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MOS Study 2010 Guide

for Microsoft®

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John Pierce and Geoff Evelyn

**MOS 2010 Study Guide
for Microsoft® Word
Expert, Excel® Expert,
Access®, and SharePoint®
Exams**

John Pierce and Geoff Evelyn

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Taking a Microsoft Office Specialist Exam

Desktop computing proficiency is increasingly important in today's business world. As a result, when screening, hiring, and training employees, employers can feel reassured by relying on the objectivity and consistency of technology certification to ensure the competence of their workforce. As an employee or job seeker, you can use technology certification to prove that you already have the skills you need to succeed, saving current and future employers the trouble and expense of training you.

Microsoft Office Specialist Certification

Microsoft Office Specialist certification for Microsoft Office 2010 is designed to assist employees in validating their skills with programs in the Office 2010 software suite. The following certification paths are available:

- A Microsoft Office Specialist (MOS) is an individual who has demonstrated proficiency by passing a certification exam in one or more of the Office 2010 programs, including Microsoft Word, Excel, PowerPoint, Outlook, and Access, or in Microsoft SharePoint.
- A Microsoft Office Specialist Expert (MOS Expert) is an individual who has taken his or her knowledge of Office 2010 to the next level and has demonstrated by passing a certification exam that he or she has mastered the more advanced features of Word 2010 or Excel 2010.

Selecting a Certification Path

When deciding which certifications you would like to pursue, you should assess the following:

- The program and program version(s) with which you are familiar
- The length of time you have used the program and how frequently you use it
- Whether you have had formal or informal training in the use of that program
- Whether you use most or all of the available program features
- Whether you are considered a go-to resource by business associates, friends, and family members who have difficulty with the program

Candidates for MOS-level certification are expected to successfully complete a wide range of standard business tasks, such as formatting a document or worksheet and its content; creating and formatting visual content; or working with SharePoint lists, libraries, Web Parts, and dashboards. Successful candidates generally have six or more months of experience with the specific Office program, including either formal, instructor-led training or self-study using MOS-approved books, guides, or interactive computer-based materials.

Candidates for MOS Expert-level certification are expected to successfully complete more complex tasks that involve using the advanced functionality of the program. Successful candidates generally have at least six months, and may have several years, of experience with the programs, including formal, instructor-led training or self-study using MOS-approved materials.

Test-Taking Tips

Every MOS certification exam is developed from a set of exam skill standards (referred to as the objective domain) that are derived from studies of how the Office 2010 programs or SharePoint are used in the workplace. Because these skill standards dictate the scope of each exam, they provide critical information about how to prepare for certification. This book follows the structure of the published exam objectives; see “Using This Book to Study for a Certification Exam” at the beginning of this book for more information.

The MOS certification exams for the Office 2010 programs and SharePoint are performance based and require you to complete business-related tasks in the program for which you are seeking certification. You might be told to adjust program settings or be presented with a file and told to do something specific with it. Your score on the exam reflects how well you perform the requested tasks within the allotted time.

Here is some helpful information about taking the exam:

- Keep track of the time. You have 50 minutes to complete the exam. Your exam time does not officially begin until after you finish reading the instructions provided at the beginning of the exam. During the exam, the amount of time remaining is shown at the bottom of the exam interface. You can't pause the exam after you start it.
- Pace yourself. At the beginning of the exam, you will be told how many questions are included in the exam. Some questions will require that you complete more than one task. During the exam, the number of completed and remaining questions is shown at the bottom of the exam interface.
- Read the exam instructions carefully before beginning. Follow all the instructions provided in each question completely and accurately.
- Enter requested information as it appears in the instructions, but without duplicating the formatting unless you are specifically instructed to do so. For example, the text

and values you are asked to enter might appear in the instructions in bold and underlined text, but you should enter the information without applying these formats.

- Close all dialog boxes before proceeding to the next exam question unless you are specifically instructed not to do so.
- Don't close task panes before proceeding to the next exam question unless you are specifically instructed to do so.
- If you are asked to print a document, worksheet, chart, report, or slide, perform the task, but be aware that nothing will actually be printed.
- Don't worry about extra keystrokes or mouse clicks. Your work is scored based on its result, not on the method you use to achieve that result (unless a specific method is indicated in the instructions).
- If a computer problem occurs during the exam (for example, if the exam does not respond or the mouse no longer functions) or if a power outage occurs, contact a testing center administrator immediately. The administrator will restart the computer and return the exam to the point where the interruption occurred, with your score intact.

Certification Benefits

At the conclusion of the exam, you will receive a score report, indicating whether you passed the exam. You can print with the assistance of the testing center administrator. If your score meets or exceeds the passing standard (the minimum required score), you will be contacted by email by the Microsoft Certification Program team. The email message you receive will include your Microsoft Certification ID and links to online resources, including the Microsoft Certified Professional site. On this site, you can download or order a printed certificate, create a virtual business card, order an ID card, view and share your certification transcript, access the Logo Builder, and access other useful and interesting resources, including special offers from Microsoft and affiliated companies.

Using the Logo Builder, you can create a personalized certification logo that includes the MOS logo and the specific programs in which you have achieved certification. If you achieve MOS certification in multiple programs, you can include up to six of them in one logo.



You can include your personalized logo on business cards and other personal promotional materials. This logo attests to the fact that you are proficient in the applications or cross-application skills necessary to achieve the certification.

For More Information

To learn more about the Microsoft Office Specialist exams and related courseware, visit:

www.microsoft.com/learning/en/us/certification/mos.aspx

Using This Book to Study for a Certification Exam

The Microsoft Office Specialist (MOS) exams for individual Microsoft Office 2010 programs are practical rather than theoretical. You must demonstrate that you can complete certain tasks rather than simply answering questions about program features. The successful MOS certification candidate will have at least six months of experience using all aspects of the application on a regular basis; for example, using Microsoft Outlook at work to send messages, track contact information, schedule appointments and meetings, track and assign tasks, and take notes.

This book has been designed to guide you in studying the types of tasks you are likely to be required to demonstrate in the MOS Expert exams for Microsoft Word 2010 and Microsoft Excel 2010 and the MOS Specialist exams for Microsoft Access 2010 and Microsoft SharePoint.

Each part of the book covers one exam. The coverage for each exam is divided into chapters representing broad skill sets, and each chapter is divided into sections addressing groups of related skills. Each section includes review information, generic procedures, and practice tasks you can complete on your own while studying. When necessary, we provide practice files you can use to work through the practice tasks. You can practice the procedures in this book by using the practice files supplied or by using your own files. (If you use your own files, keep in mind that functionality in some Office 2010 programs is limited in files created in or saved for earlier versions of the program. When working in such a file, *Compatibility Mode* appears in the program window title bar.)

As a certification candidate, you probably have a lot of experience with the program you want to become certified in. Many of the procedures we discuss in this book will be familiar to you; others might not be. Read through each study section and ensure that you are familiar with not only the procedures included in the section, but also the concepts and tools discussed in the review information. In some cases, graphics depict the tools you will use to perform procedures related to the skill set. Study the graphics and ensure that you are familiar with all the options available for each tool.

Features and Conventions of This Book

If you have worked with previous versions of Word, Excel, Access, or SharePoint, or if you need help remembering how to perform a particular task, the following features of this book will help you locate specific information:

- **Detailed table of contents** Scan a listing of the topics covered in each chapter and locate specific topics.
- **Chapter thumb tabs** Easily locate the beginning of the chapter you want.
- **Detailed index** Look up specific tasks and general concepts in the index, which has been carefully crafted with the reader in mind.

You can save time when you use this book by understanding how special instructions, keys to press, buttons to click, and other conventions are indicated in this book.

Convention	Meaning
1	Numbered steps guide you through step-by-step procedures.
2	
→	An arrow indicates a procedure that has only one step.
See Also	These paragraphs direct you to more information about a given topic in this book or elsewhere.
Tip	These paragraphs provide a helpful hint or shortcut that makes working through a task easier, or information about other available options.
Interface elements	In procedures, the names of program elements (such as buttons and commands) are shown in bold characters.
Key combinations	A plus sign (+) between two key names means that you must hold down the first key while you press the second key. For example, "press Ctrl+Home" means "hold down the Ctrl key and press the Home key."
User input	In procedures, anything you should enter appears in bold characters.

Using the Book's Companion Content

Before you can complete the exercises in this book, you need to copy the book's practice files to your computer. These practice files, and other information, can be downloaded from here:

<http://www.microsoftpressstore.com/title/9780735657885>

Display the detail page in your web browser and follow the instructions for downloading the files.

Important The Microsoft Word 2010, Excel 2010, Access 2010, and SharePoint 2010 programs are not available from this website. You should purchase and install those programs before using this book.

Practice files are organized by chapter (and by section number when necessary) in folders for Microsoft Word 2010, Microsoft Excel 2010, and Microsoft Access 2010. The names of the files you need to work with are provided in the practice tasks.

No practice files are provided for the section about Microsoft SharePoint 2010, although practice tasks you can perform on your own site are described in each chapter. To work through the SharePoint section, you need full access to a SharePoint 2010 team site, and because SharePoint 2010 is a server-based platform rather than a desktop application, you need access to a server or an online environment where SharePoint 2010 is installed or hosted. You can find information about SharePoint hosting services and the SharePoint trial edition at the start of that section of the book. The companion content also includes an appendix that provides an overview of SharePoint and its basic functionality.

Your Companion eBook

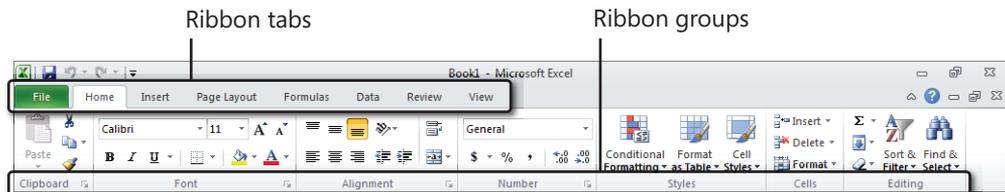
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- Search the full text
- Print
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To download your eBook, please see the instruction page at the back of this book.

Modifying the Display of the Ribbon

The goal of the Microsoft Office working environment is to make working with Office documents as intuitive as possible. You work with an Office file and its contents by giving commands to the program in which the document is open. All Office 2010 programs organize commands on a horizontal bar called the ribbon, which appears across the top of an application's program window.



Commands are organized on task-specific tabs of the ribbon, and in feature-specific groups on each tab. Commands generally take the form of buttons and lists. Some appear in galleries. Some groups have related dialog boxes or task panes that contain additional commands.

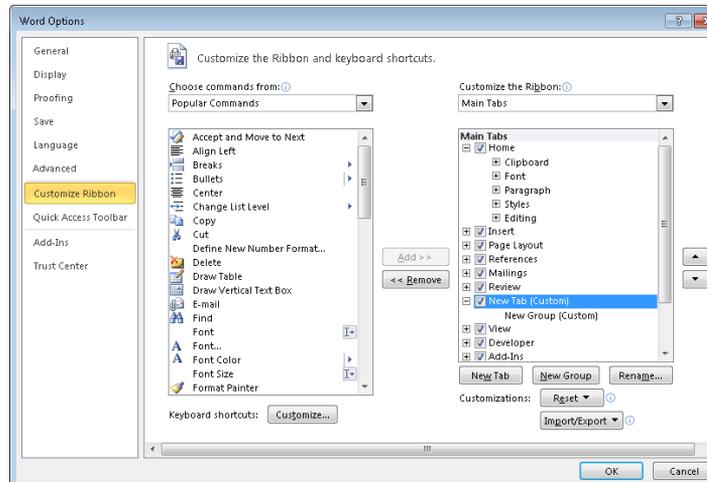
Tip Some older commands no longer appear on the ribbon but are still available in the program. You can make these commands available by adding them to the Quick Access Toolbar.

