

Word 2007: Macros

Learning guide

Why automate tasks in Word?

As you create documents in Word, you probably find that you must complete many small tasks over & over. Word macros can help you save time by automating repetitive tasks such as:

- Inserting frequently-used phrases
- Formatting headers and footers
- Inserting page and column breaks


After you record a macro containing all of the steps that make up a task, you can direct Word to automatically perform this task at any time.

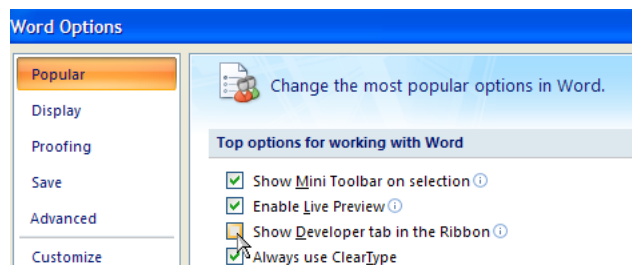
Recording a macro

Adding the Developer ribbon

The tools needed to record macros are found on the **Developer** ribbon. However, this ribbon does not appear in Word by default. To add this ribbon:



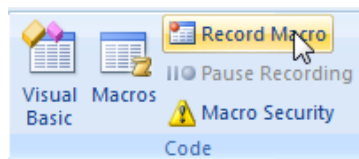
- Click on the **Office** button . At the bottom of this menu, click on **Word Options**.
- From the **Word Options** menu, click on **Popular**.



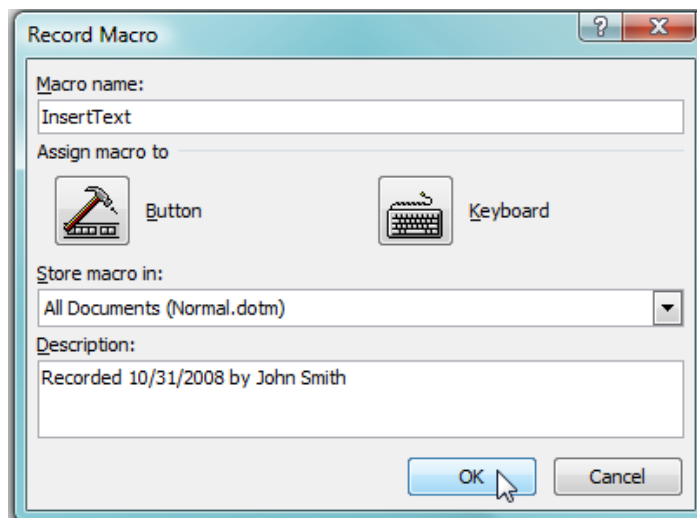
- Place a check mark next to “Show Developer tab in the Ribbon”
- Click **OK** to save these changes.

Getting started

- Open the document whose task you wish to automate.
- On a piece of paper or in a separate document, make a list of all of the steps that must be performed before the task is complete.
- From the **Developer** ribbon, go to the **Code** tab and click on the **Record Macro** button.



- Word will display the **Record Macro** window.
- In the box labeled **Macro name**, enter a name for your new macro. For best results:
 - Give your macro a name that describes the task the macro will accomplish.
 - Make sure that the macro's name doesn't include any spaces. Word will not let you record a macro with spaces in its name.



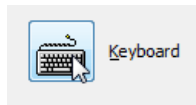
- In the box labeled **Description**, enter a description of the task that your macro will automate.

Description:
Recorded 10/31/2008 by John Smith; inserts the text "Please let me know if there are any questions."

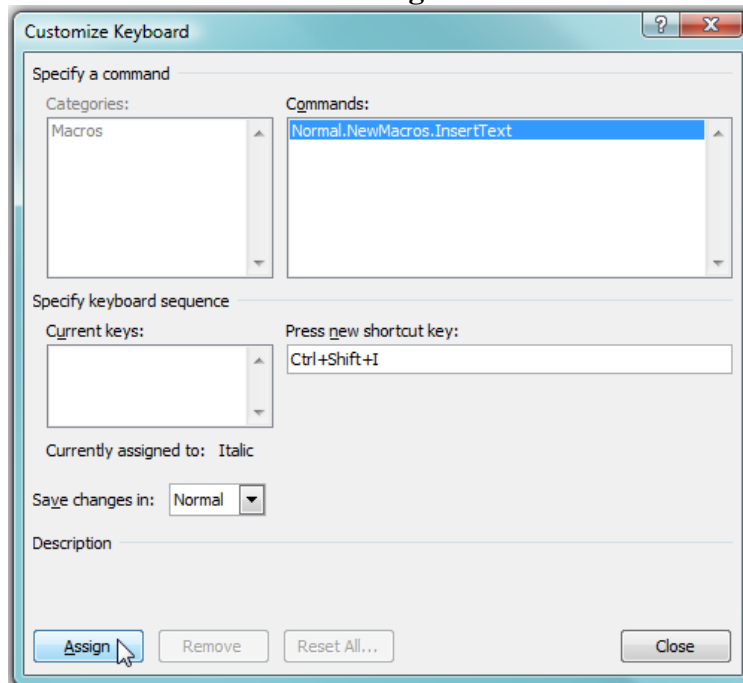
You now have two options for invoking your macro: you can create a keyboard shortcut or create a button.

