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 2013 also lets you save a workbook to **the cloud** using **OneDrive**. You can also **export** and **share** workbooks with others directly from Excel.
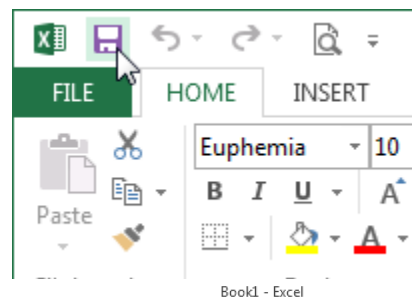
Save and Save As

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.
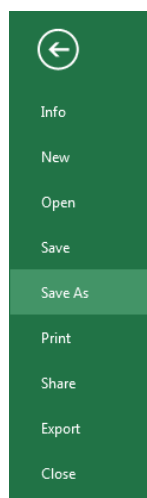
To save a workbook:

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 savethe workbook so it will be easy to find later.
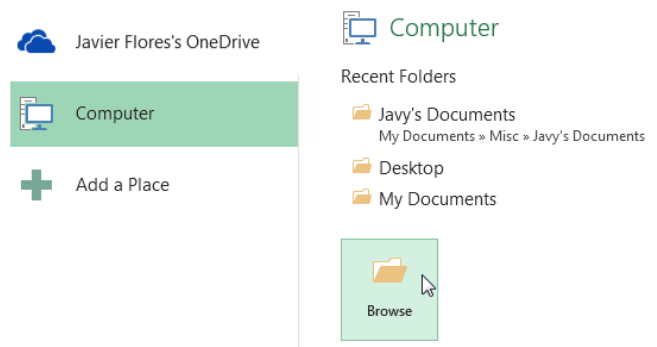
1. Locate and select the **Save** command on the **Quick Access toolbar**.

1. If you're saving the file for the first time, the **Save As** pane will appear in **Backstage view**.

2. 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**. Then place your file in your User Drive.

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**.

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

7. You can also access the Save command by pressing Ctrl+S on your keyboard.
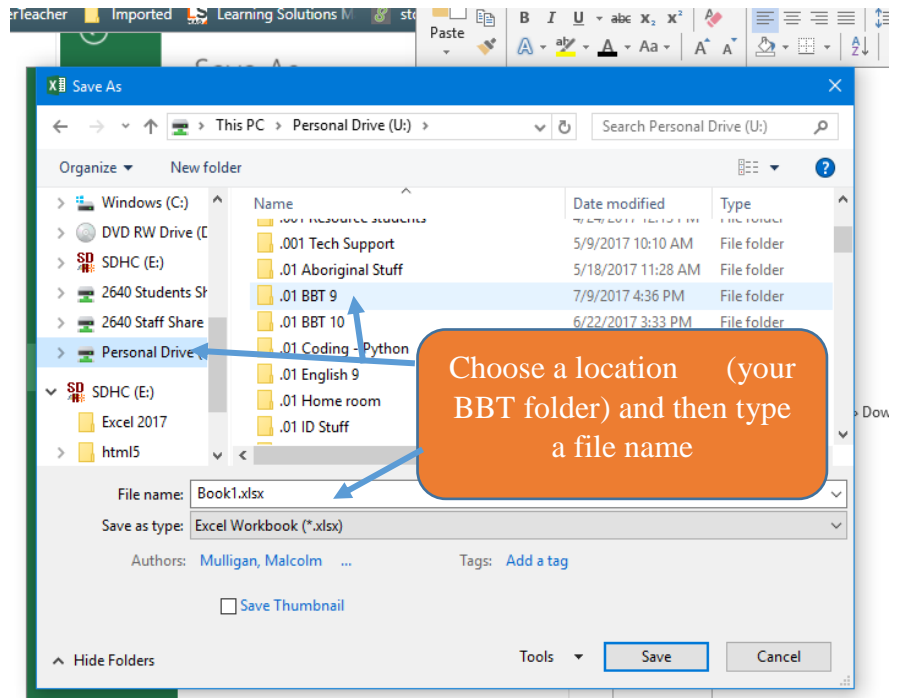
Using Save As to make a copy

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** the file and give it a new **file name**.
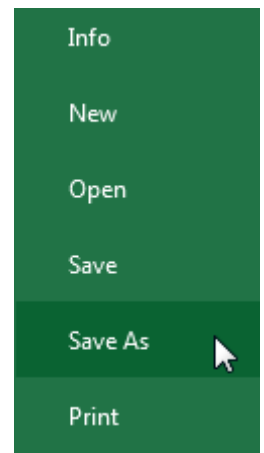
Exporting workbooks

