

5. Recording and Using Macros

In this lesson, you will learn...

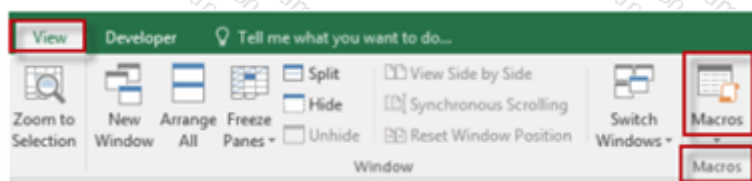
1. To record macros.
2. To run macros.
3. To edit macros (kind of).
4. To add macros to the **Quick Access Toolbar**.

As you work with Excel, you may find that you repeat certain operations frequently. Instead of performing each step of the operation, you can create a macro that stores these steps. You can then run the macro, or let Excel perform the steps for you, saving you both time and effort.

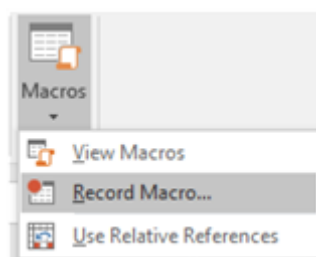
Recording Macros

To record a macro in Microsoft Excel:

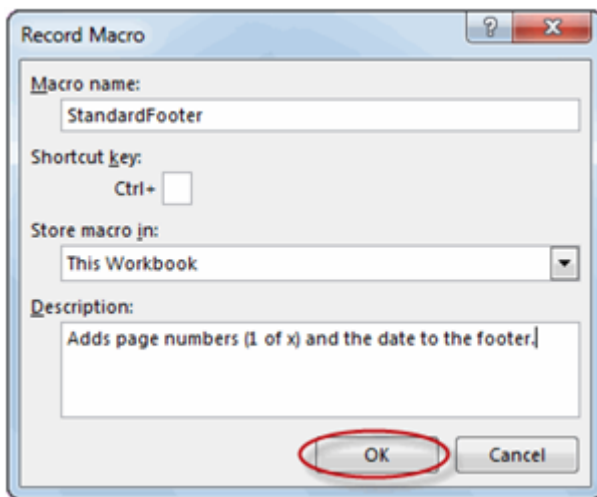
1. On the **View** tab, in the **Macros** group, click the **Macros** command:



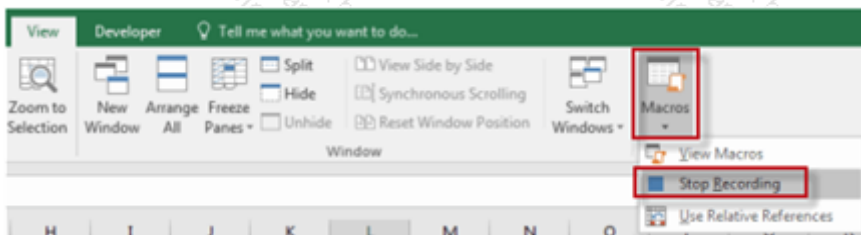
2. Click **Record Macro** :



3. In the **Record Macro** dialog box:
 - A. Enter a **Macro name** . Choose a name that clearly identifies the macro. You cannot use spaces.
 - B. Enter a **Shortcut key** . You will be able to run the macro using this shortcut key.
 - C. Choose where to store the macro. You will normally accept the default (**This Workbook**).
 - D. Enter a **Description** . Briefly explain what the macro does.
 - E. Click **OK** .



4. After clicking **OK** , every keystroke is recorded.
5. To stop recording, on the **View** tab, in the **Macros** group, click the **Macros** command and then click **Stop Recording** :

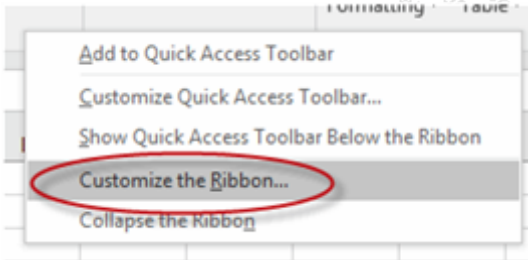


Watch and follow along as your instructor demonstrates how to record a macro.

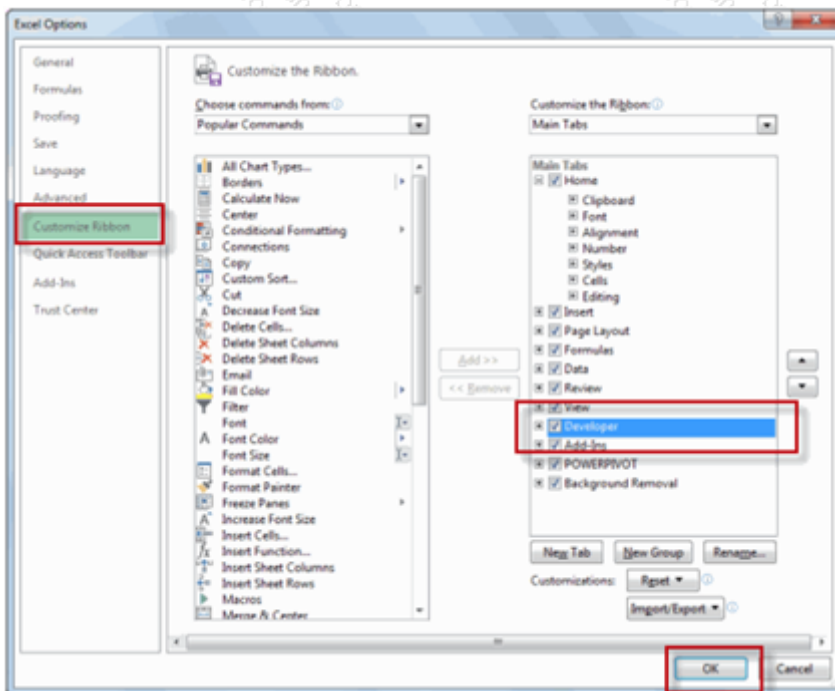
Copy a Macro from Workbook to Workbook

You can copy macros to different workbooks. First you need to ensure the **Developer** tab is active on the Ribbon. To add it:

