The Quick Access Toolbar and File Menu

Excel's user interface does not rely on multiple toolbars and menus as past versions have. Instead, it offers a cleaner, more intuitive, tab-based layout. An important component of the interface is the Quick Access Toolbar (or the QAT for short). The Quick Access Toolbar is fully customizable and gives you access to the features that you rely on the most.

In this lesson, you will learn all about the QAT. You will learn about the default buttons, how to add and remove buttons, how to change the icon size, and how to customize the toolbar.

We will also explore the File menu, which offers the Backstage view. With this view, you can manage settings that control the file itself, not the components within the file.

The Default QAT Commands

The Quick Access Toolbar is located in the upper left of the Excel screen, just to the right of the Excel icon.

The QAT has three commands. From left to right, they are Save, Undo, and Redo.

Save   If you click this command while editing a previously saved file, Excel will
save your changes, just as if you were to click File $\rightarrow$ Save.

If you opened a new file, performed some actions, and then clicked Save, you would be prompted to give the file a name and save location.

Undo   If you did something you didn't mean to, such as added the wrong
                    formatting, formula, or deleted something, use the Undo command to
                    revert one change at a time.

                    Click the pull-down arrow and select an action to undo up to and
                    including that change. For example, consider these actions. The most
                    recent action is at the top of the list:
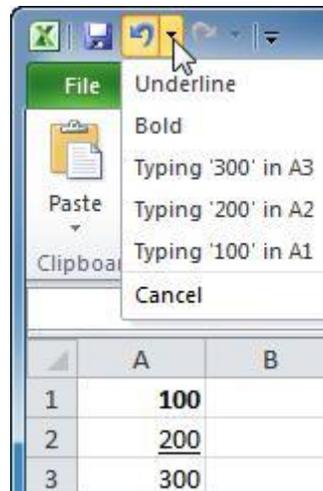
                    If you clicked "Typing '300' in A3," then the two formatting
                    commands would be undone and the typing in A3 would be erased.

Redo   Use the Redo command to "undo an Undo." If you undid an action, use
                    Redo to redo that action. As with the Undo command, you can click the
                    pull-down arrow to redo many things at once:
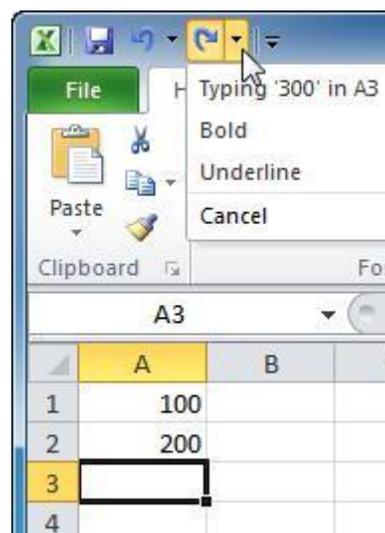
Adding Commands

If you want to customize the QAT, chances are you will add commands that are readily available on the ribbon, such as number formatting or text/data filtering. To add a command to the QAT, right-click the command and then click Add to Quick Access Toolbar.

For example, if you wanted to add currency formatting to the QAT, right-click the command and click Add to Quick Access Toolbar:
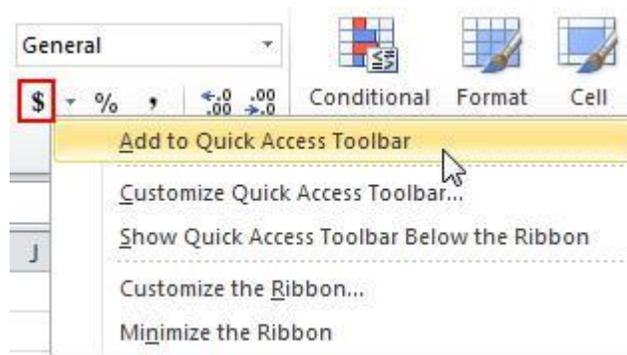
The formatting command will be added to the right-hand side of the QAT:

Many commonly-used commands can be easily added to the QAT by clicking the pull-down arrow to the right of the QAT. Select an option by clicking it; this will add a check mark beside that command and place it in the ribbon. Notice how Save, Undo, and Redo are already checked:
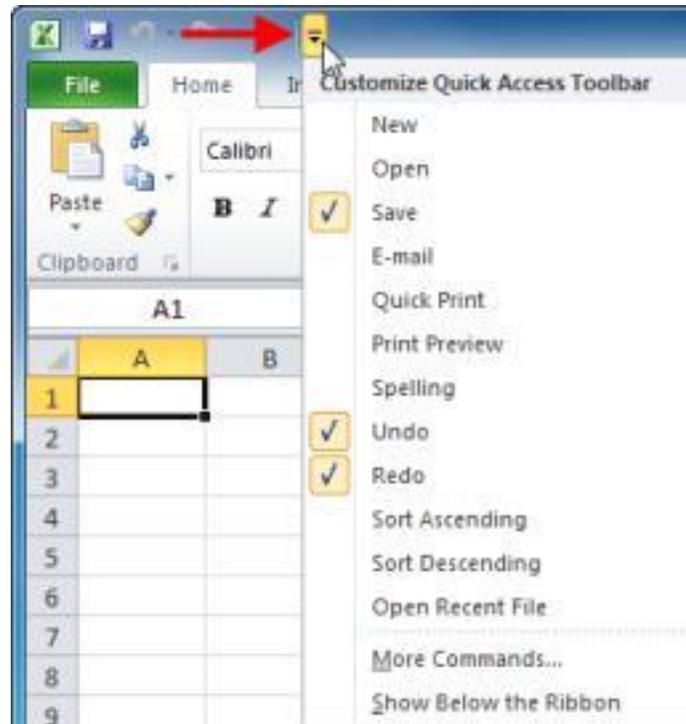
Removing Commands

To remove commands from the QAT, right-click any command and click Remove from Quick Access Toolbar:
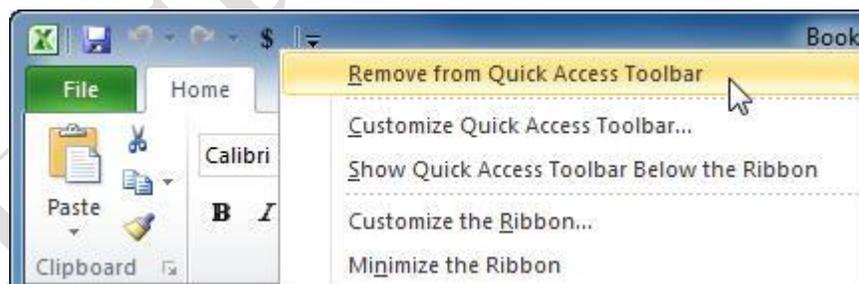
You can also remove commonly-used commands by clicking the pull-down arrow beside the QAT. Click any checked item; this will remove the checkmark and the command.

Customizing the Toolbar

The QAT is 100% customizable. You can reposition it, add any command you want, or remove all commands.

To move the QAT, click the pull-down arrow to the right of the toolbar and click Show Below the Ribbon:
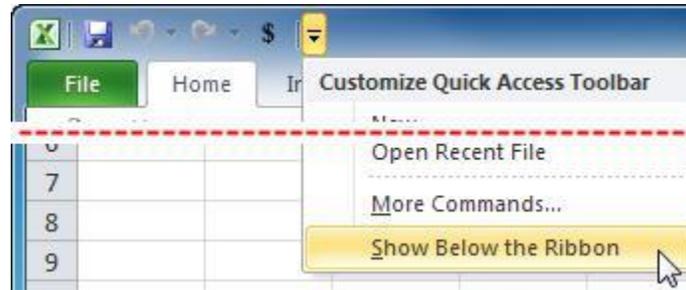
This will add the QAT between the ribbon and the Name/Formula bars:
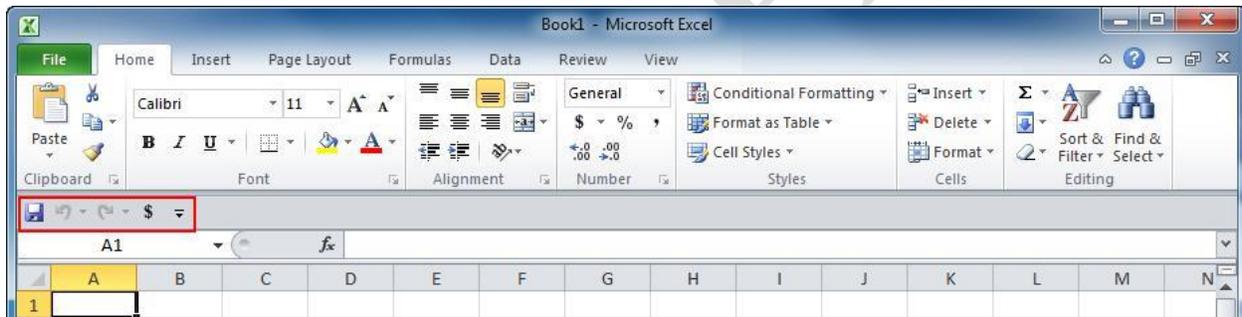
To move the toolbar back to the top, click the pull-down arrow again and click Show Above the Ribbon. We recommend you keep the QAT at the top because it already fits into the title bar for Excel. Putting it below the ribbon actually takes up more space on your screen.

