

Uploading Excel Files for Review

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When uploading Microsoft Excel files for review, it is highly recommend to 'Save As...' a PDF file.

Due to the large, customizable content areas within Excel documents, including multiple sheets, you will be unable to control the way in which Review + Approval visually converts these documents for your reviewers. The same is true when *printing* any Excel document - the file's print settings must be established beforehand to ensure the data displays correctly. **It is highly recommend to convert all Excel content to PDF files for upload for review.**

Before saving your Excel file as a PDF document, navigate to the **Page Layout'** tab in Excel and be sure to:

- Set the page layout **orientation** to *landscape* or *portrait*
- Set the page **margins**
- Set the page **size**
- Choose whether or not to print **Gridlines** or **Headings**
- Highlight your content and set the applicable **print area** (<http://goinmo.co/excelprint>)
- Finally, navigate to **'File > 'Save As...'** and choose **'PDF.'** Below the file format dropdown menu, choose **'Selection : Print_Area.'**
- **Repeat** these steps for multiple sheets!