

5-15-2007

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### Recommended Citation

(2007) "How to Create and use Macros in an Excel Spreadsheet," *Intertext*: Vol. 15, Article 9.  
Available at: <https://surface.syr.edu/intertext/vol15/iss1/9>

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# How to Create and Use Macros in an Excel Spreadsheet

## Overview

A macro is a series of keystrokes or mouse clicks which are recorded, then automatically played back when required. The purpose of a macro is to simplify a series of steps and save time.



These instructions are intended for a current version of Microsoft Excel on a Windows PC. Also, these instructions assume the reader has a basic knowledge of Microsoft Excel.

## Example Scenario

To teach you how to use macros, we will use an example scenario.

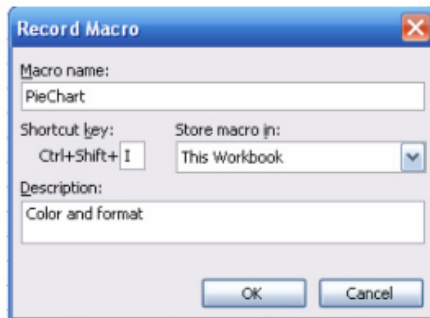
Your job as Assistant Dean of Students is to create a graph showing the correlation between attendance of an event and the class status of the attendees. After every event you are e-mailed an Excel file containing the number of students in each class that attended the event. Your boss wants to receive a standard graph of the attendance of every event. She wants freshman to be in orange, sophomores to be in pink, juniors to be in green, seniors to be in blue, and seniors+ to be in yellow.

Without being repetitive, how do you go about doing this? A macro is the answer.

## Creating a Basic Macro

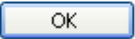
1. Open a new file in Microsoft Excel.
2. For this example, enter the following data into cells as shown in the table to the right.
3. Highlight the entered data.

Freshmen	125
Sopohomores	65
Juniors	88
Seniors	55
Seniors +	82



4. Click on Tools on the menu bar, select *Macro*, and *Record New Macros*. The **Record Macro** window should appear.

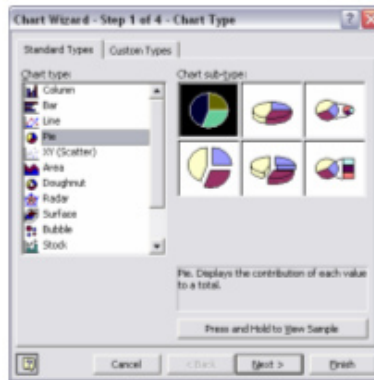
5. In the **Record Macro** window, enter "PieChart" as the Macro name.

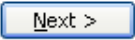
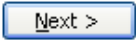
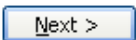
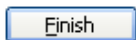
6. Hold down “Shift” then “I” as your “Shortcut key.”
7. Select “This Workbook” from the dropdown list under “store macro in:”
8. Enter “Color and format” as the Description. The window should appear as it does in the picture on the opposing bottom left page.
9. Click .



At this time any clicks or keystrokes will be recorded as a step in the macro.

10. Click on **I**nsert on the menu bar, and then select *Chart*. The **Chart Wizard** should now appear.



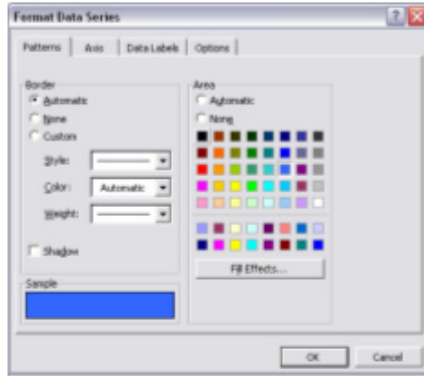
11. Under “Chart type:” choose Pie which will select a pie chart.
12. Click .
13. At the **Chart Source Data** window click .
14. At the **Chart Options** window click .
15. In the **Chart Location** window click .



Now that you are done creating the chart, some editing can be done to specify the colors your boss wants (e.g. freshman in orange, sophomores in pink, juniors in green, seniors in blue, and seniors+ in yellow). Steps 16 thru 19 will guide you through changing the colors. This process will show you that by using a macro, Excel will make these changes itself in the future when you run the macro.


16. Click on the section of the pie chart that corresponds to freshman.

That individual area should now be selected on the graph.



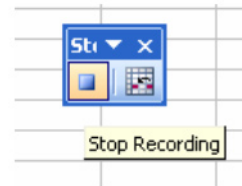
17. Right click that area, and select *Format Data Series*.

18. In the **Format Data Series** window, under “Area” choose orange.

19. When you are done selecting the color, click  .


20. Repeat steps 16 through 18 for all sections for the PieChart. This time changing sophomores to pink, juniors to green, seniors to blue, and seniors+ to yellow.

21. When this is completed, click the square button in the **Stop Recording** window. At this point the Macro recording process is complete. Your keystrokes will no longer be recorded.



### Using a Macro

Recording a Macro is just half the process. Once you have the data on the graph you want to create, you have to call up and activate the macro.

1. Open a new file in Microsoft Excel.
2. For this example, enter the following data into cells as shown in the table to the right.
3. Highlight the entered data.
4. Click on Tools and select *Macro* and then select  .

Freshmen	167
Sopohomores	59
Juniors	74
Seniors	34
Seniors +	74

5. Select the name of the macro (PieChart) you wish to invoke, and click the Run button. A pie chart of the data using the specific colors your boss requested should be created.

### Conclusion

Before creating a macro it is a good idea to plan out the steps of the process you want the macro to recreate. Once you have mastered this tool, it can be a valuable time saver. §