To customize the QAT with more commands, click the pull-down arrow beside the toolbar and click More Commands:
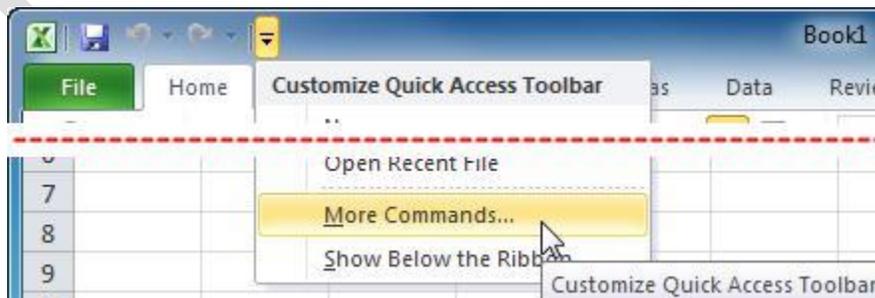
You can also click File → Options. When the Excel Options dialog opens, click the Quick Access Toolbar link on the left:
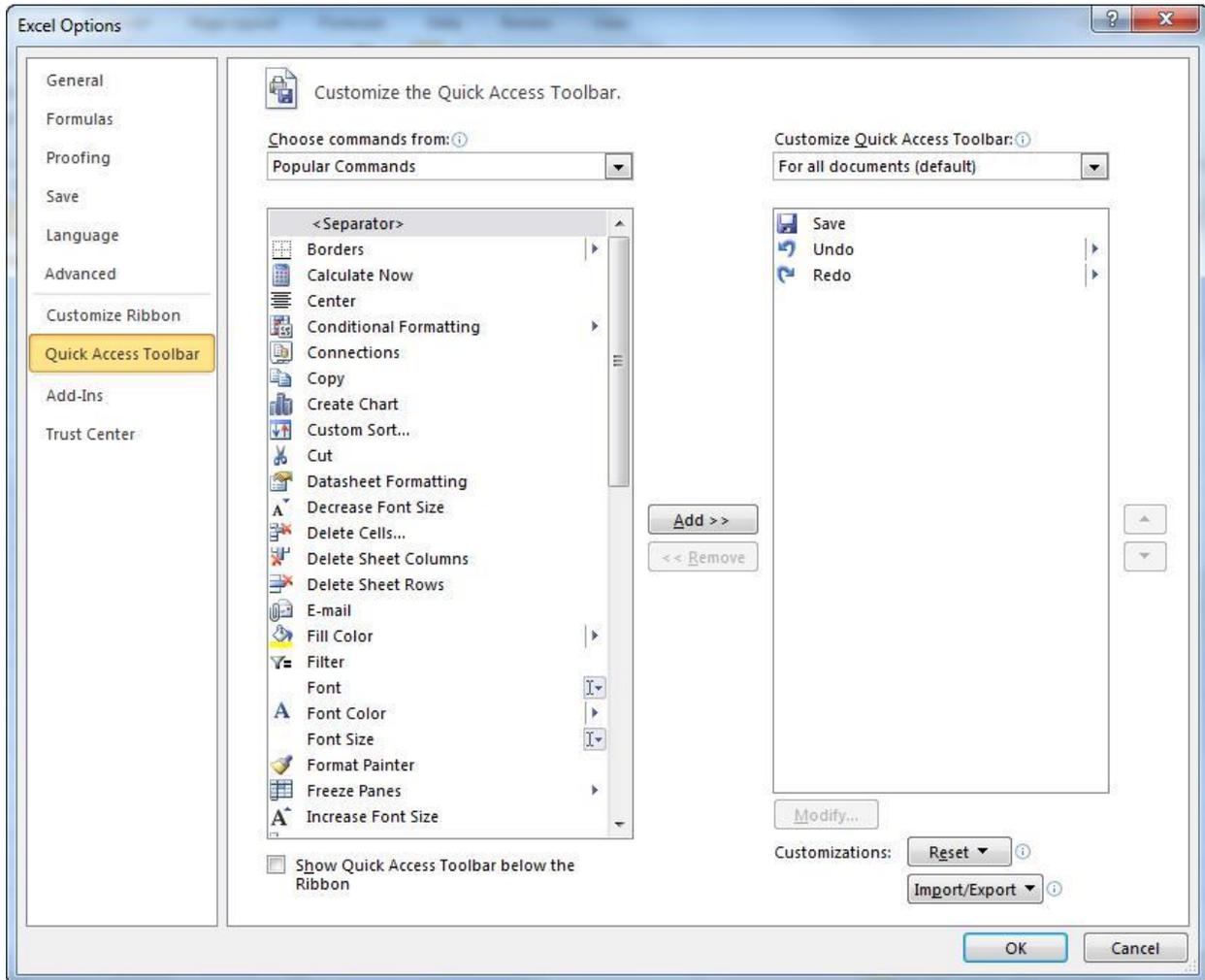
The list of Popular Commands contains mostly those commands that are already found in the