Creating, Saving, Closing, and Opening Files

Creating, saving, opening, and closing files is primarily done from the Start page or Backstage view of the Office application you are using. These areas provide you with many options and a central location to perform these tasks. You can also use shortcut commands to create, save, and open files.

Create a New File

When you create a new file in an Office application, you can create a new blank file or a new file based on a template (in PowerPoint, you can also create a presentation based on a theme). On the Start page, click Blank [file type] to create a new blank file in the application you are using (in Word, you begin with a blank document; in Excel, a blank workbook; in Access, a blank desktop database; and in PowerPoint, a blank presentation).

HOW TO: Create a New File from the Start Page

1. Open the Office application you want to use. The Start page displays when the application opens (Figure Intro-33).

2. Click Blank [file type] or select a template or theme to use for your new blank file. A new file opens in the application you are using.
   - The new file is given a generic file name (for example Document1, Book1, or Presentation1). You can name and save this file later.
   - When creating a new Access database, you are prompted to name the new file when you create it.
   - A variety of templates (and themes in PowerPoint only) display on the Start page, but you can search for additional online templates and themes using the Search text box at the top of the Start page.

MORE INFO

Esc closes the Start page and takes you into the Office application (except in Access).
If you have been using an application already and want to create a new file, you create it from the Backstage view. From the Backstage view, the new file options are available in the New area.

**HOW TO: Create a New File from the Backstage View**

1. Click the File tab to display the Backstage view.
2. Select New on the left to display the New area (Figure Intro-34).
3. Click Blank [file type] or select a template or theme to use in your new blank file. A new file opens in the application.
   - The new file is given a generic file name (Document1, Book1, or Presentation1). You can name and save this file later.
   - When you are creating a new Access database, you are prompted to name the new file when you create it.

**ANOTHER WAY**
Ctrl+N opens a new file from within an Office application. In Access, Ctrl+N opens the New area in the Backstage view.

**Save a File**

In Access, you name a file as you create it, but in Word, Excel, and PowerPoint, you name a file after you have created it. When you save a file, you type a name for the file and select the location to save the file. You can save a file on your computer, an online storage location such as OneDrive, or portable device, such as a USB drive.

**HOW TO: Save a File**

1. Click the File tab to display the Backstage view.
2. Select Save or Save As on the left to display the Save As area (Figure Intro-35).
   - If the file has not already been saved, clicking Save or Save As takes you to the Save As area on the Backstage view.
3. Click the Browse button to open the Save As dialog box (Figure Intro-36).
   - You can also select a different location (OneDrive or This PC) and select a folder from the list of folders at the right to open the Save As dialog box.
4. Select a location to save the file in the Folder list on the left.
5. Type a name for the file in the *File name* area.
   - By default, Office selects the file type, but you can change the file type from the *Save as type* drop-down list.
6. Click **Save** to close the dialog box and save the file.

**ANOTHER WAY**

Ctrl+S opens the *Save As* area on the *Backstage* view when a file has not been named. If a file has already been named, Ctrl+S saves the file without opening the *Backstage* view.

**MORE INFO**

If you save a file in OneDrive, you have access to that file from any computer with Internet access. Also, you can share and collaborate on files stored in OneDrive. OneDrive is one of the folders in the *Save As* dialog box.

Create a New Folder When Saving a File

When saving files, it is a good idea to create folders to organize your files. Organizing your files in folders makes it easier to find your files and saves you time when you are searching for a specific file (see SLO Intro.8: Organizing and Customizing Folders and Files for more information on this topic). When you save an Office file, you can also create a folder in which to store that file.

**HOW TO:** Create a New Folder When Saving a File

1. Click the **File** tab to display the *Backstage* view.
2. Select **Save As** on the left to display the *Save As* area.
3. Click **Browse** to open the *Save As* dialog box.
4. Select a location to save the file in the *Folder* list on the left.
5. Click the **New Folder** button to create a new folder (Figure Intro-37).
6. Type a name for the new folder and press **Enter**.

**ANOTHER WAY**

F12 opens the *Save As* dialog box (except in Access). On a laptop, you might have to press Fn+F12. See more about the *Fn* (Function) key in SLO Intro.7: Using Context Menus, the Mini Toolbars, and Keyboard Shortcuts.
Save As a Different File Name

After you have saved a file, you can save it again with a different file name. If you do this, you have preserved the original file, and you can continue to revise the second file for a different purpose.

**HOW TO: Save as a Different File Name**

1. Click the **File** tab to display the **Backstage** view.
2. Select **Save As** on the left to display the **Save As** area.
3. Click the **Browse** button to open the **Save As** dialog box.
4. Select a location to save the file in the **Folder** list on the left.
5. Type a new name for the file in the **File name** area.
6. Click **Save** to close the dialog box and save the file.