The appearance of commands on the ribbon changes as the width of the ribbon changes. A command might be displayed on the ribbon in the form of a large button, a small button, a small labeled button, or a list entry. As the width of the ribbon decreases, the size, shape, and presence of buttons on the ribbon adapt to the available space. For example, if you decrease the width of the ribbon, small button labels disappear and entire groups of buttons are hidden under one button that represents the group. Click the group button to display a list of the commands available in that group. When the window becomes too narrow to display all the groups, a scroll arrow appears at its right end. Click the scroll arrow to display hidden groups.

You can customize the ribbon or the Quick Access Toolbar to suit your working style and to make commands you use frequently easily available. To add a command to the Quick Access Toolbar, right-click the command on the ribbon and then choose Add to Quick Access Toolbar.

Tip The screen images shown in the procedures in this book were captured at a screen resolution of 1024 × 768, at 100 percent magnification, and with the default text size (96 dpi). If any of your settings are different, the ribbon on your screen might not look the same as the one shown in the book. If differences between your display settings and ours cause a button on your screen to look different from the one mentioned in this book, you can adapt the procedures to locate the command. First, click the specified tab. Then locate the specified group. If a group has been collapsed into a group list or group button, click the list or button to display the group's commands. Finally, look for a button that features the same icon in a larger or smaller size than that shown in the book. If necessary, point to buttons in the group to display their names in ScreenTips.

To add your own tabs and groups to the ribbon, right-click the ribbon and choose Customize the Ribbon. In the program's Options dialog box (the one shown here is for Word), click New Tab to add a tab to the ribbon. The new tab will include a new group as well. Use the New Group button to add another group to the custom tab or to any of the built-in tabs shown in the Main Tabs list. You can add commands only to custom groups, not to any of the built-in groups.



The Choose Commands From list provides options for displaying popular commands, commands not included on the ribbon, as well as all commands or commands on specific tabs. Select the command you want to add to a custom group, and then click Add. Click Remove if you want to remove a command from a custom group.

The Rename button opens a dialog box in which you can type a name for a custom tab or a custom group. For a custom group, you can also select a symbol to associate with the group.

If you want to return the ribbon and the Quick Access Toolbar to the default state, you can click Reset, Reset All Customizations.

How to Get Support and Provide Feedback

The following sections provide information on errata, book support, feedback, and contact information.

Errata & Book Support

We've made every effort to ensure the accuracy of this book and its companion content. Any errors that have been reported since this book was published are listed on our Microsoft Press site:

<http://www.microsoftpressstore.com/title/9780735657885>

If you find an error that is not already listed, you can report it to us through the same page.

If you need additional support, please send an email message to Microsoft Press Book Support at *mspinput@microsoft.com*.

Please note that product support for Microsoft software is not offered through the addresses above.

We Want to Hear from You

At Microsoft Press, your satisfaction is our top priority, and your feedback our most valuable asset. Please tell us what you think of this book at:

www.microsoft.com/learning/booksurvey/

The survey is short, and we read *every one* of your comments and ideas. Thanks in advance for your input!

Stay in Touch

Let's keep the conversation going! We're on Twitter: *<http://twitter.com/MicrosoftPress>*.

3 Tracking and Referencing Documents

The skills tested in this section of the Microsoft Office Expert exam for Microsoft Word 2010 relate to tracking revisions in documents, merging documents, and creating references such as bibliographies, source citations, and indexes. Specifically, the following objectives are associated with this set of skills:

- 3.1** Review, compare, and combine documents
 - 3.2** Create a reference page
 - 3.3** Create a table of authorities in a document
 - 3.4** Mark and compile an index for a document
-

In this chapter, you'll learn the mechanics for creating different types of reference material for a document, including bibliographies, cross-references, indexes, and tables of authorities (which are used in legal documents). Most of the tools you use for these tasks appear on the ribbon's References tab.

In the first section of this chapter, you'll learn details about tracking revisions in a document, including how to merge different versions of a document and review revisions in the combined document.

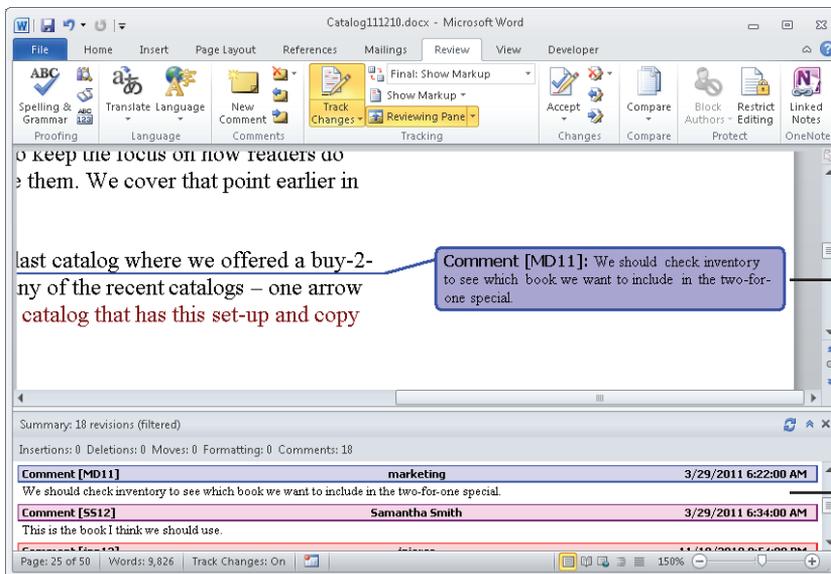
3.1 Review, Compare, and Combine Documents

In this section, you learn how to work with four groups of commands on the Review tab: Comments, Tracking, Changes, and Compare. You often use these commands when you work on a shared document with colleagues or coworkers, but you can use them effectively on your own when you need to annotate a document or compare and combine different versions of a document.

Adding Comments to a Document

A simple way to annotate a document is to insert comments. You might use a comment to indicate that a section needs revising, that information is missing, or that certain facts need to be checked. One advantage of using comments (rather than revision marks) is that they appear in context but are not integrated with the document's content. Each comment is numbered and identified by initials associated with the user who inserts it (using the initials specified on the General tab in the Word Options dialog box). You can move from comment to comment by using the Previous and Next buttons in the Comments group. Use the Delete command to remove a comment (or all comments at once) when a comment is no longer needed.

You can see comments in balloons and in the Reviewing pane.



Tip To reply to a comment, place the cursor in a comment balloon and then click New Comment. Word identifies the new comment by adding R to the comment's ID. The R tells you that this comment is a reply to the comment that precedes it.

You can view comments in balloons in the Print Layout, Full Screen Reading, and Web Layout views. In Draft and Outline views, comments are displayed in ScreenTips when you rest the mouse pointer on the highlighted text. You can also view comments in the Reviewing pane. Other options for displaying comments are available in the Track Changes Options dialog box, which is covered in the next section.

► **To insert, review, and delete comments**

1. On the **Review** tab, in the **Comments** group, click **New Comment**, and then type the comment.

Depending on which document view you are using, you will enter the comment in a balloon or in the Reviewing pane.

2. To move from comment to comment, click **Next** or **Previous** in the **Comments** group.
3. To delete a comment, select the comment and then click **Delete** in the **Comments** group.

You can also delete all comments shown or all the comments in a document.

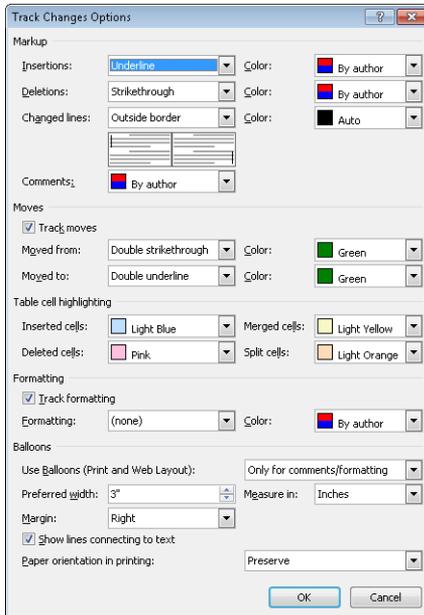
► **To reply to a comment**

1. Select the comment you want to reply to.
2. On the **Review** tab, click **New Comment**, and then type the reply.

Using Track Changes and Setting Track Changes Options

Tracking revisions that you or other users make to a document can be simple and straightforward. Click Track Changes on the Review tab, and then the insertions, deletions, and text moves you make in the document are highlighted, along with changes to formatting. You can then use the commands in the Changes group to find revisions and to accept or reject them.

You can also choose from a number of options for how revisions are tracked and displayed and how you view them. Many of these settings are controlled in the Track Changes Options dialog box.



In the Track Changes Options dialog box, you can specify the following:

- Formatting that Word applies to insertions and deletions.
- Where Word places a line that indicates where a change was made.
- The color that identifies your changes or whether changes are specified by author.
- The background color for comment balloons.
- Whether and how Word tracks text that is moved.
- Highlighting for changes to table cells.
- Whether changes to formatting are tracked and how Word displays those changes.
- The size and position of comment balloons and whether Word displays a balloon for all types of changes, never uses balloons, or displays balloons only for comments and formatting changes. You can also specify whether Word shows a line that connects a balloon to the text it refers to.
- How Word orients the page when you print a document with revisions and comments.

Tip Changes you make to a document are identified by the user name and initials entered in the Word Options dialog box. For some documents, you might want to be identified by your role or with a user name other than the one currently set. For example, you might want to associate revisions with the user name *Engineering* if you are reviewing a document on behalf of that department. You can change your identity from the Review tab by clicking Track Changes, Change User Name. Enter the user name and initials you want to use, and then click OK. Note, however, that any change you make is carried over to other documents. You should revert to your standard user name and initials as necessary.

Use the list of views available on the Display For Review menu (at the top of the Tracking group) to show or hide revisions:

- **Final: Show Markup** The default option, which shows the final document with insertions, deletions, and comments.
- **Final** Shows how the document appears if you accept all revisions.
- **Original: Show Mark** Shows the original document with insertions, deletions, and comments.
- **Original** Shows the original document without any revisions that have been made (as the document would appear if all revisions were rejected).

Because the Final and Original options let you see a document without its revision marks, you can use these options to read through passages of heavily revised text more easily.

The Show Markup menu lets you control the display of specific items. For example, in a document in which formatting changes have been tracked from start to finish, clear the check mark for Formatting to suppress the corresponding balloons or other highlighting. Word shows changes by all reviewers of a document by default. If you want to see the changes made by a specific reviewer or a particular set of reviewers, click Reviewers, click All Reviewers to remove the check mark, and then open the menu again and select the reviewer or reviewers whose work you want to inspect.

Display the Reviewing pane in horizontal or vertical layout so that you can see the collection of revisions made to a document. The Reviewing pane also shows a set of statistics about how many of each type of change the document contains.

See Also For information about accepting or rejecting changes, see “Reviewing a Combined Document” later in this chapter.