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 in a variety of file types.
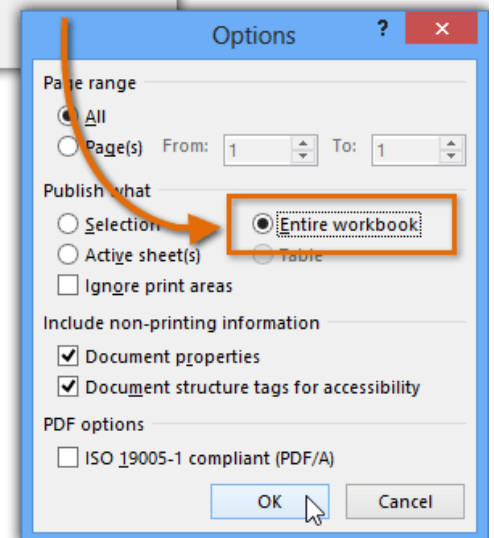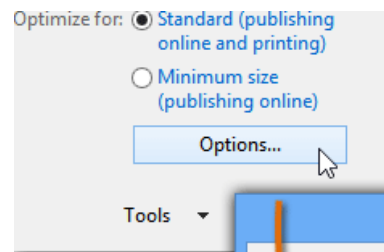
To export a workbook as a PDF file:

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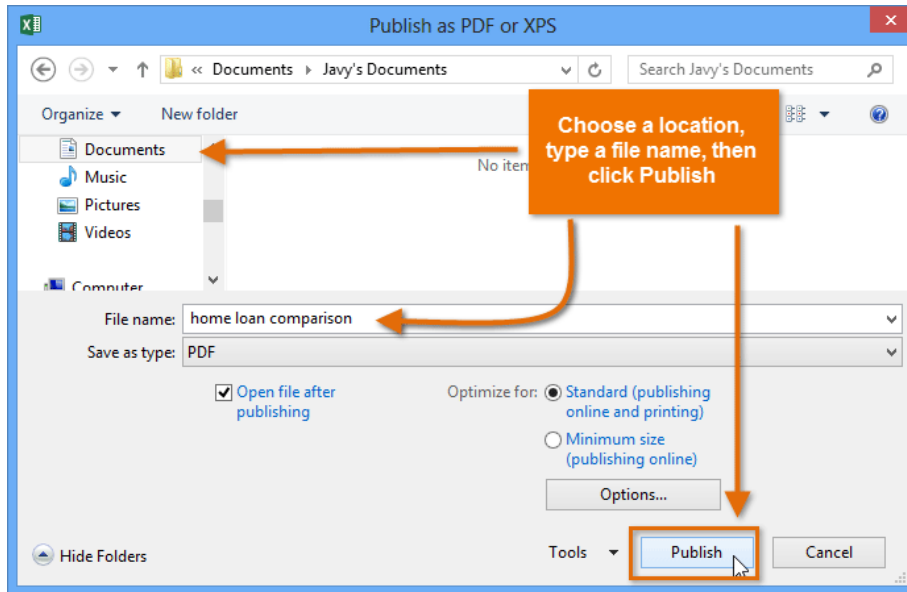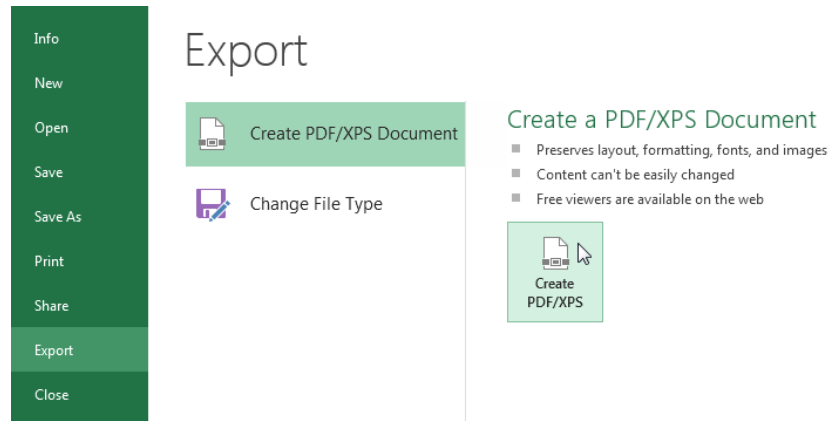
By default, Excel will only export the **active worksheet**. If you have multiple worksheets and want to save all of them in the same PDF file, click **Options** in the **Save as** dialog box. The **Options** dialog box will appear. Select **Entire workbook**, then click **OK**.

Challenge!

1. Create a **new blank workbook**.
2. Use the **Save** command to save the workbook to your Excel folder in your U drive.
3. **Export** the workbook as a **PDF** file.

Resources:

https://www.gcflearnfree.org/excel2013/saving-and-sharing-workbooks/1/