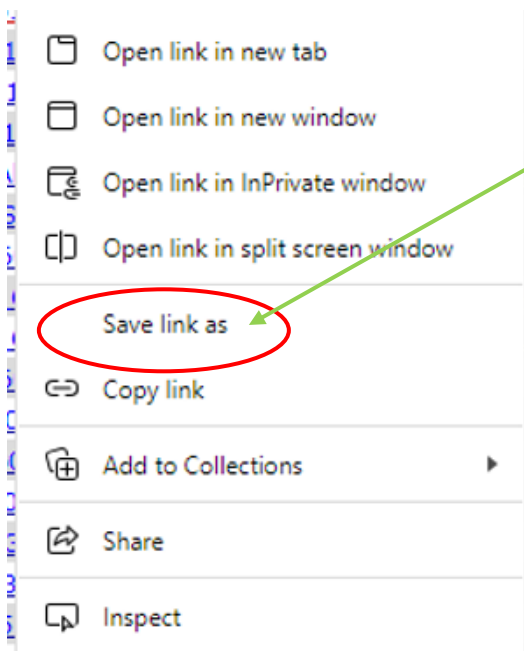# How to save your invoice from Document Management into an Excel File.

Find the file you wish to save as an excel File.
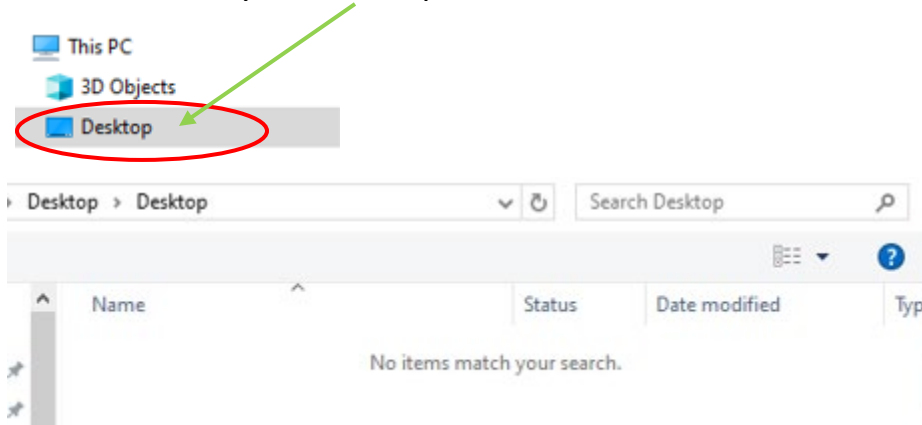
Inv_all_sd_MAR24__053124_23:34:02.xls   Final_Invoice_All_SD - MAR24 - ran on MAY 31, 2024
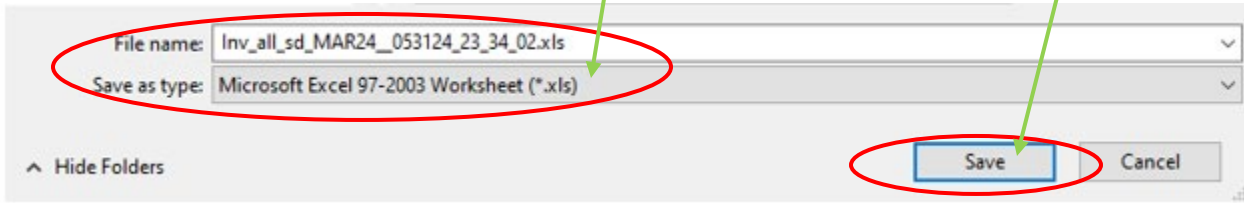
Right click on file name you want to save and select option "Save link as".
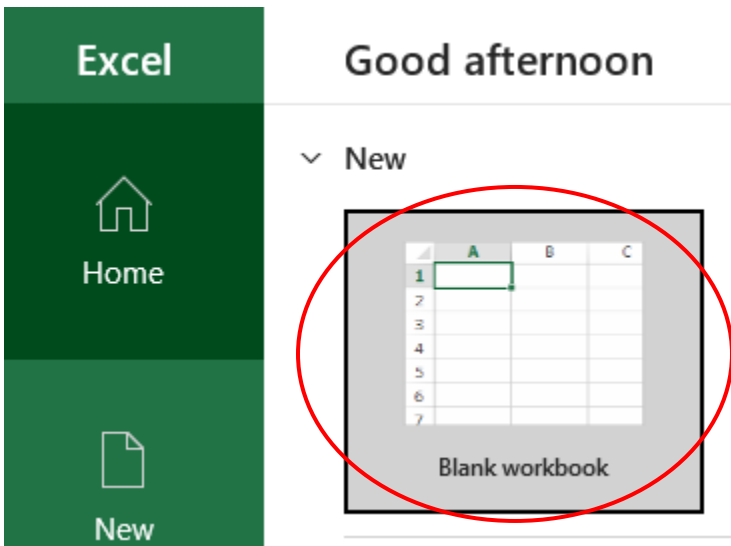

Save the file to your Desktop.

