# What You Can Do in Excel

icrosoft Excel is one of the world's most popular spreadsheet programs. You could create worksheets on ledger paper and use a calculator, or draw charts on graph paper, but Excel makes these tasks and others related to managing numeric information easier. You can use the program to create worksheets, databases, and charts. Without a doubt, you could perform the following functions manually, but you can use Excel to make them easier.

### Lay Out a Worksheet

When you sit down to develop a worksheet with a pencil and ledger paper, you do not always have all the information to complete the design and layout of the worksheet. Ideas may occur to you after you sketch the layout of your worksheet. After you are finished jotting down the column headings and the row headings, you might think of another column or row that you did not include. If you are working with pencil and paper, restructuring the layout of a worksheet can be tedious and time-consuming. With Excel, you can easily insert columns and rows and move information from one location to another.

#### **Calculate Numbers**

Think about the tasks involved in managing your checkbook register. You subtract the amount of each check written and add the deposits to the running balance. You then use your bank statement to balance your checkbook, and it is not at all uncommon to find math errors in your checkbook. So, you must then recalculate the numbers in your checkbook register and jot down the new answers. If you set up an Excel workbook for the same tasks, you can use formulas that subtract checks and add deposits. You enter the formulas only once and simply supply the amounts of your checks and deposits, much as you record them in your checkbook register. When you change the numbers in the workbook, Excel uses the formulas to recalculate the information in your workbook and instantly gives you the new answers — in most cases without the associated math errors.

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### **Organize, Sort, and Filter Lists**

You can create tables to organize your data in lists. For example, you can create inventory lists, employee lists, customer lists, student grade lists, and sales records. In Excel, you can add, delete, sort, search, and display records in the list as often as required to maintain the list. You can sort data on the worksheet alphabetically and numerically in ascending or descending order. For example, you can sort sales records in chronological order by dates. You can also use the AutoFilter feature to quickly find information that meets a specific criterion or to find the top or bottom ten values in the list without sorting.

# Getting Started with Excel

chapter

### **View Data**

When working with a large worksheet on ledger paper, such as a financial statement, you might have to use a ruler to compare figures on a far portion of the worksheet. You might even find yourself folding the ledger paper to bring the columns you want to compare close together. In Excel, you can split the worksheet into two or four panes to view distant figures side by side. That way, you can easily see the effects of asking "what happens when I change this value?" to project changes. You can also temporarily hide intermediary columns so that distant figures appear right next to each other as you work.

### **Make Editing Changes**

To correct a mistake on ledger paper, you have to use an eraser, or you have to reconstruct the entire worksheet. With Excel, you can overwrite data in any cell in your worksheet. You can also delete data quickly, in one cell or a group of cells. And, when you accidentally make mistakes that overwrite original data while using Excel, you do not have to retype or reconstruct information. Instead, you can just restore the data using the Undo button.

### **Check Spelling**

No more manually proofreading your work. When you use Excel's AutoCorrect feature, Excel corrects commonly made mistakes as you type — and you can add your own personal set of "common typos" to the list. In addition, before you print, you can run a spell check to search for misspellings. If you are a poor typist, this feature enables you to concentrate on calculating your numbers while Excel catches spelling errors.

### **Make Formatting Changes**

Excel easily enables you to align data in cells; center column headings across columns; adjust column width; and display numbers with dollar signs, commas, and decimal points. You can experiment with the settings until the worksheet appears the way that you want it; then you can print it. You can boldface, italicize, and underline data, and change fonts and font sizes. Excel also lets you shade cells, add borders, and apply styles to improve the appearance of a worksheet.

#### **Preview Before Printing**

You can preview your worksheet to see how it will look when you print it. You also can add headers and footers and adjust page breaks before you print.

#### **Chart Numeric Data**

Numbers form the foundation of charts. Manually creating charts is time-consuming and takes some artistic skill. In Excel, creating charts is quick and easy. You can track the sales trends of several products with a chart. You also can make as many "what if?" projections as you want in the worksheet by increasing and decreasing the numbers used in the chart; as you change the numbers in the worksheet, Excel instantly updates the chart. Excel's charts let you simultaneously view the sales trends in a picture representation on-screen and the numbers in the worksheet, making your sales forecasting more efficient.



