

“Solutions” Image Services

Saving an Excel Document to Document Locator

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Introduction

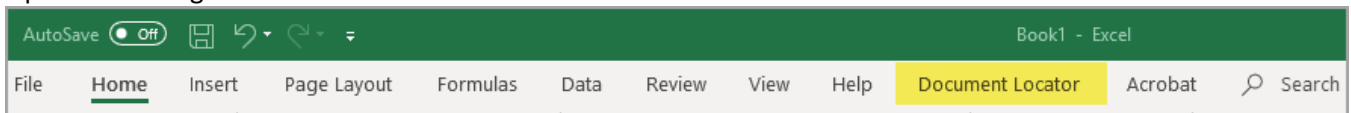
This document describes how to save an Excel document directly to Document Locator and how to check out/in the document for editing purposes.

Quick Steps-Save Excel Document to DL

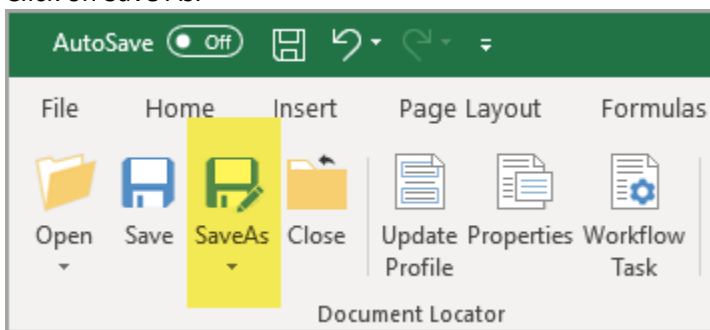
1. Open an existing or create a new Excel document.
2. Click on Document Locator in Excel toolbar.
3. Click on Save As.
4. Drill down to the correct folder/profile in Document Locator and click Save.
5. Complete the property values in the import window that opens, click OK.

Process

Open an existing or create a new Excel document - click on Document Locator in Excel toolbar.



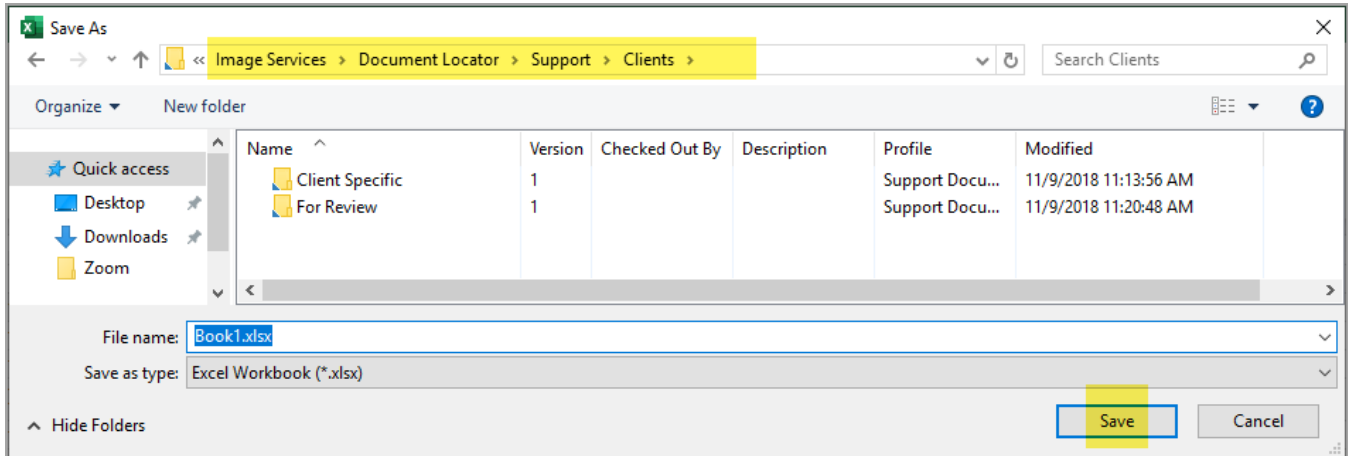
Click on Save As.