► To track changes and set track changes options

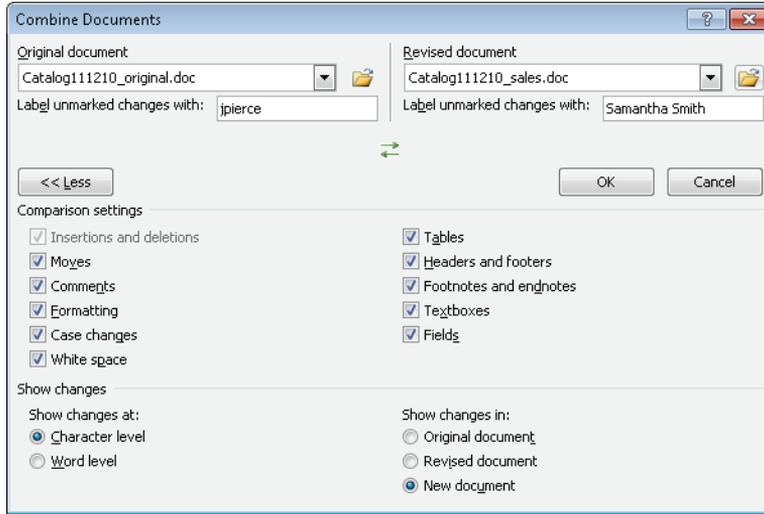
1. On the **Review** tab, click **Track Changes** in the **Tracking** group.
Word highlights the Track Changes command to indicate that the feature is active.
2. On the **Review** tab, click **Track Changes** and then click **Change Tracking Options**.
3. In the **Track Changes Options** dialog box, change the settings for how insertions and deletions should be marked, whether and how to track text moves and formatting changes, and which changes Word should display a balloon.
4. Use the **Display for Review** menu to choose whether to see the final or original document, with or without markup.
5. On the **Show Markup** menu, select or clear the check marks for which elements of the document markup you want to view (including comments, insertions and deletions, and formatting).
6. Click **Show Markup, Reviewers** to see only the changes made by a specific reviewer or set of reviewers.

Merging Documents

If you have two or more versions of a document that you want to compare or bring together, click **Compare** on the **Review** tab. Use the first option on the menu that Word displays to compare two versions of a document. (Word also calls this a *legal blackline*, a method of showing only what is different between two versions of the document.) In the **Compare Documents** dialog box, you point to the original document and the revised document, choose settings for the types of changes Word will mark, and specify whether Word will show the results of the comparison in the original document, the revised document, or a new document.

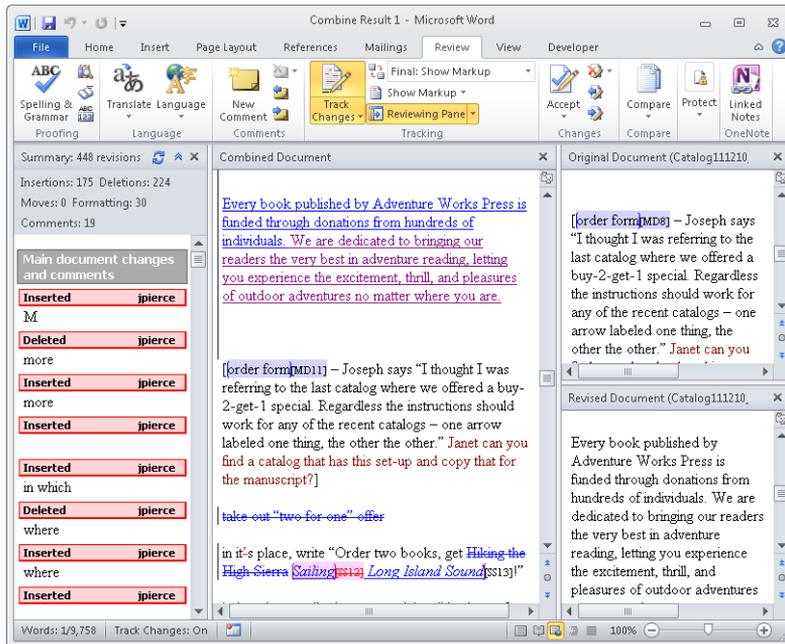
The second option on the **Compare** menu is **Combine**, which is more fully identified as **Combine Revisions From Multiple Authors Into A Single Document**. The **Combine Documents** dialog box is set up essentially the same as the **Compare Documents** dialog box.

When you click **OK** in the **Combine Documents** dialog box, Word is likely to display a message box telling you that only one set of formatting changes can be stored in the merged document. You need to choose between the changes in the original document and the revised document to continue merging the documents. Word displays the results of combining the documents in a set of windows that shows the combined document in a central pane and the original and revised documents in smaller panes at the right. Word also displays the **Reviewing** pane along the left side of the window.



Clear check boxes in the Comparison Settings area for items Word can skip when it combines two documents.

The Character Level option shows changes in capitalization and other letter-by-letter changes.



If you need to, you can merge another version of the document at this point by choosing Combine from the Compare menu again, pointing to the combined result document

(Combine Result 2 in the preceding screen shot) as the original document, and selecting the next version you want to combine.

To save the combined result, click **Save** on the Quick Access Toolbar (or click **File, Save**) and then name the combined document. You can then open the combined document and work through the variations (indicated by revision marks), accepting and rejecting them as necessary, to achieve a final document.

► To combine two or more documents into a single document

1. Open a blank document in Word. (You can also start with the original document or one of the revised documents open.)
2. On the **Review** tab, in the **Compare** group, click **Compare, Combine**.
3. In the **Combine Documents** dialog box, select the original document (if it isn't already selected) by choosing it from the drop-down list or by clicking the folder icon and browsing to the location where the document is saved.
4. Select the revised document you want to combine with the original document.
5. If necessary, click **More** to display the **Comparison settings** area and other options in the dialog box.
6. In the **Comparison settings** area, clear or select the check boxes to specify the document elements you want Word to use in its comparison.
7. In the **Show changes at** area, choose the option to show changes at the character level or the word level.
8. In the **Show changes in** area, choose an option for where Word will show changes: in the original document, the revised document, or a new document.

Reviewing a Combined Document

In the window that Word displays after you combine documents, you can scroll through the combined document and the original and revised documents at the same time. Your location in each document is synchronized, which lets you refer to any of the documents as you need to.

In the Reviewing pane, you can right-click an insertion or a deletion and then accept or reject it. Working in the Reviewing pane can be cumbersome. If you prefer to work in the document itself, close the Reviewing pane (by clicking the X in the pane's upper-right corner or clicking **Reviewing Pane** on the **Review** tab).

If you close the Reviewing pane, you can use commands in the Changes group to navigate from change to change (by clicking Previous or Next) and to accept or reject the changes showing in the combined document. The Accept and Reject menus have similar sets of commands: Accept and Move To Next, Accept Change, Accept All Changes Shown, and Accept All Changes In Document. The Accept (or Reject) All Changes Shown command is active only when you select an option other than All Reviewers from the Show Markup, Reviewers menu.

Tip You can also right-click a change in the combined document and then click Accept Change or Reject Change in the menu that appears.

► **To review changes in a combined document**

1. In the **Reviewing** pane, right-click in a heading marked Inserted or Deleted and then choose the **Accept** or **Reject** option from the menu that appears.
Or follow these steps:
2. On the **Review** tab, in the **Changes** group, click **Next** to move to the next revision.
3. In the **Changes** group, click the arrow under **Accept** (or under **Reject**) and then click **Accept Change** or **Reject Change**.
4. Click **Accept and Move to Next** to accept the revision and move directly to the next one. Click **Reject and Move to Next** to reject a revision and move to the next one.
5. To accept or reject all revisions at once, click the arrow under **Accept** (or **Reject**) and then click **Accept All Changes in Document** or **Reject All Changes in Document**.

► **To accept or reject revisions made by a particular reviewer or set of reviewers**

1. On the **Review** tab, in the **Tracking** group, click **Show Markup, Reviewers**.
2. Clear the check mark next to **All Reviewers**, and then repeat step 1 and select the first (or only) reviewer whose revisions you want to see. Repeat step 1 again to select any other reviewer.
3. In the **Changes** group, click the arrow under **Accept** (or **Reject**) and then click **Accept All Changes Shown** or **Reject All Changes Shown** to work with this group of revisions all at once.

You can also move from revision to revision in the set that is shown and accept or reject revisions one at a time.

Practice Tasks

The practice files for these tasks are located in the practice files folder for Microsoft Word 2010. You can save the results of these exercises in the same folder. Change the file name so that you don't overwrite the sample files. When you are done, try performing the following tasks:

- Open the file SpringCatalog2012.docx, and make some revisions to this file and insert comments. For example, insert a table that you can use as the basis for an order form. Include columns such as Title, Price, and Quantity. Insert the titles of a few books or other publications you like as placeholders. Use the Save As command to save a new copy of this document.
- Create a new blank document in Word. Open the Combine Documents dialog box, and then point to the file SpringCatalog2012.docx as the original document. Merge the version of the document you created in the first step of this exercise to create a combined document.
- Open the Combine Documents dialog box again, and merge the document SpringCatalog2012_marketing.docx with the combined document you have already created.
- Save the combined document, open it in its own window, and then accept or reject one or more of the changes.

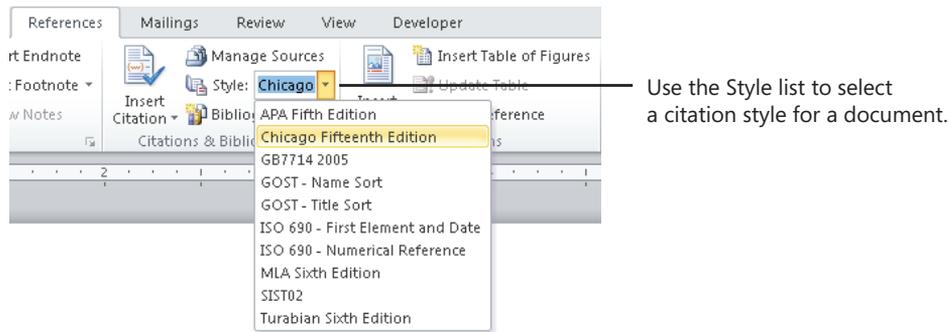
3.2 Create a Reference Page

Research and scholarly documents, and even many types of longer business documents, include citations to sources that the authors of the documents referred to in developing their ideas and performing their investigations and analyses. The References tab in Word 2010 provides tools that let you build a list of sources (using the information required by conventional authorities such as the Modern Language Association or the *Chicago Manual of Style*), manage these sources, and insert the citations where you need them in a document. When the citations are in place, you can easily create a bibliography or a list of works cited.

Word also provides a mechanism for creating and managing cross-references in a document. To aid navigation within a document, you can link a cross-reference to the element it refers to. Word also updates cross-references so that the information they refer to, such as section headings or page numbers, is kept up to date automatically.

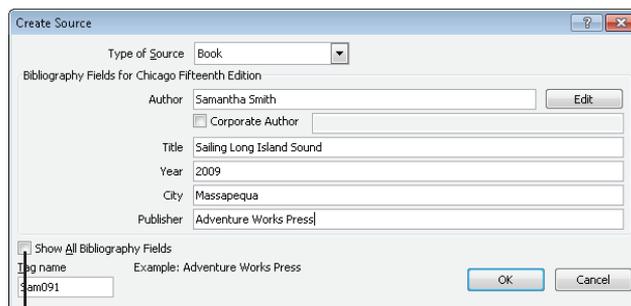
Adding Citations to a Document

To add and define citations for a document, you work with the commands in the Citations & Bibliography group on the References tab. Word provides a number of built-in citation styles that you can choose from. These styles conform to conventions defined by organizations and in traditional style manuals. For example, the style list includes entries for the fifth edition of the American Psychological Association's style guide (APA Fifth Edition), the Modern Language Association (MLA Sixth Edition), and the fifteenth edition of the *Chicago Manual of Style*. The style you select here determines what information you enter for a citation.



