In the first of a two-part class Terry Pinnell shows how easy it is to create simple macros to tackle repetitive tasks in Microsoft Word and Excel
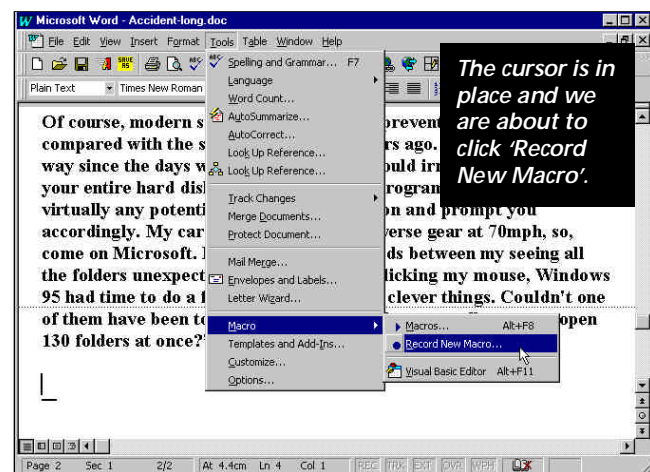
part 1

Macros
made easy

If you work with Microsoft Word for Windows or Excel, it's surprising how much time you can spend performing the same tasks over and over again. Some are really simple, such as typing your name or phone number, or entering a directory path into a dialog box to open or save a file. Yet sheer repetition can have an impact on your productivity. Other tasks might be more complex, such as editing and formatting columns or tables, and here it's all too easy to make errors, sometimes with serious consequences.

Macros can be the answer. If you've set them aside on the suspicion that they're too complicated, then I hope that by the end of this two-part class you'll have changed your mind. In this issue we'll cover the basics of recording simple macros in Word for Windows. Although we'll be using the latest version, Word 97, the steps are very similar for Word 6.0 and Word 95.
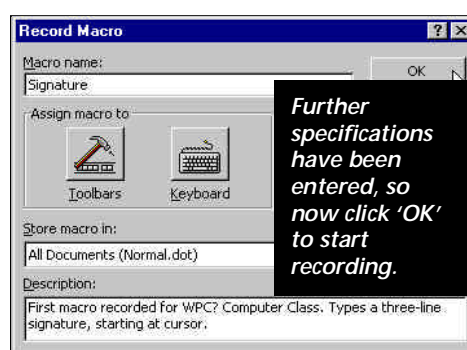
the macro recorder and the Visual Basic Editor. The first of these is the only sensible approach for anyone but an expert, and it's the one we'll concentrate on here. Word records the macro as a series of Word commands written in its Visual Basic for Applications programming language. So the alternative method is to use the built-in Visual Basic Editor to create flexible macros that include instructions you can't record. In practice, even skilled users rarely use the second method from cold. The best approach is to start with the macro recorder and then edit the result if you need to add further steps and enhancements later.

We'll illustrate the basics by recording a very simple macro to enter a signature. First, position the cursor at the place where you want the text to be inserted. On the Tools menu, select 'Macro', and then click 'Record New Macro'.

1 A macro is just a series of commands and instructions that you group together as a single command to accomplish a task automatically. In Word, there are two ways you can create a macro:

The cursor is in place and we are about to click 'Record New Macro'.

2 The Record Macro dialog box now appears. Type an appropriate name such as 'Signature' in the 'Macro name' box. In the 'Store macro in' box, click the template or document in which you want to keep the macro; this will determine its scope of application. Choose 'normal.dot' in this case, so that your macro will run in any document, not just in the current one in which you're creating it.
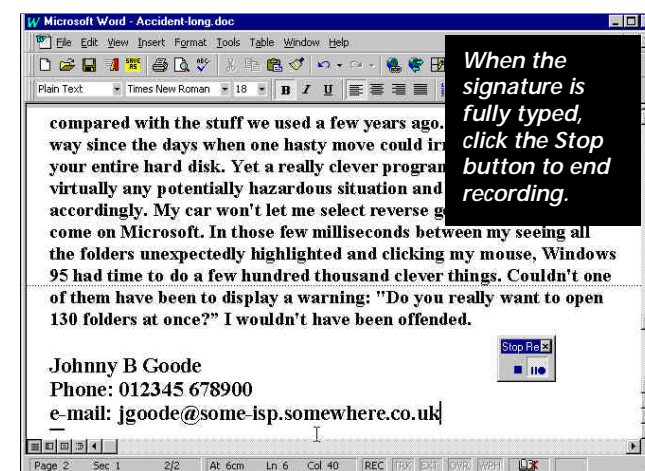
Next, give it a description. The macro's purpose always seems obvious at the time you create it, so it's often tempting to skimp this or ignore it altogether. But if you do you'll regret

Further specifications have been entered, so now click 'OK' to start recording.

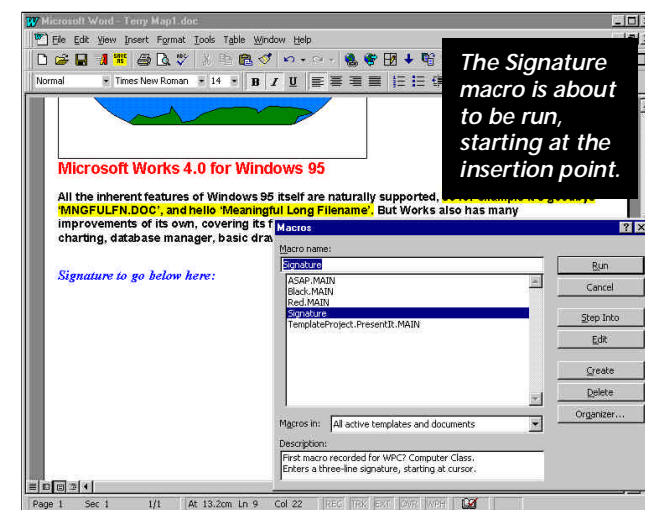it, because it's astonishing how quickly you'll forget what your macro was supposed to do.