ribbon. You can change which group of commands to see by clicking the "Choose commands from" combo box and selecting an option:
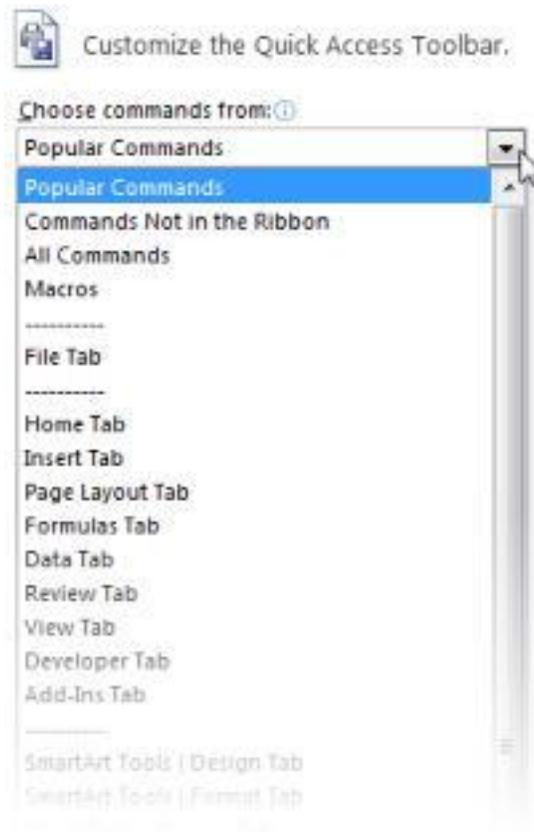
To add commands, select a command from the list on the left and click Add. The command will be added to the bottom of the list on the right. Note that you can also add <Separators> to help organize whatever commands you will add to the QAT.

