

Microsoft Word 2007: Level 3 of 3



Lesson 3: Using Macros and Forms

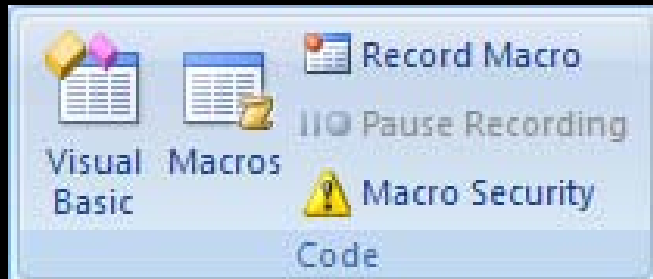
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Understanding Macros

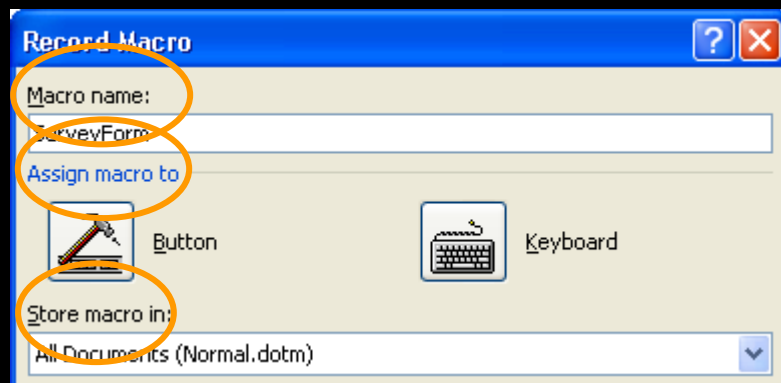
- **A macro is a set of instructions that can be played back at a later time**
 - Useful for automating routine tasks
 - Saves time and increases productivity
- **Macro recording tools are on the Developer tab**




- Turn on Developer tab in Word Options dialog box

Understanding Macros

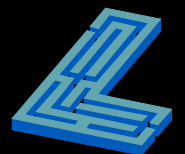
- Record your keystrokes and commands using the macro recording feature
- Run a macro from the Developer tab, a toolbar button, or a shortcut key
- Store a macro in a document or template



TIP  Macros stored in the Normal template are available to all documents on the system.

Working with Visual Basic for Applications

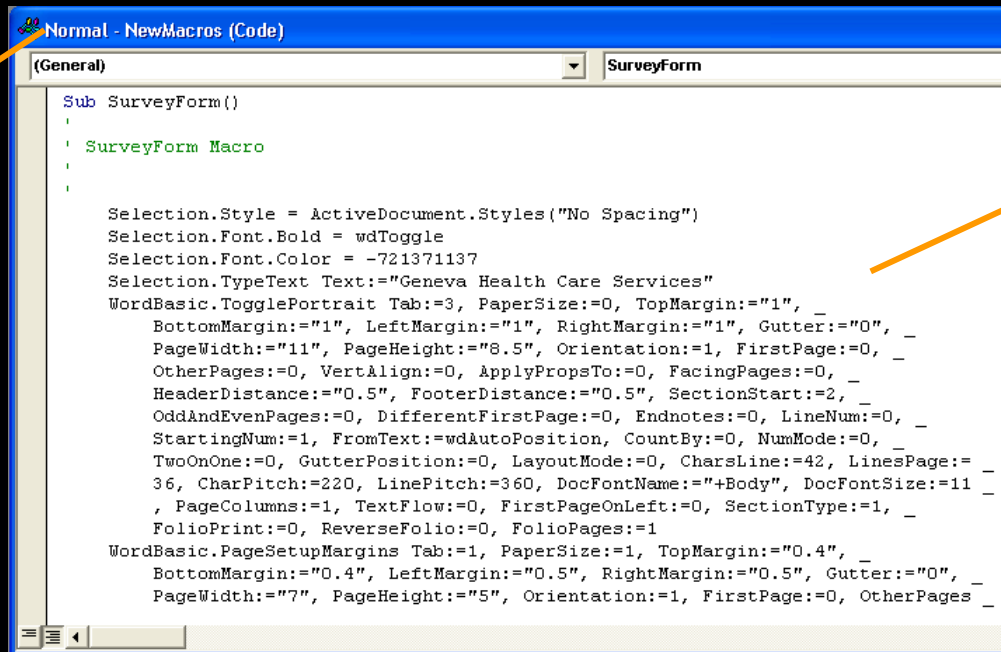
- **VBA is a macro programming language that runs within Office 2007 applications**
 - Automates processes in applications
 - Customizes applications
- **VBA is used when you create a macro**
 - When you record a macro, Visual Basic code is entered in a *module*
 - To display a module and edit a macro, open Visual Basic Editor



