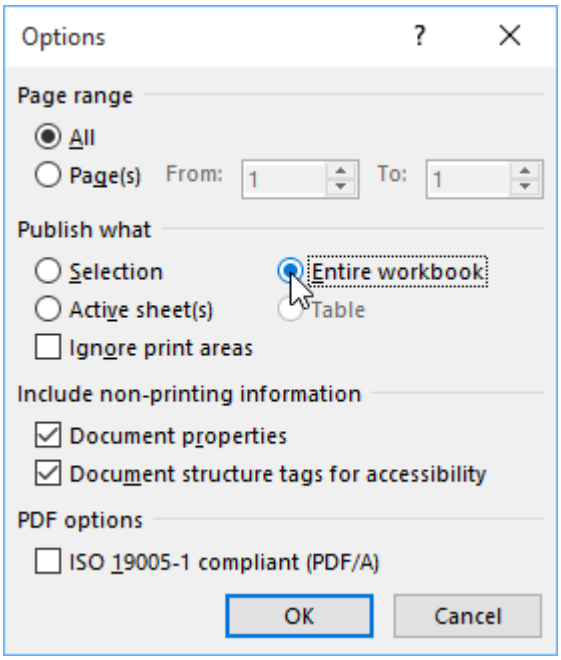
2.Click **Export**, then select **Create PDF/XPS**.



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**.



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**.

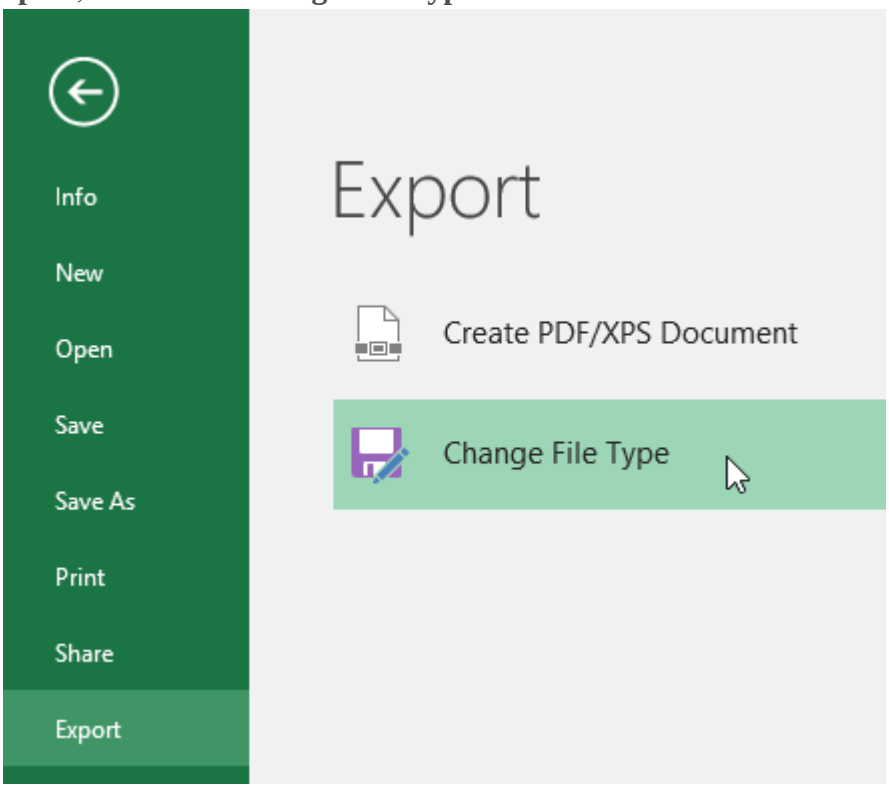


Whenever you export a workbook as a PDF, you'll also need to consider how your workbook data will appear on each **page** of the PDF, just like **printing**a workbook. Visit our **Page Layout and Printing** lesson to learn more about what to consider before exporting a workbook as a PDF.