You **do not** need to change the name, or the type of file just click the Save button.
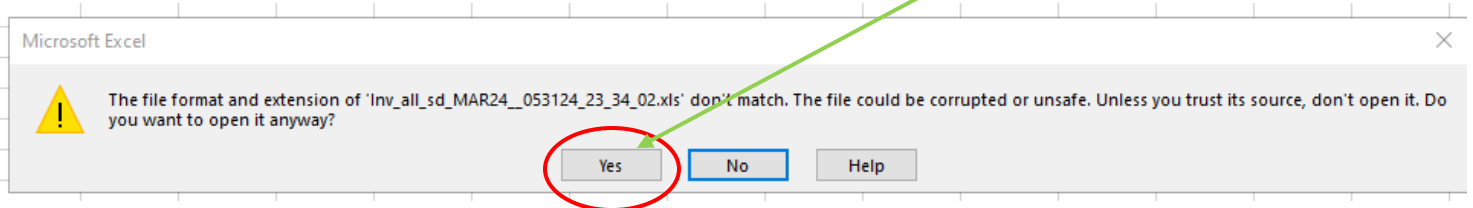

Open a blank Excel spreadsheet and choose a blank workbook.

Drag and drop the file you saved to your Desktop into the empty spreadsheet.

This message will pop up once you do that and you will select Yes.
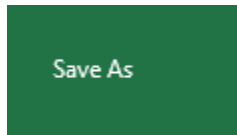

From there you can change the file type to Excel Spreadsheet by saving it as an excel file to any location on your computer.
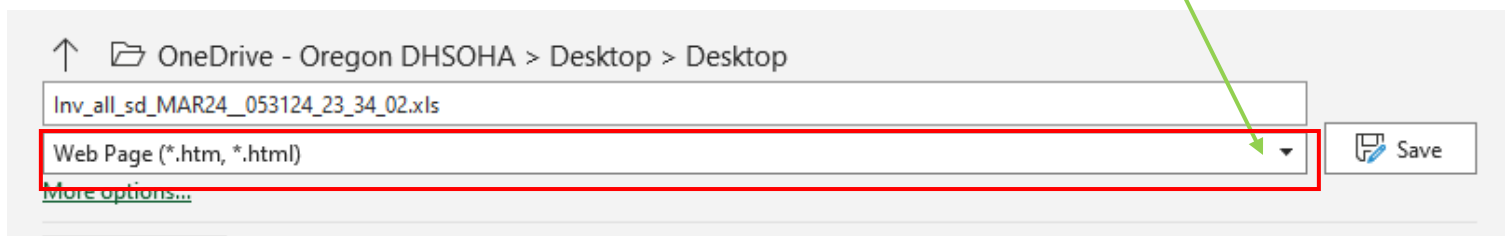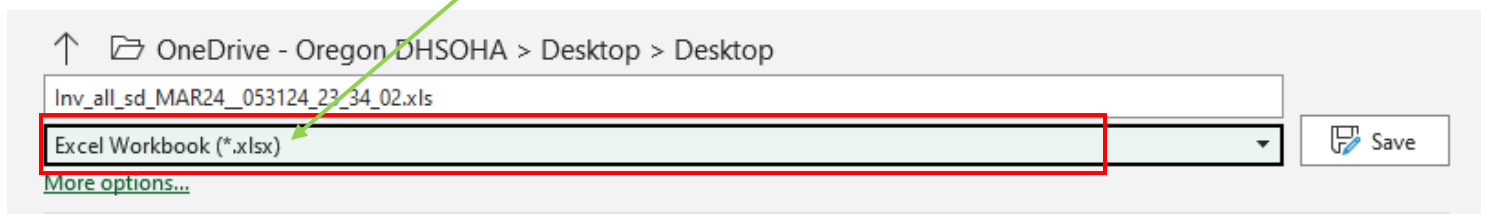
Choose the File button on the upper ribbon.

| File | Home | Insert | Page Layout | Formulas | Data | Review | View | Help |
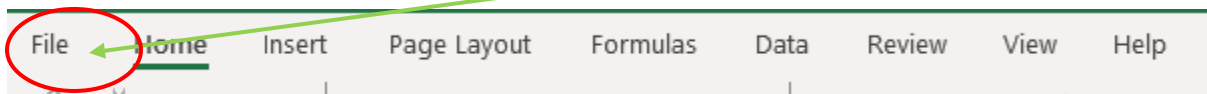
On the left-hand side select "Save As"

Save As

Off the right-hand side is where you will change the file type by using the <u>arrow</u> for the drop-down menu.

↑ 📂 OneDrive - Oregon DHSOHA > Desktop > Desktop

Inv_all_sd_MAR24__053124_23_34_02.xls

Web Page (*.htm, *.html)   ▼   💾 Save

More options...

Change to Excel Workbook (*.xlsx)

↑ 📂 OneDrive - Oregon DHSOHA > Desktop > Desktop

Inv_all_sd_MAR24__053124_23_34_02.xls

Excel Workbook (*.xlsx)   ▼   💾 Save

More options...

From there, click on the <u>file folder</u> and a file folder will pop up, you can choose where you want to save the excel file now.

↑ 📂 OneDrive - Oregon DHSOHA > Desktop > Desktop

Inv_all_sd_MAR24__053124_23_34_02.xls

Excel Workbook (*.xlsx)   ▼   💾 Save

More options...