

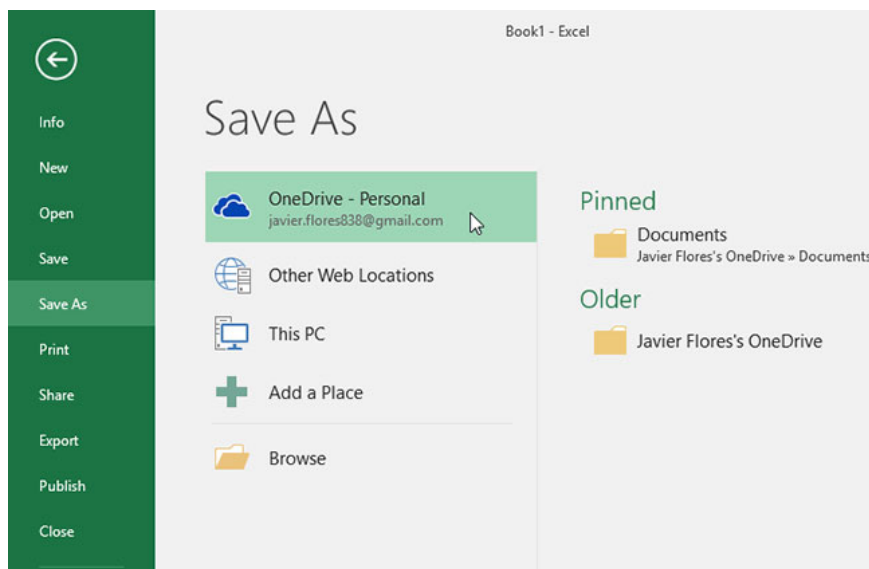
Excel 2019 (Part 3): Saving and Sharing Workbooks

Whenever you create a new workbook in Excel, you'll need to know how to save it so you can access and edit it later.

Whenever you create a new workbook in Excel, you'll need to know how to save it for later access and editing. As with previous versions of Excel, you can save the file locally to your computer or to the cloud using OneDrive , as well as export and share the workbook with others directly from Microsoft Excel .

Save and Save As features

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



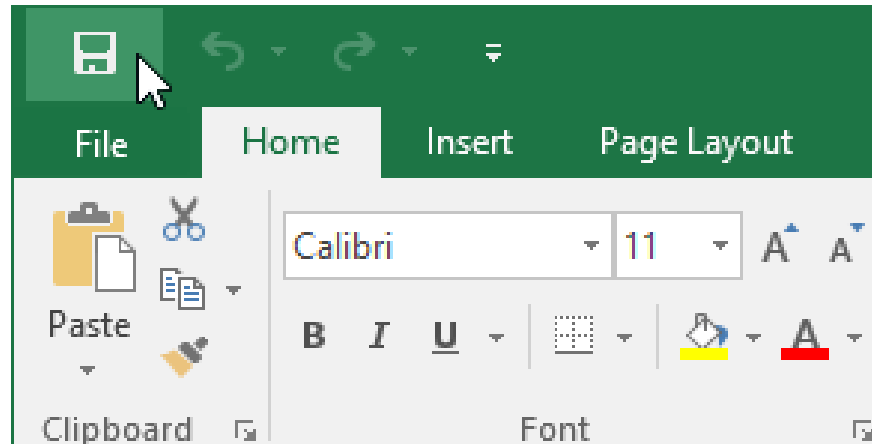
Save : When creating or editing a workbook, you'll use the Save command to save your changes. You'll use this command in almost every situation. When saving a file, you'll only need to choose a name and location the first time. Then, you can simply click the **Save** command to save it with the same name and location.

Save As : You will use this command to create a copy of the workbook while keeping the original. When using **Save As** , you will need to choose a different name and/or location for the copied version.

How to save a workbook

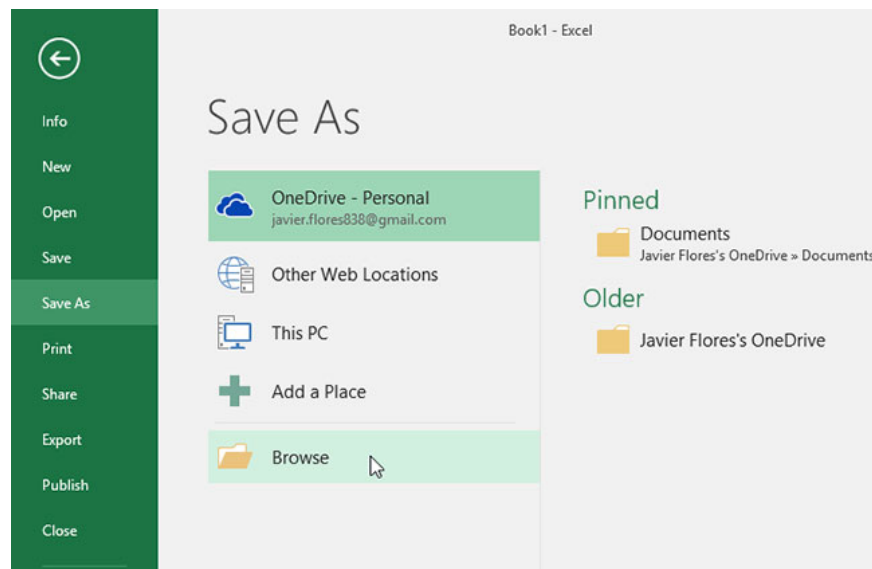
It's important to save your workbook whenever you start a new project or make changes to an existing one. Saving documents early and regularly can help prevent your work from being lost if something goes wrong. You'll also need to pay attention to where you save your workbook so you can easily find it later.