# Start and Close Excel

ou can start the Excel program using the Windows Start menu. When you open the Start menu, a search field appears at the bottom and the All Programs choice appears immediately above the search field. Once you select All Programs, Windows displays folders that contain the programs installed on your computer. The shortcut to start Excel appears in the Microsoft Office folder. After you select Excel from the Microsoft Office folder several times, it will appear on the Start menu in the list of recently opened files. You can select Microsoft Office Excel 2007 from that list to open the program. If you use Excel regularly, you may want to pin Excel to the Start menu or create a desktop shortcut for it so that you can open it more quickly.

You can close Excel using a command on the Office menu, or you can use the Close button in the upperright corner of the Excel window. Excel behaves differently, depending on the method you choose to close the program, the number of workbooks you have open, and whether you have made changes to any of the open workbooks.



Getting Started with Excel

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The main window for Excel appears.

The cell pointer (()) appears as you move the mouse over cells in the worksheet. You use the cell pointer to select cells.

**Note:** See Chapter 4 for details on selecting cells.



### **Close Excel**

Click the Microsoft Office button (
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2 Click Exit Excel.

Excel closes all open workbooks.

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#### Does Excel prompt me to save before closing the program?

If you have not made any changes to the workbook, Excel closes without prompting you to take any further action. However, if you have made changes to an open workbook, Excel prompts you to save the workbook. After you respond to the prompt, Excel closes, regardless of whether you save the workbook.

# Can I click the X in the upper-right corner to close Excel?

Yes, but, if you have more than one workbook open, Excel closes only the active workbook, instead of the program. You must click the X in the upper-right corner of each open workbook. When you click the X while viewing the last open workbook, both the workbook and the program close. Before Excel closes any workbook you have changed, Excel prompts you to save the workbook.

#### What happens if I pin Excel to the Start menu?

Excel always appears on the left side of the Start menu, above the list of recently opened files. Right-click the Excel icon and click Pin to Start Menu.

# How do I create a desktop shortcut.

 To create a desktop shortcut for Excel, rightclick the Excel icon, click Send To, and then click Desktop (Create Shortcut).

# Understanding the Excel Screen

ach time you open Excel, you see a new workbook named Book1 that contains three worksheets.

## A Title Bar

**B** Office Button

Displays the name of the workbook and the name of the program.

Öpens a menu containing commands related to file operations such as Save and Print.

# **O** Quick Access Toolbar

By default, contains buttons that enable you to save, undo your last action, and redo your last action. You can also add buttons to this toolbar; see Chapter 30 for details.



# **Scroll Bars**

Enable you to view more rows and columns of the worksheet.

## Status Bar

Displays Excel's current mode, such as Ready or Edit, and identifies any special keys you press, such as CAPS LOCK. The Status Bar also contains View buttons that you can use to switch views, and a Zoom control to help you zoom in or zoom out. See Chapter 8 for more information on views and zooming.

## Ribbon

Contains most Excel commands, organized on tabs. See the section, "Understanding the Ribbon," for details.

### Formula Bar

Made up of three parts, the Formula Bar contains the Name box, buttons that pertain to entering data, and the contents of the currently selected cell.

## Worksheet Area

The place where you enter information into Excel, divided into rows and columns.

## **G** Worksheet Tabs

Tabs that identify the worksheet on which you are currently working. You can switch worksheets by clicking a worksheet tab.

# Learn Excel Terminology

hen you learn anything new, you need to learn its terminology. Presented below are a series of terms you need to know as you work with Excel.

### Workbook

A workbook is a file in which you store your data. Think of a workbook as a three-ring binder. Each workbook contains at least one worksheet, and a new workbook contains three worksheets, named Sheet1, Sheet2, and Sheet3. People use worksheets to organize, manage, and consolidate data. You can have as many worksheets in a workbook as the memory on your computer permits.

#### Worksheet

A *worksheet* is a grid of columns and rows. Each Excel workbook contains 1,048,576 rows and 16,384 columns. Each column is labeled using a letter of the alphabet; the column following column Z is column AA, followed by AB, and so on. The last column in any worksheet is column XFD. Each row is labeled using a number, starting with row 1 and ending with row 1,048,576.

