

Section 5 File Operations

By the end of this section you will be able to:

- Open and close files
- Create new files
- Save files
- Understanding file types and filenames
- Save files with different names in different locations
- Save as different types of files

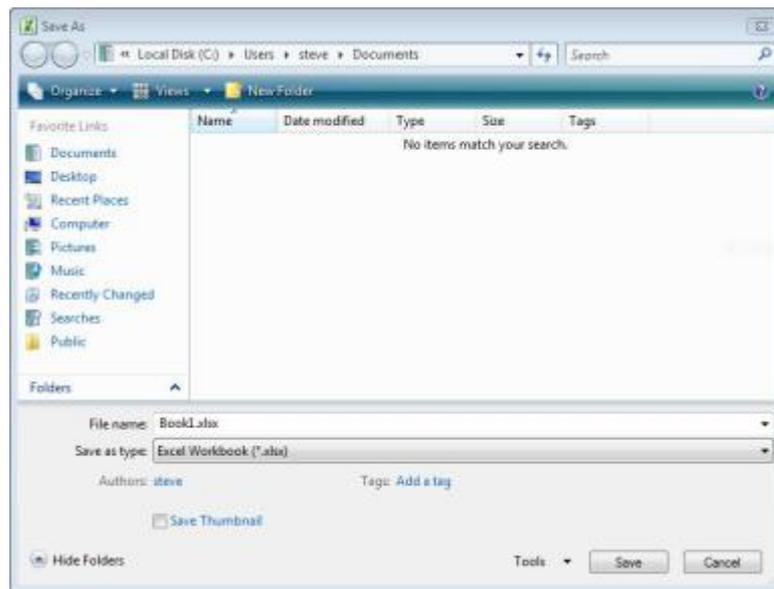


Working with Files

You can save any information entered in Excel so that you may call it back at a later stage either to add, edit or print the contents. It's a good idea to save work frequently as this will minimise the risk of work being lost in the event of a power cut or system fault.

Saving Files

Excel gives any new document you create a temporary name – the word 'Book' followed by a number. The number increases by one for each new workbook you create in any one work session.



Parts Of The Save As Dialog Box



PREVIOUS/NEXT FOLDER- As you move through the folder structure in the Files list, these buttons allow you to go back to a previous folder that you viewed.



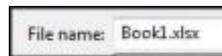
UP ONE LEVEL-Click one of these button to look in the folder that is up one level in the current folder structure.



CREATE NEW FOLDER- Click this button to create a new folder within the current folder.



VIEWS- Click the arrow next to this button to display file and folder view options.



FILE NAME- Type or select a file name for the file that you are saving.



SAVE AS TYPE- In the list, click the file format in which you want to save the file. Most 2010 Microsoft Office system programs can save files in more than one format, so you may need to select the format that you want.

FAVOURITE LINKS- Click a shortcut on the **FAVOURITE LINKS** bar on the left to save the file to the location represented by the shortcut.

DELETE-Right click a file or folder to delete the selected file or folder.

TOOLS Click **TOOLS** to display a list of tasks that you can perform. The tools that are available vary depending on the program that you are using.



SAVE After you determine the location, file name, and format of the file that you are saving, click **SAVE** to save the file.

CANCEL To go back to the file without saving it, click **CANCEL**.

To Save A File:**MOUSE**

1. Click the **SAVE** button. On the **QUICK ACCESS** toolbar. If you have not saved the workbook previously, the **SAVE AS** dialog box will appear asking you for a document name and location.
2. The first list box marked **AT THE TOP** allows you to determine the drive and folder that you want to save the document in. The large area below the **LIST BOX** allows you to see which files are stored in the area currently displayed.

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To Change The Location:**MOUSE**

1. Click the drop-down list arrow to the right of the list box and choose the desired drive or folder.(you may need to use more than one)
2. At the bottom of the dialog box are two list boxes, one for the file name and one for the document type. Excel automatically assigns the first few words you typed as the workbook name.

File Types And File Names

Excel in general has always saved files with three letter filetype's such as **book1.xls** or **accounts.xlt** the last three letters always being the *type* of file that it is saved as. In 2010, however, this has now changed and the default filetype for all excel files is now **book1.xlsx** a *four character* filetype. This is because the nature of the contents of the file has changed radically and is in no way comparable to earlier versions.