Working with Visual Basic for Applications

- Visual Basic Editor is a program independent of Word
 - Has its own menus, toolbars, and commands
 - Allows you to develop, edit, and test Visual Basic applications

Title bar indicates you are in a different program



```
Normal - NewMacros (Code)
(General) SurveyForm

Sub SurveyForm()
    ' SurveyForm Macro
    '

    Selection.Style = ActiveDocument.Styles("No Spacing")
    Selection.Font.Bold = wdToggle
    Selection.Font.Color = -721371137
    Selection.TypeText Text:="Geneva Health Care Services"
    WordBasic.TogglePortrait Tab:=3, PaperSize:=0, TopMargin:="1", _
        BottomMargin:="1", LeftMargin:="1", RightMargin:="1", Gutter:="0", _
        PageWidth:="11", PageHeight:="8.5", Orientation:=1, FirstPage:=0, _
        OtherPages:=0, VertAlign:=0, ApplyPropsTo:=0, FacingPages:=0, _
        HeaderDistance:="0.5", FooterDistance:="0.5", SectionStart:=2, _
        OddAndEvenPages:=0, DifferentFirstPage:=0, Endnotes:=0, LineNum:=0, _
        StartingNum:=1, FromText:=wdAutoPosition, CountBy:=0, NumMode:=0, _
        TwoOnOne:=0, GutterPosition:=0, LayoutMode:=0, CharsLine:=42, LinesPage:=
        36, CharPitch:=220, LinePitch:=360, DocFontName:="+Body", DocFontSize:=11
        , PageColumns:=1, TextFlow:=0, FirstPageOnLeft:=0, SectionType:=1, _
        FolioPrint:=0, ReverseFolio:=0, FolioPages:=1
    WordBasic.PageSetupMargins Tab:=1, PaperSize:=1, TopMargin:="0.4", _
        BottomMargin:="0.4", LeftMargin:="0.5", RightMargin:="0.5", Gutter:="0", _
        PageWidth:="7", PageHeight:="5", Orientation:=1, FirstPage:=0, OtherPages _
```

VBA code is displayed on the right side of the Visual Basic Editor



Run Macros from Toolbar

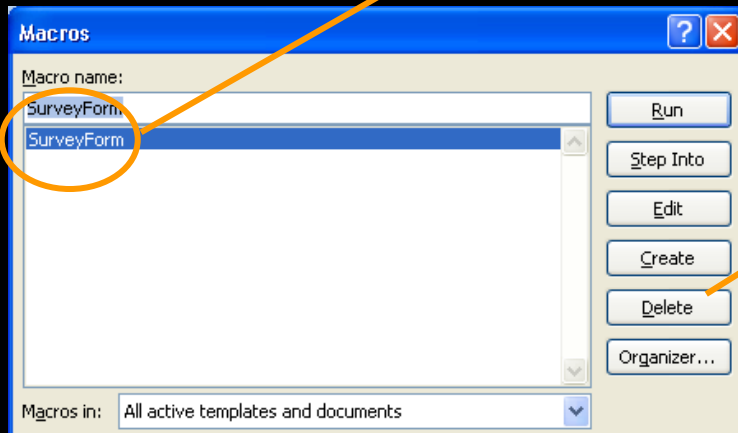
- Run macros quickly from the Quick Access toolbar
- Add buttons to or remove buttons from the toolbar
- Choose from a variety of button images if adding more than one macro to the toolbar



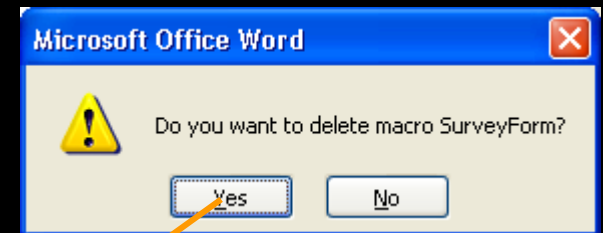
Deleting Macros

- Any shortcut keys or buttons that have been assigned to macros will no longer function

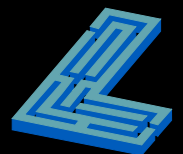
Choose the macro



Delete the macro



Confirm your decision



Working with Forms

- Collect data
- Use fields for data entry
 - Users type in information
 - Form fields assist users (checkboxes and drop-down lists)

Geneva Health Care
Employee Survey Response Form

Address Information

Name Eugene Washington
Address 5250 Ramiro Avenue
City Richmond State CA Zip 94803

Date 1/30/07

Personal Information

Married Spouse Name Maria
Dependents How Many? 3

Which benefits are of interest to you?