Once commands and/or separators are added, you can organize them using the small up and down buttons on the far right. Items at the top of the list are shown on the left of the QAT.

For example, here we are adding the Create Chart command:
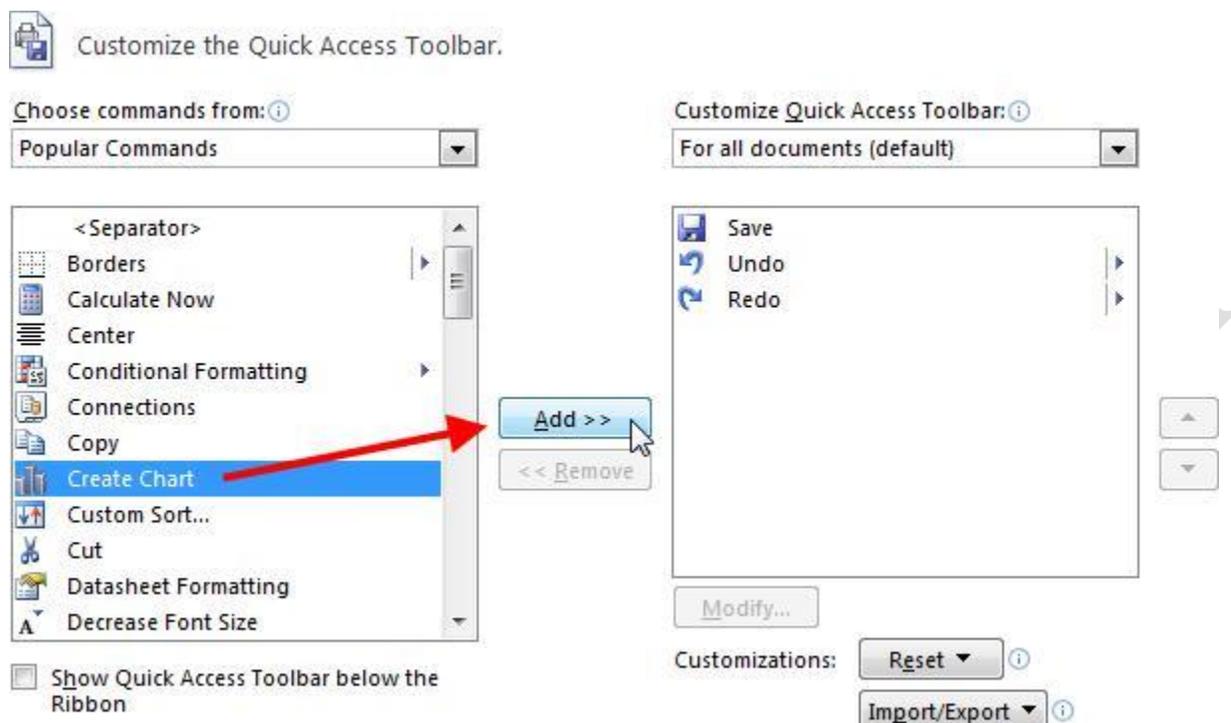
Once the command is added, we will move it up two positions using the Move Up button:
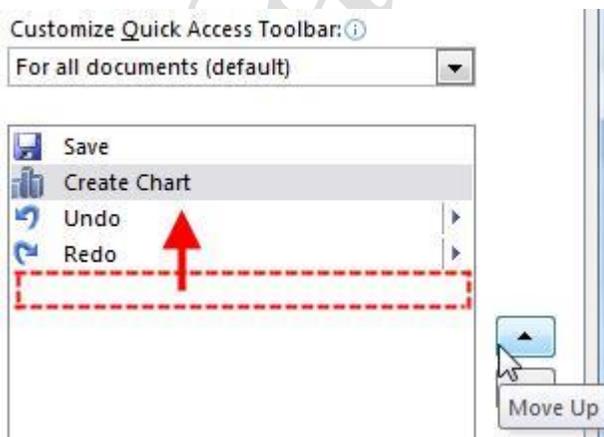
Click OK to commit the changes. The QAT will be updated:

As you become more experienced with Excel, you may find that you frequently use the same group of commands for a certain file, but not other files. **Excel lets you save certain QAT customizations for use with a specific file.** To do this, open the file you use frequently. Click File

☐ Options ☐ Quick Access Toolbar. Make your customizations to the QAT and then select the file name from the Customize Quick Access Toolbar:
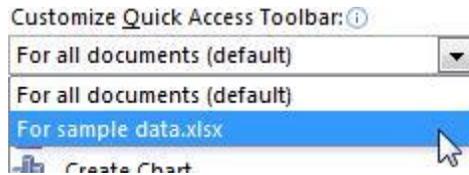
Click OK to confirm the change. Now each time you open this file, the QAT customizations will be applied.

