# Microsoft Excel Advanced Class April 2017

Norwalk Community College — Extended Studies

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# How to Set up a Macro

A macro is short for macro instruction—a single instruction that expands in a set of several instructions. Whenever you have a set of tasks that you have to perform over and over again, you can save a lot of time and tedium by creating and using a macro that does the same thing.

Macros are available in all the Microsoft Office apps and work pretty much the same way. Office macros can be stored within a document or spreadsheet, which means that the macros travel with the file and can be used by anyone who uses the file. Alternatively, macros can be stored on your computer, which means that the macros can be used with all the documents or spreadsheets on your PC.

### Show the Developer Tab

To use macros, you first must show the Developer tab, which is normally hidden from Excel users.

#### Right-click any tab at the top of the Excel window

#### Choose: Customize the Ribbon…

#### On the right side of the Excel Options dialog box, check the box for Developer

### Create a Simple Macro

We’ll start by creating a simple macro that will put your name in a certain cell.

#### Open a new Excel workbook

#### Click the Developer tab

#### Click: Record Macro

#### Type a name for the macro: InsertMyName

#### Set the shortcut key as Ctrl + n

#### Confirm that the macro will be stored in This Workbook

#### Click OK

Excel is now busily recording all your keystrokes and mouse clicks.

#### Click in cell A2

#### Type your name and press Enter

#### In the Developer tab, click: Stop Recording

Your macro is now ready to use.

#### Click the “plus” button at the bottom of the window to create a new worksheet.

#### Press: Ctrl + n

Your name should appear in cell A2

#### Delete the contents of cell A2

#### Click in cell D4

#### Press: Ctrl + n

The macro will only insert your name in cell A2 of the current sheet. That is because the macro recorder is using Absolute cell references, which are precise, but not flexible.

Create a Macro with Relative References

Now we’ll do the same macro as above, but with one difference:

#### Click the Developer tab

#### Click: Record Macro

#### Type a name for the macro: InsertMyNameInCell

#### Set the shortcut key as Ctrl + m

#### Confirm that the macro will be stored in This Workbook

#### Click OK

#### In the Developer tab, click Use Relative References so that it is gray

#### Type your name and press Enter

#### In the Developer tab, click: Stop Recording

Now let’s see the difference with this macro:

#### Click any cell

#### Press: Ctrl + n

#### Press Ctrl + N a few more times

With this macro, your name will appear in the active cell, wherever that is.

### Delete a Macro

We now have two macros, but the second is more useful, so let’s delete the first one:

#### In the Developer tab, click the large Macros button.

#### In the Macro dialog box, select the macro: InsertMyName

#### Click: Delete

### Run a Macro from the Macros Dialog Box

Setting up a shortcut key with a macro is convenient but not always necessary. You can run a macro from the Macros dialog box:

#### In the Developer tab, click the large Macros button.

#### In the Macro dialog box, select the macro: InsertMyNameInCell

#### Click: Run

### Run a Macro from the Quick Access Toolbar

Another option for running a macro is to insert a macro button in the Quick Access Toolbar at the top left corner of the Excel window:

#### At the right end of the Quick Access Toolbar, click the arrow button (Customize Quick Access Toolbar)

#### Choose: More Commands…

#### Near the top of the Excel Options dialog box, click the list arrow for: Choose commands from:

#### Choose: Macros

#### Click: InsertMyNameInCell

#### Click the Add button

#### Click OK

A new button will appear at the right of the Quick Access Toolbar. You can add several macro buttons here, but unfortunately, they will all look alike. You will need to hover your mouse pointer over one to see the screen tip in order to distinguish them.

### Run a Macro from a Button

One of the hottest ways to run a macro is from a button on a spreadsheet:

#### In the Developer tab, click the Design Mode button, which turns it gray

#### Click: Insert

#### In the top left of the Form Controls section, click: Button (Form Control)



#### In your spreadsheet, click the desired position for the upper left corner of the button and drag down and to the right to set the size of the button

#### In the Assign Macro dialog box, click the macro: InsertMyNameInCell

#### Click the button and edit the caption to read: Insert Name in Selected Cell

#### Click outside the button to finish editing

#### Click the Design Mode button to turn it off

#### Now click any cell and then click the button

Macros are very powerful tools. As with any such tools, they can save you quite a bit of time. But they should always be used with care. It is usually a good idea to save your spreadsheet before using a macro the first few times.

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