401K Plan Contribution \$500.00
Dental Plan
Cafeteria Plan

0
1
2
3
4
5
6
7
8

Typed data

Drop-down list

Checkbox




Working with Forms

- **Create distributable forms**
 - Printed—Print out and complete on paper
 - Electronic—Distribute and complete in Word
 - Can use form-field objects (checkboxes, drop-down lists)
 - Internet-Based—Posted to a website and completed using a web browser

Geneva Health Care
Employee Survey Response Form

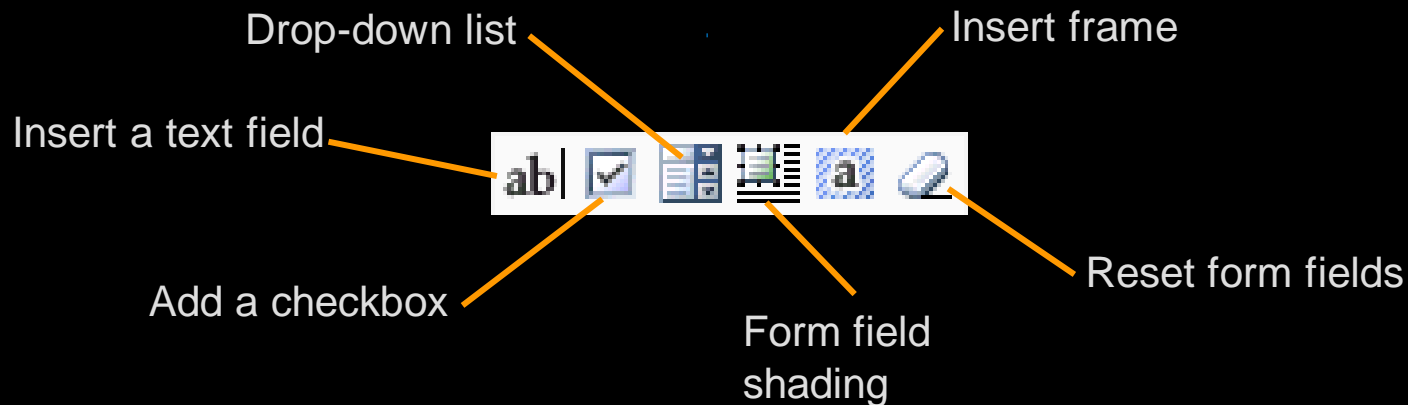
Address Information Name <input type="text"/> Address <input type="text"/> City <input type="text"/> State <input type="text"/> Zip <input type="text"/>	Date <input type="text"/>
Personal Information Married <input type="checkbox"/> Dependents <input type="checkbox"/>	Spouse Name <input type="text"/> How Many? <input type="text"/>
Which benefits are of interest to you? 401K Plan <input type="checkbox"/> Dental Plan <input type="checkbox"/> Cafeteria Plan <input type="checkbox"/>	Contribution Amount <input type="text"/>


TIP  *Electronic forms are often distributed via a network or email.*



Working with Forms

- Set up forms using the same tools and techniques used to set up any other type of document
- Form field tools are specifically designed to use with forms



TIP  *Tables allow you to lay out forms with an orderly structure.*

Working with Forms

- **Form Fields**

- Text box
- Checkbox
- Drop-down list

- **Field Properties**

- Each field type has various properties associated with it

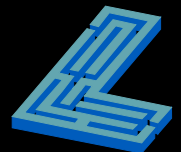
Restrict data type and length

The screenshot shows the 'Text Form Field Options' dialog box. It has a blue title bar with a question mark and a close button. The main area is divided into sections: 'Text form field', 'Run macro on', and 'Field settings'. In the 'Text form field' section, 'Type' is set to 'Regular text', 'Maximum length' is '25', and 'Text format' is 'Title case'. The 'Run macro on' section has 'Entry' and 'Exit' dropdowns. The 'Field settings' section has a 'Bookmark' field with 'Text1', a checked 'Fill-in enabled' checkbox, and an unchecked 'Calculate on exit' checkbox. At the bottom are 'Add Help Text...', 'OK', and 'Cancel' buttons.

Have Word format the text



The drop-down Form Field Options allows you to specify list items.



Protecting and Restricting Forms and Other Documents

■ Protect Forms



Electronic and internet-based forms must be protected first then saved

- Prevents users from modifying forms
- Allows forms to behave like forms
 - For example, tapping **[Tab]** moves cursor to the next form field or clicking a checkbox inserts or removes an X



TIP *Save an electronic form as a template if it is to be used on a regular basis.*

The screenshot shows a dialog box with two sections. The first section, titled "2. Editing restrictions", has a checked checkbox "Allow only this type of editing in the document:" and a dropdown menu set to "Filling in forms". The second section, titled "3. Start enforcement", asks "Are you ready to apply these settings? (You can turn them off later)" and features a button labeled "Yes, Start Enforcing Protection". An orange arrow points from the text "Protect a form to use it" to this button.

Protect a form to use it



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