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Lesson 1: Prepare the Worksheets

Discussion

There are two items that need to be considered before creating a PDF file from an Excel document:

1. Review the selection to be used at **Print Preview** and make any necessary changes.
2. Review the **Document Properties** to determine if the properties will be saved with the PDF and to make any necessary changes.

A single worksheet, an entire workbook or a range of cells (selection) may be saved as a PDF file. When the PDF file is created, the pages will look like the printed (hard copy) pages of the worksheet. Therefore, it is important to use the Print Preview command to display the pages and review how the PDF file will look when it is created.

Based on that review, make any changes to improve the appearance of the printed pages. Many of these changes are made in the Page Setup dialog box, which is available on the Page Layout tab at the Page Setup dialog box launcher




If you wish to save an entire workbook as a PDF file, follow these instructions for each sheet of the workbook. Most, but not all, of the instructions can be given once for multiple worksheets by using CTRL + click on the worksheet tab to select each of the worksheets to be formatted and then, selecting the options in the Page Setup dialog box.


Steps



1. **Open** the workbook.

- Click on the Office Button  .
- Select Open.
- In the Open dialog box, navigate to the file's location.
- Double-click on the filename.


2. **Preview** how the file will look when it is printed.

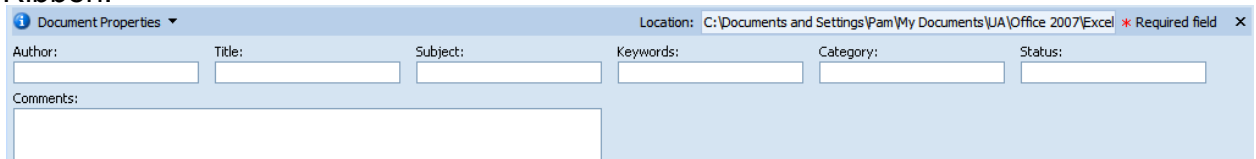
- Click on the Office Button .
- Select Print.
- Select Print Preview.
- Use the Next Page and Previous Page tools to move through the pages.
- Note the changes that you want to make.
- Click on the Close Print Preview tool.

3. **Make and save the changes** to improve the printed appearance of the worksheet.

For worksheets that print on more than one page, consult the Quick Reference Guide, "Using and Printing Large Worksheets in Excel 2007."

4. **OPTIONAL: Review the Document Properties.**

- Click on the Office Button .
- Select Prepare.
- Select Properties. The Document Properties information appears below the Ribbon.

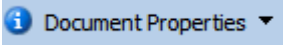


Document Properties

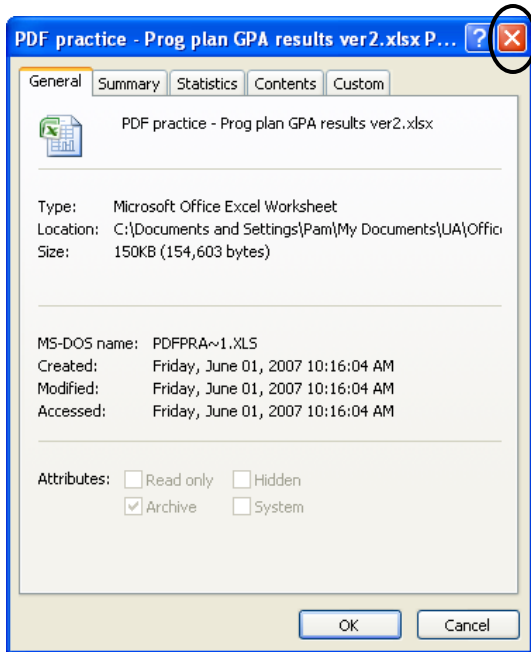
Location: C:\Documents and Settings\Pam\My Documents\JA\Office 2007\Excel * Required field

Author: Title: Subject: Keywords: Category: Status:

Comments:

- Enter any data that is to be stored with the Excel file. Some of this data also may be saved to the PDF file, such as File name, Title, Author, Subject, and Keywords.
- Click on the down arrow for .

- Select Advanced Properties. The Document Properties dialog box is displayed.



- Review the data contained on the various tabs. Make any changes, if necessary.
- Click on OK.
- Close the Document Properties information area by clicking on its x

5. Click on the Save tool  in the Quick Access toolbar to save any changes.


Lesson 2: Create the PDF File

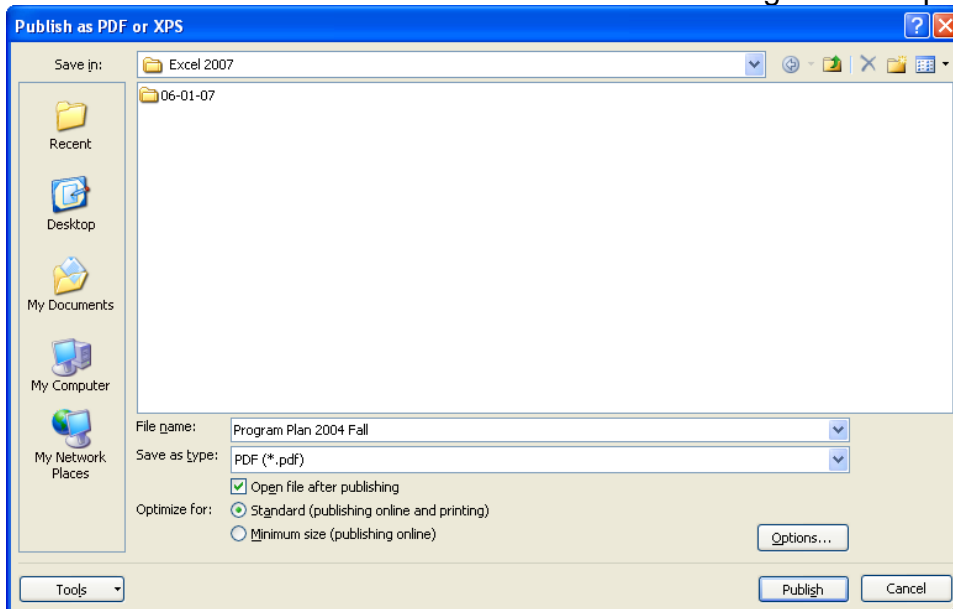
A PDF file may be created from:

- A range of cells
- A worksheet
- The entire workbook


Steps

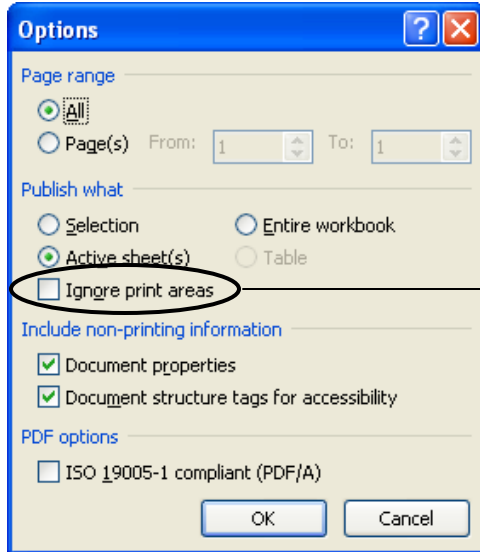


1. If the PDF file will be created for a worksheet, click on that worksheet's tab to make it the active sheet.
2. If the PDF file will be created from a range of cells, select the range of cells so that they are highlighted.
3. If the PDF file will be created for the entire workbook, click in any cell of the workbook so that it is the active open file.
4. Click on the Office Button .
5. Select Save As.
6. Select PDF or XPS. The Publish as PDF or XPS dialog box is displayed.



7. At Save in, select the drive and folder in which to save the PDF file.
8. Type a file name in the File name edit box.

9. Be certain that PDF (*.pdf) is selected at Save as type.
10. It is recommended that the box for Open file after publishing is marked, so that you may preview the PDF file after it is created.
11. Make a selection at Optimize for. If you are uncertain whether to select Standard (publishing online and printing) or Minimum size (publishing online), select Standard.
12. Click on the  button. The Options dialog box is displayed.




If print areas have been designated in the workbook, you may want to mark this checkbox.

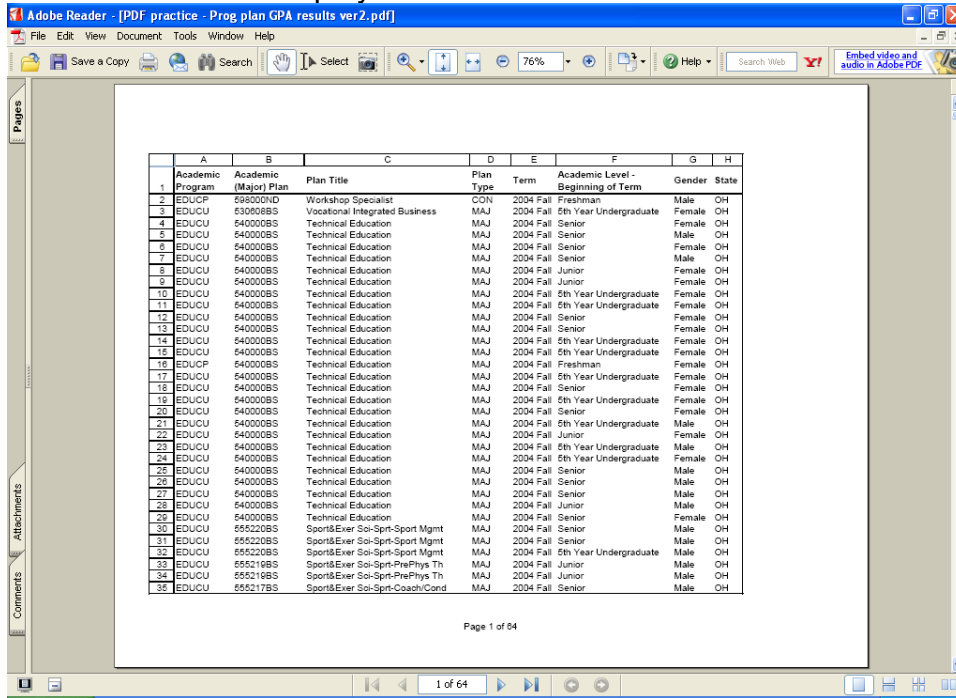
13. At Page range, select All or a range of pages, based on your prior review at Print Preview.
14. At Publish what, indicate your choice.
15. At Include non-printing information:

- Unmark the Document properties checkbox, if you do not want any of that information to be available in the PDF file.

If this box is marked, properties that are saved to the PDF file include File name, Title, Author, Subject and Keywords. Other properties that are saved include date and time that the file was created/modified and file size.

- If Document structure tags for accessibility is marked, the file will be larger and include data that helps disabled users. For example, data included helps a person using a screen reader to navigate the document.
- The ISO 1900S-1 compliant format is required by some governmental agencies. Mark this checkbox if this format is required.

16. Click on OK. The Publish as PDF or XPS dialog is displayed.
17. Select . The hourglass appears as the PDF file is created.
18. The PDF file is saved in the drive and folder indicated in the Save As dialog box.
19. If the option Open file after publishing was selected, Adobe Reader is opened and the PDF file is displayed.



20. Review the file.
21. To view the Document properties, select File, Properties from Adobe Reader's menu.