You can use the Insert Citation command to add a citation that's already defined, to create a new source for a citation, or to enter a placeholder for a citation. You can return to a placeholder later when you need to fill in details for the source.

In the Create Source dialog box, first select the type of source (for example, book, conference proceedings, interview, or sound recording). The fields in the Create Source dialog box change to reflect the type of source you select. Word displays a simple example for each field when you select that field.



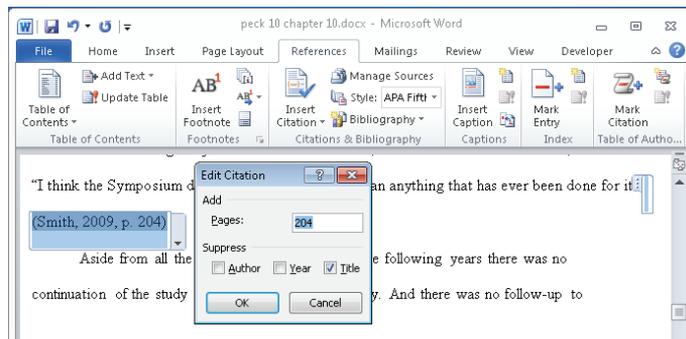
Select Show All Bibliography Fields to display fields for information such as volume, translator, and short title.

To create an entry with multiple authors, click Edit beside the Author field and then use the Edit Name dialog box to add each author name required for the citation. Word creates a tag name on the basis of the author name you enter.

Each citation you define is included in a gallery that appears when you click Insert Citation. Select a citation from that gallery when you need to insert it. To fill in the details for a placeholder, right-click the content control for the placeholder and click Edit Source. You can also use the Edit Source command to change the details of a citation inserted in the document.

To make changes to a citation itself, click the down arrow that appears on the citation's content control. The menu that appears provides options that let you edit the citation, edit the details for the source that is cited, convert the citation to static text, and update the citations and bibliography in the document.

When you work in the Edit Citation dialog box, you can add page references for the citation and choose to display the author, year, and title or suppress the display of one or more of these elements.



In the Edit Citation dialog box, you can specify the information that appears in the citation.

► To insert a new citation

1. On the **References** tab, in the **Citation & Bibliography** group, choose the style of citation you want to use.
2. Position the cursor where you want the citation to appear, and then click **Insert Citation, Add New Source**.
3. In the **Create Source** dialog box, select the type of source and then fill in the fields shown.
4. Select **Show All Bibliography Fields** if you need to enter additional details for the source.

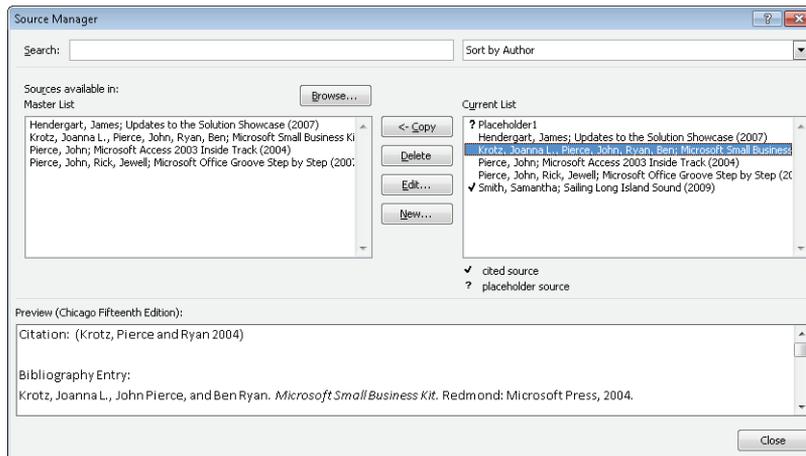
► To use a citation placeholder

1. Position the cursor where you want the citation to appear, and then click **Insert Citation, Add New Placeholder**.
2. In the **Placeholder Name** dialog box, keep the default title provided or type a tag name for the source.
3. To fill in the source details, right-click the placeholder and then click **Edit Source**.
4. In the **Edit Source** dialog box, select the type of source and then fill in the fields required.

Managing Sources

When you define the details for a source in the Create Source dialog box, Word adds the reference to a master list of sources. To work with this list, you use Source Manager.

Use the Search and Sort boxes in Source Manager to quickly find a source or to arrange the sources by title instead of author.



Tip Instead of providing details for each citation as you insert them, you can build a list of sources in Source Manager. Open Source Manager, and then use the Create Source dialog box (by clicking **New** in Source Manager) to provide the details for each source you need to cite. Then return to the document and place citations where you need them by using the entries in the Insert Citation gallery.

Source Manager shows two lists of sources: the master list and the list for the current document. You can copy sources from the master list when you need to cite them in the current document. (You can also copy a source in the list for the current document to the master list.) Use the other command buttons in Source Manager to edit source information or to delete a source. You cannot delete a cited source (indicated by a check mark) from the current list of sources.

Word stores the sources you define in a file named Sources.xml. To see this file, click the Browse button in Source Manager to display the Open Source List dialog box. You can copy this file and use it on another computer or share it with other users. To add sources from this file to Source Manager, display the Open Source List dialog box, select Sources.xml, and then click Open. But be warned that this will replace any existing definitions of the currently logged on user.

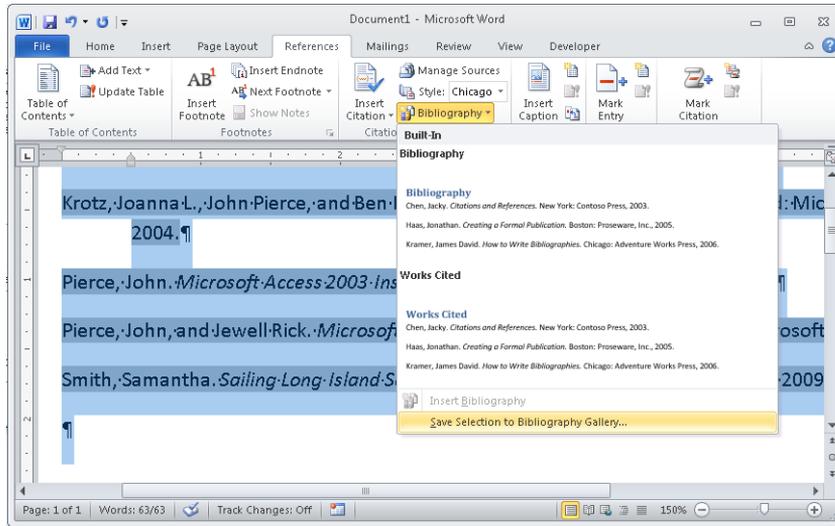
► To manage sources for a document

1. On the **References** tab, in the **Citation & Bibliography** group, click **Manage Sources**.
2. In the **Source Manager** dialog box, click **Copy** to move a source from the master list to the current list.
3. Select a source, and then click **Delete** to remove a source from a list.
4. Select a source, and then click **Edit** to update or revise details for the source.
5. Click **New** to open the **Create Source** dialog box and define a new source.
6. To change the sort order for the source lists, select an option from the **Sort** list.
7. To search for a particular source or set of sources, type the search string in the **Search** box.

Creating a Bibliography

To insert a bibliography that lists the sources cited in a document, click **Bibliography** in the **Citations & Bibliography** group. Word displays a gallery from which you can insert a list of sources that is labeled *Bibliography* or a list that uses the label *Works Cited*. Choose **Insert Bibliography** to insert a simply formatted bibliography.

Because bibliographies are a type of building block, you can change the formatting for the bibliography you insert, and then select it and save it to the **Bibliography** gallery to use in other documents.



See Also For more information about creating custom building blocks, see “Construct Reusable Content in a Document” in Chapter 2 in this part of the book.

► To insert a bibliography or a list of works cited

1. Position the cursor where you want the bibliography to appear.
2. On the **References** tab, in the **Citation & Bibliography** group, click **Bibliography**, and then choose the option you want from the gallery that appears.

► To save a bibliography to the Bibliography gallery

1. Insert the bibliography for the document.
2. Make any formatting changes you want to the bibliography entries.
3. Select the bibliography, and then click **Bibliography, Save Selection to Bibliography Gallery**.
4. In the **Create New Building Block** dialog box, type the name and description for this bibliography, specify its gallery and the template you want to save it in, and then click **OK**.

Using Cross-References in a Document

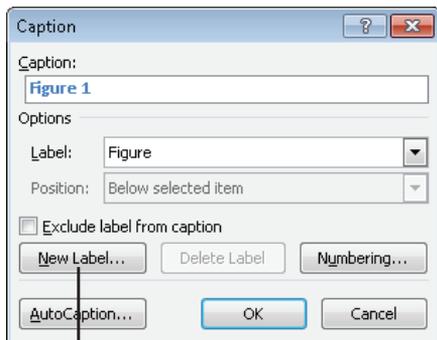
Cross-references let you easily locate specific content within the current document, and they also help keep numbered items (numbered tables and figures, for example) and

page references up to date. By default, Word lets you define cross-references to the following elements of a document:

- **A numbered item** Paragraphs that use Word's automatic numbering styles
- **Heading** A paragraph styled with one of Word's built-in heading styles or a style based on those styles
- **Bookmark** A bookmark defined in the document
- **Footnote or endnote** Notes you insert by using commands in the Footnote group on the References tab
- **Equation** An equation associated with a Word caption
- **Figure** An illustration or other figure associated with a Word caption
- **Table** A table associated with a Word caption

Creating a Caption

Judging by the last three items in the preceding list, you shouldn't be surprised to find the Cross-Reference command in the Captions group on the References tab. (It also appears in the Links group on the Insert tab.) When you want to label an equation, a figure, or a table (or any other element you want to refer to in a document), select the object and then click Insert Caption.



Click New Label to define a label that you can assign to other elements you want to cross-reference.

In the Caption dialog box, use the Label list to select the type of object you are adding a caption to. The default choices are equation, figure, and table. You can define other labels as you need them by clicking New Label. (You can delete custom labels when you no longer need them, but you cannot delete the default options.)

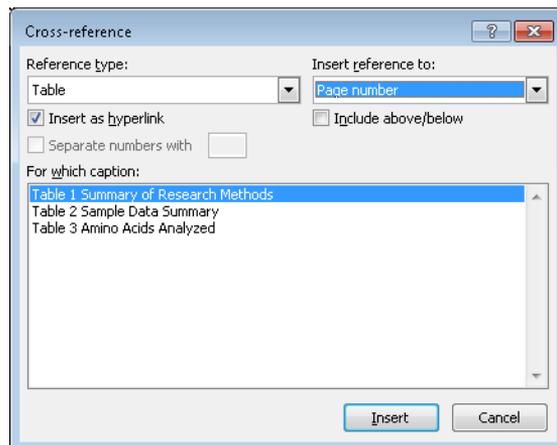
Type the text for the caption (making sure you include a space after the default label that's shown). Click the Numbering button to display the Caption Numbering dialog box, and then use this dialog box to switch to a different numbering format or to include a chapter number with a caption's label. (Chapters must be defined by using one of Word's built-in heading styles.)