Naming A File:**MOUSE**

1. Click in the **FILE NAME** box and drag your mouse over the current file name – this will highlight it. Then type the new name.
2. Choose from the **SAVE AS TYPE** box which version of excel you wish to save this file as. (If somebody using a previous version needs to access this file this is essential)
3. Finally, when the location, name and filetype have been entered, save the workbook by clicking the button marked **SAVE**. This closes the dialog box. Back in the Excel screen you will notice that the name you allocated to your workbook appears on the **TITLE BAR** at the top of the screen
4. If you saved this file as an earlier version you will see **COMPATIBILITY MODE** next to the filename in the **TITLE BAR**
 - *Workbook names can be up to 255 characters. File names cannot include any of the following characters: forward slash (/), backslash (\), greater than sign (>), less than sign (<), asterisk (*), period (.), question mark (?), quotation mark ("), pipe symbol (|), colon (:), or semicolon (;). You do not need to type the document extension (".xls") as Excel automatically adds this to all files you save.*

Saving Changes To Files



Once you have allocated a name to a file using the **SAVE AS** dialog, clicking the **SAVE** button simply saves any new changes to the name you originally gave. It is worth saving files that you are working on every ten minutes or so. When you click the Save button, the status bar displays a message to say that it is saving and a blue meter which counts up to show how long the save will take.

To Save Changes

KEYBOARD

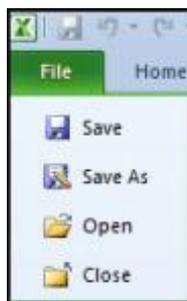
1. You can save the current workbook by using the keystroke **CTRL+[S]**. If the workbook has never been saved before, the **SAVE AS** dialog will appear, otherwise, **CTRL+[S]** saves any new changes to the file name that you have already allocated.

Saving As A Different Type Or Different Name

If a file you work with needs to be saved as something else it needs saving under a different name or maybe another version then we cannot use the **SAVE** button as this would just save the changes to this file we must call up the **SAVE AS** dialog again and save the file as something else.

To Save As Different File

MOUSE



1. Click on the **FILE RIBBON** and move the mouse cursor to **SAVE AS**
2. This will bring the **SAVE AS** dialog box to the screen again
3. Make the necessary changes and click on save

Close Files

When you finish working on a file, you can close it down using the following methods:

To Close The Current File:

MOUSE



1. Click on the **FILE RIBBON** and choose **CLOSE** near the bottom of menu.

OR

1. Click once on the cross (situated on the right-hand side of the screen)
 - You will see two of these buttons on-screen – one will close the current file and the other will close the Excel application. To close the current file, use the innermost close button.



360°
thinking.

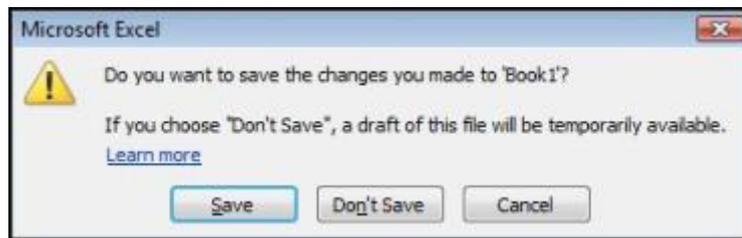
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If you have changed a file since the last time you saved it, Excel will not let you close that file without prompting you first to save the changes. A dialog box will appear with the option to save the changes you have made



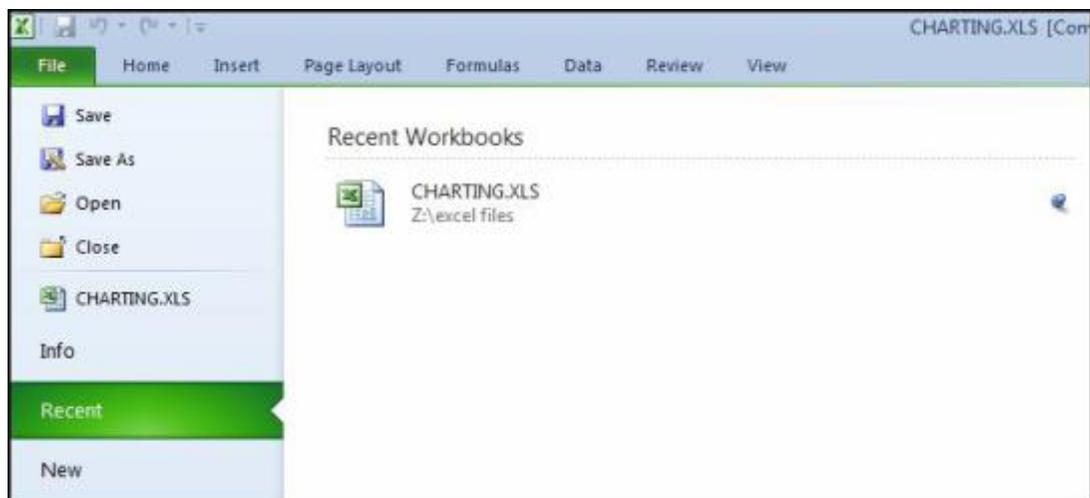
- *Merely opening a file could create changes for many reasons even if you personally have not changed anything so think carefully before deciding whether or not to save any changes as you close.*

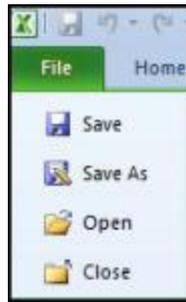
Open Files

To Open A File:

