Microsoft Word 2007: Level 3 of 3

Lesson 3: Using Macros and Forms
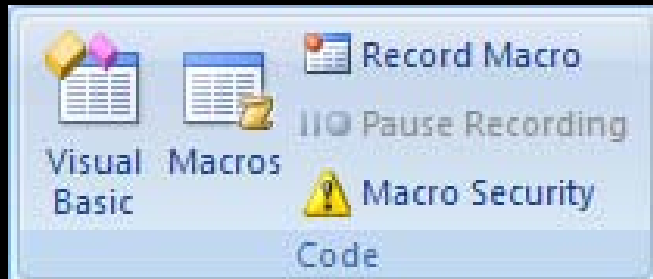
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Understanding Macros

- **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

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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**
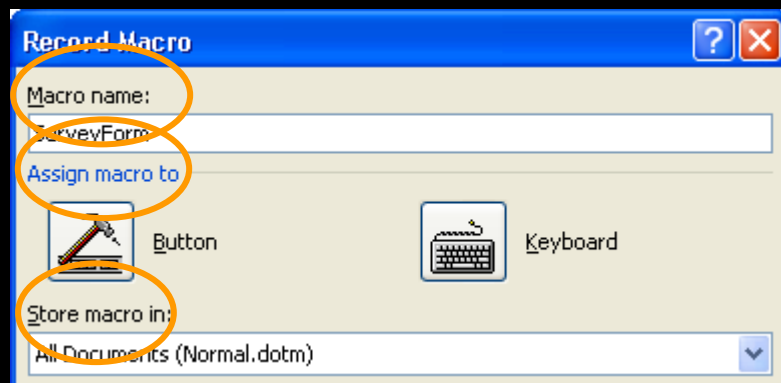
TIP ⚠️

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

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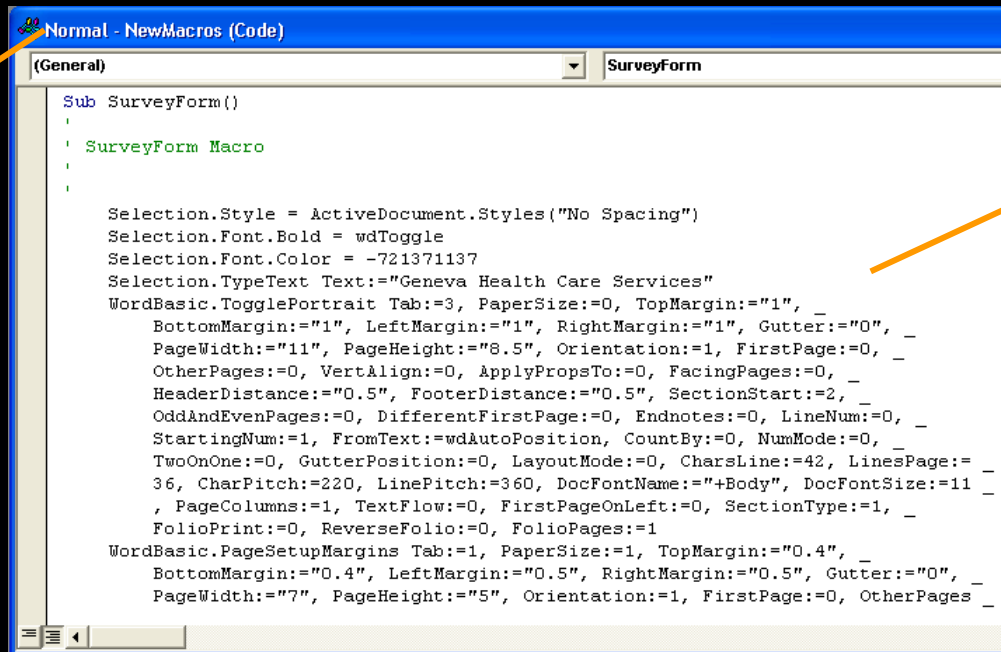# Working with Visual Basic for Applications

- **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

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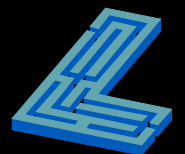
Working with Visual Basic for Applications