AutoCaptions

If you need to insert a particular type of object repeatedly in a document and you want these objects to have a caption, click AutoCaption in the Caption dialog box. Select the object types (Bitmap Image or Microsoft Excel Worksheet, for example) for which you want Word to provide a caption automatically when you insert an object of this type. You can adjust the label that's used with a particular type of object and where Word positions the caption by default.

Inserting a Cross-Reference

With the cursor positioned where you want to add a cross-reference, type some text that introduces the object you are cross-referencing (for example, **For a summary of the amino acids analyzed, see**). Open the Cross-Reference dialog box, and then select the type of reference. For example, to reference a table, select that entry from the Reference Type list, and then Word displays a list of tables in the document (those tables labeled with a caption created in Word). With the type of reference selected, use the Insert Reference To list to choose the reference format—a page number, for example, or the text of a heading—and then choose the item you are referring to in the For Which Caption list.



For some types of references (headings or bookmarks, for example), the Insert Reference To list includes two types of numbers: No Context and Full Context. These options are used with lists or outlines that use multiple levels. The Full Context option includes each element in a numbering scheme—for example, 4.1.1.a. The No Context alternative refers only to the last of the levels used.

Select the Include Above/Below option to insert a positional cross-reference that uses the word *above* or *below* depending on where the item you are referring to is located in relation to the reference.

Keep the Insert As Hyperlink check box selected if you want to create a hyperlink from the cross-reference to the reference's target. The hyperlinks you create in the Cross-Reference dialog box work in Word and in a browser if you save a document as a web page.

► **To create a caption for a document element**

1. Select the object you want to create a caption for.
2. On the **References** tab, in the **Captions** group, click **Insert Caption**.
3. In the **Caption** dialog box, in the **Label** list, select the type of object.
4. In the **Position** list, select an option for where you want the caption to appear.
5. Click **Numbering** to open the **Caption Numbering** dialog box, in which you can adjust number formatting for the caption.
6. Type the caption after the label in the **Caption** box, and then click **OK**.

► **To insert a cross-reference**

1. Type the text you want to use to introduce the item you are referencing.
2. On the **References** tab, in the **Captions** group, click **Cross-reference**.
3. In the **Cross-reference** dialog box, select the reference type.
4. In the **Insert reference to** list, select which option you want to use as the reference (page number, caption, section heading, for example).
5. In the **For which caption** list, select the target for the cross-reference.
6. Click **Insert**.

Practice Tasks

The practice files for these tasks are located in the practice files folder for Microsoft Word 2010. You can save the results of these exercises in the same folder. Change the file name so that you don't overwrite the sample files. When you are done, try performing the following tasks:

- Use the sources listed in the file PracticeSources.docx to create a list of six or seven sources in Source Manager.
- Open the file Citations.docx, and insert citations to the sources you defined. Insert several placeholders for citations as well.
- Open Source Manager, and edit information for three of the sources listed. Choose one or more of the entries for the placeholders you inserted, and then use the file PracticeSources.docx to enter details for those placeholders.
- Insert a bibliography for the file Citations.docx.
- Open the file X-refs.docx, which contains several tables and figures, along with section headings. Create captions for the tables and figures, and then insert cross-references to several of the elements in the file.

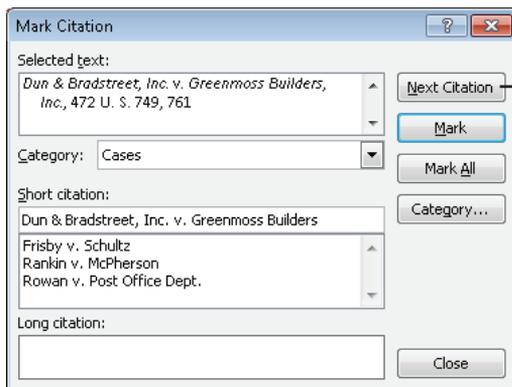
3.3 Create a Table of Authorities in a Document

Tables of authorities are used in legal documents as a reference to the cases, statutes, rulings, regulations, and other citations included in a document. Word can generate a table of authorities on the basis of the citations you mark and define in a document. Word's table of authorities feature provides several built-in categories that you use to classify citations, but you can modify this list or add categories of your own. Word also lets you choose options for formatting a table of authorities and for how the table displays the citations.

Marking Citations

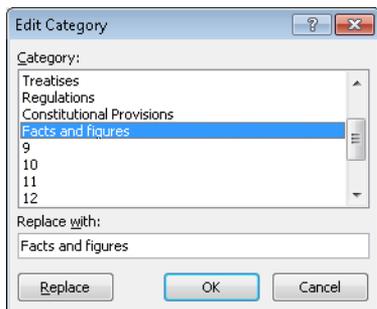
To start building a table of authorities, select the text of a citation in the document and then click Mark Citation in the Table Of Authorities group on the References tab. The text you select appears in the Selected Text box and the Short Citation box in the Mark

Citation dialog box. You can edit the citation's text in the Selected Text box or in the Short Citation box. To change the formatting of the text, right-click in the Selected Text box and then choose Font.



Clicking Next Citation takes you to the next location that Word thinks is a citation you need to mark.

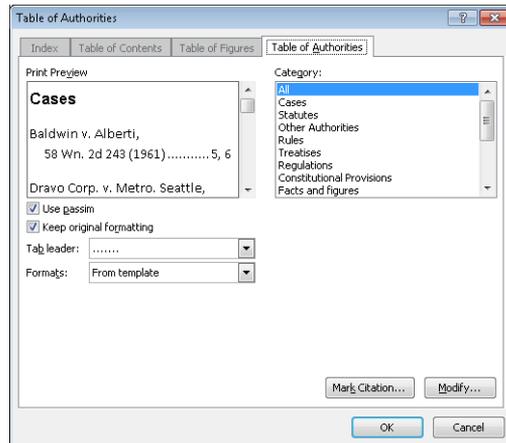
Word provides seven named categories by default (cases, statutes, other authorities, rules, treatises, regulations, and constitutional provisions), along with unspecified categories numbered 8 through 16. You can replace a named category or assign a name to a numbered category to modify what Word provides.



When you click Mark in the Mark Citation dialog box, Word adds the citation to a list. Click Mark All, and Word inserts a “table of authorities” field (identified by the characters TA) for each instance in the document that matches the text in the long and short forms you define. You can keep the Mark Citation dialog box open as you navigate through a document to mark other citations. The Next Citation button moves to the next likely citation in the document—Word uses clues such as “v.” or dates in parentheses—for example, (2001)—to identify citations.

Formatting and Aligning a Table of Authorities

When you are ready to build your table of authorities, position the cursor where you want the table of authorities to appear, then click Insert Table Of Authorities on the References tab.



In the Table Of Authorities dialog box, you can set the following options:

- **Category** Select which category of authorities you want to include, or choose All. You cannot choose more than one option in this list.
- **Use Passim** Keep this check box selected if you want to use the term *passim* to indicate that information the citation refers to is scattered throughout the source. Clear this check box to list specific pages.
- **Keep Original Formatting** Use this option to specify whether the citations listed in the table of authorities appear in the table as they are formatted in the document.
- **Tab Leader** Choose the type of tab leader to use (which helps align page numbers), or choose None from this list.
- **Formats** Choose a style for the table of authorities, or use the styles and formatting that is defined in the current template.

To change formatting for the table of authorities entries and the table heading, use the From Template setting in the Formats list, and then click Modify to open the Style dialog box. Select the element you want to change, click Modify in the Style dialog box, and then revise the formatting in the Modify Style dialog box.

► **To mark table of authorities citations**

1. In the document, select the text for a citation.
2. On the **References** tab, in the **Table of Authorities** group, click **Mark Citation**.
3. In the **Mark Citation** dialog box, edit the text for the citation in the **Selected text** box.
4. Edit the short form for the citation in the **Short citation** box.
5. In the **Category** list, select a category for the citation.
6. Click **Mark**, or click **Mark All**, to insert a table of authorities reference for each instance of this citation as you have defined it in the **Mark Citation** dialog box.
7. Click **Next Citation**, and repeat steps 3 through 6.

► **To format and generate a table of authorities**

1. Position the cursor where you want the table of authorities to appear in the document.
2. On the **References** tab, in the **Table of Authorities** group, click **Insert Table of Authorities**.
3. In the **Table of Authorities** dialog box, do the following:
 - Select the category of citation you want to create a table for, or select **All**.
 - Select or clear the **Use Passim** check box to use the term *passim* for short-form references or to show specific page numbers referred to in the citation.
 - Select or clear the **Keep original formatting** option to maintain the formatting defined for the citation in the **Mark Citation** dialog box.
 - Select a tab leader to use to align page numbers.
 - Select a format for the table, or choose **From template**.
4. Click **OK**. (If the field code appears, right-click and select **Toggle field codes**.)

► **To replace a category for a table of authorities**

1. On the **References** tab, click **Mark Citation**.
2. In the **Mark Citation** dialog box, click **Category**.
3. In the **Edit Category** dialog box, select the category you want to change.
4. In the **Replace with** box, modify the category name.
5. Click **Replace**.
6. Make changes to other categories as necessary, and then click **OK**.

► **To modify styles for table of authorities entries**

1. In the **Table of Authorities** dialog box, select **From template** in the **Formats** list.
2. Click **Modify**.
3. In the **Style** dialog box, select the element you want to change—**Table of Authorities** (for entries) or **TOA Heading**.
4. In the **Style** dialog box, click **Modify**.
5. In the **Modify Style** dialog box, make changes to the style and then click **OK**.
6. Click **OK** to close the **Style** dialog box.

Practice Tasks

Tables of authorities are used specifically in legal documents. No special practice files have been included with this book, but you can use one of your own to build a table of authorities in Word by using the techniques you learned in this section.

3.4 Mark and Compile an Index for a Document

To create an index in a document, you need to complete two general steps: mark index entries in the file, and set options for how Word generates the index. You can find details about specifying index options in “Setting Index Options” later in this section. In the next section, you’ll learn the mechanics of marking index entries.

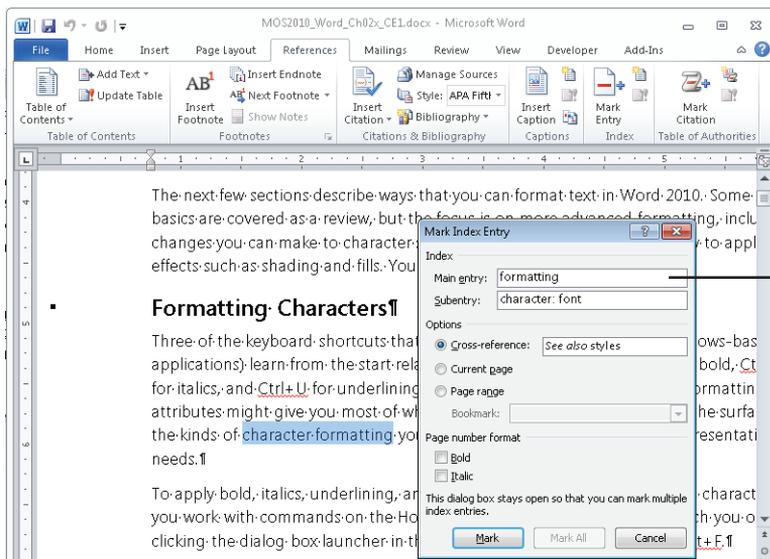
Marking Index Entries

You can follow any of several approaches for marking index entries. You can select text in a document to use as an entry, insert an entry of your own where you want the index marker to appear, or insert index markers by importing a list of terms set up in an AutoMark file.