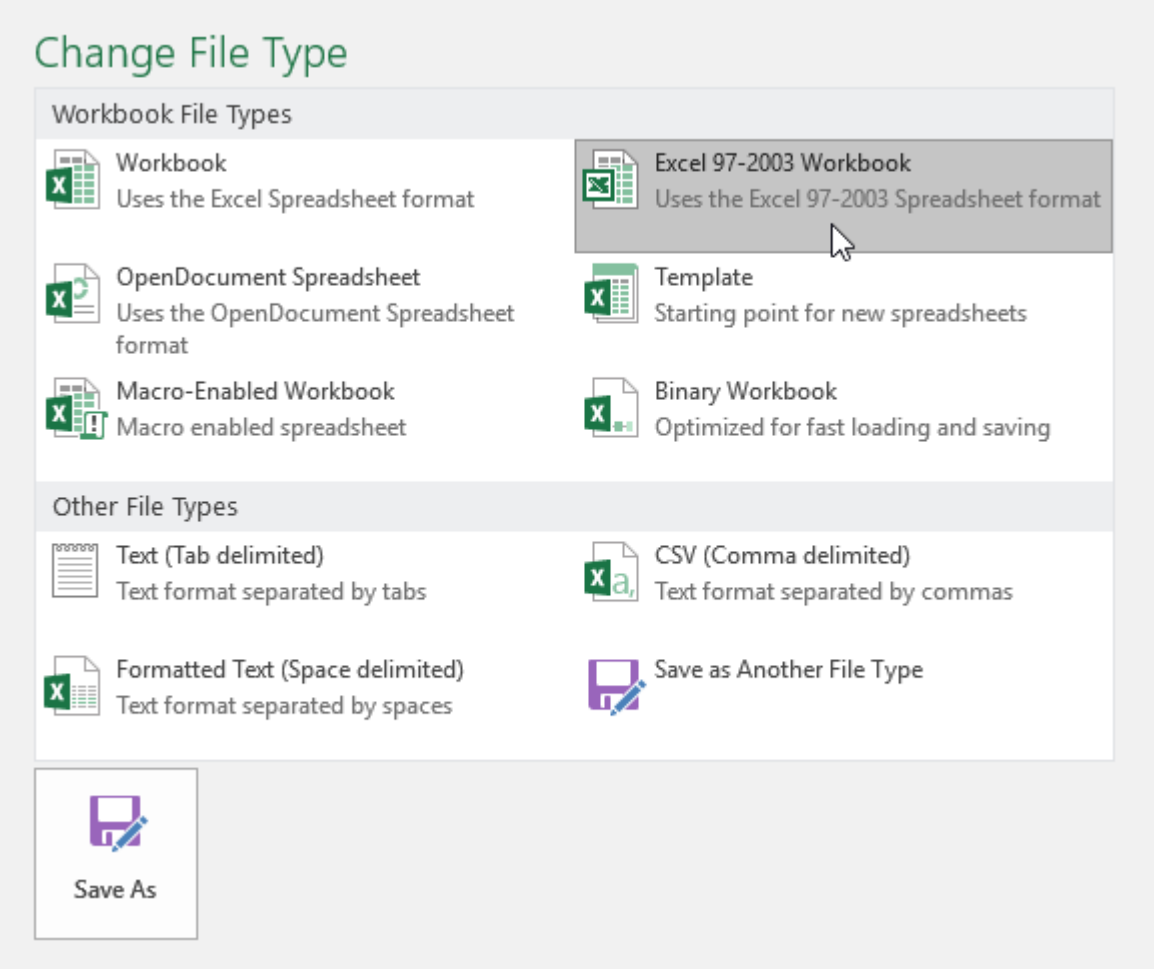
To export a workbook to other file types:

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.