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



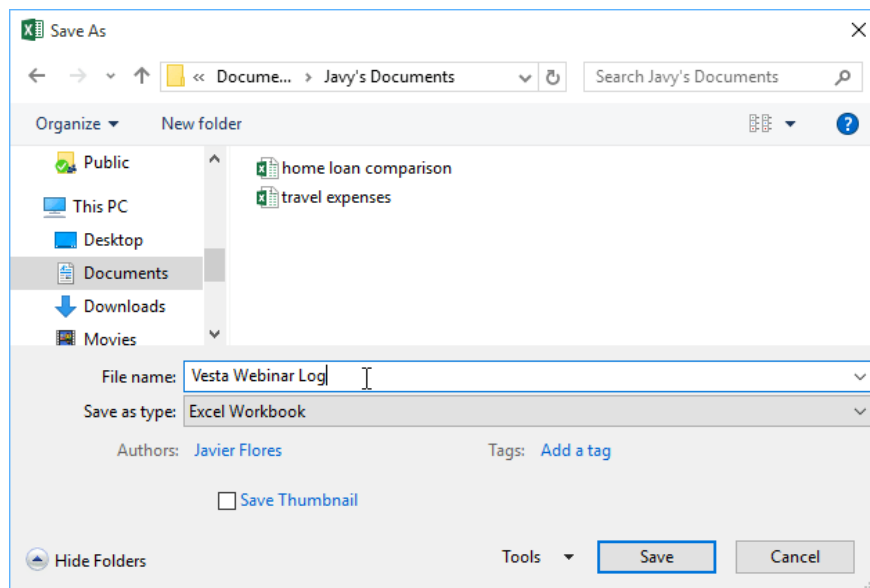
2. If you are saving a file for the first time, the **Save As** control bar will appear in the Backstage view.

3. Next, you'll need to choose where to save and name the file. To save the workbook to your computer, select **Computer** , then click **Browse**. You can also click **OneDrive** to save the file to your OneDrive.



4. The **Save As** dialog box will appear. Choose 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 when modifying the workbook.

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

Use Save As to create a copy.

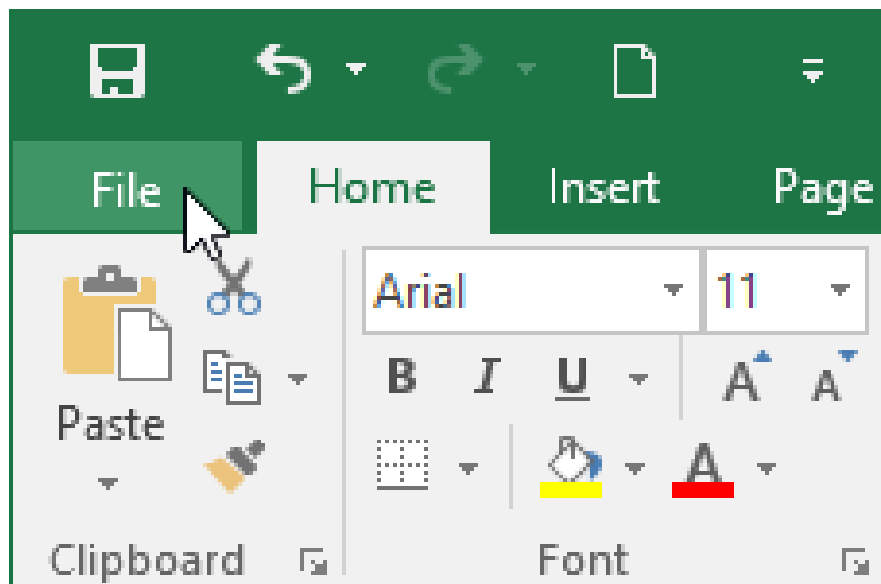
If you want to save a different version of the workbook while keeping the original, you can create a copy. For example, if you have a file named *Sales Data*, you can save it as *Sales Data 2* so you can edit the new file and still reference the original version.

To do this, click the **Save As** command in the Backstage view. Just like when saving a file for the first time, you will need to choose a save location and name the new file.