To mark entries in the file, begin by clicking **Mark Entry** in the **Index** group on the **References** tab to open the **Mark Index Entry** dialog box.

In the file, select a word or phrase you want to add as a main index entry and then click the dialog box to make it active. The text you select appears in the **Main Entry** field. You do not need to select text in the document to use as the main entry. You can also place the cursor where you want an index entry to appear and then type the main entry as a starting point.

You can edit the text for the entry and type a subentry if applicable. To include a third-level entry, type the subentry text followed by a colon (:), and then type the text of the third-level entry. In the Options area, select Cross-Reference and then type a reference to other index entries as applicable.

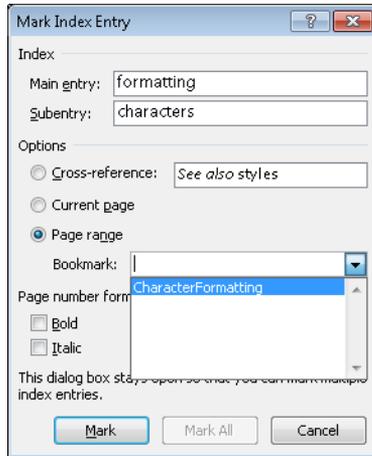


Use text in the document to start a main entry or type a main entry yourself.

Tip To format the text for the index, select the text in the Main entry or Subentry box, right-click, and then click Font. Select the formatting options you want to use.

If this entry relates to the specific instance of this text on the current page, keep the Current Page option selected. To specify a page range for an entry, you first need to create a bookmark. Select the paragraphs in the range you want to use, and then use the Bookmark dialog box (which you can open by clicking Bookmark in the Links group on the Insert tab) to define the bookmark. In the Mark Index Entry dialog box, choose Page Range and then select the bookmark you defined for that range.

Use the options provided for formatting the page number in bold or italic, and when the entry is complete, click Mark to define it. Click Mark All to insert an index field for each occurrence of the main entry you defined in the document.



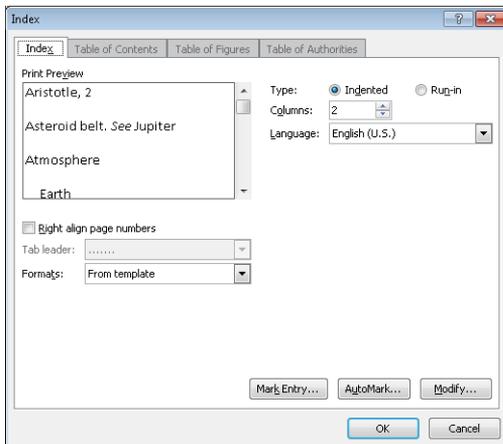
When you select text and mark it as an index entry, Word adds an index entry field. The field is identified by the characters XE and encloses all the information for an entry in curly braces. If you don't see the index fields in your document, click Show/Hide (the paragraph icon) in the Paragraph group on the Home tab. Here is an example of the information you might see for an index field:

```
{ XE "formatting:characters: font" \t "See also styles" }
```

Another method for identifying the terms for an index is to list main entries in a separate file that Word uses to mark your document. You can set up the entries in a two-column table—with the terms you want to search for in the left column and the corresponding entries in the right column—or use a single list. The entries in this list are case sensitive. For example, if you are searching for the term *text effects*, Word won't insert an index field if the AutoMark file includes only an entry *Text effects*. To insert the entries, click Insert Index on the References tab, click AutoMark in the Index dialog box, and then select the file that lists the terms in the Open Index AutoMark File dialog box.

Setting Index Options

After you mark all the index entries, you use the Index dialog box to choose an index design and select other options.



For example, Word supports two types of indexes: indented and run-in.

In a run-in index, main entries and subentries are formatted as follows:

Styles: applying, 211; creating, 209; updating
in template, 212. *See also* character formatting

In an indented index, the entries are listed in this format:

Styles
applying, 211
creating, 209
updating in template, 212
See also character formatting

When the length of an index is a factor, you save space by using a run-in index. When you select an option for the type of index, Word displays an example in the Print Preview area of the Index dialog box.

By default, Word creates a two-column index. You can choose the Auto setting or set the number of columns from 1 to 4. Choose the language you want to use as necessary. If you are setting up an indented index, you can change the alignment of page numbers by selecting the Right Align Page Numbers check box. Word previews this format when you select the option, and you can then select the type of tab leader you want to include (or select None from this list). The Formats list provide several options for the fonts, line spacing, and other styles Word applies when you generate the index.

If you keep From Template selected in the Formats list, click Modify in the Index dialog box to open the Style dialog box, which lists the styles for index levels 1 through 9.

Select an index level, and then click **Modify** to open the **Modify Style** dialog box and make changes to formatting attributes for that style.

See Also For more information about modifying styles, see “Apply Advanced Font and Paragraph Attributes” in Chapter 2 in this section of the book.

When you finish defining options for the index, place the cursor where you want the index to appear, and click **OK**. Word sorts the entries alphabetically, adds page number references, and removes duplicate entries that occur on the same page.

Editing and Updating an Index

If you need to edit an index entry, you should edit the specific index marker and not the index that Word generates. Locate the field, and then edit and format the text within the quotation marks inside the curly braces that define the field. (Click **Show/Hide** on the **Home** tab if you don’t see the fields in the document.)

To delete an index marker, select the field (including the braces) and press **Delete**.

When you need to edit an index, open the **Find And Replace** dialog box (by clicking **Find**, **Advanced Find** in the **Editing** group on the **Home** tab). Click **Special** (or first click **More** if you don’t see the **Special** button), and then select **Field**. Click **Find Next** to move to the first field. To continue from field to field, click **Find Next** again, or close the dialog box and press **Shift+F4**.

After you revise the index entries, click **F9** or click **Update Index** on the **References** tab.

► To mark index entries

1. On the **References** tab, in the **Index** group, click **Mark Entry**.
2. In the document, select the text for a main entry, and then click the **Mark Index Entry** dialog box to make it active. You can also position the cursor where you want an entry to appear, and then type the entry in the **Main Entry** box.
3. In the **Subentry** box, type a subentry (if needed). To define a third-level entry, add a colon to the end of the subentry, and then type the third-level entry.
4. To add a **See** or **See Also** reference, select **Cross-reference** and then type the text for the reference.
5. To specify a page range for an entry, click **Page Range** and then choose the bookmark for the range. (See the next procedure for the steps you follow to create a bookmark.)

6. In the **Page number format** area, select bold and italic formatting as required.
7. Click **Mark**. Click **Mark All** to mark all instances of this entry in the document.

► **To define a bookmark for a page range**

1. Select the paragraphs you want to include in the page range.
2. On the **Insert** tab, in the **Links** group, click **Bookmark**.
3. In the **Bookmark** dialog box, type a name for the bookmark and then click **Add**.

► **To create an index from an AutoMark file**

1. Create the AutoMark file using a two-column table. Specify the terms you want Word to search for in the left column. Add the corresponding index term to the right column.
2. On the **References** tab, in the **Index** group, click **Insert Index**.
3. In the **Index** dialog box, click **AutoMark**.
4. In the **Open AutoMark File** dialog box, select the file and then click **Open**.

► **To specify index formatting options and generate the index**

1. In the document, insert your cursor where you want the index to appear.
2. On the **References** tab, in the **Index** group, click **Insert Index**.
3. In the **Index** dialog box, set the following options. Refer to the **Print Preview** area of the dialog box to see the effects of your selections.
 - Select a type of index: indented or run-in.
 - Specify the number of columns.
 - Choose a language if you are using a language other than the default language on your system.
 - If you are using an indented index, click **Right align page numbers** (an optional choice) and then select the style of tab leader you want to use.
 - Select a format for the index, or keep **From template** selected.
4. Click **OK** in the **Index** dialog box.

► **To modify index styles**

1. In the **Index** dialog box, select **From template** in the **Formats** list.
2. Click **Modify**.

3. In the **Style** dialog box, select the index level whose style you want to change and then click **Modify**.
4. In the **Modify Style** dialog box, make changes to the style and then click **OK**.
5. Click **OK** in the **Style** dialog box.

► **To edit and update an index**

1. In the document, click **Show/Hide** if the index fields are not displayed.
2. Select the text in the index field, and revise and format it as you need to.
3. Press F9 or click **Update Index** on the **References** tab.

Practice Tasks

The practice files for these tasks are located in the practice files folder for Microsoft Word 2010. You can save the results of these exercises in the same folder. Change the file name so that you don't overwrite the sample files. When you are done, try performing the following tasks:

- Open the file Chapter02.docx, which is an abbreviated version of the Word file for Chapter 2 in this section of the book. Work through three or four pages of the file, and add index entries for terms such as *formatting*, *styles*, *text effects*, and others. Add any applicable subentries, and define page ranges using bookmarks. Use the Index dialog box to set formatting options for the index, and then generate the index in Word. Edit a handful of entries using the field tags, and then update the index to reflect your changes.

Objective Review

Before finishing this chapter, be sure that you have mastered the following skills:

- 3.1 Review, compare, and combine documents
- 3.2 Create a reference page
- 3.3 Create a table of authorities in a document
- 3.4 Mark and compile an index for a document

4 Working with Macros and Forms

The skills tested in this section of the Microsoft Office Expert exam for Microsoft Excel 2010 relate to using macros and forms, including how to record and run a macro and how to insert controls to build a form. Specifically, the following objectives are associated with this set of skills:

- 4.1 Create and manipulate macros
 - 4.2 Insert and manipulate form controls
-

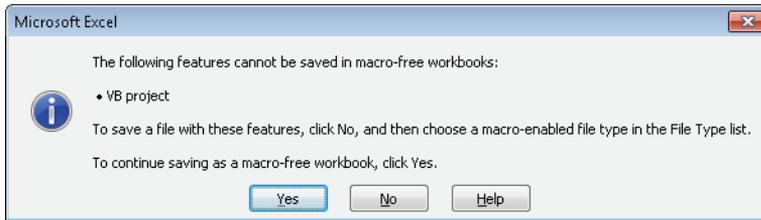
Important The topics and procedures in this chapter refer to command groups on the Developer tab. If the Developer tab is not displayed on the ribbon, click Options on the File tab, click Customize Ribbon in the Excel Options dialog box, and then select Developer in the list of main tabs.

4.1 Create and Manipulate Macros

A macro in Excel can perform an operation as routine as adding your company address to a worksheet or printing a worksheet with specific settings. You could record a macro that enters a series of dates, months, or other periods of time in a worksheet row, aligns the cell data, and then applies formatting to the cells. Macros can, of course, be used to do many other tasks, especially once you learn how to enhance the operations of a macro you record or write macros from scratch by using Microsoft Visual Basic for Applications (VBA).

When working with macros in Excel, keep in mind that the default file format—Excel Workbook (.xlsx)—does not support macros. If you record or write a macro in a workbook and try to save the workbook as an .xlsx file, Excel displays a message indicating that you can't include the macro. To include macros in a workbook, you must save the workbook in the Excel Macro-Enabled Workbook (.xlsm) format or as a macro-enabled template (.xltn). You can also use the Excel 97–2003 Workbook (.xls) format, but that format does not support many of the features in Excel 2010.

