Lesson 3 Saving your Workbook & Making a Folder

Once you have created your workbook, you will need to change the name and have a location, or place on your computer.

A suggestion is that you open a folder up , where it will be easier to find when you need to refer to it.

To open a **Folder**,go to your **Desktop** and *right click* on your mouse. A *menu* will come up as shown below. Follow the *menu* down to **new** and click on will click on **folder** which is normally located at the top of the extended menu called ***new***.1

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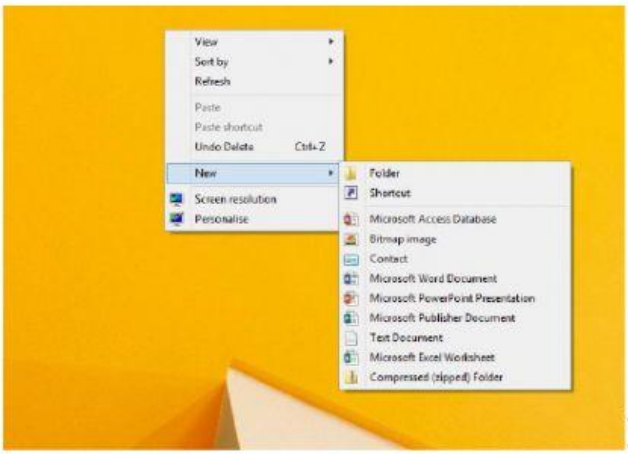

1

When you click on **folder 2** the folder will appear on your desktop and you can name it according to what it will hold e.g. **April Expenses and trips for Driver A**

2

3

When it appears on the desktop it will be called **New Folder**. *Right click* on the words and a *menu* 3 will appear. Follow the menu down to **rename** and *click* on that, here you will *name 4* your **folder** once finished naming it will be saved as that.

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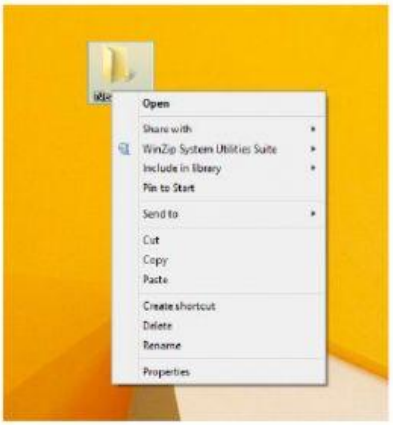

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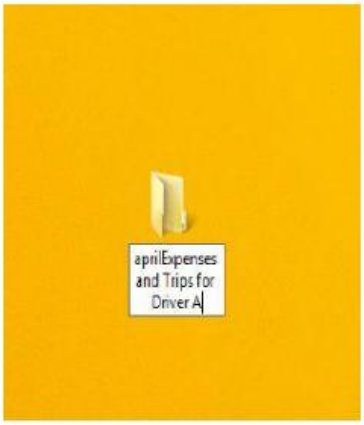

4

You at any time you may change the *name of the folder* should the need arise, **BUT** remember what is in that folder must represent the name. The folder works like a *book* a tiltle with the chapters inside.

Saving your Workbook.

Saving your workbook is a simple process.

Go to your tab on the top left hand side called **File.**

A *menu* will appear this is called **the Backstage View,1** from this will be a *drop-down* menu where you may choose what you would like to do. Go to **"Save As"**

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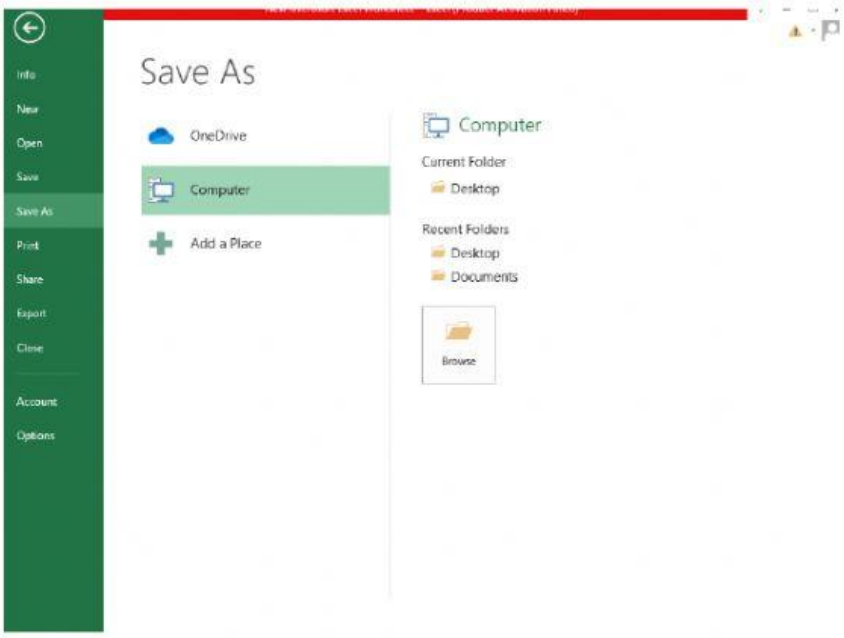