MOUSE

1. Click on the **FILE RIBBON** and choose **RECENT** all recently used files appear on the right hand side of window.

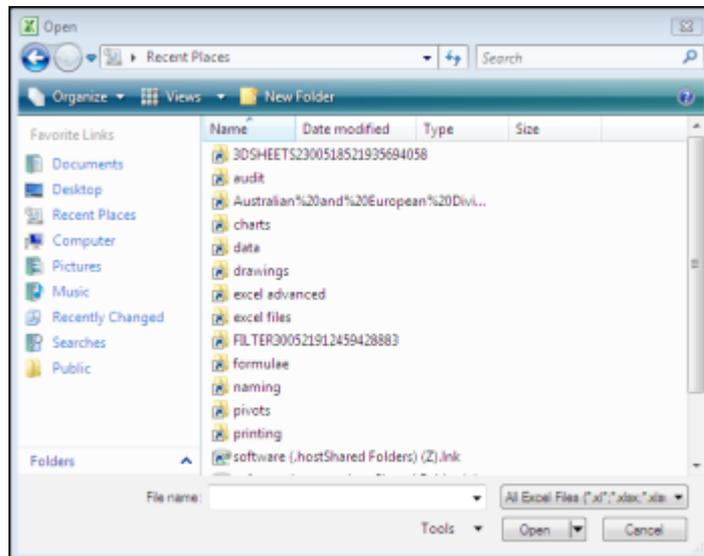


OR

1. Click on **FILE** ribbon and choose **OPEN**.
2. The **OPEN** dialog box will appear
3. If the file you want is not listed in the window, click the **LOOK IN** drop-down list box to change to the location of the desired workbook.
4. To open the file either: Click once on the file name to select it and click the **OPEN** button.

OR

1. After locating the file Double-click the file name.

KEYBOARD

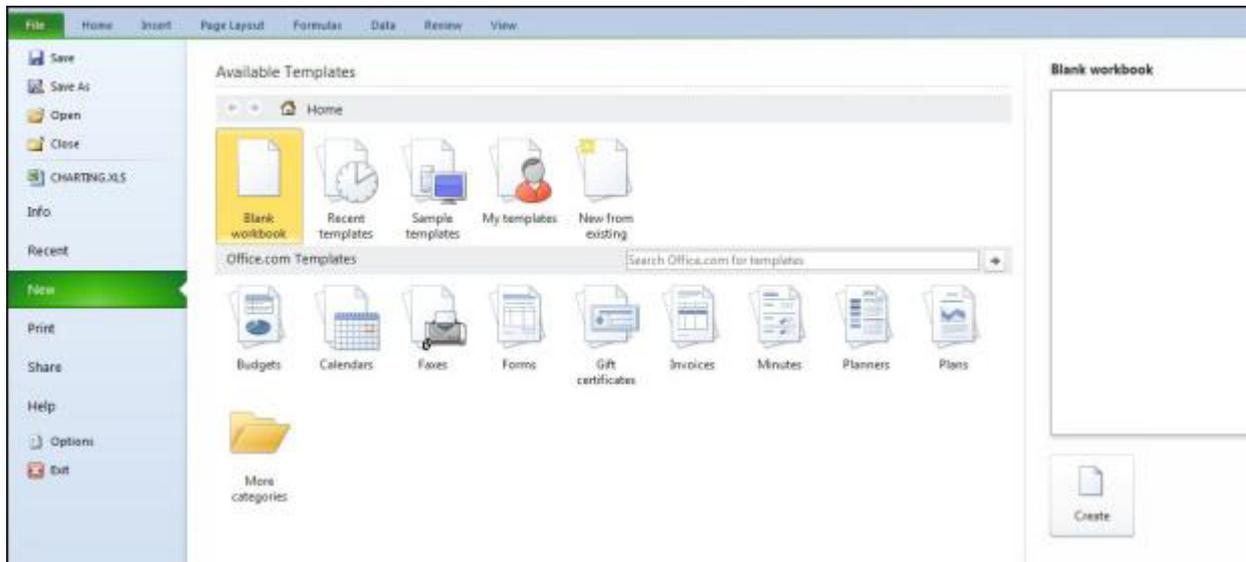
1. You can also open workbooks using the key combination **CTRL+[O]**. This will invoke the **FILEOPENDIALOG** – follow the steps outlined above to select and open the file that you want.

New Files

To Create A New File:

MOUSE

2. Click on the **FILE RIBBON** and click on **NEW** The following options will appear



3. In the main area are categories of templates if you are online there are many more choices available as you will see.
4. Choosing a category such as **RECENT OR SAMPLE TEMPLATES** will allow you to create a **NEW** workbook from any that are featured from the link we will create a blank workbook at the moment.
5. A preview of any workbook type is shown on the right.
6. When you have the correct type of workbook selected even if it is only blank click on **CREATE**.

OR

KEYBOARD

1. **CTRL+[N]** will create a new blank file.