How to change the default save location

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

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



2. Click on **Options**.

Save As

Print

Share

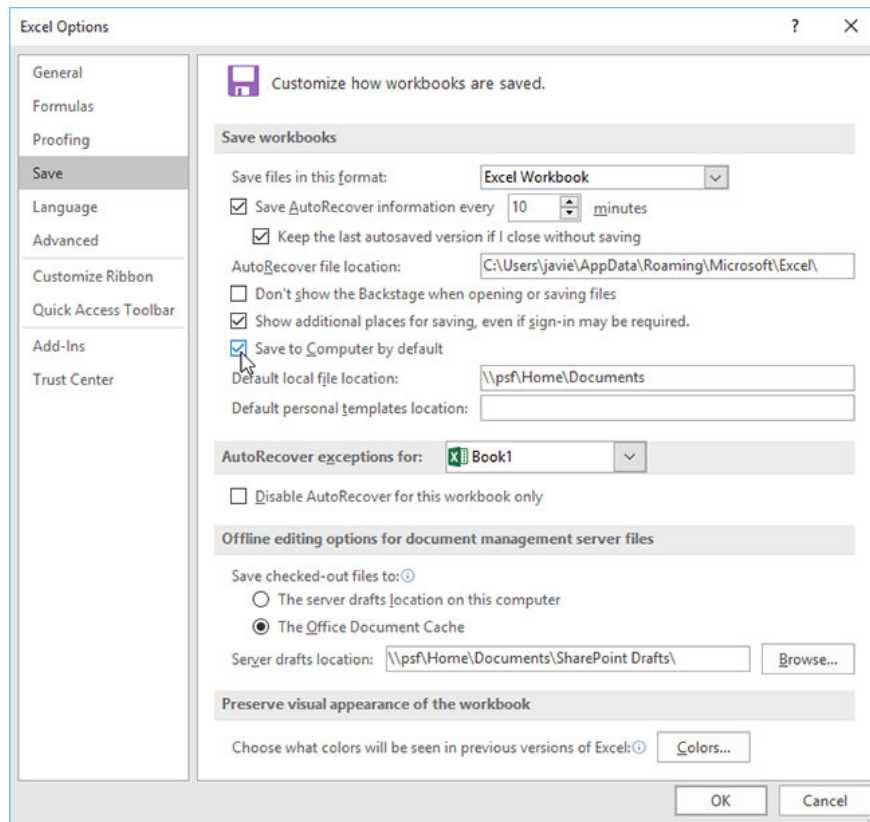
Export

Publish

Close

Account

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

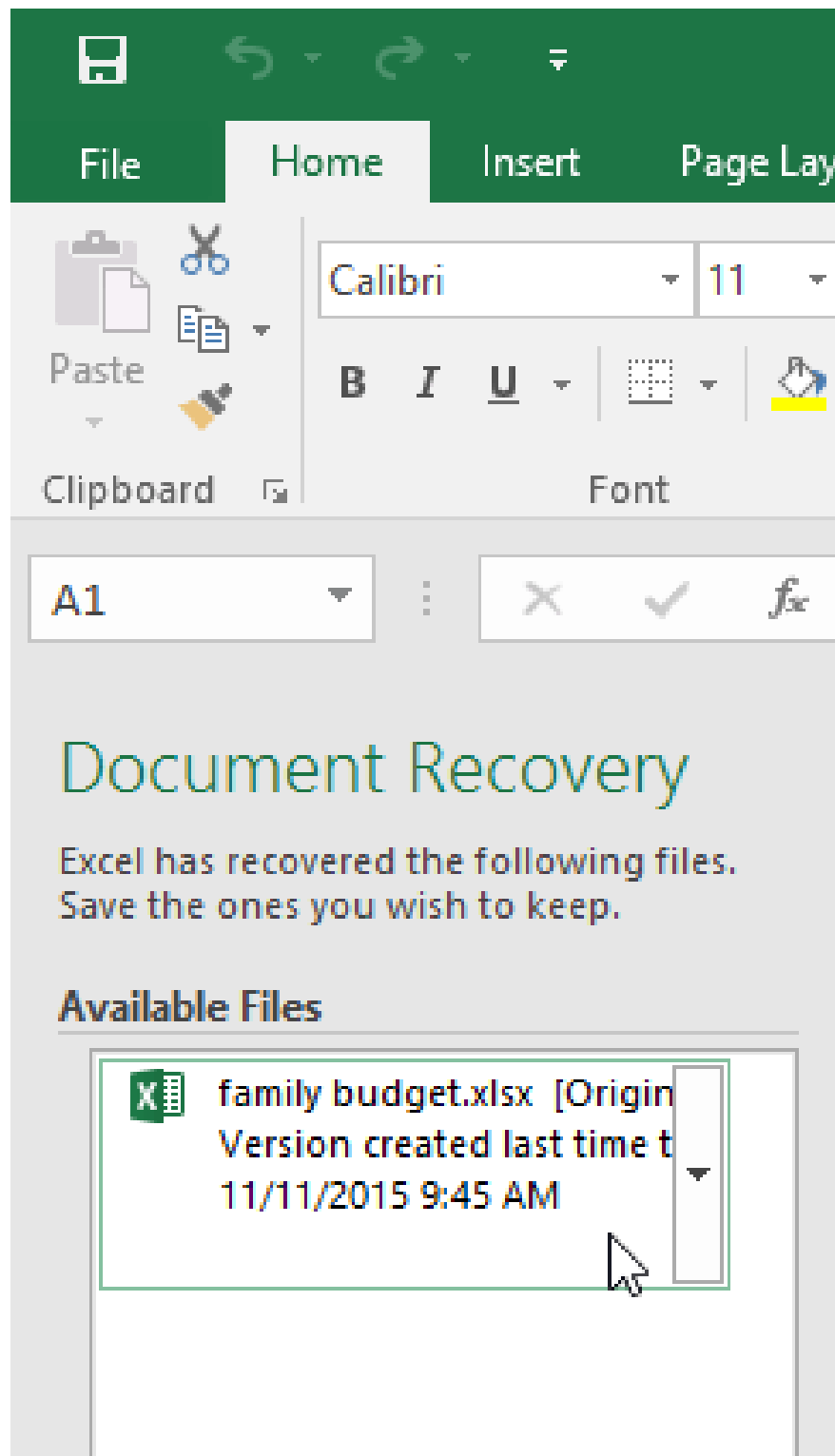


AutoRecover feature

Excel automatically saves your workbook to a temporary folder while you're working on it. If you forget to