

Create a MACRO to Format a Spreadsheet



Create a Macro

- A macro can be created to complete spreadsheet set ups with one click
 - Freeze Top Row
 - Wrap Text in the Header Row
 - Justify column width
 - Apply Filters
- Create it once and use it over and over
- Start by opening any FTE Report from the Data Collector



Begin Creating a Macro

From the View tab, select the down arrow under Macros and select "Record Macro"

DEMO 1_MACRO_FTE_Detail_Report.xlsx - Excel

VIEW

Zoom to Selection New Window Arrange All Freeze Panes Split Hide Unhide Window Switch Windows

Macros

View Macros

Record Macro

Record a macro

Each of the commands you perform will be saved into the macro so that you can play them back again.

Le N	LEA	IRN	LEVEL 2	R	RESULT	C	RESULT	C	FTE	FUNC	ENRL	ST	ENRL	ENI	ORIG	FTE	ADJ	STD	F	ADJ	S	NT	REA	SENT	RI
le N 012664			FTED-001	FT0000	FTE Detai	ATSM	07/01/20	12/31/25								1			1						
le N 012664			FTED-001	FT0000	FTE Detai	ATSM	09/26/20	12/31/25	0.85714							0.85714			0.85						
le N 133333			FTED-001	FT0000	FTE Detai	COMM	08/21/20	12/31/25								1			1			040404		100	-
le N 133333			FTED-001	FT0000	FTE Detai	COMM	03/02/20	12/31/25	0.05525							0.05525						040404		100	-
le N 000444			FTED-001	FT0000	FTE Detai	COMM	07/01/20	12/31/25	0.42778							0.42778						040404		100	-

EMIS Alliance

Record Macro Prompt

Set up the prompt

Record Macro

Macro name: Macro1

Shortcut key: Ctrl + t

Store macro in: Personal Macro Workbook

Description:

OK Cancel

Enter a Macro name or leave as the default value

Enter a unique Shortcut key value
Tip- enter a value that you don't typically use as a Ctrl command (don't use values such as Ctrl A, Ctrl C, Ctrl V, etc.)

Select "Personal Macro Workbook" from the "Store macro in" dropdown menu then click OK

EMIS Alliance


Recording the Macro

- Macro is now recording
- Ready status and a small square icon show at bottom left

B1	040404	042222		TW26248	Emis ID	Last Nam First Nam Middle N	040404	FTED-001	FT0000
B2	040404	042222		XG70213	Emis ID	Last Nam First Nam Middle N	040404	FTED-001	FT0000
B3	040404	011606		DD84801	Emis ID	Last Nam First Nam Middle N	011606	FTED-001	FT0000
B4	040404	011606		LS693436	Emis ID	Last Nam First Nam Middle N	011606	FTED-001	FT0000
B5	040404	011606		FL311036	Emis ID	Last Nam First Nam Middle N	011606	FTED-001	FT0000
B6									
B7									
B8									

Hovering over the icon will generate the message-
"A macro is currently recording. Click to stop recording."

(FTED-001) FTE Detail043968-201

READY 



Recording the Macro, cont'd

Start by selecting the top row

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW

Normal Page Break Page Custom Workbooks Views

Formula Bar

Zoom 100% Zoom to Selection

New Arrange Freeze Hide Unhide Windows

Switch Windows Macros

A1

RPT DEST Bldg IRN SEVERITY SSID Emis ID Last Nam First Nam Middle N LEA IRN LEVEL 2 R RESULT C RESULT C FTE FUNE ENR STA ENR LENI ORIG FTE ADJ STD FADJ STD

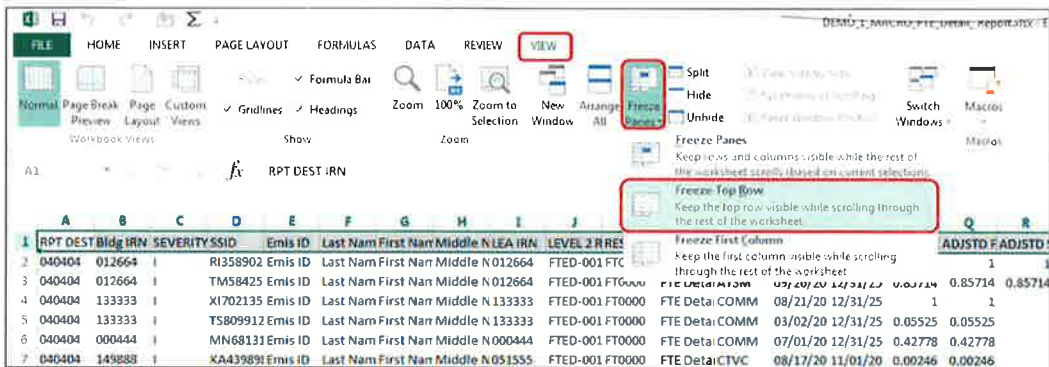
1	040404	012664		R1358902	Emis ID	Last Nam First Nam Middle N	012664	FTED-001	FT0000	FTE Deta: ATSM	07/01/20	12/31/25	1	1	1
2	040404	012664		TM58425	Emis ID	Last Nam First Nam Middle N	012664	FTED-001	FT0000	FTE Deta: ATSM	09/26/20	12/31/25	0.85714	0.85714	0.85714
3	040404	133333		X1702135	Emis ID	Last Nam First Nam Middle N	133333	FTED-001	FT0000	FTE Deta: COMM	08/21/20	12/31/25	1	1	
4	040404	133333								COMM	03/02/20	12/31/25	0.05525	0.05525	
5	040404	000444								COMM	07/01/20	12/31/25	0.42778	0.42778	
6	040404	149888		KA439891	Emis ID	Last Nam First Nam Middle N	051555	FTED-001	FT0000	FTE Deta: CTVC	08/17/20	11/01/20	0.00246	0.00246	
7	040404	149888		GM78917	Emis ID	Last Nam First Nam Middle N	051555	FTED-001	FT0000	FTE Deta: CTVC	08/22/20	10/19/20	0.00191	0.00191	