- **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

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

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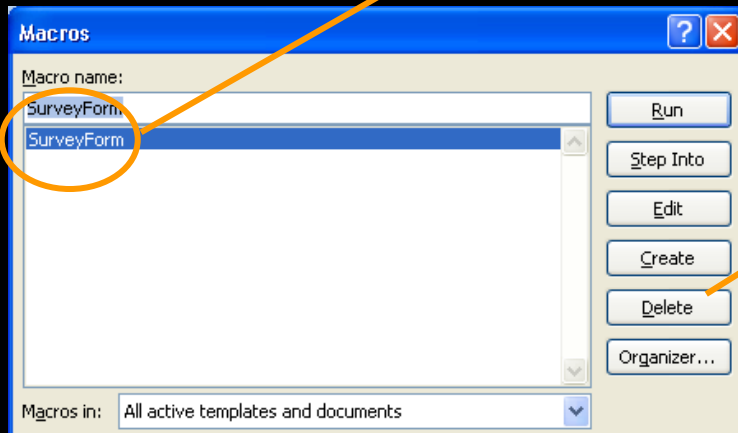L E A R N I N G ™

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**
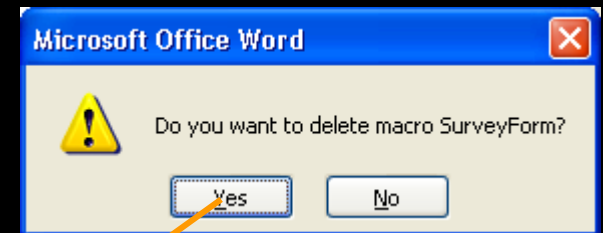
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Deleting Macros

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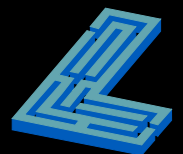
Choose the macro

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

Typed data

Checkbox

Drop-down list

Address Information
Name   Eugene Washington   Date 1/30/07
Address   5250 Ramiro Avenue
City   Richmond State CA Zip 94803

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

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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

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

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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**

Drop-down list

Insert frame

Insert a text field

Add a checkbox

Form field shading
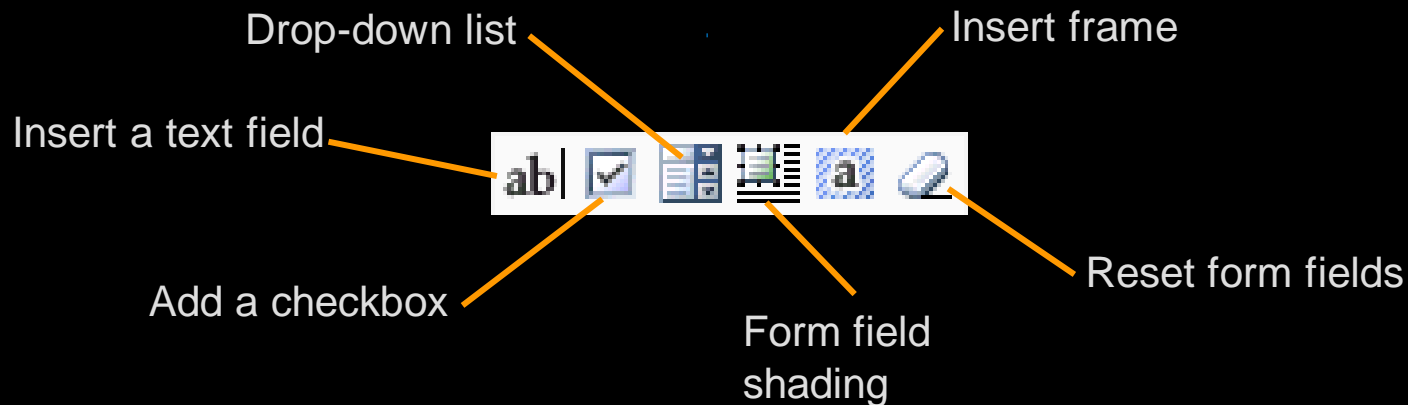
Reset form fields

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

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Working with Forms

- ## Form Fields
  - Text box
  - Checkbox
  - Drop-down list

- ## Field Properties
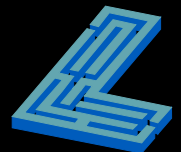 - Each field type has various properties associated with it

Restrict data type and length

Have Word format the text

TIP ⚠️

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

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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.*

2. Editing restrictions
☑ Allow only this type of editing in the document:

`Filling in forms ▾`

3. Start enforcement
Are you ready to apply these settings? (You can turn them off later)

`Yes, Start Enforcing Protection`

Protect a form to use it

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