save your changes or if Excel crashes, you can recover the file using AutoRecover.

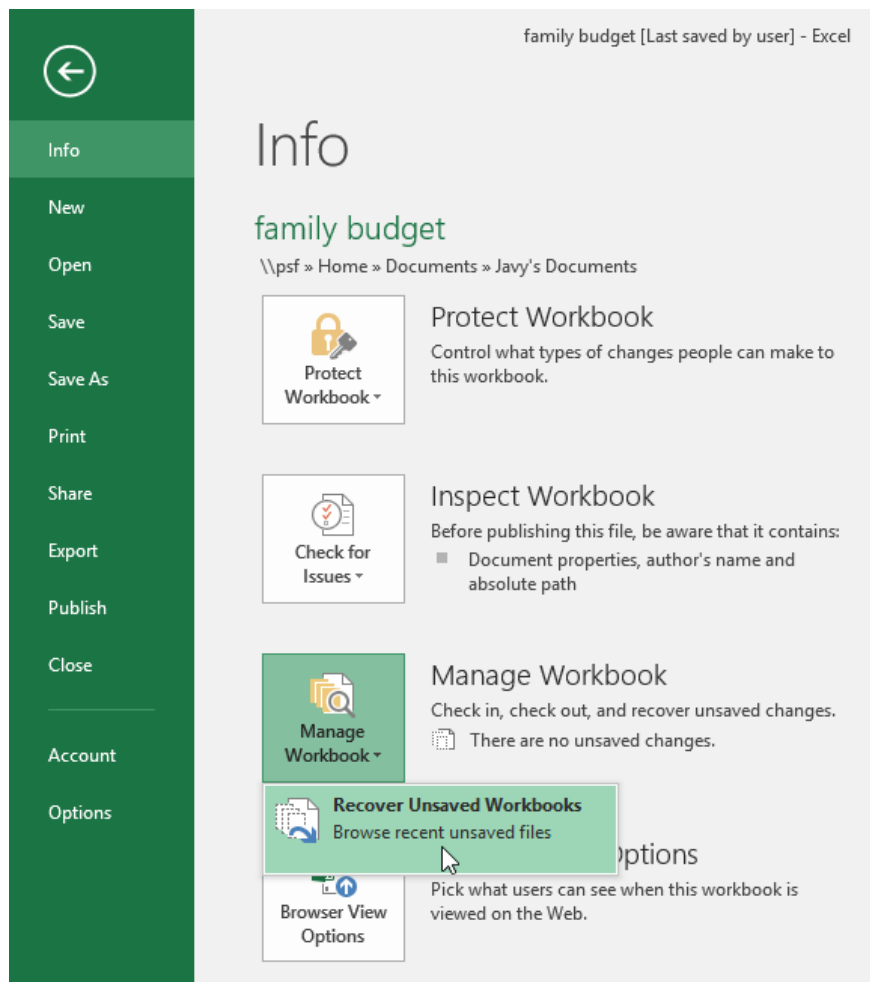
How to use AutoRecover

1. Open Excel. If automatically saved versions of the file are found, the **Document Recovery** panel will appear.
2. Click to open an existing file. The workbook will be restored.



By default, Excel automatically saves every 10 minutes. If you plan to edit the workbook for less than 10 minutes, Excel may not create an automatically saved version.