Next consider whether you want to assign the macro to a toolbar or a keyboard shortcut. In this example let's suppose you want neither, so leave these buttons alone. This means that the default option will be selected, allowing the macro to be run from the Tools/Macro menu. Finally, with all four fields completed, click 'OK' to begin the recording.

3 Now perform the actions that you want to include in your macro. Type in the three lines of signature, exactly as you normally would, pressing the return key at the end of each line, and

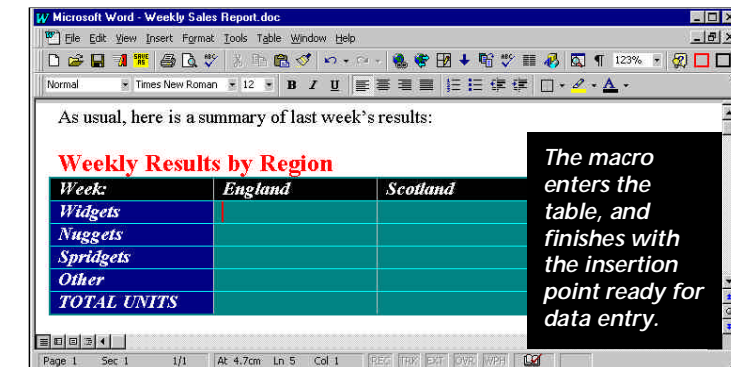*When the signature is fully typed, click the Stop button to end recording.*

again when you've finished. You can use the mouse in the usual way to click any Word commands and options, and these will be properly recorded. However, the macro recorder doesn't record mouse movements in the document window. For example, you can't use the mouse to move the insertion point or to select, copy, or move items by clicking or dragging. You must use keystrokes for these.

Occasionally you'll find there are things you want to do within your document or elsewhere that you don't want to record. If so, you can temporarily pause by clicking the Pause button in the small pop-up window; then resume recording where you stopped by clicking the same button again – this time it's labelled 'Resume'. When you've finished recording entirely, click the Stop button.

The Signature macro is about to be run, starting at the insertion point.

4 This macro can now run in any Word document. With the insertion point in the right place, to run the macro, click 'Tools' in the main menu, then 'Macro', then 'Macros...' to display the Macros window. This is where you'll find a list of all the macros available. In the 'Macros in' drop-down list make sure either 'normal.dot' or 'All active templates and documents', is
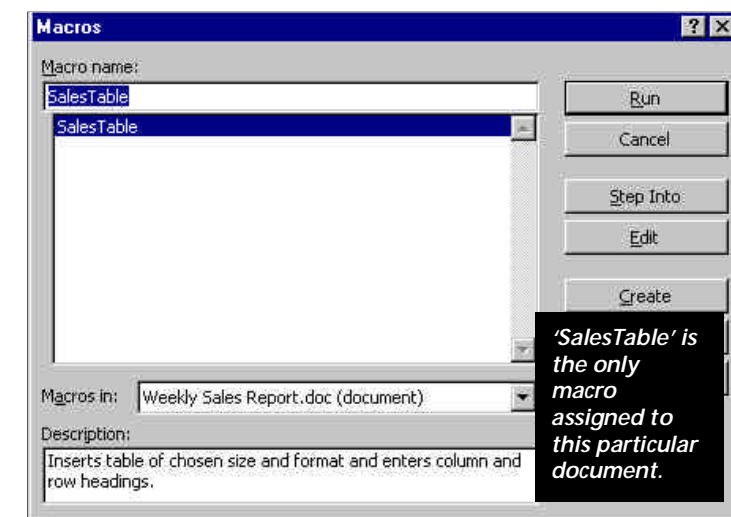
selected. If on the other hand you had assigned the macro to one particular document, rather than giving it global scope, then you'd select that instead from the 'Macros in' drop-down list. The list of macros shown would then be only those applicable to that document. Now, in the 'Macro name' box, highlight 'Signature'. Then just click 'Run', or double-click the highlighted macro name. The Macros window will then close and the macro will be run, typing your signature text in the active document.

The macro enters the table, and finishes with the insertion point ready for data entry.

5 That illustrates the basics, although it's a trivial example. As a more useful illustration, suppose you frequently want to add a formatted table at the end of a report.

Repeat the procedure outlined in steps one and two, call it say 'SalesTable', assign it to the current document ('Weekly Sales Report.doc') and then record the following actions:

Click 'Table' on the menu and choose 'Insert table'.

'SalesTable' is the only macro assigned to this particular document.

In the dialog box specify four columns and six rows, and click 'Autoformat'.

In the 'Format' drop-down list choose a format to your liking, say 'Colorful 1'.

Click 'OK'.

Using the keyboard, enter appropriate column and row headings.

Enter and format a heading for the table.

Place the insertion point wherever you want to be when the macro finishes.

Then click 'Stop' to finish recording. Run it as described in step four.

Part two

In part two we'll first look at how to make it even easier to run recorded macros by assigning them to either a tool button or to a shortcut key. We'll also take a quick look at Word's built-in macros and try a spot of Visual Basic editing to add more power to recorded macros. ●