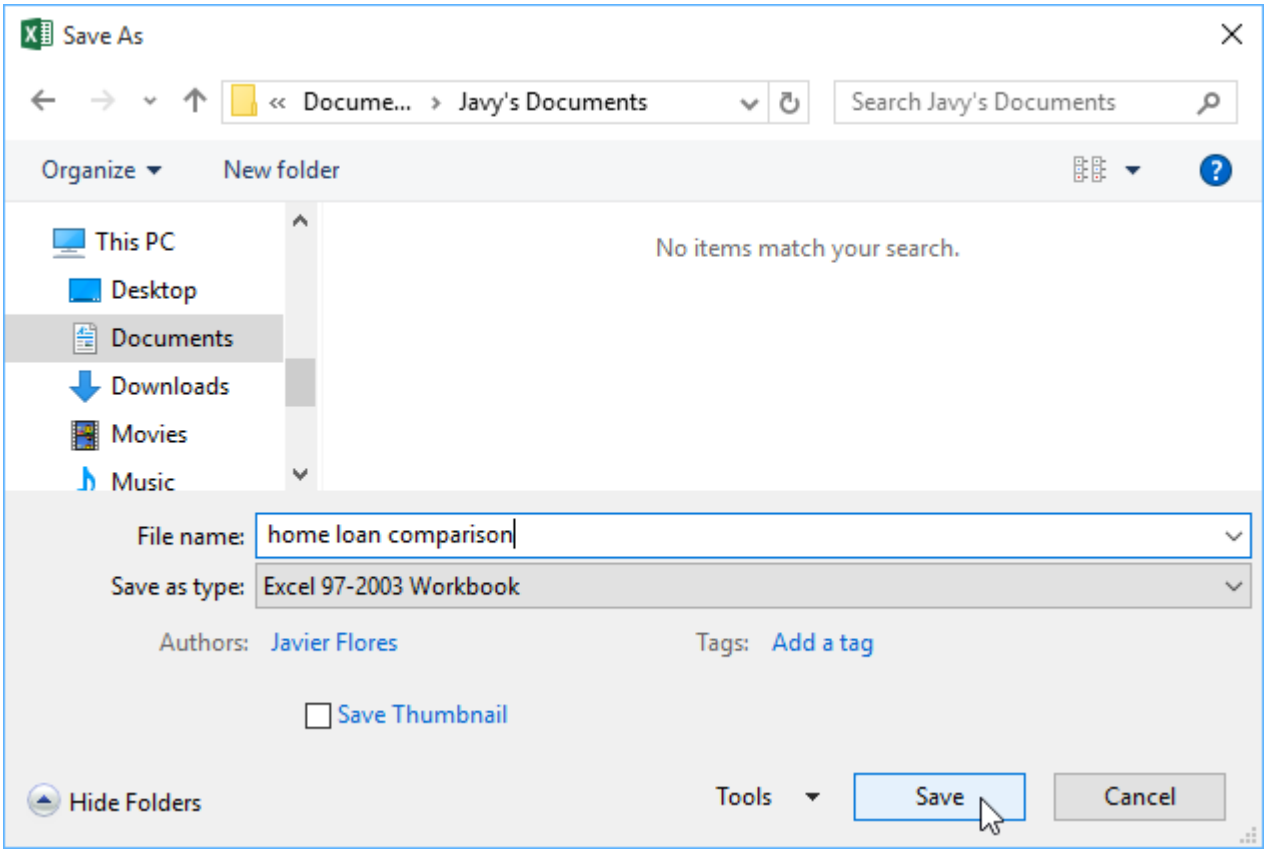
1. Click the **File** tab to access **Backstage view**.
2. Click **Export**, then select **Change File Type**.



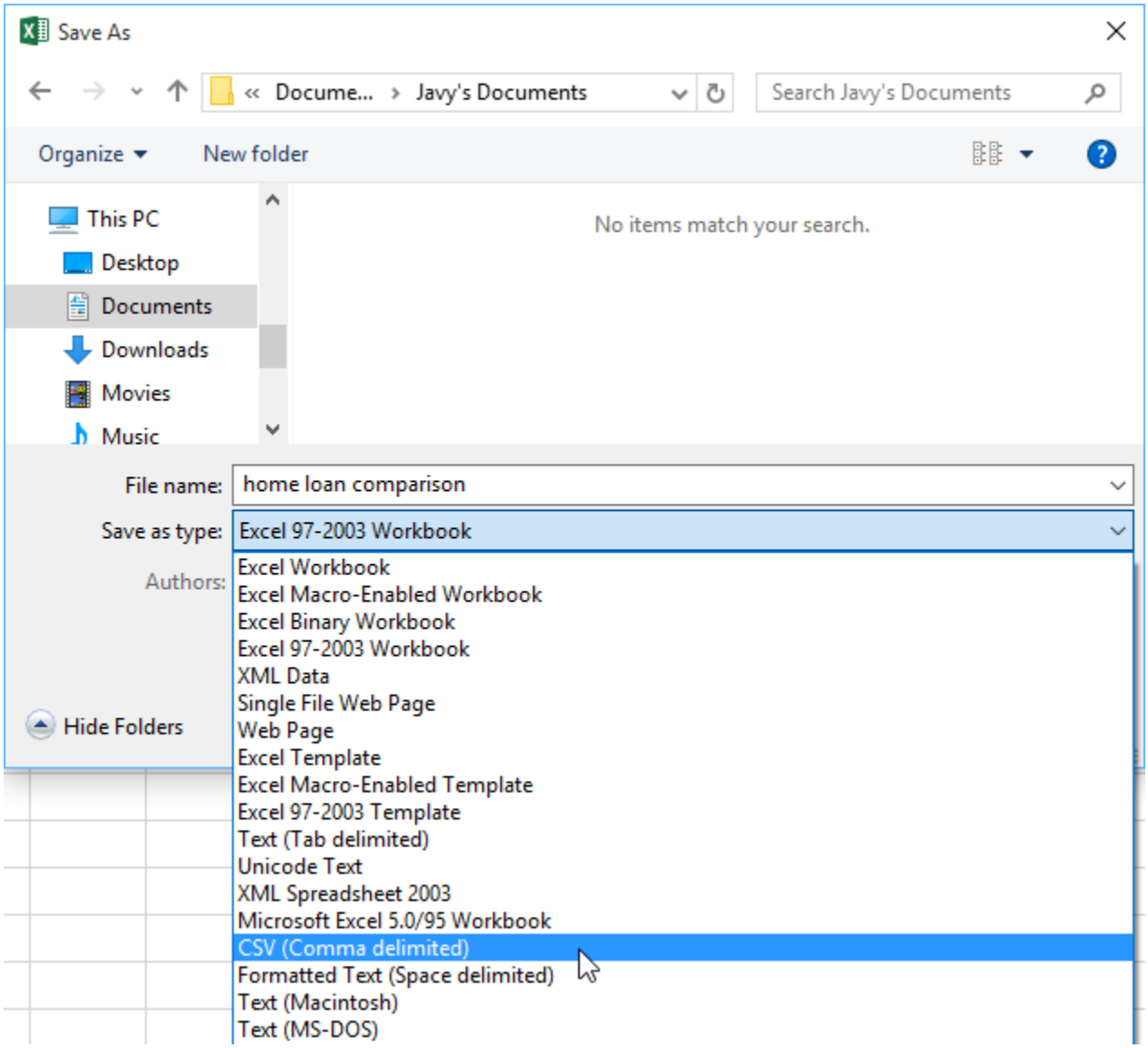
3. Select a common **file type**, then click **Save As**.