1. Right-click the Ribbon and select **Customize the Ribbon**.

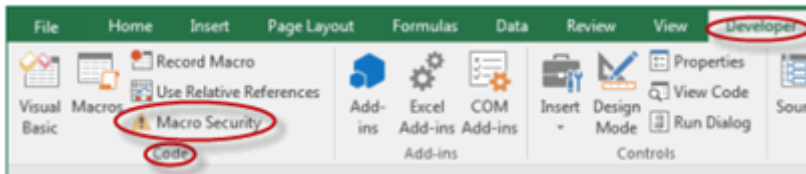


2. Select **Customize Ribbon**, and on the right, select the **Developer** check box and click **OK**.

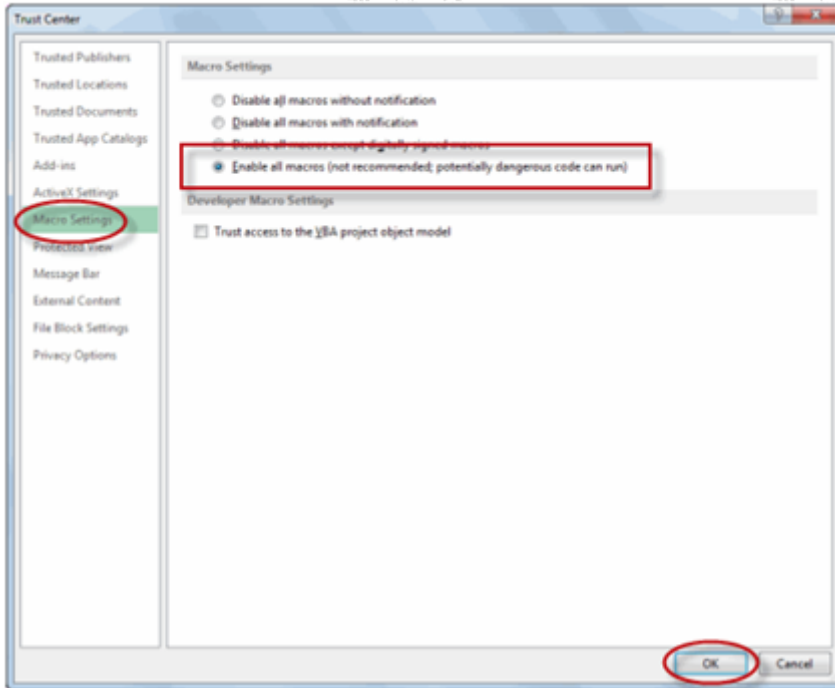


Now you need to enable and copy the macros:

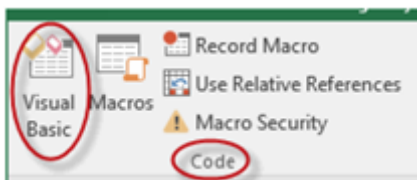
1. Select the **Developer** tab, and select **Macro Security** from the **Code** group.



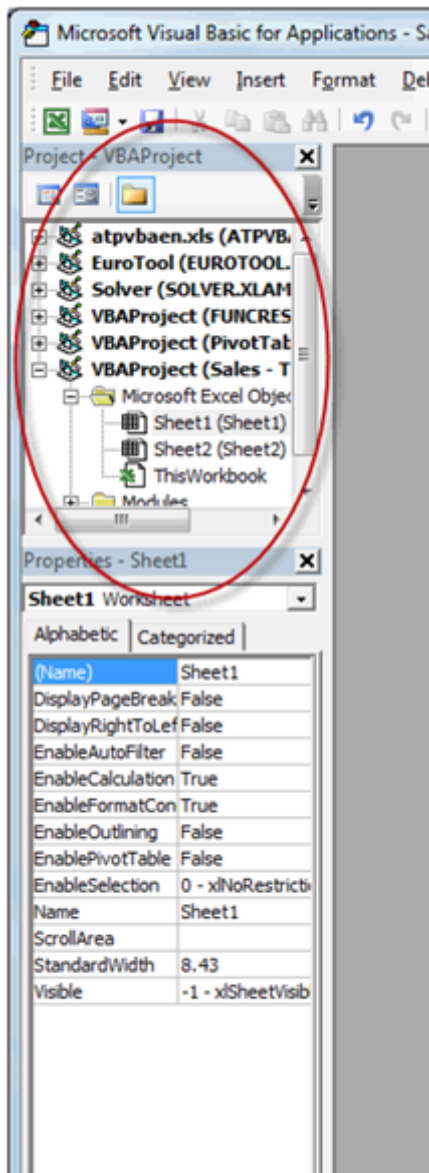
2. Under **Macro Settings**, select **Enable all macros** and click **OK**.



3. Open both the source and destination workbook.
4. Select the **Developer** tab, and select **Visual Basic** from the **Code** group.



5. From the **Project Explorer** pane, press **Ctrl** and drag the module from the source to the destination workbook.



6. Close the Visual Basic window and save the workbook.

Exercise 12 Recording a Macro

10 to 20 minutes

In this exercise, you will record a macro that adds a custom header and footer to a Microsoft Excel workbook.