You'll see this message if you try to save a macro in a macro-free file format. Use the macro-enabled workbook format (.xslm) instead.



Tip You can change the default file format in which workbooks are saved to a format that supports macros by opening the Excel Options dialog box from the File tab, displaying the Save page, and then selecting the format you want in the Save Files In This Format list.

You can run the macros in a workbook in a variety of ways, which lets you choose the option that fits the situation at hand. For a macro you want to apply to every workbook, you can add a button that runs the macro to the Quick Access Toolbar or to a custom group on the ribbon. You can also define a macro that runs whenever a workbook is opened or run a macro by using a keystroke.

See Also For general information about customizing the ribbon, see “Modifying the Display of the Ribbon” at the beginning of this book.

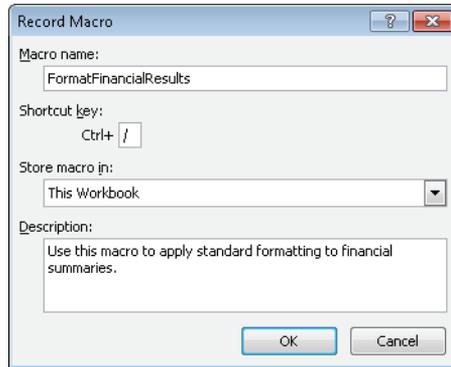
In the following sections, you'll learn details about recording a macro and about different ways you can run a macro.

See Also For information about assigning a macro to a command button that you add to an Excel worksheet, see “Inserting Form Controls” later in this chapter.

Recording and Storing a Macro

In the Record Macro dialog box, you should first provide a name for the macro you're recording. (You can accept the default name that Excel displays, but providing your own descriptive name is more useful.) You must begin a macro name with a letter; you can include numbers later in a macro's name. Macro names cannot include spaces. Use an underscore character to separate words or use interior capitalization (for example, My_new_macro or MyNewMacro).

See Also For more information about assigning a shortcut key, see “Assigning a Keystroke to a Macro” later in this chapter.



Use the Store Macro In list to specify whether you want access to the macro globally or only in the current workbook.

By default, Excel first displays This Workbook in the Store Macro In list. Keep this option if you want the macro to be available only in this workbook. Choose Personal Macro Workbook to make a macro available throughout Excel. The Personal Macro Workbook (Personal.xlsm) is a file Excel creates when you first choose to save a macro in it. (Excel prompts you to save Personal.xlsm when you save a macro in the Personal Macro Workbook and when you add macros to it after that.) Excel opens Personal.xlsm when you run Excel but hides the workbook by default. You can view it by choosing Unhide in the Window group on the View tab.

Tip The option you choose in the Store Macro In list is retained by Excel. If you choose Personal Macro Workbook in this list, that option appears in the list the next time you open the Record Macro dialog box. Check this setting to be sure that you are saving a macro where you want to.

Using the XLStart Folder

Excel by default saves Personal.xlsm in a folder named XLStart, which it creates under your user profile. In Windows 7 or Windows Vista, the XLStart folder is located at Users\username\AppData\Roaming\Microsoft\Excel. In Windows XP, the folder is located at \Documents and Settings\username\Application Data\Microsoft\Excel. If you want Excel to open a specific workbook each time you run Excel, add that workbook to the XLStart folder. If you want each workbook you create to contain specific information—a custom header, for example—create a workbook named Book.xlsx and save it in the XLStart folder. Excel opens this workbook when it starts. Add the details you need to the workbook, and then save it with its own name.

Before you record a macro, you should also determine whether to use absolute or relative cell references. (You can use a combination of the two as necessary). If you keep absolute references, the macro operates only in the specific cells you use when you record the macro. For example, with absolute references, if you insert a series of dates or names in the cell range A1:G1 as a step in recording a macro, that macro works only in that cell range when you run it. If you use relative references (by clicking Use Relative References in the Code group), the macro will insert the data in any comparable range of cells.

You can alternate between absolute and relative references while recording a macro by turning on or off the Use Relative References command. The command appears highlighted when it is enabled.

Tip The View tab also provides a Macros group. If the Developer tab is not displayed, you can use this group to view available macros, record a macro, and turn on or off relative references when recording a macro.

Macro Security Settings

The default security setting for macros in Excel is Disable All Macros With Notification. With this option selected, when you open a workbook that contains macros, Excel displays a security warning indicating that macros are disabled. Click Enable Macros if you trust the workbook and need access to the macros. You can change security settings by clicking the Macro Security command in the Code group on the Developer tab. Use the Macros Settings page of the Trust Center dialog box to select a different option. For example, if you are experimenting with macros during a work session, select Enable All Macros (Not Recommended) as a temporary measure and then reset the default option (or choose one of the other options that disable macros) when you are done. The other options available are Disable All Macros Without Notification and Disable All Macros Except Digitally Signed Macros.

If you select the most restrictive setting (Disable All Macros Without Notification), you can still gain access to macros in a workbook by saving that workbook in a trusted location. (The Trust Center does not check files stored in a trusted location.) You can view default trusted locations and add a new location by using the Trusted Locations page in the Trust Center dialog box (the same dialog box that Excel displays when you click Macro Security in the Code group).

Digital signatures are used to verify the source of a macro and to confirm that a macro (or a Visual Basic project that contains a macro) has not been modified since it was signed. If you select the option **Disable All Macros Except Digitally Signed Macros**, Excel enables macros automatically if the macros are signed and originate from a source (a publisher) you have trusted. Excel displays a security warning and the **Enable Macros** button when you open a workbook from a source that is not a trusted publisher. Unsigned macros are disabled if you select this option.

► **To record a macro**

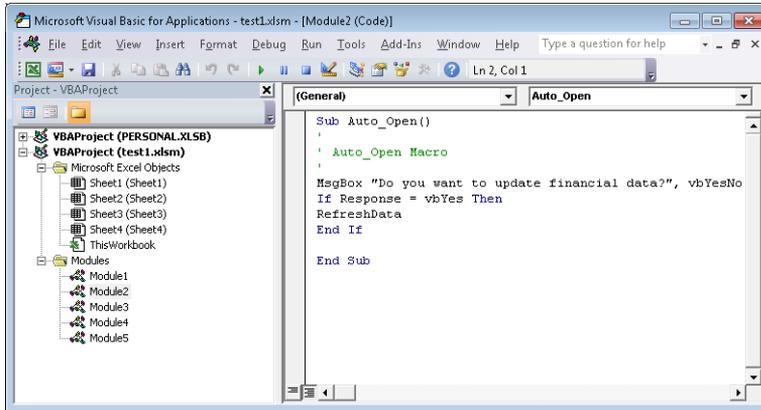
1. On the **Developer** tab, click **Record Macro**.
2. In the **Record Macro** dialog box, type a name for the macro.
3. Enter a shortcut key if you want to run the macro from the keyboard.
4. In the **Store macro in** list, specify whether to store this macro in the current workbook, the **Personal Macro Workbook**, or a new workbook.
5. Type a description of the macro, and then click **OK**.
6. To turn on relative references, click **Use Relative References** in the **Code** group.
7. Follow the steps you want to record in the macro.

Click the **Use Relative References** command to control the use of relative references as you record the macro.

8. When you complete the steps, click **Stop Recording**.

Modifying a Macro

When you record a macro in Excel, Excel stores the macro in a module that you can work with in the Visual Basic editor. To open the Visual Basic editor, click **Visual Basic** in the **Code** group. To work with a specific macro, first click **Macros** on the **Developer** tab (or click **Macros**, **View Macros** on the **View** tab). In the **Macro** dialog box, select the macro you want to modify and then click **Edit**. You'll see the modules for the current workbook listed in the pane at the left (called the **Project Explorer**). The code for the macros in that module appears in the **Code** window.



If you are familiar with VBA, you can modify code directly. If you are working with macros you recorded, you can expand and change the operations of a macro by adding code for one macro to another macro or by calling one macro from another.

For example, as part of recording a macro that inserts your company's address or another block of text, you might apply formatting to the cells by using a specific font and font size, bold text, a light-colored fill, and a centered alignment. Excel would generate code something like the following to apply that formatting (you would see this code within the code that performs the macro's other operations):

```
With Selection.Font
    .Name = "Arial"
    .FontStyle = "Bold"
    .Size = 11
    .Strikethrough = False
    .Superscript = False
    .Subscript = False
    .OutlineFont = False
    .Shadow = False
    .Underline = xlUnderlineStyleNone
    .ThemeColor = xlThemeColorLight1
    .TintAndShade = 0
    .ThemeFont = xlThemeFontNone
End With
With Selection
    .HorizontalAlignment = xlCenter
    .VerticalAlignment = xlBottom
    .WrapText = False
    .Orientation = 0
    .AddIndent = False
    .IndentLevel = 0
    .ShrinkToFit = False
    .ReadingOrder = xlContext
    .MergeCells = False
End With
```

```

With Selection.Interior
    .Pattern = xlSolid
    .PatternColorIndex = xlAutomatic
    .ThemeColor = xlThemeColorLight2
    .TintAndShade = 0.799981688894314
    .PatternTintAndShade = 0
End With

```

If you want to use this formatting code in another macro, you can copy the code and paste it into the code from another macro. You can also save this code as a separate subprocedure in a module and run it on its own when you want to apply the same formatting to a selection of cells.

A subprocedure is a set of code statements enclosed by *Sub* and *End Sub* statements. You can see these statements in the preceding screen shot. When you record a macro in Excel, the macro is defined in a subprocedure. You can call one macro from another by referring to the name of the macro you want to run in the subprocedure for the second macro. In the following code, for example, the RefreshData macro is run from the Auto_Open macro:

```

Sub Auto_Open()
'
' Auto_Open Macro
'
    MsgBox "Do you want to update financial data?", vbYesNo
    If Response = vbYes Then
        RefreshData
    End If
End Sub

```

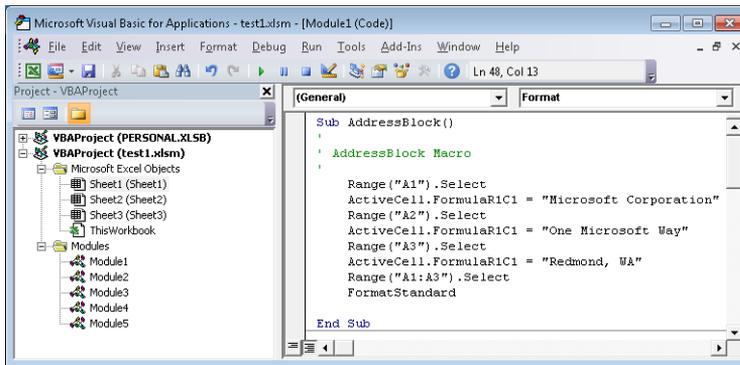
To save code as its own subprocedure, click Visual Basic on the Developer tab. In the Visual Basic editor, in the Project Explorer, open the module that contains the macro with the code you want to copy. Select that code, and copy it to the Clipboard.

On the Insert menu in the Visual Basic editor, click Procedure. Type a name and keep the default settings in the Type and Scope sections. The Sub option creates a subprocedure, and the Public option makes the code available to macros in other modules.

When you click OK in the Add Procedure dialog box, the Visual Basic editor inserts the lines *Public Sub* (which includes the name you provided) and *End Sub*. Paste the code you copied between these lines.