Office 2016 File Types

When you save an Office file, by default Office saves the file in the most recent file format for that application. You also have the option of saving files in older versions of the Office application you are using. For example, you can save a Word document as an older version to share with or send to someone who uses an older version of Word. Each file has an extension at the end of the file name that determines the file type. The **file name extension** is automatically added to a file when you save it. The following table lists common file types used in the different Office applications:

### Office File Types

<table>
<thead>
<tr>
<th>File Type</th>
<th>Extension</th>
<th>File Type</th>
<th>Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word Document</td>
<td>.docx</td>
<td>Access Database</td>
<td>.accdb</td>
</tr>
<tr>
<td>Word Template</td>
<td>.dotx</td>
<td>Access Template</td>
<td>.accdt</td>
</tr>
<tr>
<td>Rich Text Format</td>
<td>.rtf</td>
<td>PowerPoint Presentation</td>
<td>.pptx</td>
</tr>
<tr>
<td>Excel Workbook</td>
<td>.xlsx</td>
<td>PowerPoint Template</td>
<td>.potx</td>
</tr>
<tr>
<td>Excel Template</td>
<td>.xlt</td>
<td>PowerPoint 97-2003 Presentation</td>
<td>.ppt</td>
</tr>
<tr>
<td>Comma Separated Values (CSV)</td>
<td>.csv</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Close a File

You can close a file using the following different methods:

- Click the **File** tab and select **Close** on the left.
- Press **Ctrl+W**.
- Click the **X** in the upper right corner of the file window. This method closes the file and the program if only one file is open in the application.
When you close a file, you are prompted to save the file if it has not been named or if changes were made after the file was last saved (Figure Intro-38). Click Save to save and close the file or click Don’t Save to close the file without saving. Click Cancel to return to the file.

Open an Existing File

You can open an existing file from the Start page when you open an Office application or while you are working on another Office file.

**HOW TO: Open a File from the Start Page**

1. Open an Office application to display the Start page.
2. Select a file to open in the Recent area on the left (Figure Intro-39). The file opens in the Office application.
   - If you select a file in the Recent area that has been renamed, moved, or on a storage device not connected to the computer, you receive an error message.
3. Alternatively, click the Open Other [file type] (for example Open Other Presentations) (see Figure Intro-39) link to open the Open area of the Backstage view (Figure Intro-40).

4. Click the Browse button to open the Open dialog box (Figure Intro-41).
5. Select a location from the Folder list on the left.
6. Select the file to open and click the Open button.
   - If the file opens in Protected View, click the Enable Editing button to allow you to edit the file.

When working on a file in an Office application, you might want to open another file. You can open an existing file from within an Office application from the Open area on the Backstage view.
HOW TO: Open a File from the Backstage View

1. Click the File tab from within an open Office application to open the Backstage view.
2. Click Open on the left to display the Open area on the Backstage view (see Figure Intro-40).
3. Click the Browse button to open the Open dialog box (see Figure Intro-41).
   - You can also select a file to open from the list of Recent files on the right of the Open area on the Backstage view.
4. Select a location from the Folder list on the left.
5. Select the file to open and click the Open button.
   - If the file opens in Protected View, click the Enable Editing button to allow you to edit the file.

ANOTHER WAY

Press Ctrl+F12 to open the Open dialog box when you are in the working area of an Office application (except in Access). On some laptops, you might have to press Fn+Ctrl+F12.

You can also open a file from a File Explorer folder. When you double-click a file in a File Explorer folder, the file opens in the appropriate Office application. Windows recognizes the file name extension and launches the correct Office application.

PAUSE & PRACTICE: INTRO-1

For this project, you log in to Windows using your Microsoft account, customize the Windows Start menu and Taskbar, create and save a PowerPoint presentation, create a folder, open and rename an Excel workbook, and use Windows 10 features.

File Needed: ARCC2018Budget-Intro.xlsx (Student data files are available in the Library of your SIMnet account)
Completed Project File Names: [your initials] PP Intro-1a.pptx and [your initials] PP Intro-1b.xlsx

1. Log in to Windows using your Microsoft account if you are not already logged in.
   a. If you don’t have a Microsoft account, you can create a free account at https://signup.live.com.
   b. If you are using a computer on your college campus, you may be required to log in to the computer using your college user name and password.

2. Customize the Start menu to include Office 2016 apps. If these apps tiles are already on the Start menu, skip steps 2a–e. You can pin other apps of your choice to the Start menu.
   a. Click the Start button at the bottom left of your screen to open the Start menu.