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**.



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

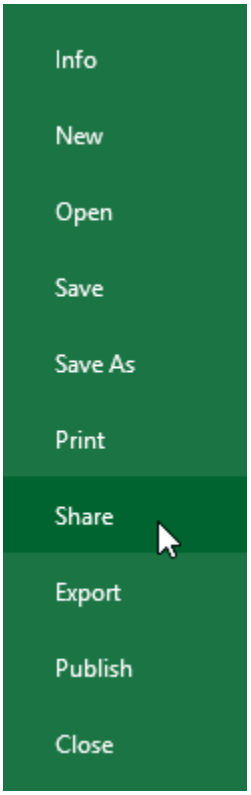
Excel makes it easy to **share and collaborate** on workbooks using **OneDrive**. In the past, if you wanted to share a file with someone you could send it as an email attachment. While convenient, this system also creates **multiple versions** of the same file, which can be difficult to organize.

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.

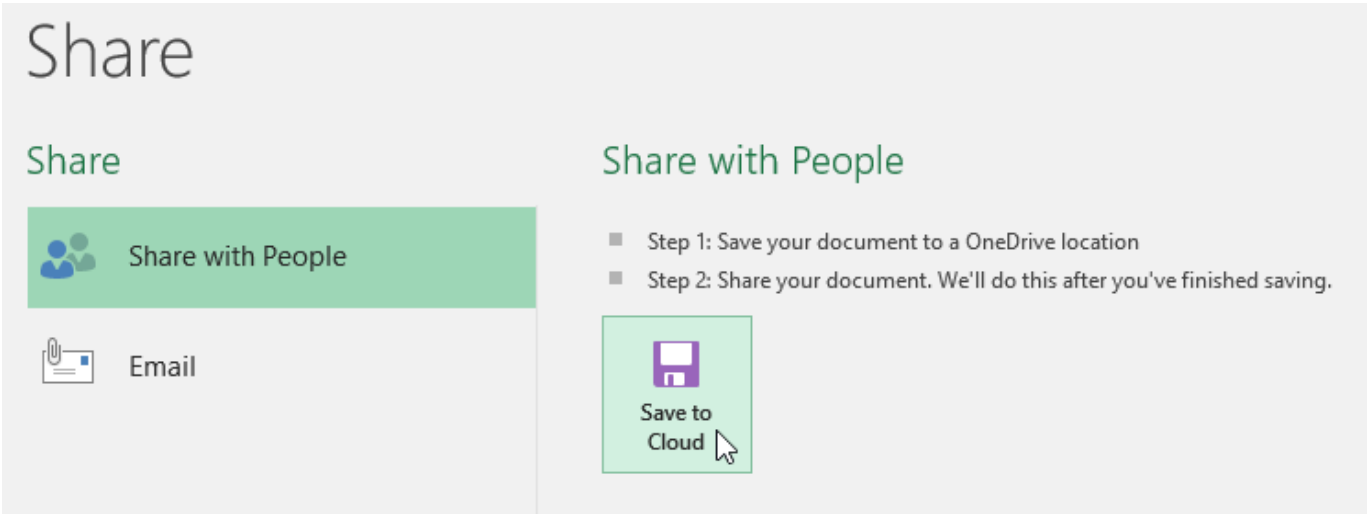
In order to share a workbook, it must first be **saved to your OneDrive**.