To reset the QAT back to its default, click File → Options → Quick Access Toolbar → Reset only
Quick Access Toolbar:
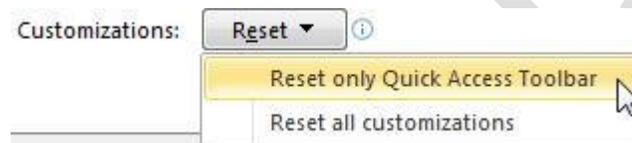
Using the File (Backstage) Menu

The File menu is a new addition to Excel 2010. This menu lets you modify your workbook as a single entity, rather than making changes to the data contained within the workbook. You can preview your file, print it, make changes to file properties, share the file with others, and more, all using the File menu.

Click the File tab. This will open the Backstage view:
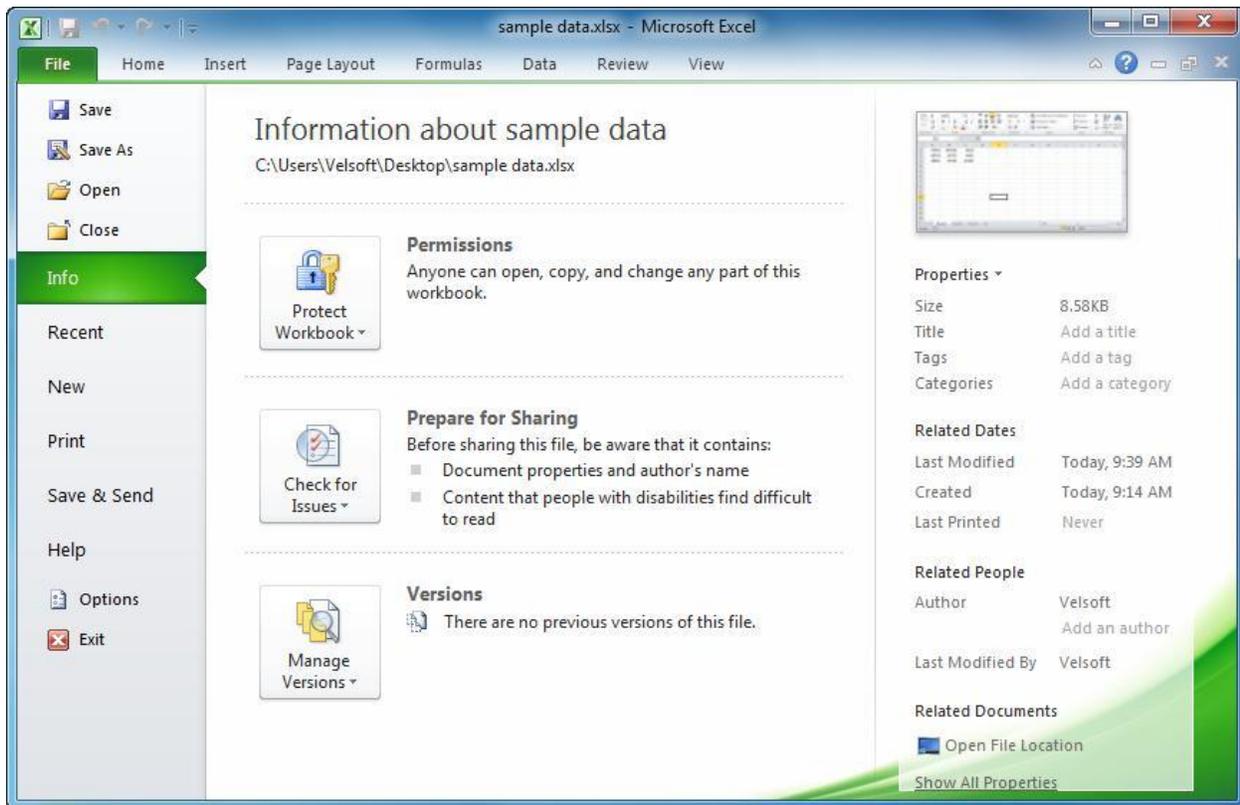
Let's go over the main categories available on the left. As we progress further through this manual, we will expand more on some of these options:

File Management   These are options we have already explored:

      ☐ **Save** will save changes to an open file.