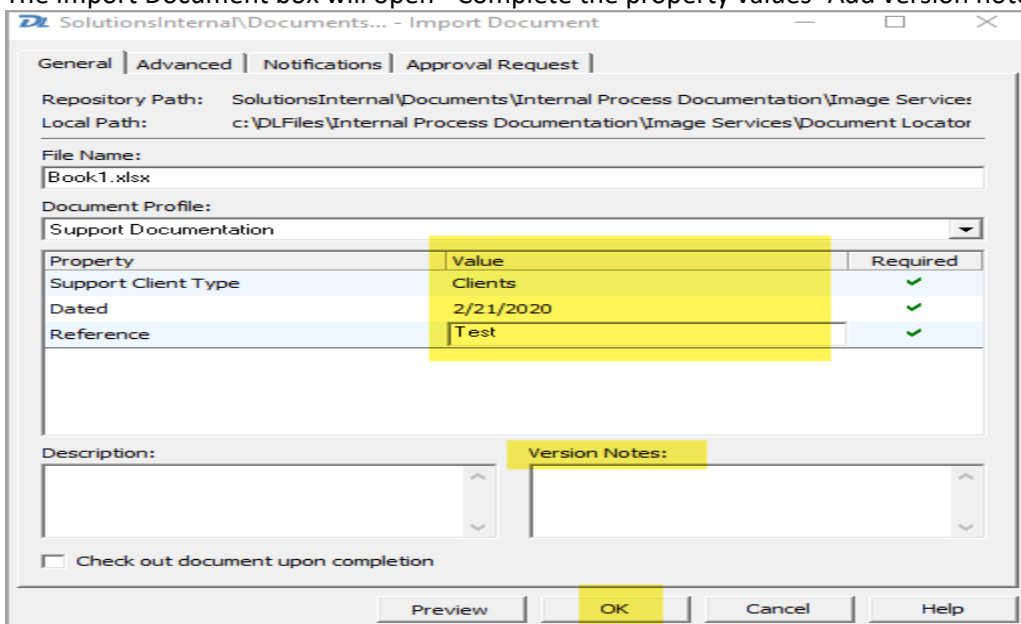
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Saving an Excel Document to Document Locator

Drill down to the correct folder/profile in Document Locator where the Excel document is to be saved and click Save.



The Import Document box will open - Complete the property values -Add version note if desired- Click OK.



Once saved, the document will appear in Document Locator.

Searching in WebTools.docx	3		Quick Guide f...
Split Versions in to Individu...	2		
Test.xlsx	1		
Trouble Searching or Viewi...	2		Quick guide o...
Workflow Notifications.docx	4		This document...

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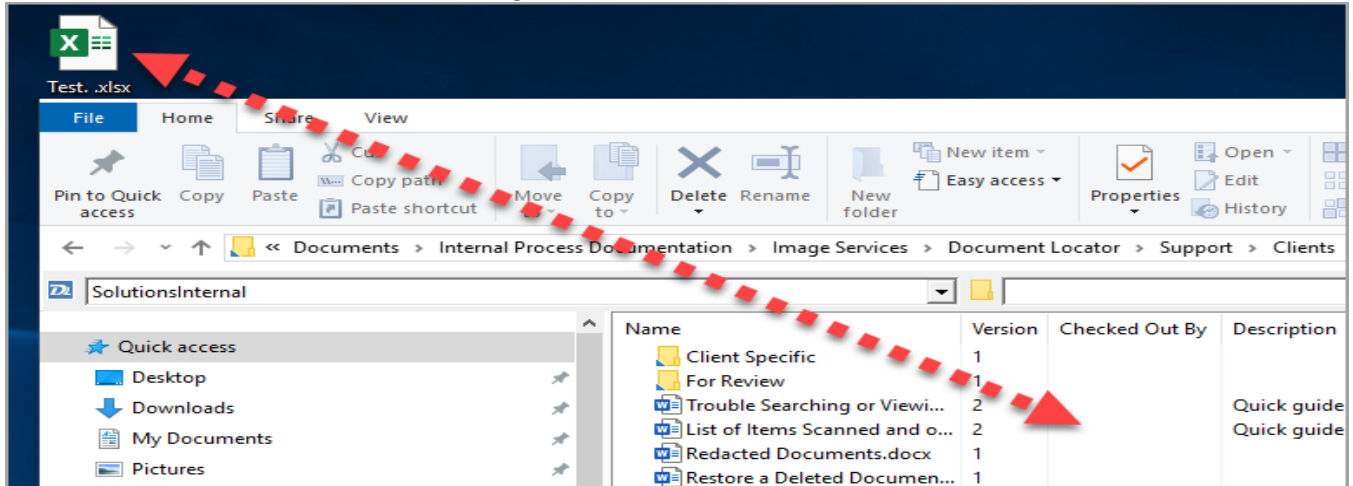
Saving an Excel Document to Document Locator