If you can't find the file you need, you can browse through all the automatically saved files from the Backstage view. Simply select the **File** tab , click **Manage Workbook** , and then select **Recover Unsaved Workbooks** .



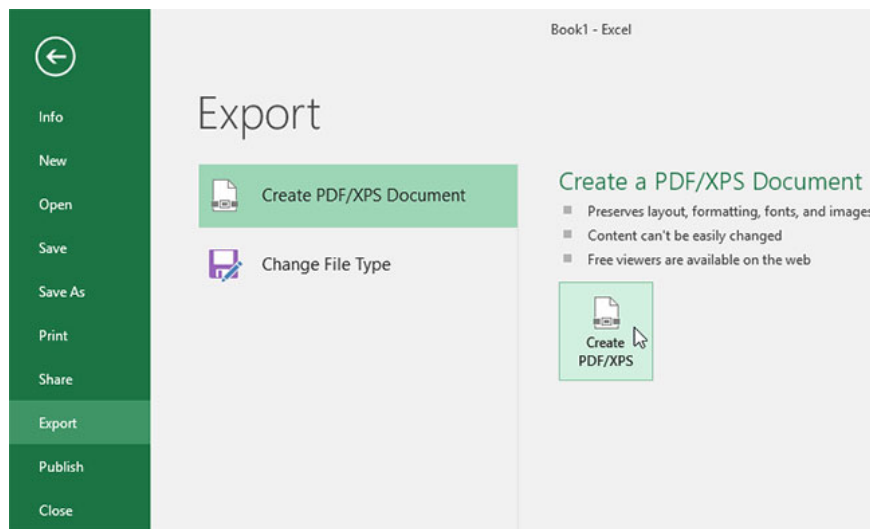
Export workbook

By default, Excel workbooks are saved in the .xlsx format. However, sometimes you need to use a different file type, such as PDF or Excel 97-2003. It's easy to export your workbook from Excel to many different file types.

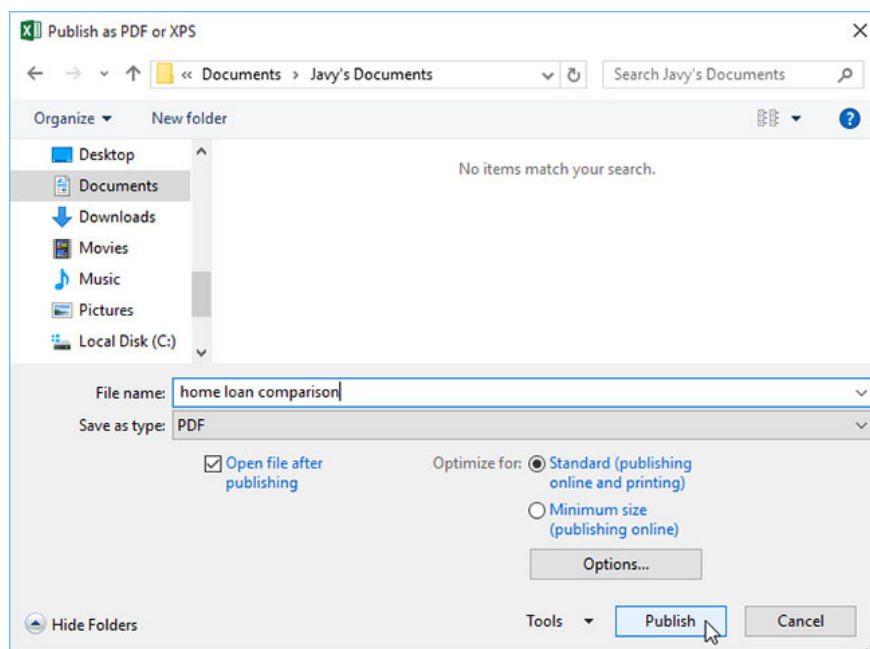
How to export a workbook as a PDF file

Exporting your workbook as an Adobe Acrobat document, commonly known as a PDF file, can be especially useful if you're sharing it with someone who doesn't have Excel. A PDF allows the recipient to view but not edit the workbook's contents.