1. Open Macros.xlsx from your Excel2016.3/Exercises folder.

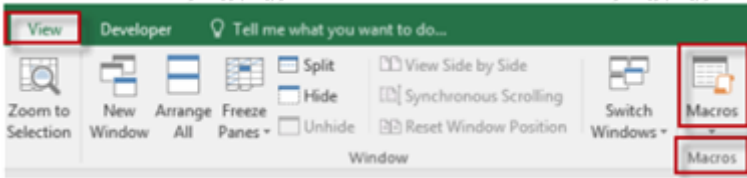
- 2.

Record a macro named CustomHF to add a custom header and footer to your workbook. Specifically, the macro should:

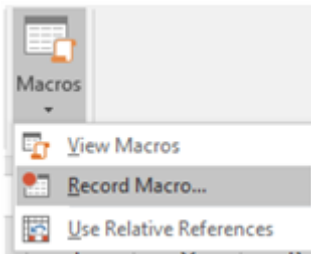
- A. Add the word "CONFIDENTIAL" in the center of the header.
- B. Add the date on the right side of the header.
- C. Add the page number to the center of the footer.

Exercise Solution

1. On the **View** tab, in the **Macros** group, click the **Macros** command:

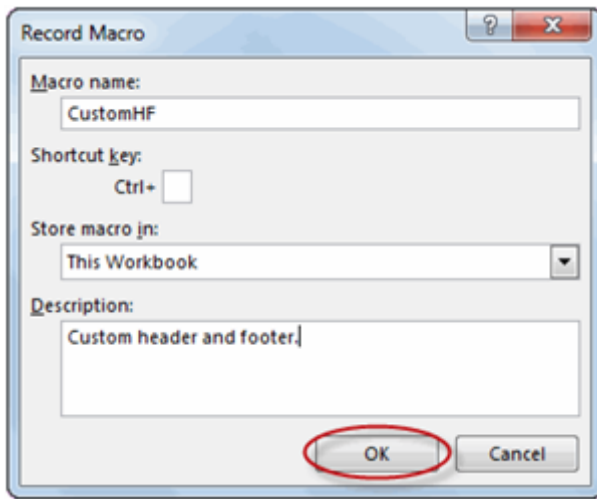


2. Click **Record Macro** :



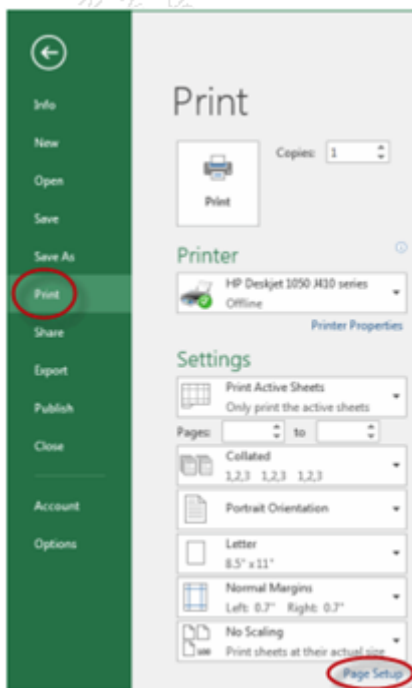
3. In the **Record Macro** dialog box:

- A. Enter the **Macro name** of "CustomHF".
- B. Enter a **Shortcut key**.
- C. Accept the default to store the macro in this workbook.
- D. Enter a **Description** such as "Custom header and footer."
- E. Click **OK**.

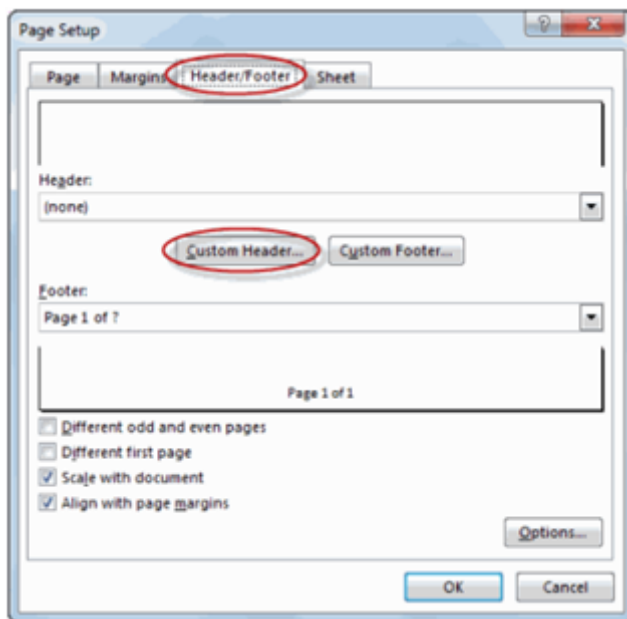


4. After clicking **OK**, every keystroke is recorded. Following are specific instructions:

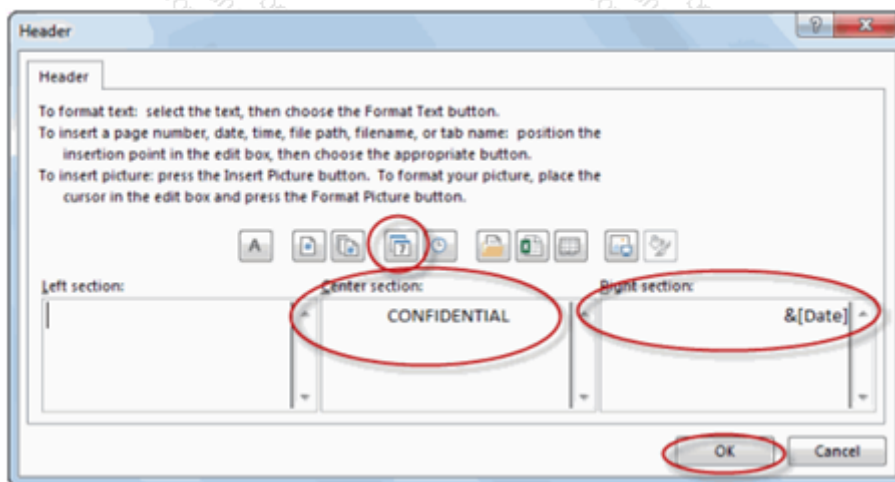
A. Click **File**, then **Print**, and then **Page Setup**:



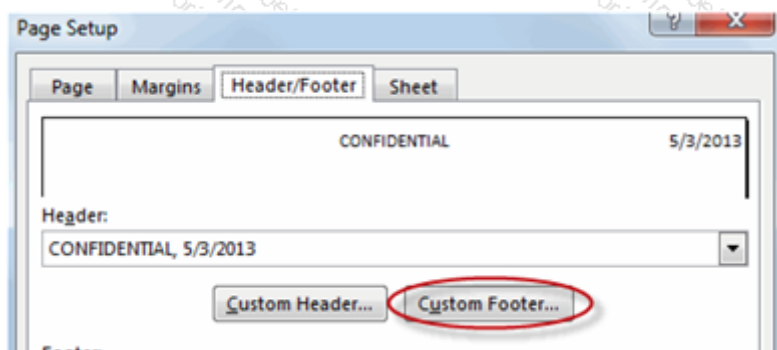
B. Select the **Header/Footer** tab and then click **Custom Header**:



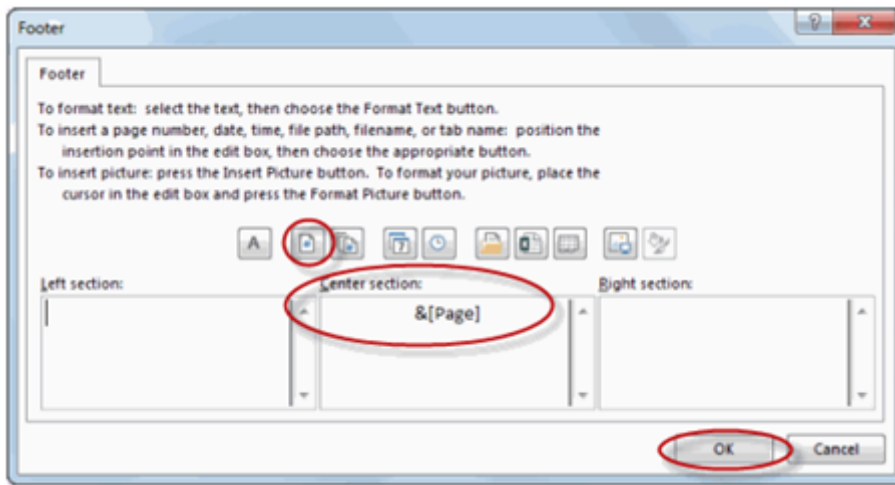
- C. Tab to or click in the **Center section** and type "CONFIDENTIAL". Then tab to or click in the **Right section**, click the **Insert Date** icon, and then click **OK** :



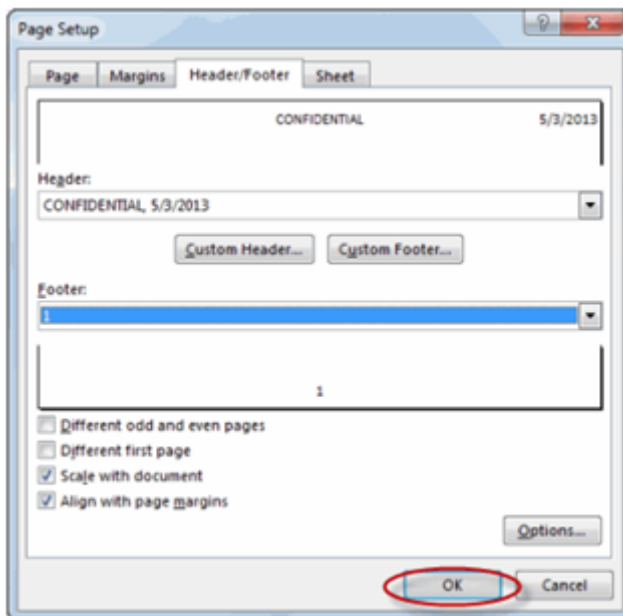
- D. Click **Custom Footer** :



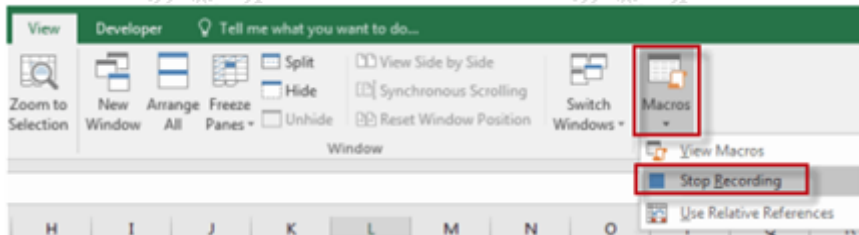
- E. Tab to or click in the **Center section**, click the **Insert Page Number** icon, and then click **OK**:



F. You are now back in the **Page Setup** dialog box. Click **OK** :



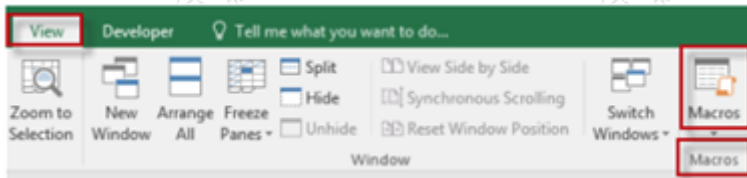
G. On the **View** tab, in the **Macros** group, click the **Macros** command and then click **Stop Recording** :



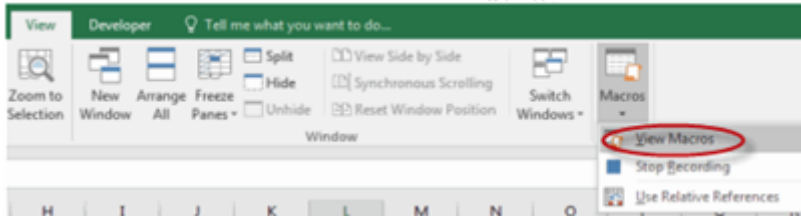
Running Macros

To run a macro in Microsoft Excel:

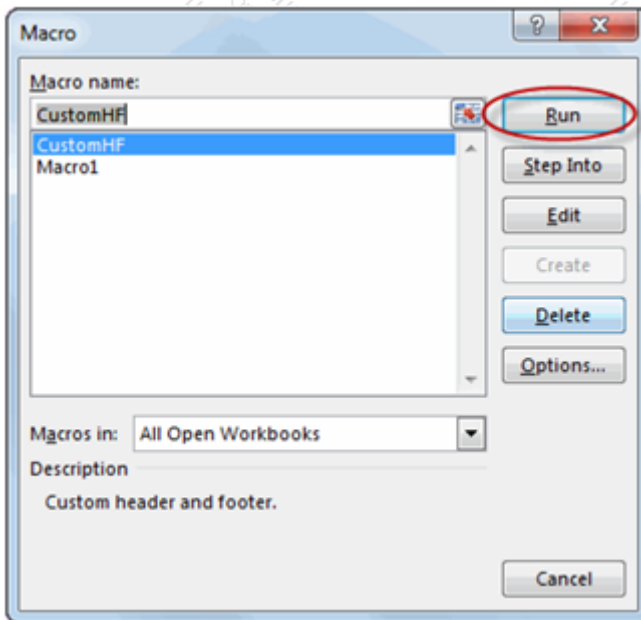
1. On the **View** tab, in the **Macros** group, click the **Macros** command:



2. Click **View Macros** :



3. In the **Macro** dialog box, choose the macro you want to run and click **Run** :



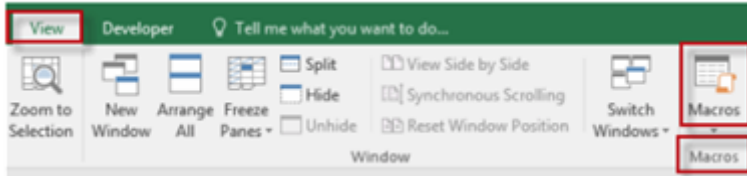
Unless they are very large, macros run very fast, meaning that almost immediately after clicking **Run** the macro will finish executing. If the macro doesn't change anything that is readily visible, it may seem as if nothing has happened.

Editing Macros

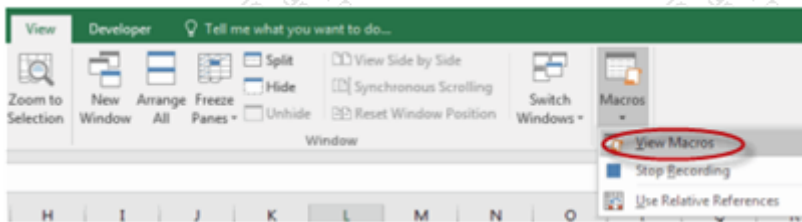
If you need to make simple changes to a macro, you can do so using Microsoft Visual Basic for Applications (VBA). The steps below briefly describe how to do this. For most Excel users, however, it is easier to record a new macro than to edit an existing macro. To learn how to write and edit complicated macros, you should take a course on VBA.

To edit a macro in Microsoft Excel:

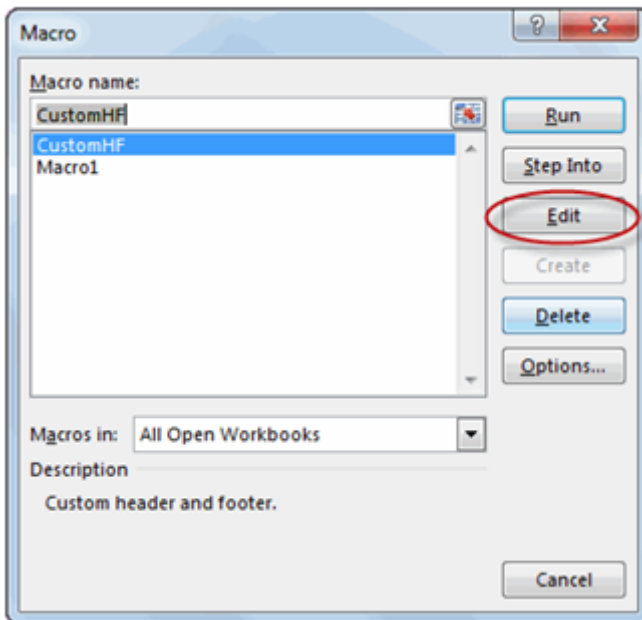
1. On the **View** tab, in the **Macros** group, click the **Macros** command:



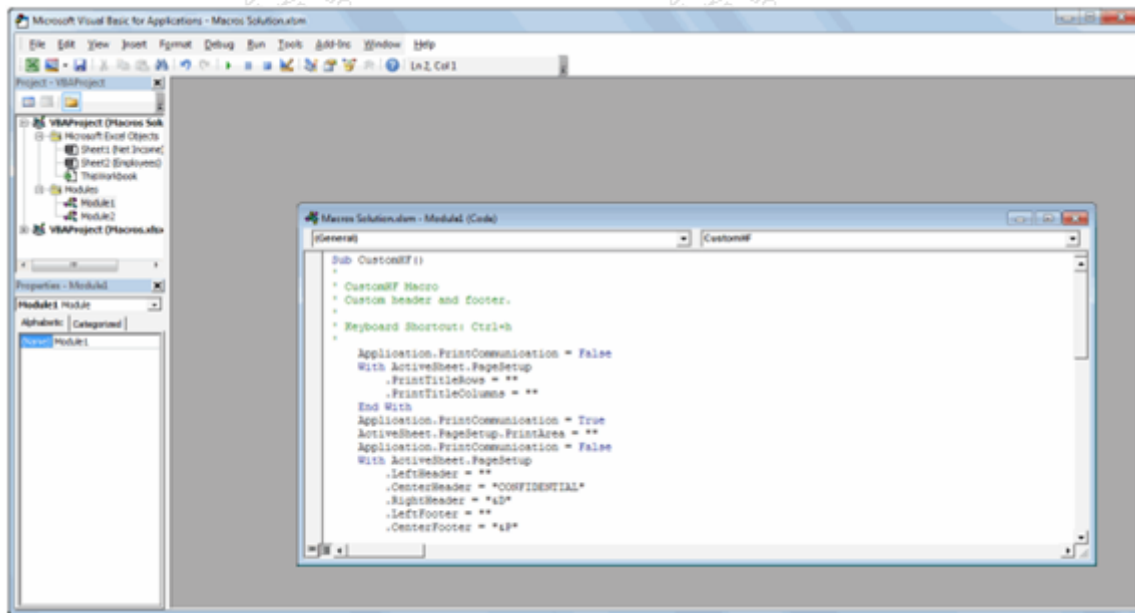
2. Click **View Macros**:



3. In the **Macro** dialog box, choose the macro you want to change and click **Edit** to open the macro in the **Microsoft Visual Basic for Applications** window:



4. You can see and edit your code in the **Microsoft Visual Basic for Applications** window:



Microsoft Visual Basic for Applications is a powerful programming language that can be used to make major customizations to Microsoft Excel and other Microsoft Office applications. Editing code is far beyond the scope of this class, but it's fun to think about just how powerful Microsoft Excel is.

Adding Macros to the Quick Access Toolbar

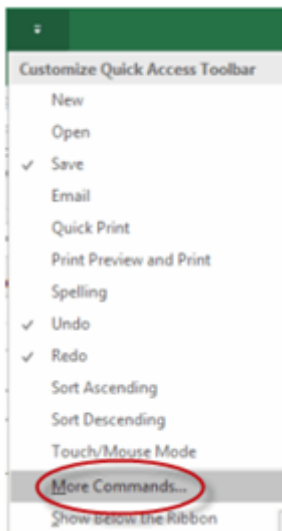
The reason to create a macro is to make it easier to complete a set of operations that you regularly perform. Given this, it is likely that you need to run the macro frequently. To make it easy to do so, you can add the macro to the **Quick Access Toolbar**.

To add a macro to the **Quick Access Toolbar**:

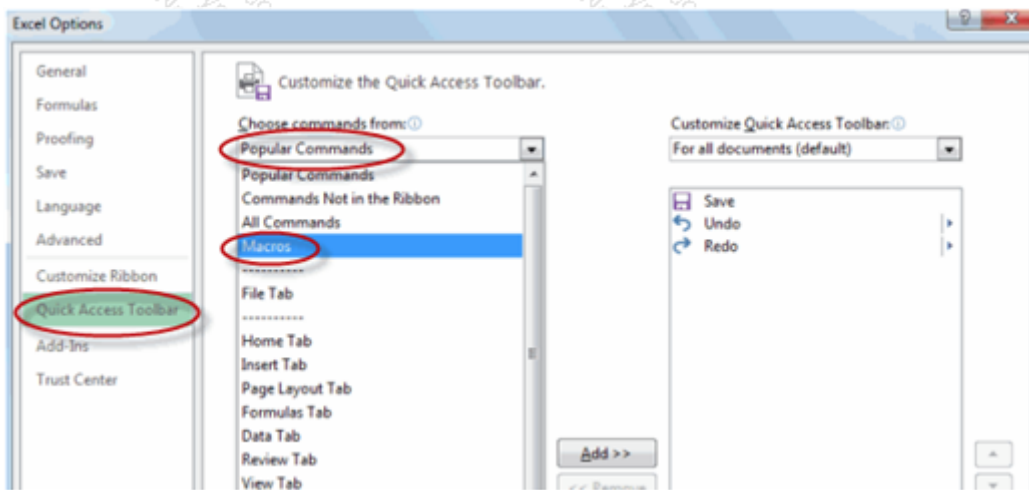
1. Click the **Customize Quick Access Toolbar** drop-down arrow:



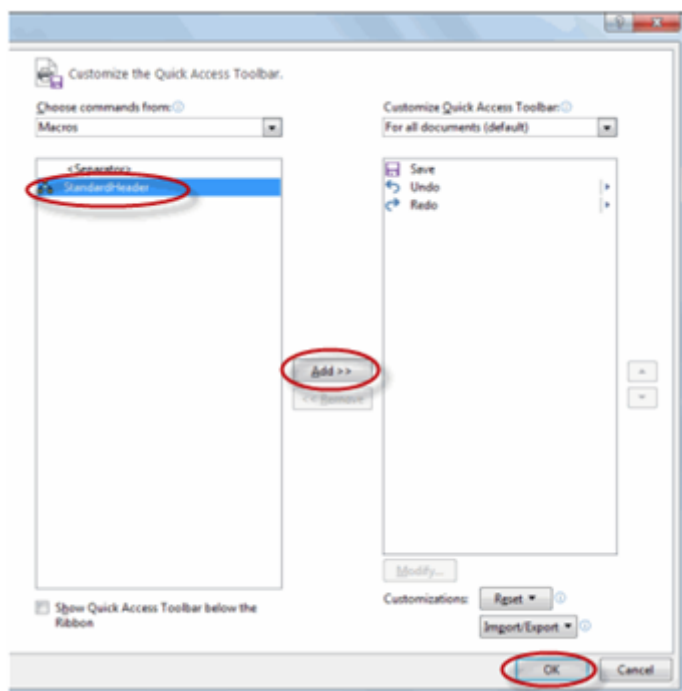
2. Select **More Commands**:



3. In the **Excel Options** dialog box on the **Quick Access Toolbar** tab, from the **Choose commands from** drop-down list, select **Macros** :



4. Select the macro you want to add to the **Quick Access Toolbar** and click **Add** and then **OK** :



5. You can now see and run the macro on the **Quick Access Toolbar** :



Managing Macro Security

When working with macros, it is important to maintain security, that is, ensure that no dangerous code is going to be run.

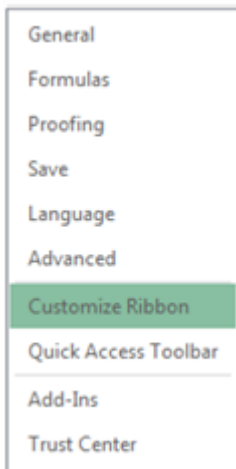
To enable security when working with macros in Excel 2016:

- 1.



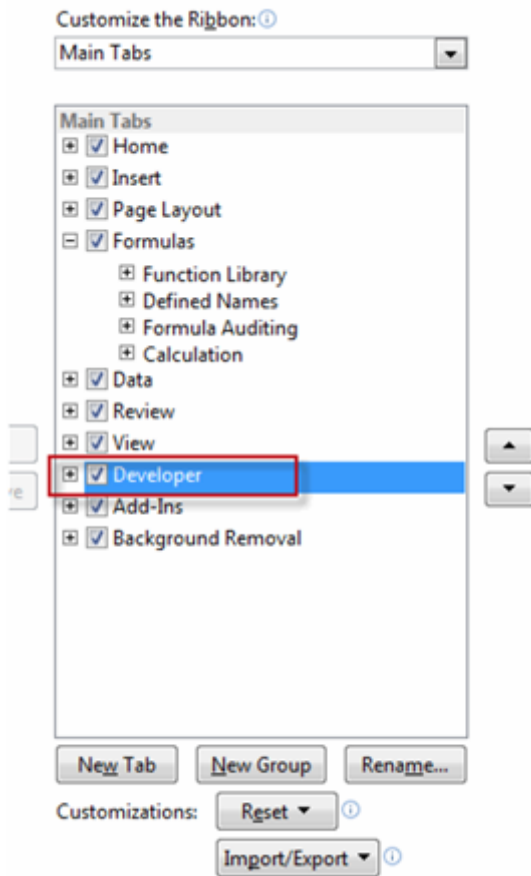
Enter Backstage View by selecting **File > Options**.

2.



In the **Excel Options** dialog box, select **Customize Ribbon**.

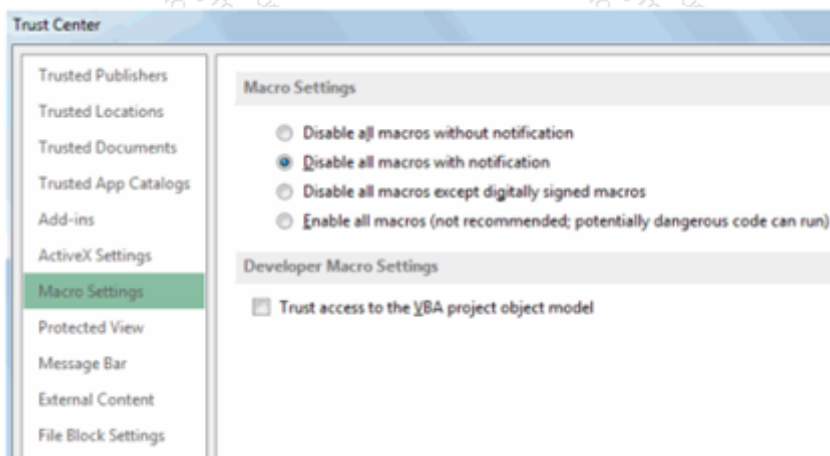
3. Under **Customize Ribbon**, on the right, check the **Developer** check box and then click **OK**.



4. Now, on the **Developer** tab, in the **Code** group, select **Macro Security**.



5. Use the options in the **Trust Center** dialog box to set security options.



Exercise 13 Adding a Macro to the Quick Access Toolbar

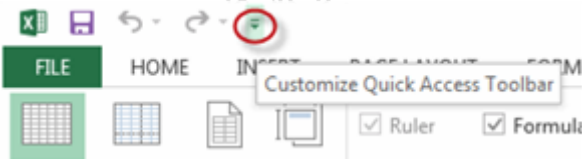
5 to 10 minutes

In this exercise, you will add a macro to the **Quick Access Toolbar**.