### Cell

A *cell* is the intersection of a row and a column. Each cell in a worksheet has a unique name called a *cell address*. A cell address is the designation formed by combining the column and row names in column/row order. For example, the cell at the intersection of column A and row 8 is called cell A8, and A8 is its cell address.

### **Cell Pointer**

 The *cell pointer* appears as you move the mouse over cells in the worksheet. You use the cell pointer to select cells in the worksheet.

### **Currently Selected Cell**

You click a cell to select it. Excel identifies the currently selected cell, also called the *active cell*, by surrounding it with a bold, black box containing a small, black square in the

lower-right corner. That small, black square is called the *Fill handle*; you can read more about the Fill handle in Chapter 10.

#### Range

The term *range* refers to a group of cells. A range can be any rectangular set of cells. To identify a range, you use a combination of two cell addresses: the address of the cell in the upper-left corner of the range, and the address of the cell in the lower-right corner of the range. A colon (:) separates the two cell addresses. For example, the range A2:C4 includes the cells A2, A3, A4, B2, B3, B4, C2, C3, and C4.

### **Formula Bar**

The *Formula Bar* is made up of three parts. At the left edge of the Formula Bar, the Name box displays the location of the currently selected cell.

The Cell Contents area appears on the right side of the Formula Bar and displays the information stored in the currently selected cell. If a cell contains a formula, the formula appears in the Cell Contents area, while the formula's result appears in the active cell. If the active cell contains a very long entry, you can use at the right edge of the Cell Contents area to expand the size of the Cell Contents area vertically.

Between the Name box and the Cell Contents area, buttons appear that help you enter information. Before you start typing in a cell, only the Function Wizard button () appears, as described in Part III; you can use this button to help you enter Excel functions. Once you start typing, two more buttons appear; click to accept the entry as it appears in the Cell Contents area, or click to reject any typing and return the cell's contents to the way they appeared before you began typing.

# Understanding the Ribbon

o accomplish tasks in Excel, you use commands that appear on the Ribbon. New to Excel 2007, the Ribbon fundamentally changes the way you work in Excel compared to earlier versions of Excel. You no longer open menus to find commands; buttons for commands appear on the Ribbon. By default, the Ribbon contains the commands most commonly used to complete an Excel task. Do not worry if you do not find a particular command on the Ribbon; it is still available and, if you use it often, you can add it to the Quick Access Toolbar, which

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appears at the top of the Ribbon. See Chapter 30 for details on customizing the Quick Access Toolbar.

On the Ribbon, in addition to the Office Button () and the Quick Access Toolbar, you find tabs, which take the place of menus in Excel 2007. Each tab contains a collection of buttons that you use to perform a particular action. On each tab, commands are grouped together. For example, on the Home tab, you find seven groups: Clipboard, Font, Alignment, Number, Styles, Cells, and Editing. In the lower-left corner of some groups, you see a dialog box launcher icon () that you can click to see additional options that you can set for the group.

By default, the Ribbon contains seven tabs, as described in the following table.

# Tabs on the Ribbon

Tab	Purpose
Home	This tab helps you format and edit a worksheet.
Insert	This tab helps you add elements such as tables, charts, PivotTables, hyperlinks, headers, and footers.
Page Layout	This tab helps you set up a worksheet for printing, by setting elements such as margins, page size and orientation, and page breaks.
Formulas	This tab helps you add formulas and functions to a worksheet.
Data	This tab helps you import and query data, outline a worksheet, sort and filter information, validate and consolidate data, and perform What-If analysis.
Review	This tab helps you proof a worksheet for spelling errors, and also contains other proofing tools. From this tab, you can add comments to a worksheet, protect and share a workbook, and track changes that others make to the workbook.
View	This tab helps you view your worksheet in a variety of ways. You can show or hide worksheet elements such as gridlines, column letters, and row numbers. You can also zoom in or out.

In addition to these seven tabs, Excel displays contextual tabs, which are tabs that appear because you are performing a particular task. For example, when you select a chart in a workbook, Excel adds the Chart Tools tab behind the View tab. The Chart Tools tab contains three tabs of its own: Design, Layout, and Format. As soon as you select something other than the chart in the workbook, the Chart Tools tab and its three sub-tabs disappear.