Quick Steps- Saving Excel Document to DL- Drag and Drop

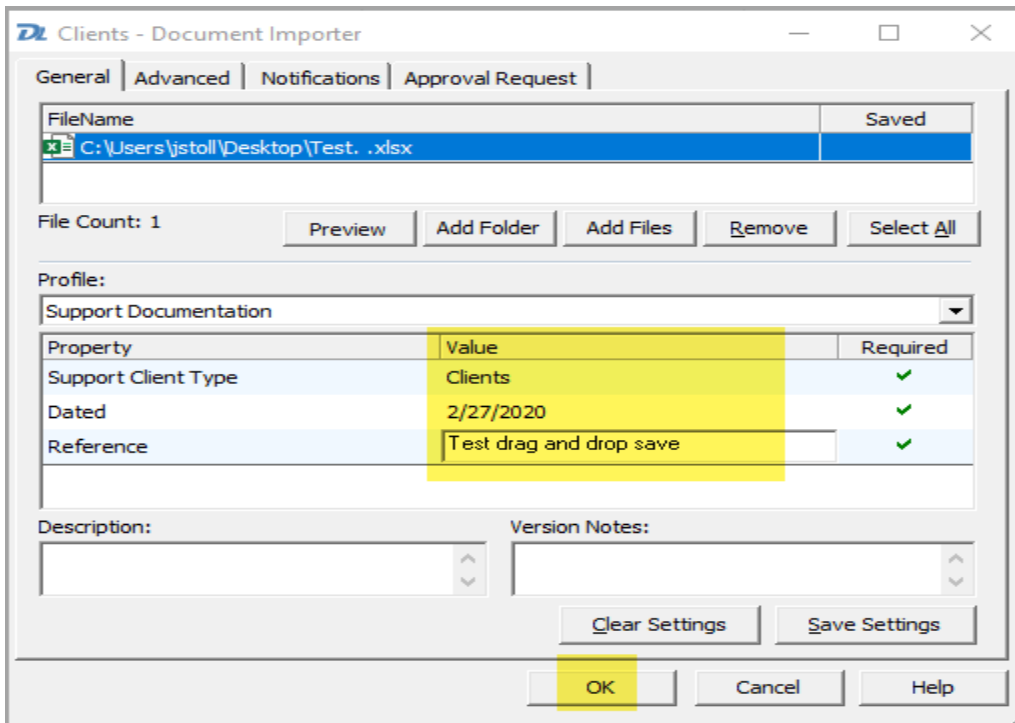
1. Left click on the document and hold to drag document into the selected DL folder and release click.
2. Complete the Document Import Values and click OK.

Process

Left click on the document and hold to drag document into the selected DL folder and release click.



The Document Import window will open, complete the import values - Click OK and the document will be saved.



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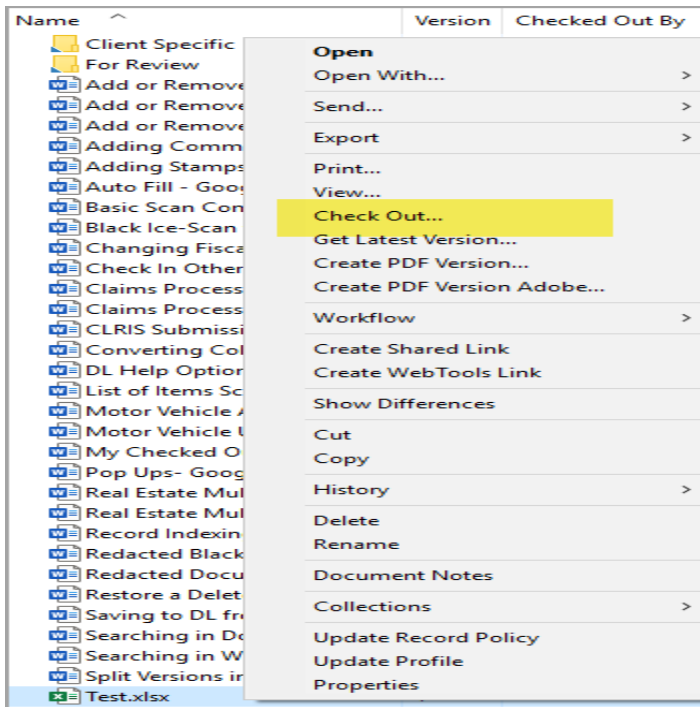
Saving an Excel Document to Document Locator

Quick Steps- Check Out/In Document to Edit Spreadsheet

1. Right click on desired document and click on check out.
2. Edit document and Close document.
3. Check in window will open, add version note if desired, click ok.

Process

To make changes to the document once saved in document locator, right click on the document and click on check out.



Check In Document window opens, add version note if desired, click OK. Your changes are now saved.