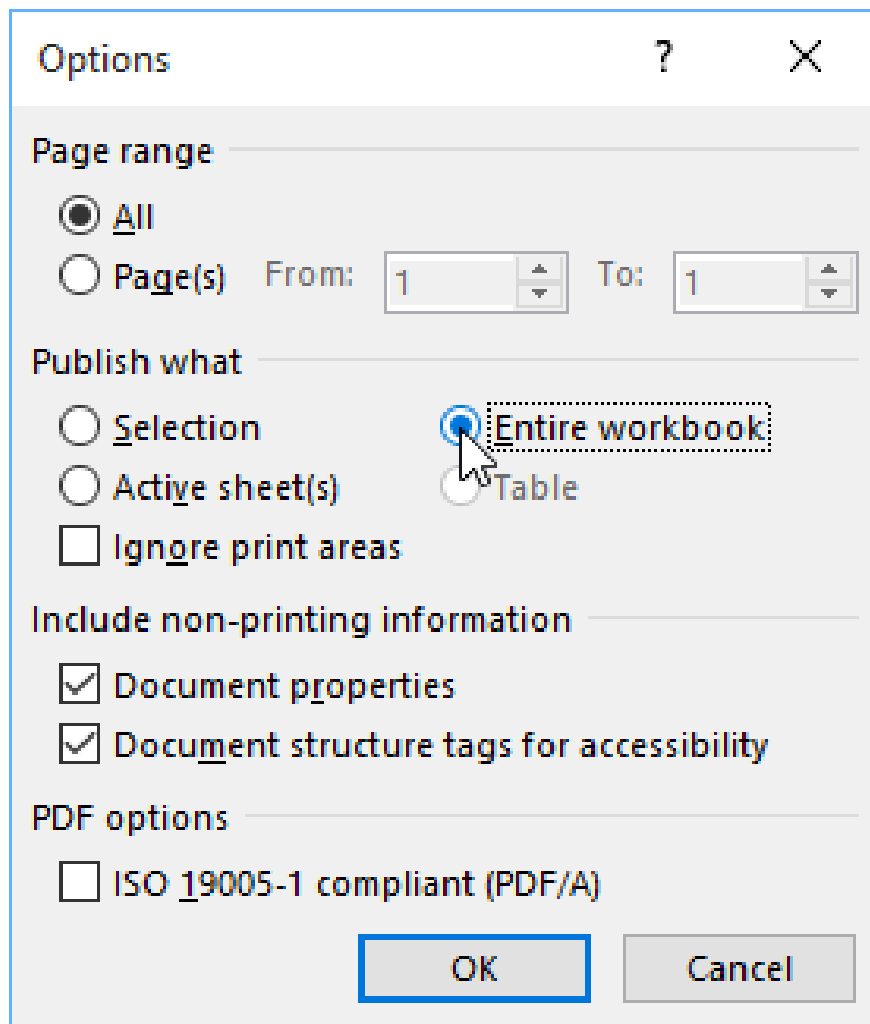
1. Click on the **File** tab to access **the Backstage view**.
2. Click on **Export**, then select **Create PDF/XPS**.



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



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

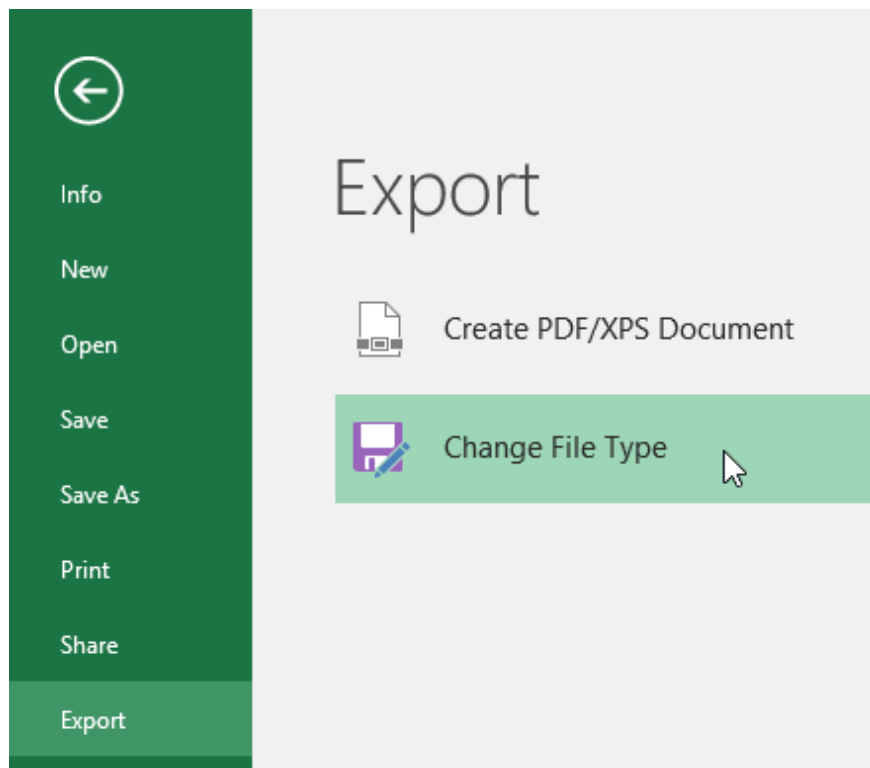


Whenever you export a workbook as a PDF, you also need to consider how your workbook data will appear on each PDF page, just like when printing a workbook.