To use the commands on the Ribbon, you simply click a button. If you prefer to use a keyboard, you can press the Alt key; Excel displays keyboard characters that you can press to select , tools on the Quick Access Toolbar, and tabs on the Ribbon. If you press a key to display a tab on the Ribbon, Excel then displays all the keyboard characters you can press to select a particular command on the Ribbon.



Getting Started with Excel

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# Work with the Mini Toolbar and Context Menu

ou can use the Mini Toolbar and the Context menu to help you quickly format text without switching to the Home tab. The Mini Toolbar and the Context menu contain a combination of the most commonly used commands available in the Clipboard, Font, Alignment, and Number groups on the Home tab.

The Mini Toolbar and the Context menu always appear together when you work with shapes, text boxes, WordArt, or cells containing text or numbers. The Mini Toolbar does not appear when you work with pictures, charts, Clip Art, or SmartArt.

The buttons that appear on the Mini Toolbar do not change; you always see the same set of buttons. However, the commands that appear on the Context menu, also called a shortcut menu, change depending on the cells or object with which you are working. That is, Excel displays only those commands on the Context menu that are relevant to the cells or object you select; this is how the Context menu got its name.

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# Work with the Mini Toolbar and Context Menu

Select a cell or range of cells.

Note: See Chapter 4 for details on selecting cells.

**2** Right-click the selection.

• The Mini Toolbar appears above the Context menu.

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# Enter Information

ou can quickly and easily type text and numbers into your worksheet. Most people use Excel primarily to accomplish mathrelated tasks, and supplying text labels for the numbers you enter provides meaning to those tasks. Although you can type information into a worksheet in any order, some people find it easier to type labels first, because it helps them identify the correct place for corresponding numbers.

You enter text using your keyboard, and you can enter numbers using either the number keys above the letters on your keyboard or the number pad to the right of the letters on your keyboard. To use the numbers on the number pad, you can press the Num Lock key.

By default, when you enter *text* into a cell, Excel leftaligns it in the cell and assigns it a General format. When you enter a *number* into a cell, Excel right-aligns it in the cell and assigns it a General format. Excel also recognizes some dates that you type; as a result, it right-aligns them in cells and formats them as dates. Information in a selected cell appears both in the cell and in the Formula Bar. For more information on formats, see Chapter 3.

# **Enter Information**

### **Enter Text**

Click a cell to select it.

Note: See Chapter 4 for details on selecting cells.

- Type text.
  - As you type, the information appears both in the cell and in the Formula Bar.
- 3 Click 🗹.
  - The cell pointer remains in the cell you selected in Step 1, and the text you typed appears left aligned.

4 Repeat Steps 1 to 3 to enter other text labels.



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# **Getting Started with Excel**

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### Enter Numbers

Select a cell and type a number.

- Press Enter.
  - The number you typed appears right aligned in the cell you selected in Step 1.
  - The cell pointer moves down one row.
- 3 Repeat Steps 1 and 2 to enter other numbers.

## Enter Dates



- Type a date in mm-dd-yy format, separating the parts of the date with either dashes (-) or slashes (/).
- 3 Press Enter.
  - The date you typed appears right aligned in the cell you selected in Step 1.
  - The cell pointer moves down one row.
- 4 Repeat Steps 1 to 3 to enter other numbers.



### Can I edit or delete the information that I type in a cell?

Yes. You can edit the information either as you type it or after you type it by pressing the F2 key on your keyboard to switch to Edit mode. To edit as you type, just press F2. To edit after you type, click the cell to select it and then press F2. To change an entry completely, enter new information as described in this section. To delete all of the information in a cell, select the cell and press Delete. To delete both information and cell formatting, see Chapter 3.

#### Why does my label in cell A1 appear truncated while my label in cell B1 seems to occupy both cells B1 and C1?

The information in both cells exceeds their column widths. When an empty cell such as C1 appears beside a cell containing an over-large entry such as B1, information seems to occupy both cells. However, Excel actually stores all of the information in cell B1; look at the Formula Bar as you select cell B1 and then cell C1. The information in B1 is also hiding part of the over-large entry in A1. To view all of an over-large entry on the worksheet, widen the column. See Chapter 6 for details.

