



# Microsoft Office Virtual Learning

# Saving and Sharing Workbooks

**April 29, 2020**



Lesson: April 29, 2020

**Objective/Learning Target:**

Students will learn how to create and open workbooks in MS  
Excel and Google Sheets



# Introduction

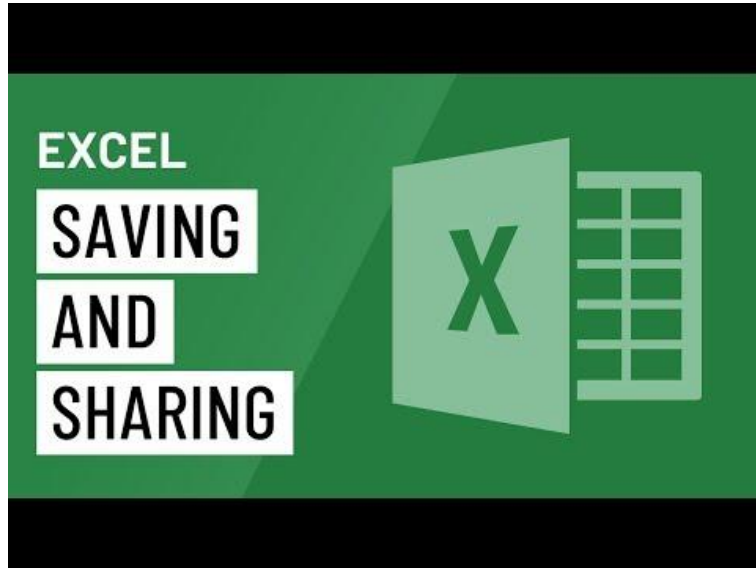
## MS Excel

Excel files are called **workbooks**. Whenever you start a new project in Excel, you'll need to **create a new workbook**. There are several ways to start working with a workbook in Excel. You can choose to **create a new workbook**—either with a **blank workbook** or a predesigned **template**—or **open an existing workbook**.

## Google Sheets

Google Sheets files are called **workbooks**. Whenever you start a new project in Google Sheets, you'll need to **create a new workbook**. You can choose to **create a new workbook**—either with a **blank workbook** or a predesigned **template**—or **open an existing workbook**.

## Excel



<https://youtu.be/yTHgz8Vwik8>

## Google Sheets



[https://youtu.be/npArx4\\_3fmw](https://youtu.be/npArx4_3fmw)



# Save and Save As

## Excel

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.

## Sheets

Whenever you need to view or edit your spreadsheet, you can access it again from your Google Drive, where it will be saved automatically.

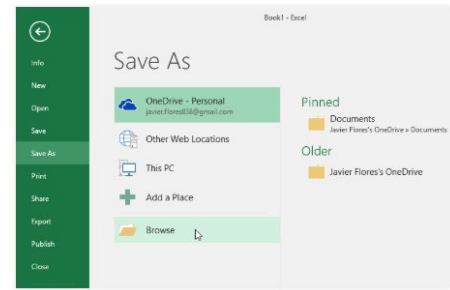
You may notice that there is no save button. This is because Google Drive uses autosave, which automatically and immediately saves your files as you edit them.

# Practice: Save a Workbook

## Excel

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 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.





# Sharing Workbooks

## Excel

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.

## Sheets

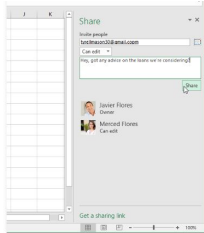
Whenever you share a file from your Google Drive, you can let others view and even edit that same file. While you can share any file stored on your Google Drive, it's important to note that you can only use the collaboration features for files created within your Drive.

When you share a file with a limited group of people, your collaborators must sign in with a Google account to view or edit the file. However, when you share with a larger group or make the file public, your collaborators will not need a Google account to access the file.

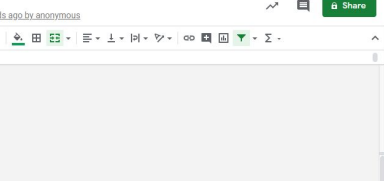
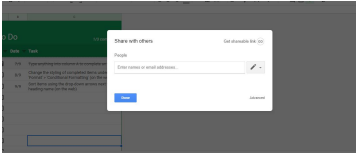
# Practice: Sharing Workbooks

## Excel

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.



## Sheets

1. Locate and select the file you want to share, then click the Share button.
 
2. A dialog box will appear. In the People box, type the email addresses of the people you'd like to share the file with. If you want, you can add a message that will be emailed to the people you share the file with.
 
3. Click Send. Your file will be shared.





# Challenge

## Excel

1. Open Excel 2016.
2. Select the Personal Monthly Budget template
3. 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.

## Sheets

1. Open Google Sheets
2. Open a new blank spreadsheet
3. Share the workbook with a person of your choice

For More Resources:

Microsoft Excel:

<https://edu.gcfglobal.org/en/excel2016/saving-and-sharing-workbooks/1/>

Google Sheets:

<https://edu.gcfglobal.org/en/googlespreadsheets/sharing-and-collaborating/1/>