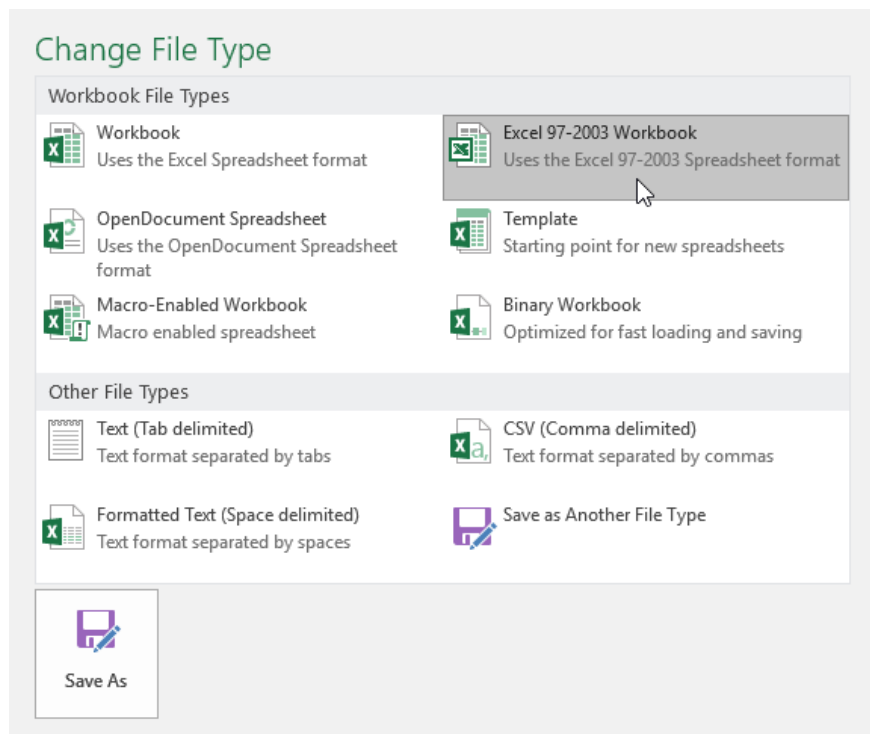
How to export a workbook to other file types

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

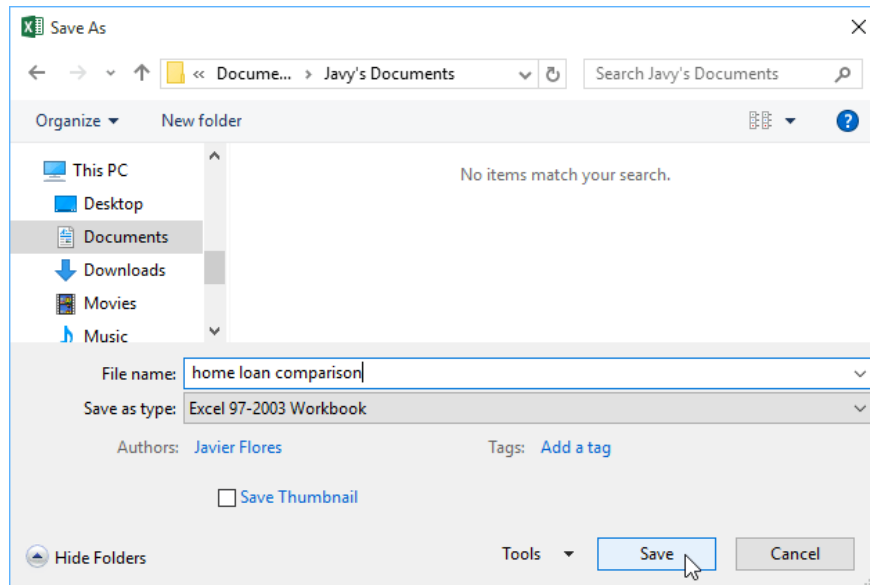
1. Click on the **File** tab to access **the Backstage view** .
2. Click on **Export** , then select **Change File Type** .



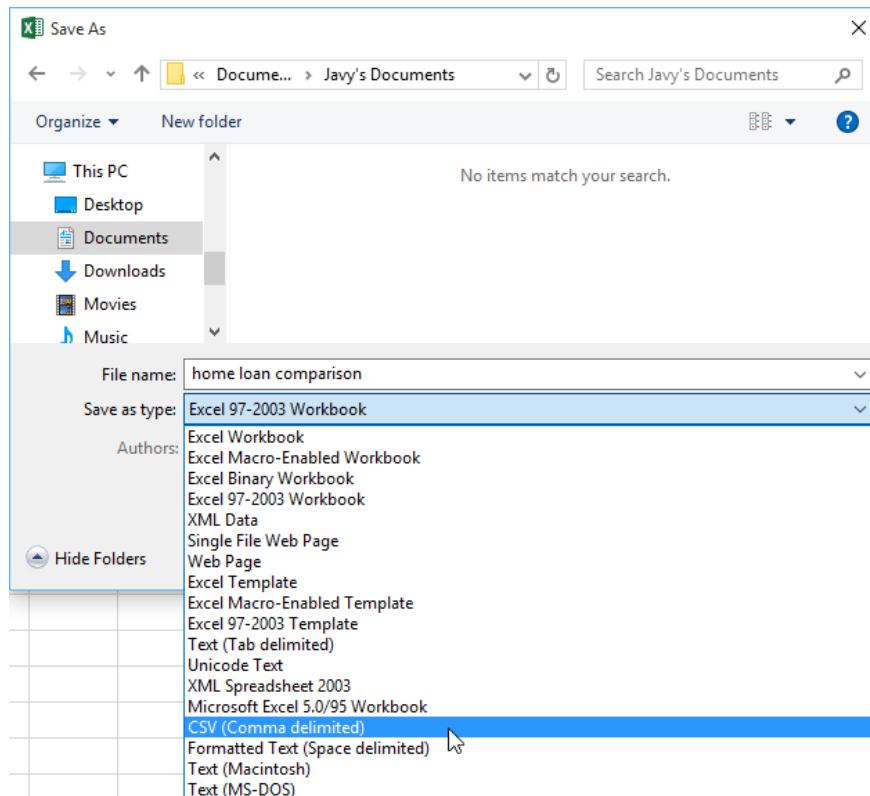
3. Select a common file type, then click **Save As**.