# Undo and Redo

ou can use the Undo feature in Excel to recover from editing mistakes that might otherwise force you to re-enter data. The Undo feature in Excel is cumulative, meaning that Excel keeps track of all of the actions you take until you close the program. When you use the Undo feature, Excel begins by reversing the effects of the last action you took. If you undo four times, Excel reverses the effects of the last four actions you took in the order you took them. For example, suppose that you edit a text label and remove some characters. If you undo the action, Excel reinserts those characters.

The Redo feature works like the Undo feature, but in reverse. After you undo an action, you can redo it. If you undo several actions in a row, you can redo all of them, in the order you undid them. For example, if you undo typing and then the effects of resizing a column, when you use the Redo feature, Excel first restores the effects of resizing the column. If you then immediately use the Redo feature again, Excel restores the typing.

## **Undo and Redo**

Perform an action.

In this example, text is typed.

2 Perform another action.

In this example, italics are added.

Note: See Chapter 3 for details on adding italics.

3 Click the Undo button 🗐.

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# Getting Started with Excel

Excel reverses the last action.

In this example, Excel removes italics.

If you click Undo again in this example, Excel removes the text.

4 Click the Redo button 💽.

 Excel reverses the effect of undoing by adding back your last action. In this example, Excel reapplies italics.

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# Can I undo more than one action at a time?

Yes. Click beside to display the list of actions you can undo. Click the oldest action you want to undo, and Excel undoes all of the actions from the oldest one you select to the latest, showing you the worksheet at the point in time before you took any of those actions.

# Can I redo more than one action at a time.

Yes. The Redo feature works the same way as the Undo feature. To be able to redo more than one action at a time, you must undo multiple actions before you redo. Then, click beside to display a list of actions you can redo. Click the oldest action, and Excel redoes all of the actions from the oldest to the latest.

#### Why is the Redo button unavailable when the Undo button is available?

Excel keeps track of all actions you take in all open workbooks and makes those actions available to undo until you close Excel. The 💌 button will not be available unless there are actions to redo, and actions to redo do not become available until you undo an action. If you then click 💽 to redo the action you undid, then 🕅 becomes unavailable because there are no more actions to redo.

# Move Around in a Worksheet

ou can use arrow keys to move around a worksheet, moving the cell pointer up, down, left, or right one cell at a time. If you hold down an arrow key, Excel moves the cell pointer repeatedly in the direction designated by the arrow key. You can also move one screen at a time using the Page Up and Page Down keys.

To quickly move to the first or last cell in a range, you can take advantage of the End key. You use the End

key in combination with the arrow keys to move the cell pointer to the top or bottom cell in a column, or the left or right cell in a row. When you use the End key, Excel displays "End Mode" on the Status Bar to alert you that the cell pointer will move to the first or last cell in the direction of the arrow key you use.

When you know the address of the cell in which you want to work, you can move directly to that cell using the Go To dialog box.

A .....

# Move Around in a Worksheet

Click a cell.

Excel displays the cell pointer in that cell.

**2** Press the right-arrow key on the keyboard.

• Excel moves the cell pointer one column to the right.

You can press any arrow key to move the cell pointer one cell in that direction.

You can press and hold an arrow key to repeatedly move the cell pointer in that direction.

**3** Press the End key.

The Status Bar displays "End Mode."

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# **Getting Started with Excel**

- Press the up-arrow key.
  - Excel moves the cell pointer to the first cell in the column containing information.

You can use the End key with any arrow key to move to the first or last cell in the row or column containing information.

You can press Ctrl+Home to move to cell A1.