      ☐ **Save As** lets you save an existing file under a new name, location, and/or file format.

      ☐ **Open** will open a worksheet.

      ☐ **Close** will close the current worksheet without closing Excel.

Info   Displays vital statistics about the current file. You are also able to modify read/write permissions, check for compatibility issues with other programs, and manage versions of this file. The document properties are listed on the far right.

Recent   Lists recently-opened files; click a workbook to open it and/or pin recent documents to this list. Note the checkbox at the very bottom of the list:

Recover Unsaved Workbooks

☐ Quickly access this number of Recent Workbooks: 4 ⏶⏷

If you click this checkbox, the first few workbooks in the Recent list (default 4) will be shown under the File Management area:
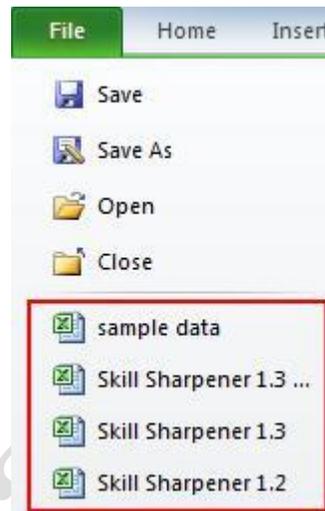
New   Create a new blank workbook or choose from a number of installed templates. More templates are available via download from Office.com. To create a new blank file or a file from a template, select an option and click Create:
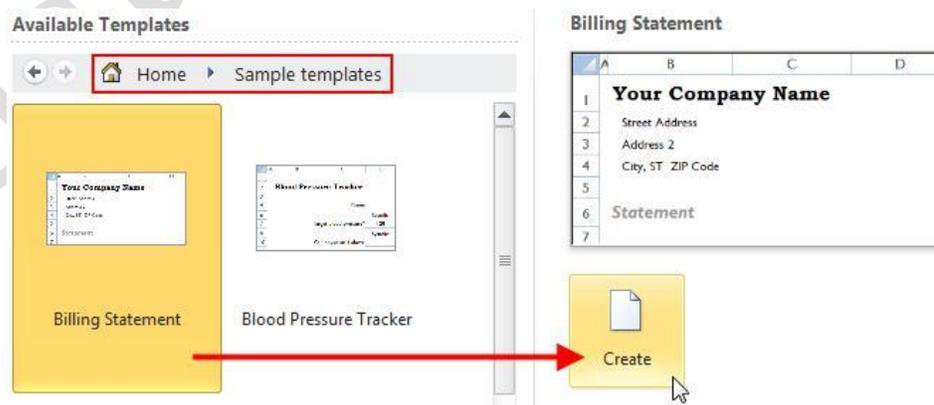
Print   Excel 2010 features an all-in-one printing location. Select your printing
options on the left, and see what the printed page will look like on the
right:
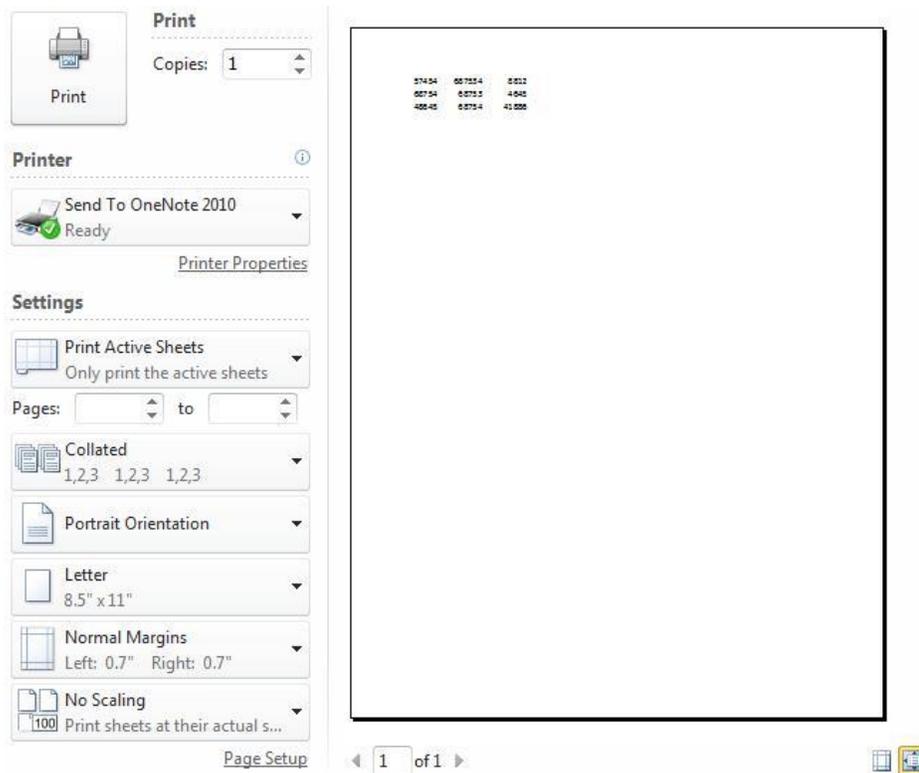
Save & Send   Collaboration was a major design consideration when Office 2010 was in
production. Although many of the sharing options here are beyond the
scope of this manual, the major ones are explained below. We will
discuss some of them later:

☐ **Send Using E-mail:** Send the workbook via e-mail or send a link,
provided the recipient is part of the same network.

☐ **Save a workbook in PDF/XPS format:** These two file formats
are
widely used and easy to e-mail.

☐ **Save to Windows Live SkyDrive:** Online file-sharing service.

☐ **Save to SharePoint:** A combination of a central repository Web
site and other collaboration tools.

☐ **Publish to Excel Services:** Make all or part of this workbook
available to view/edit through a Web browser or SharePoint.

☐ **Change the file type:** Same as Save As command.

Help   Here you can open the Help file, learn about new Excel 2010 features, view Excel options (same as next item), check for program updates, and view program information:

Options   Opens the Excel Options dialog. Here you can view and modify the more
                     specific and background options in Excel. Choose a category on the left
                     and then modify options on the right:
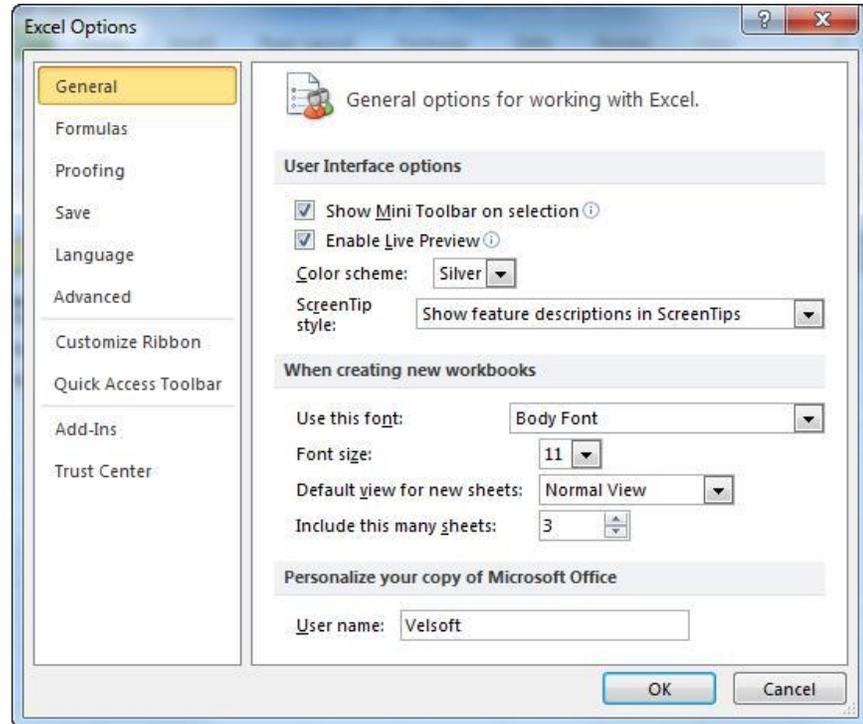
Exit   Closes the program. You will be asked to save any changes to opened
                     documents if you haven't already done so.