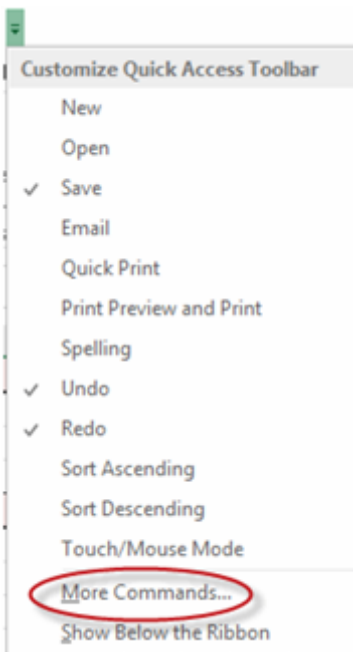
1. Open Add Macros to QAT.xlsm from your Excel2016.3/Exercises folder.
2. Add the macro named CustomHF to the **Quick Access Toolbar**.

Exercise Solution

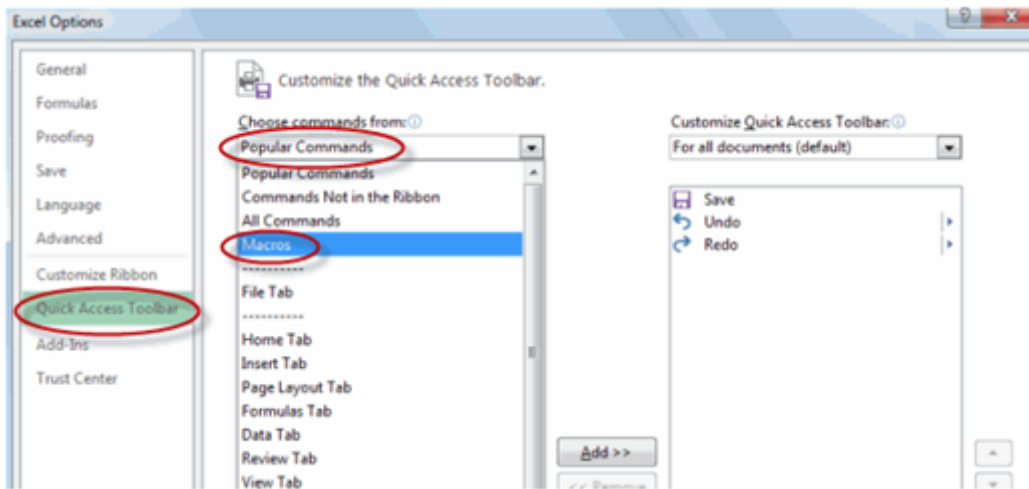
1. Click the **Customize Quick Access Toolbar** drop-down arrow:



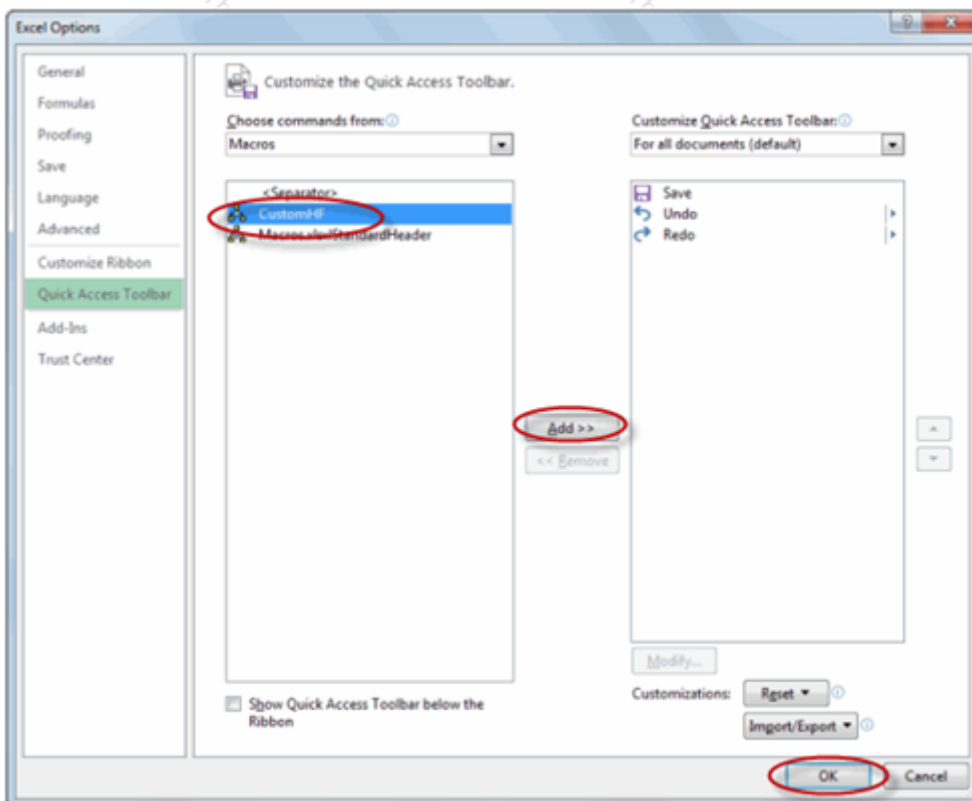
2. Select **More Commands**:



3. In the **Excel Options** dialog box on the **Quick Access Toolbar** tab, from the **Choose commands from** drop-down list, select **Macros**:



4. Select the macro named "CustomHF" to add it to the **Quick Access Toolbar** and click **Add** and then **OK** :



5. You can now see and run the macro on the **Quick Access Toolbar** :



Conclusion

In this lesson, you learned to record and run macros and how to add a macro to the **Quick Access Toolbar**.