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14	12/2/2007		Internet	Customer Service		Existing	-
15	12/2/2007		Internet	Customer Service		Existing	-
16	12/2/2007		Internet	Customer Service		Existing	-
17	12/2/2007		Package	Customer Service		Existing	-
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22	12/2/2007	59.95	TV	Customer Service	East Valley	New	
23	12/2/2007	59.95	TV	Customer Service	East Valley	Existing	
24	12/2/2007	52.95	TV	Customer Service			
25	12/2/2007	58.95	TV	Customer Service	Phoenix	Neo	
26	12/2/2007	59.95	TV	Customer Service	Phoenix	Existing	
27	12/2/2007	59.95	TV	Customer Service	East Valley	Existing	
28	12/2/2007	59.95		Direct Sales	East Valley	Existing	
29	12/2/2007	59.95		Customer Service	Phoenix	Existing	
30	12/2/2007	59.95	TV	Customer Service		New	
31	12/2/2007	59.95	TV	Customer Service		Existing	
32	12/2/2007	59.95	TM .	Customer Service	East Malley	Existing	

So To

Go to:

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The Go To dialog box appears.

- 6 Type a cell address.
- 7 Click OK.

Excel moves the cell pointer to the address you typed.



#### What happens if I click the Special button in the Go To dialog box?

Excel displays the Go To Special dialog box, where you can set special conditions for Excel to use to go to a particular cell. For example, if you select the Comments option, Excel selects all cells that contain comments. If you select the Formulas option, Excel selects all cells that contain formulas.

#### Where does Excel place the cell pointer when I move a screen at a time?

The cell pointer remains in the same relative position on the screen when you press the Page Up or Page Down keys. For example, if D10 is the active cell while viewing rows 1 to 27 and you press the Page Down key, then Excel displays D37 as the active cell. However, the cell pointer does not move if you click in the horizontal scroll bar.

# What happens when I press the Page Down key?

OK Cancel

2 8

Excel displays the next page of rows. For example, if you are viewing rows 1 to 27 on one screen and you press the Page Down key, then Excel displays rows 28 to 54.

#### Is there an easy way to move one screen to the right or left?

Yes. You can click a blank area in the horizontal scroll bar that runs across the bottom of the screen. Part I

# Move Around in a Workbook

ou can move between the worksheets in a workbook using the tabs and controls at the bottom of the Excel screen. By default, a workbook contains at least three worksheets and you can switch between them. If your workbook contains more than three worksheets, it is possible that the tabs for all worksheets will not be visible at all times. You can use the controls to the left of the worksheet tabs to scroll through hidden worksheets. The first and last controls scroll all of the worksheet tabs to display the first and last worksheets, respectively. The middle controls scroll to display the next worksheet tab in the direction of the control's arrow.

# How can I make more worksheet tabs visible at all times?

STER

Resize the horizontal scroll bar by moving the mouse pointer over the left edge of the horizontal scroll bar. When the resizing mouse pointer (+|+) appears, click and drag to the right. Excel makes more space available for worksheet tabs and less for the horizontal scroll bar.

# Move Around in a Workbook

- Open a workbook.
  - Excel displays the first worksheet in the workbook or the last sheet you viewed before saving the workbook.
- Click a worksheet tab.

- Excel displays that worksheet.
- To display additional worksheet tabs, you can click these controls.





Getting Started with Excel

chapter

# Manage the Status Bar

ou can add elements to, or remove elements from, the Status Bar to display many different types of information. When you open a blank workbook, the Status Bar displays the cell mode, the macro recording state, the View shortcuts, the zoom factor, and the zoom slider. The Status Bar is actually set to display a wide variety of information, if conditions are right to display the information. For example, if you press the Scroll Lock key on the keyboard, Excel displays the state of the Scroll Lock key on the Status Bar. The cell mode that appears by default in all workbooks switches between four states. *Ready mode* is a general state, and the state that appears when no other state is appropriate. *Enter mode* appears as soon as you start typing in a cell, and Excel returns to Ready mode after you press Enter to store the information in the cell. When you edit any cell entry, *Edit mode* appears on the Status Bar. *Point mode* appears on the Status Bar when you point to cells that you want to include while setting up a formula.

# Manage the Status Bar

- Right-click the Status Bar.
  - Excel displays the Customize Status Bar menu. Each item with a check mark (v) beside it will appear on the Status Bar under appropriate conditions.

2 Click an item that does not contain 🗹.

- Excel can now include that item on the Status Bar.
- If appropriate conditions exist, the item appears immediately on the Status Bar.
- 3 Click anywhere on the worksheet to hide the Status Bar menu.

