

BOOST YOUR SKILLS IN
Microsoft Excel 365/2021

Chapter 13: Working with Macros

Learning Objectives

After studying this chapter, you will be able to:

- Change the macro security settings
- Create macros to automate tasks
- Run macros
- Create macro buttons to run macros quickly

Introducing Macros

- A macro is a recorded set of mouse and keyboard actions that can be played back.
- It records a repetitive series of tasks that can be completed with a mouse click or keyboard shortcut.

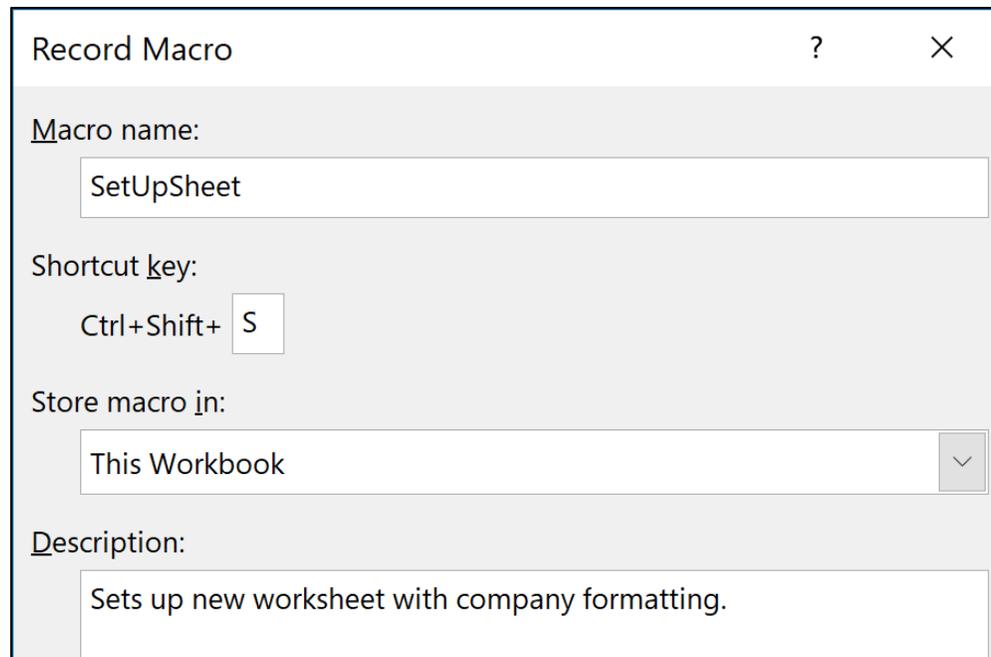
Changing Macro Security

- Macros can contain viruses, so there are added security features associated with them.
- There are four options for macro security:
 - Disable all macros without notification.
 - Disable all macros with notification.
 - Disable all macros except digitally signed macros.
 - Enable all macros.

NOTE! The default and recommended option is “disabling all macros with notification.” It is not recommended that you choose the “enable all macros” option due to potentially unsafe macros.

Recording Macros

Creating a macro is as simple as clicking a button and completing the series of actions you wish to include in the macro. It's like using a video camera!



The image shows a screenshot of the 'Record Macro' dialog box. The dialog box has a title bar with 'Record Macro', a question mark icon, and a close button. The main area contains four sections: 'Macro name:' with a text box containing 'SetUpSheet'; 'Shortcut key:' with a button showing 'Ctrl+Shift+S'; 'Store macro in:' with a dropdown menu showing 'This Workbook'; and 'Description:' with a text box containing 'Sets up new worksheet with company formatting.'

When you choose to create a macro, you will see the Record Macro dialog box where you can add details for the new macro.