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



You can also use the **Save as type: drop-down menu in the Save As** dialog box to save the workbook in various file types.



Share workbook

Excel makes it easy to share and collaborate on workbooks using OneDrive. Previously, if you wanted to share a file with someone, you could send it as an email attachment. While convenient, this system also created multiple

versions of the same file, which could be difficult to organize.

When you share a workbook from Excel, you are essentially giving others access to the same file. This allows you and the people you share it with to edit the same workbook without having to keep track of multiple versions.

To share a workbook, it must first be saved to your OneDrive.

How to share a workbook

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

Info

New

Open

Save

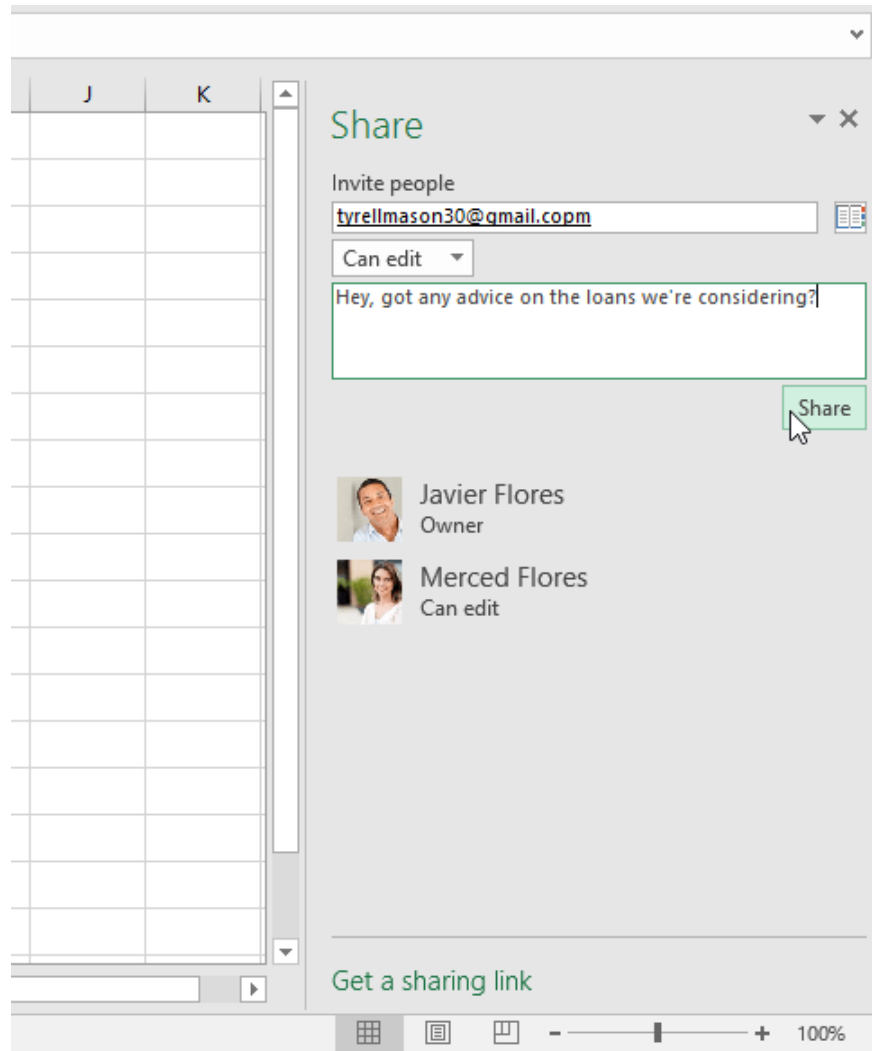
Save As

Print

Share



2. 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 people who have access to the document, and set permissions to edit or view the document.



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