To share a workbook:

1. Click the **File** tab to access **Backstage view**, then click **Share**.

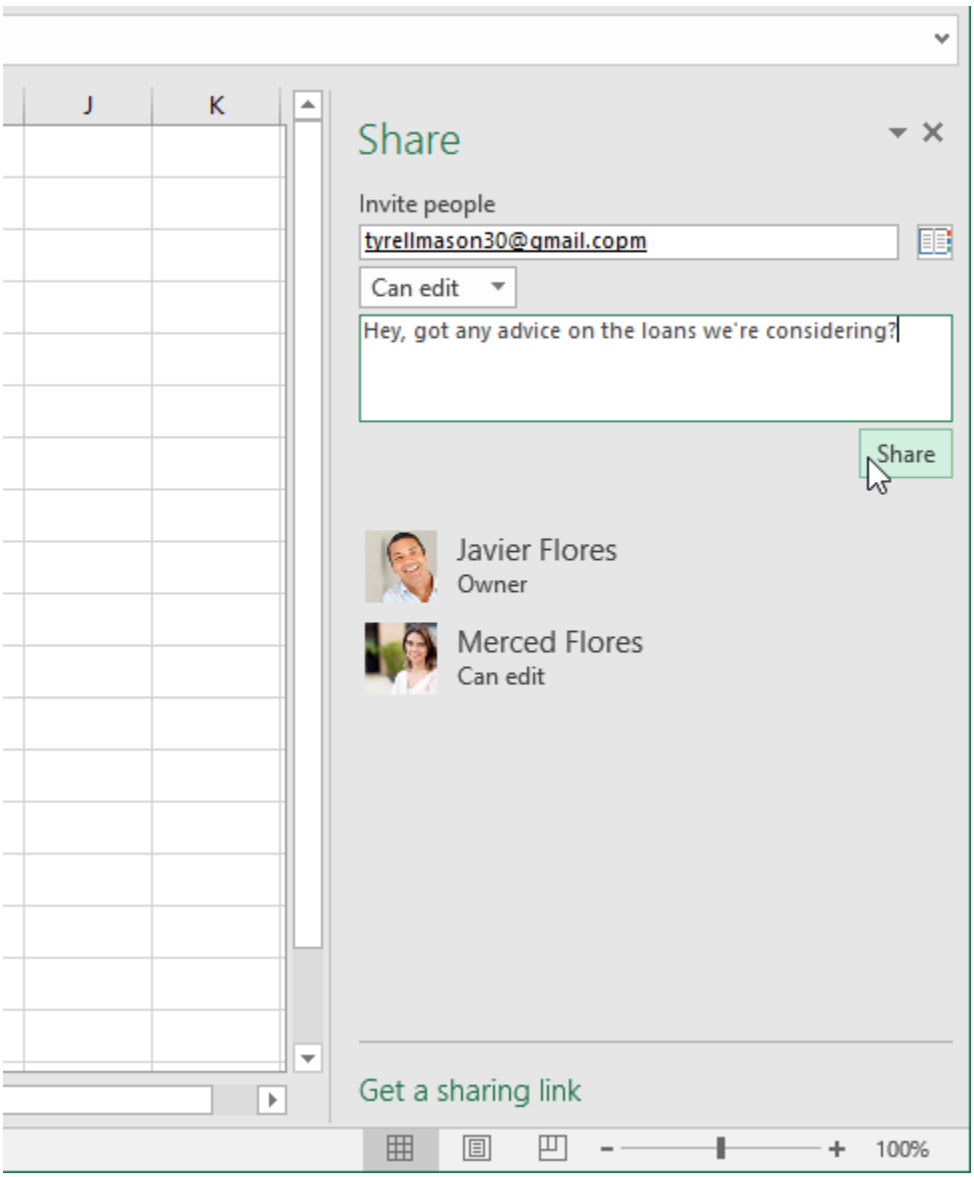


2.The **Share** pane will appear. If you have not already done so, you will be prompted to save your document to **OneDrive**. Note that you may need to navigate back to the Share pane after saving.



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

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
tyrellmason30@gmail.copm
Can edit
Hey, got any advice on the loans we're considering?
Share
Javier Flores
Owner
Merced Flores
Can edit
Get a sharing link
100%