Click on the "1" to select the first row



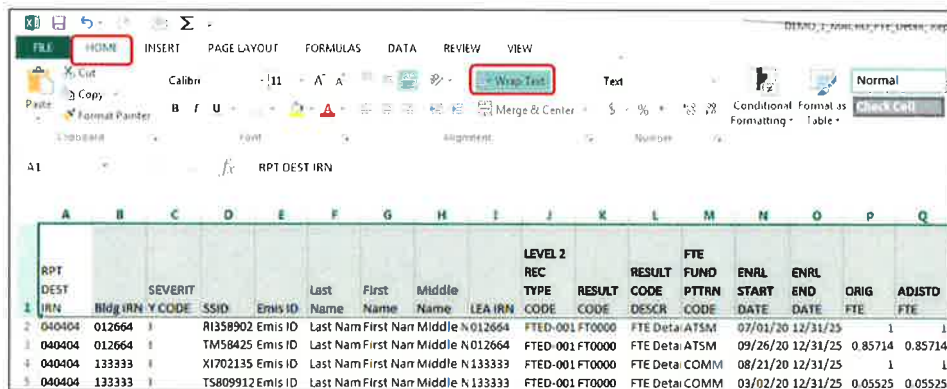
Recording the Macro, cont'd

From the View tab, select "Freeze Panes" and "Freeze Top Row"



Recording the Macro, cont'd

From the Home Tab, select "Wrap Text"



Stop the Recording

Click on the small square icon at the bottom left to stop the recording

28	040404	014444	I	JH2231564	Emis ID	Last Name	First Name	Middle Name	051555	FTED-
29	040404	011777	I	MM3506602	Emis ID	Last Name	First Name	Middle Name	040404	FTED-
30	040404	042222	I	KS2624834	Emis ID	Last Name	First Name	Middle Name	051555	FTED-
31	040404	042222	I	TW2624834	Emis ID	Last Name	First Name	Middle Name	040404	FTED-
32	040404	042222	I							FTED-
33	040404	011606	I							FTED-
34	040404	011606	I							FTED-
35	040404	011606	I							FTED-
36										

(FTED-001) FTE Detail043968-201

READY



Make the Macro a Quick Link

Select the Quick Link dropdown arrow, then "More Commands"

	First	Middle		ENRL	START		
1	Name	Name	LEA IR				
2	First Nam	Middle N	012664		07/01/20		
3	First Nam	Middle N	012664		09/26/20		
4	First Nam	Middle N	133333		08/21/20		
5	First Nam	Middle N	133333	FTED-001	FT0000 FTE Detai	COMM	03/02/20
6	First Nam	Middle N	000444	FTED-001	FT0000 FTE Detai	COMM	07/01/20

Local Options

Choose commands from: [Dropdown]

Popular Commands: [List]

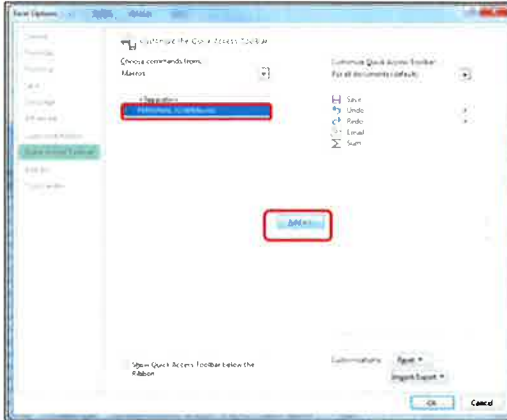
Customize Quick Access Toolbar: [List]

Import/Export: [Buttons]