1

A list will come up where you would like to save the workbook to e.g. Desktop, current Folder etc. If you are saving only the workbook save it to Desktop, because it will be easier to find there later. *This is where your folder will come in useful*. If you have opened a Folder the name will appear **2** and you choose **Desktop Folder** name will appear click on that. On the white horizontal space you will see *New Microsoft Excel Worksheet* 3,(it will automatically highlight in blue)erase that by pointing the cursor at the end of the words, and using **left arrow (backspace)under your function keys,** it will *erase* the words ready for you to type the name of your workbook.

Once you have typed the name of the workbook click **save 4.**

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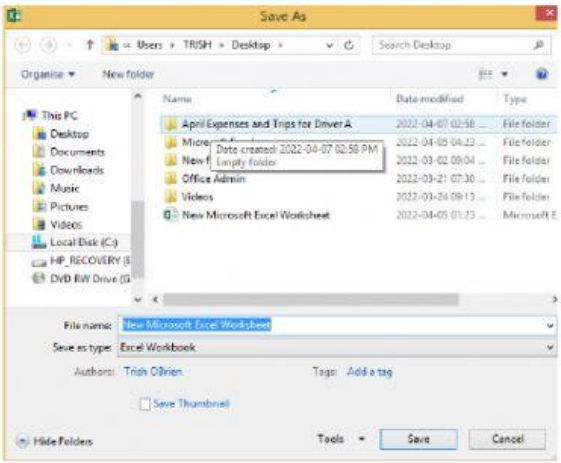

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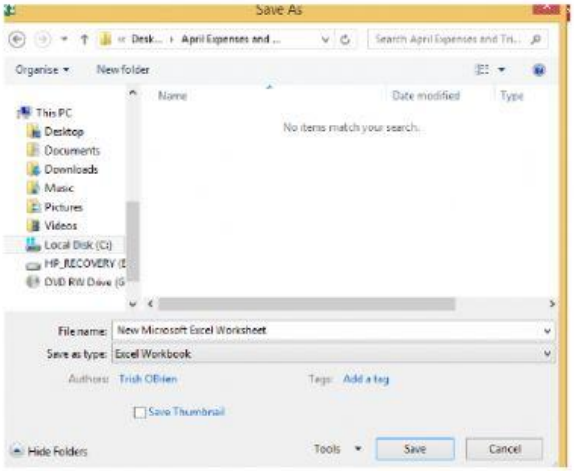

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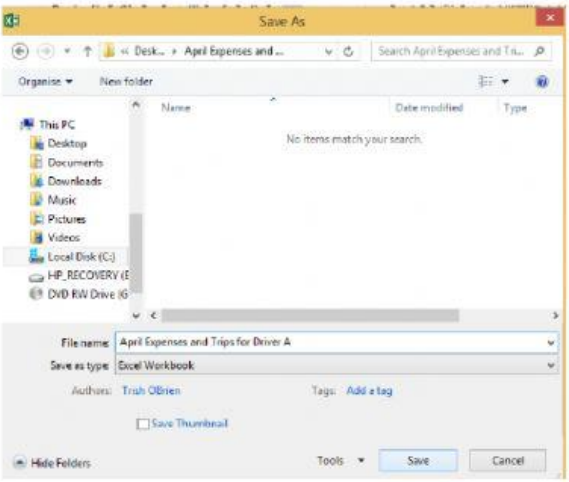

4

A Saving Shortcut

Keyboard Shortcuts

Save As

- Press the F12 key and use the tab and arrow keys to navigate around the Save As dialog box. Use the ENTER key to make a selection.

- Or press the ALT key on your keyboard. You will see letters and numbers, called Key Tips, appear on the Ribbon. Press the F key on your keyboard for the File tab and then the A key. This will open the Save As dialog box.
- The Mac shortcut is: Hold down the Command and Shift keys and press S

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This here is what you need to learn to memorize .It has been shortened for you to remember easier.

Saving Workbooks (Save As)

1. Click the File tab on the Ribbon.
2. Click the Save As option.
3. Click on Browse to select a location on your PC to save.
4. Click in the File name box and type a new file name if needed.
5. Click the down arrow next to the "Save as type" box and select the appropriate file type if needed. Excel will default to the file type of .xlsx
6. Click the Save button.

Questions

1. What is the best way to save your workbook to keep a good filing status?

2. How do you process a Folder on your desktop?

3. How do you save your workbook. Give the steps?

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