Assigning a keyboard shortcut to your macro

- From the **Record Macro** window, click on the button labeled **Keyboard**.



- From the **Customize Keyboard** window that appears, click in the box labeled **Press new shortcut key**.
- Choose a keyboard shortcut to invoke your new macro.
- Press and hold the keys used in your shortcut.
- In the lower left corner of the **Customize Keyboard** window, click on the button labeled **Assign**.

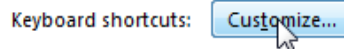


- The keystroke you chose will appear in the **Current keys** box.
- Click on the button labeled **Close** at the lower right corner of the **Customize Keyboard** window.
- The window will close, and you'll be ready to begin recording your macro.

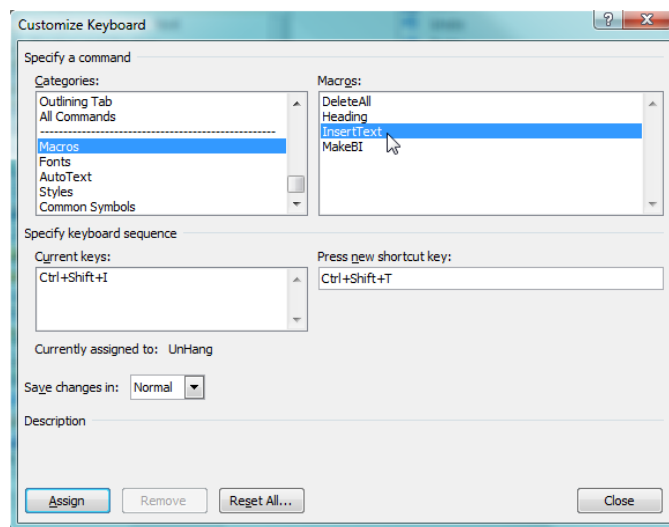
Changing the shortcut of a macro



- Click on the **Office** button and click on **Word Options**.
- Go to the **Customize** tab and click on the **Customize** button next to the label “Keyboard shortcuts”



- The **Customize Keyboard** window will appear. In the left-hand pane labeled **Categories**, scroll to the bottom and highlight **Macros**.



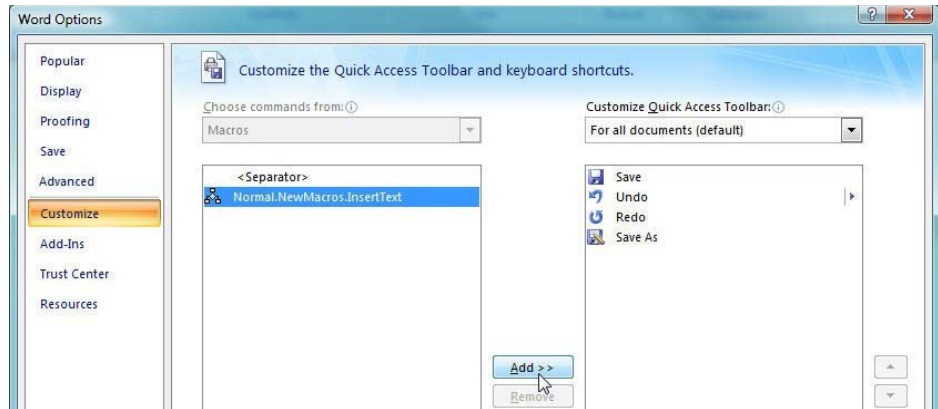
- Highlight the macro that you wish to modify and assign it a new shortcut key.

Assigning a button to your macro

- From the **Record Macro** window, click on the button labeled **Button**.



- Click on your macro then click **Add >>** to add it to the Quick Access Toolbar.



- You are now able to invoke your macro by clicking on the newly inserted button in the Quick Access toolbar.



Recording the steps in your macro

Once you've chosen a name and assigned a keyboard shortcut for your macro, you're ready to perform the steps that make up the task you wish to automate. While you're recording your macro:

- The **Code** tab will now allow you to pause and stop recording.
- The **recording cursor** will replace the standard **arrow** and **I-beam** cursor that Word displays.

