Excel Part 4 - The File Tab

The File tab is the first tab on the Ribbon, at the far left. It does not show a Ribbon. It opens a full screen called the backstage, where you manage the file itself, not the data inside it. The list of items is on the left. To go back to your sheet, click the arrow at the top left, or press Escape. We go through the list from the top to the bottom.

1. Home, New, and Open

Home is the first item. It shows the start screen, with templates at the top for new files, and a list of your recent files below them. New shows the templates, such as Blank workbook, and lets you search for more templates online. Open lists your recent files, the files shared with you, your OneDrive, and This PC. Add a Place connects another storage place, such as a cloud service. The Browse button opens a file from any folder.

2. Share and Info

Share lets you upload the workbook to OneDrive and share it, or attach a copy to an email, as an Excel workbook or as a PDF. Info shows the properties of the file, such as its size, its dates, and its author. It also has buttons to protect the workbook, to check it for issues, to see the version history, to manage the workbook, and to reset the Changes pane.

3. Save and Save As

Save stores your changes in the file. The first time you save a new file, Excel opens Save As, because the file needs a name and a place. Save As saves the file with a new name, in a new place, or as a different file type. You type the file name in the box at the top, choose the type below it, and click Save.

4. Print and Export

Print shows a preview of the page on the right. On the left are the print settings: the number of copies, the printer, which sheets to print, one-sided or two-sided printing, collated or not, the

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page orientation, the paper size, the margins, and the scaling. Export lets you create a PDF or XPS document, or change the file type.

5. Close, Account, and Options

Close closes the current workbook, and leaves Excel open. Account shows who is signed in, your Office background and Office theme, and the details of your Microsoft subscription. Options, at the bottom of the list, opens the Excel Options window, where you change the settings of the program.

Example: Let us say you want to print a sheet on a wide page. What you do is click File, then Print. Open the orientation list, and choose Landscape Orientation. The preview on the right now shows a wide page.

Example: Let us say you want to send your workbook as a PDF. What you do is click File, then Export, then Create PDF/XPS Document. The Publish as PDF or XPS window opens. Type a file name, and click Publish.

Summary

You have now been through the File list, from the top to the bottom. Home, New, and Open start and find your files. Share and Info send a file and show its properties. Save and Save As keep it. Print and Export put it on paper or into a PDF. Close, Account, and Options finish the list. Next, we start the Home tab.

Sources

- Microsoft Support - Keyboard shortcuts for the File menu in Microsoft 365 for Windows – https://support.microsoft.com/en-us/accessibility/office-accessibility/keyboard-shortcuts-for-the-file-menu-in-microsoft-365-for-windows
- Microsoft Support - Save a workbook as PDF / Export – https://support.microsoft.com/en-us/office/save-a-workbook-in-another-file-format-6a16c862-4a36-48f9-a300-c2ca0065286e
- Microsoft Support - Print a worksheet or workbook – https://support.microsoft.com/en-us/office/print-a-worksheet-or-workbook-in-excel-for-windows-d5139cf6-8a3b-4d0f-8f4f-1d9bf0e0a3a5
- Screens checked in a real copy of Microsoft Excel for Windows (November 2026): every File item, Print orientation, Export to PDF

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