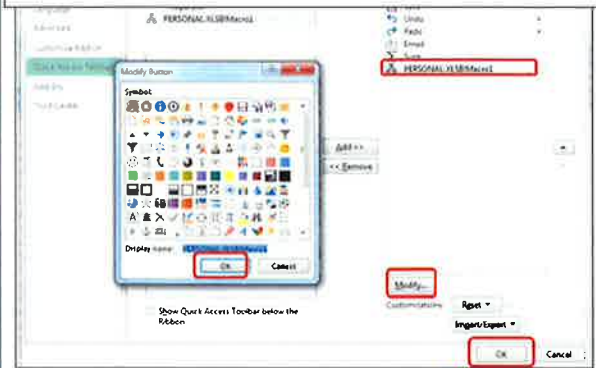


Make the Macro a Quick Link

Highlight your macro from the list and click "Add"

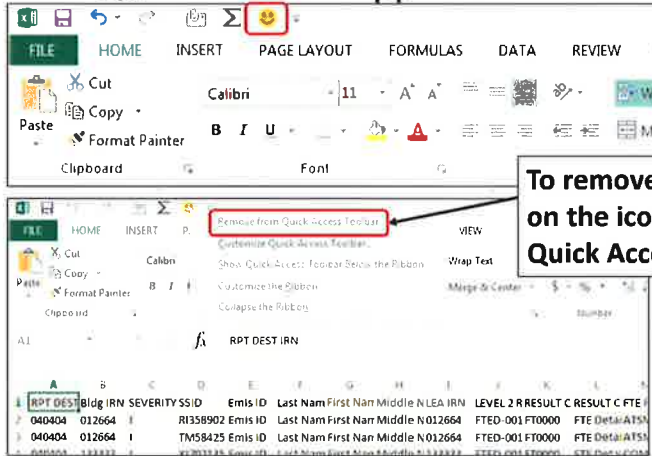


The macro will move to the list on the right. While it is highlighted, select "Modify" and choose an icon that you like. Click Ok and Ok.



Quick Link

New Quick Link now appears



To remove the Quick Link, right click on the icon and select "Remove from Quick Access Toolbar"



Save the Macro

- You can choose to save or not save your spreadsheet
- A second prompt will ask if you want to save the changes made to your Personal Macro Workbook

Select Save so that the macro will be available to use on future spreadsheets



Delete a Macro

Once a Macro is created a few extra steps are needed to delete it if needed

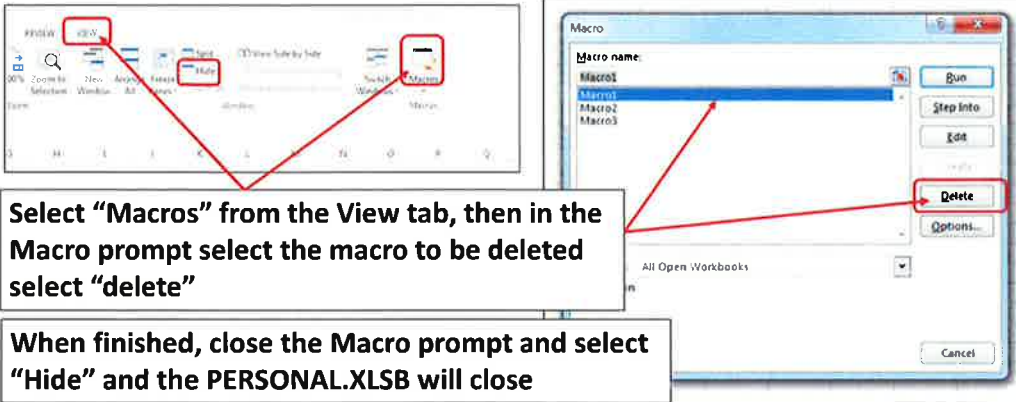
From a new or existing spreadsheet select "Unhide" from the View tab

In the Unhide prompt with PERSONAL.XLSB selected, click OK



Delete a Macro, cont'd

A blank spreadsheet named PERSONAL.XLSB will open



The image shows two screenshots from Microsoft Excel. The left screenshot shows the 'View' tab on the ribbon, with the 'Macros' button highlighted by a red box. A red arrow points from this button to the right screenshot. The right screenshot shows the 'Macro' dialog box with a list of macros (Macro1, Macro2, Macro3) and the 'Delete' button highlighted by a red box. A red arrow points from the 'Delete' button to a text box below.

Select "Macros" from the View tab, then in the Macro prompt select the macro to be deleted select "delete"

When finished, close the Macro prompt and select "Hide" and the PERSONAL.XLSB will close



Quick Check

Macros are a quick way to turn a multi-step process in Excel into one click. Creating a quick link macro does not embed the macro into the spreadsheet. This macro is for use on the machine where it is created.

- Are you able to record and save your macro?
- Can you think of other instances where a macro can save time?
- Are you able to find and manage your macros?