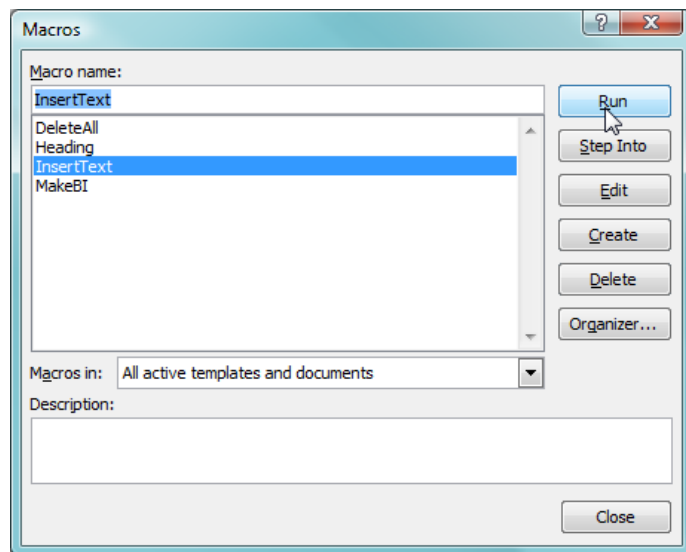


- One by one, perform the steps that you wish to automate.
- When you have finished recording all steps, click on the **Stop Recording** button on the **Code** tab.

***Tip:** While you record your macro, you won't be able to use your mouse to select text within your document. To select text, hold down the **Shift** key on your keyboard and press the arrow keys to change the size of the selected area.*

Running a macro

- If necessary, click to position your cursor at the location in your document where you wish to perform your task.
- Run your macro using one of these techniques:
 1. Press the keystroke combination that you assigned when you recorded the macro
 2. Press the button that you added to the Quick Access toolbar.
 3. From the **Developer** ribbon, go to the **Code** tab and click on the **Macros** button.
 - From the **Macros** window, click on the name of the macro you wish to run.
 - Click on the button labeled **Run**.

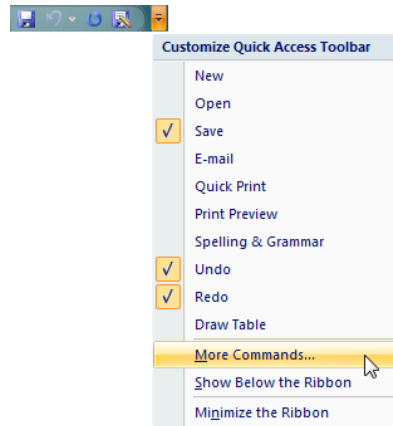


Creating easy access to your macro

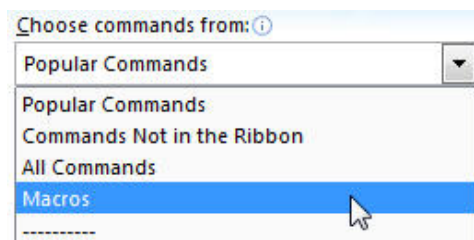
Once you've recorded your macro, you can run it even more easily by making it accessible from one of Word's toolbars or menus.

Creating a Quick Access button for your macro

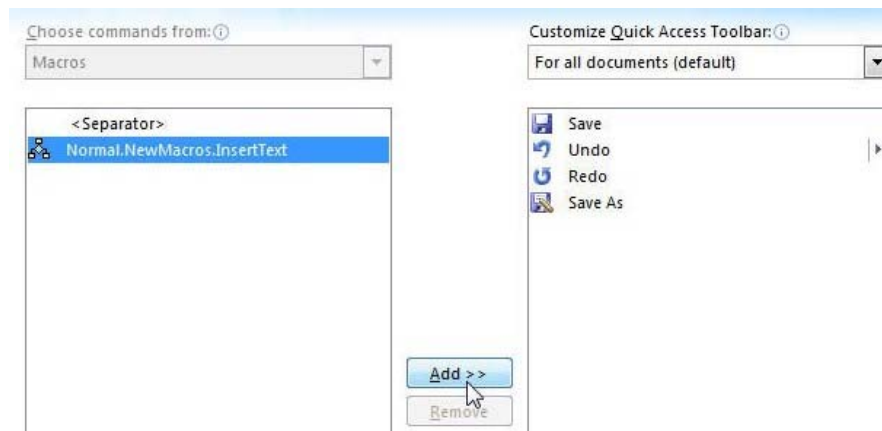
- Click on the drop-down arrow to the right of the **Quick Access** toolbar.
- Select **More Commands...**



- From the **Customize** tab, go to the “Choose commands” drop-down menu and select **Macros**.



- Highlight the Macro you wish to insert and click **Add**. Click **OK** to save your changes.



- Your macro will now be pictured on the **Quick Access toolbar**. Click on the  button to execute your macro.