Recording the Macro Steps

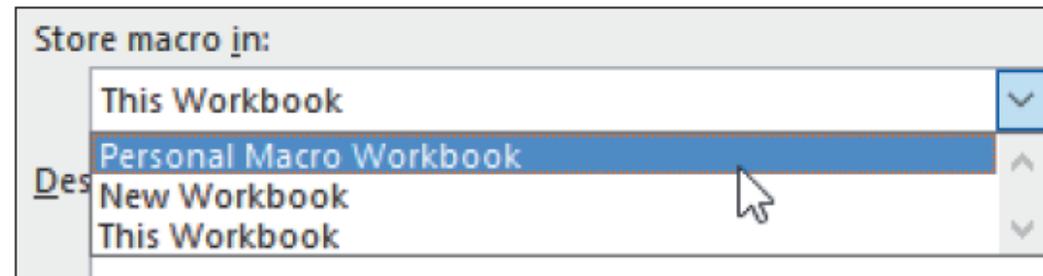
Most actions performed are recorded in the macro, including:

- Mouse actions
- Choosing Ribbon commands
- Selecting options in dialog boxes
- Using arrow keys to navigate the worksheet
- Typing text

NOTE! It's a good idea to practice the steps before actually recording the macro!

Storing and Sharing Macros

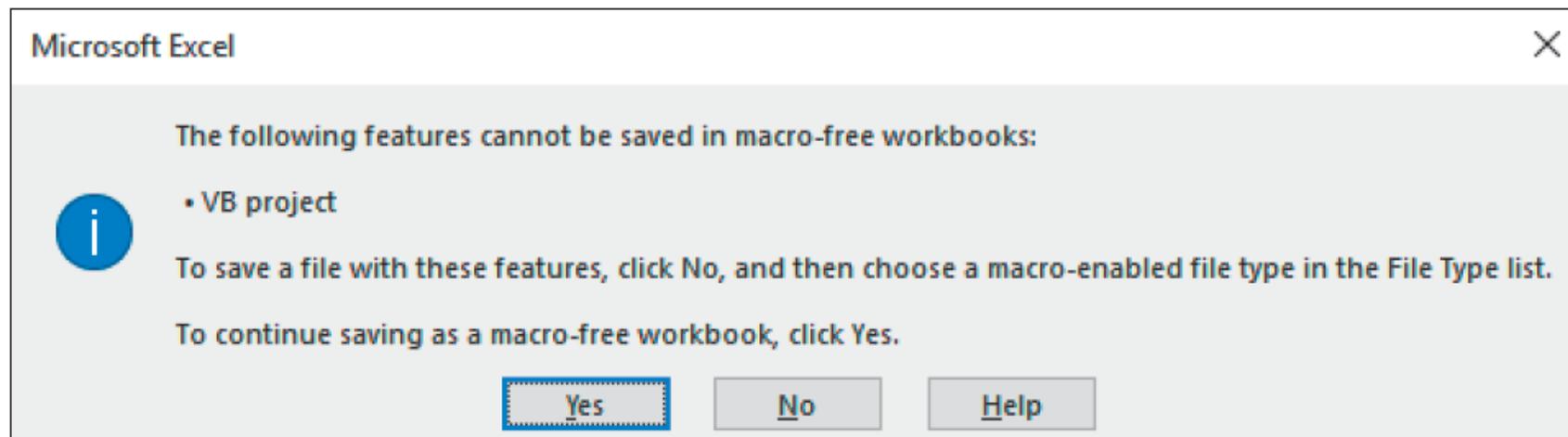
- By default, a recorded macro is saved only for the current workbook.
- You can, however, assign it to the Personal Macro Workbook, which makes it available to all open workbooks.



Choose “Personal Macro Workbook” when saving to make it available to all open workbooks.

Saving a Workbook Containing Macros

- Choose “Excel Macro-Enabled Workbook” as the type of file to avoid losing the macro(s) you have created.
- If you attempt to save it as a “normal” Excel workbook, you will see the following warning message:



Running and Assigning Macros

Running macros is easy and can be accomplished by:

- Issuing the command from the Macro dialog box
- Using a shortcut key
- Clicking a custom button on a worksheet
- Clicking a custom button on the Quick Access toolbar

City	Region	Participants	Volunteers	Funds Raised
Oakland	West	260	14	\$48,658
Atlanta	South	177	16	\$46,494
Denver	West	209	21	\$46,218
Dallas	South	205	17	\$45,884
Baltimore	East	220	16	\$44,225

The image shows a table with five columns: City, Region, Participants, Volunteers, and Funds Raised. To the right of the table are two blue rounded rectangular buttons. The top button is labeled 'Sort By Region' and the bottom button is labeled 'Sort By Funds'. These buttons are examples of custom buttons that can be created by assigning a macro to a shape in a worksheet.

You can insert a shape in a worksheet (like the rounded rectangles displayed above) and assign a macro to it to create a custom button.