Even though you didn't specifically record a macro with this name, you'll find an entry for it in the Macro dialog box in Excel. You can now run the macro as you would any other, including by calling the macro from another macro. To do this, you add the

macro's name to the macro you want to call it from. Here's an example in which the FormatStandard macro is called at the end of the AddressBlock macro.



► **To open the Visual Basic editor to work with a macro**

→ Click **Visual Basic** in the **Code** group on the **Developer** tab.

► **To modify a macro**

1. In the **Code** group, click **Macros**.
2. In the **Macro** dialog box, select the macro you want to modify and then click **Edit**.
3. Revise the macro by using the Visual Basic editor, and then click **Save** on the Visual Basic editor toolbar.

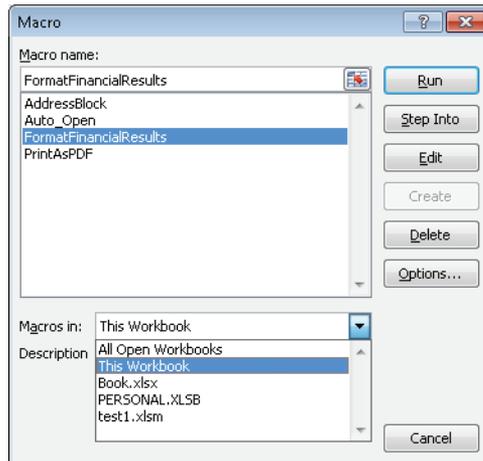
► **To insert a subprocedure in the Visual Basic editor**

1. In Excel, click **Visual Basic** in the **Code** group on the **Developer** tab.
2. In the Visual Basic editor, on the **Insert** menu, click **Procedure**.
3. In the **Add Procedure** dialog box, type a name for the procedure.
4. In the **Type** group, keep **Sub** selected. In the **Scope** group, keep **Public** selected, and then click **OK**.
5. In the Code window, write or copy code for the new subprocedure.
6. On the Visual Basic editor toolbar, click **Save**.

Run a Macro from the Macro Dialog Box

You can run a macro directly from the Macro dialog box, which Excel displays when you click Macros in the Code group on the Developer tab. Use the Macros In list to select from the macros available only in the current workbook, in all open workbooks, in Personal.xlsb (which contains global macros), or other choices.

Before you open the Macro dialog box, be sure you place the cursor in the cell where the macro should begin its operations (if necessary). When you've done this, click Macros, select the macro you want to run, and then click Run.



When you run a macro from the Macro dialog box, use the Macros In list to select which macros you want to see.

► To run a macro from the Macro dialog box

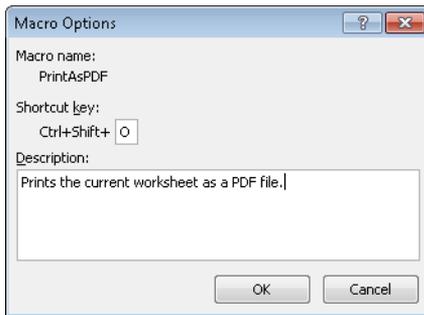
1. Position your cursor where you want to start running the macro.
2. In the **Code** group, click **Macros**.
3. In the **Macro** dialog box, choose an option from the **Macros in** list to display the available macros.
4. Select the macro you want to run, and then click **Run**.

Assigning a Keystroke to a Macro

In the Record Macro dialog box, you can assign a shortcut key to a macro before you start recording. The shortcut key must be used in combination with the Ctrl key. You can

also press the Shift key to use uppercase characters or a special character you access with the Shift key, but you cannot use an Alt key combination. To specify this shortcut when you record a macro, just type the key in the Short Key area of the Record Macro dialog box.

If you don't assign a shortcut key when you record a macro, you can assign one later through the Macro dialog box. Click Macros on the Developer tab, select the macro in the list of macros, and then click Options. Use the Shortcut Key area of the Macro Options dialog box to assign the keystroke combination you want to use.



► To assign a shortcut key to a macro

→ When you record the macro, enter the shortcut key you want to use in the **Shortcut key** area of the **Record Macro** dialog box.

or

1. On the **Developer** tab, click **Macros**.
2. In the **Macro** dialog box, select the macro you want to work with and then click **Options**.
3. In the **Macro Options** dialog box, enter the shortcut key in the **Shortcut key** area and then click **OK**.

Running a Macro When You Open a Workbook

By naming a macro `Auto_Open`, you define the macro so that it runs whenever you open a workbook. You will probably save an `Auto_Open` macro in a specific workbook (you might use an `Auto_Open` macro to set properties for your view of a workbook, for example), but you can save an `Auto_Open` macro in your Personal Macro Workbook (`Personal.xlsm`) so that it is applied to more than one workbook. However, keep in mind that an `Auto_Open` macro runs before other workbooks are opened, so storing it in

Personal.xlsm is often problematic. If you record actions that you want Excel to perform on the default Book.xlsx workbook or on another workbook that is opened from the XLStart folder, the Auto_Open macro fails when you start Excel because the macro runs before the workbooks stored in XLStart are opened.

See Also For more information about the XLStart folder, see “Using the XLStart Folder” earlier in this chapter.

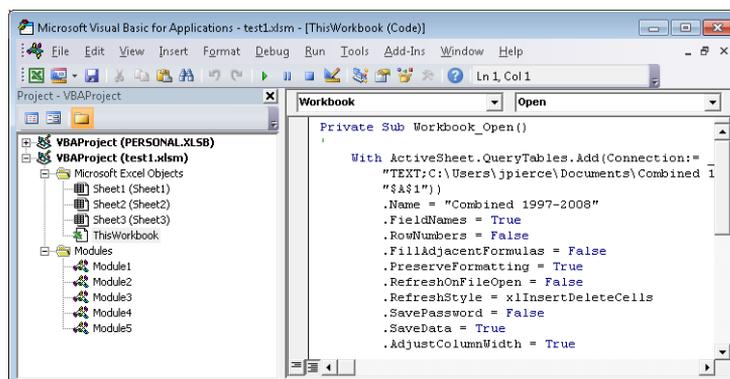
Another approach to automatically running a macro when you open a workbook is to use the workbook’s *Open* event, which you can add code to in the Visual Basic editor. (Events are part of Visual Basic for Applications. The default event for a command button is the *Click* event, for example. In addition to the *Open* event, you can control workbooks by using the *BeforeClose* or *AfterClose* events, for example.)

To use a workbook’s *Open* event, click Visual Basic in the Code group to open the Visual Basic editor. In the Project Explorer (the pane at the left), right-click This Workbook and choose View Code. In the Code window, open the list on the left (the Object list) and choose Workbook (if Workbook is not displayed). Open the list at the right (the Procedure list), and choose Open. In the Code window, you’ll see the following lines of code:

```
Private Sub Workbook_Open()
```

```
End Sub
```

Insert the code for the macro you want to run when Excel opens the workbook. You can write this code yourself, insert the name of a macro you recorded or wrote already, or copy code from another macro and paste it between *Private Sub Workbook_Open()* and *End Sub*. The code shown in the following screen shot updates an external connection to a text file when the workbook opens.



See Also For more information about working with macros in the Visual Basic editor, see “Modifying a Macro” earlier in this chapter. For information about managing external connections in Excel, see “Use External Data Sources” in Chapter 3 in this section of the book.

► **To create an Auto_Open macro**

1. On the **Developer** tab, click **Record Macro**.
2. In the **Macro** dialog box, name the macro `Auto_Open`.
3. Click **OK**, and then record the steps you want the macro to perform.
4. Click **Stop Recording**, and then save the workbook.

The macro runs the next time you open the workbook.

► **To run a macro from a workbook’s Open event**

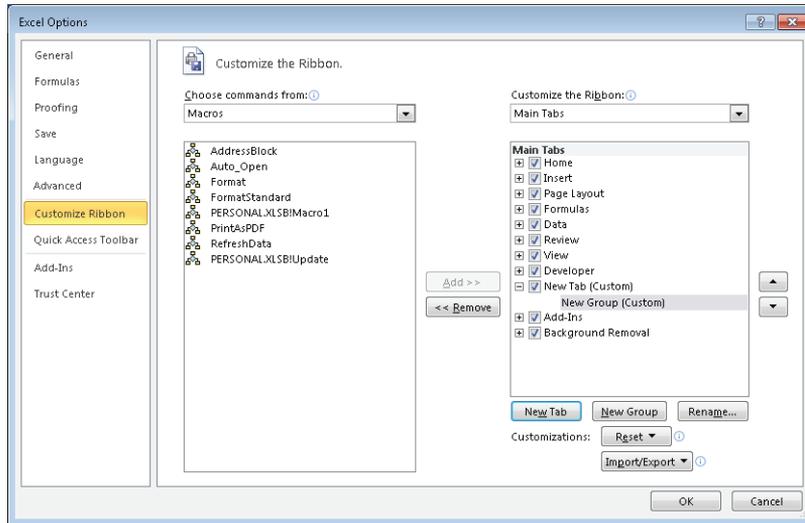
1. On the **Developer** tab, click **Visual Basic** in the **Code** group.
2. In the Visual Basic editor, right-click **This Workbook** in the Project Explorer and choose **View Code**.
3. In the Code window, choose **Workbook** from the Object list and **Open** from the Procedure list.
4. Insert the code for the macro between the lines of code `Private Sub Workbook_Open()` and `End Sub`.
5. On the Visual Basic editor’s toolbar, click **Save**.

Adding a Macro Button to the Ribbon

To run a macro from the ribbon, you need to add the macro to a custom group. You can create a custom group for one of the built-in tabs or create a tab of your own and add the macro to a group on your custom tab.

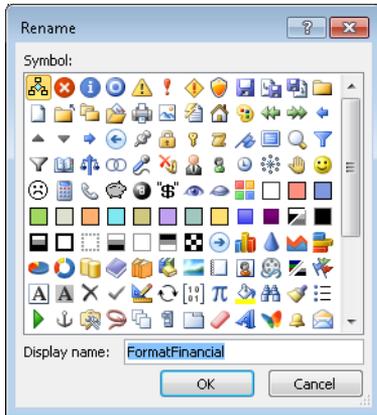
To start, open the Excel Options dialog box from the File tab and then click **Customize Ribbon** in the list on the left. If you are adding a custom group to one of the main tabs, consider the purpose of the macro in deciding where to place it. If you use the macro to format a workbook, you might add the group to the Page Layout tab. If the macro is designed for working with data, it might be useful to place it on the Data tab. If you have several macros and want to collect them on a tab of their own, create a custom tab that holds all your macros.

You can run a macro from the ribbon by adding it to a custom group on a built-in tab or by creating a custom tab and group to hold the macro.



If you are adding a macro to a built-in tab, use the New Group button to create a custom group on that tab. To create a custom tab, click New Tab. Excel creates an entry for the tab and creates a new group for that tab as well. To name the tab (to something more meaningful than New Tab), select the entry for the custom tab, click Rename, and then type a display name for the tab. Do the same for the new group Excel creates by default for a custom tab. If you are adding several macros to a custom tab, use more than one group and name them so that they reflect the type of macros you are adding (Formatting, Analysis, and so on).

In the Choose Commands From list, select Macros. In the Main Tabs list, select the group where you want to place the macro, select the macro in the list at the left, and then click Add. If you want to provide a different display name for the macro or change the icon Excel uses to display it, click Rename and then make the modifications you want in the Rename dialog box.



► To add a macro to a custom tab

1. On the **File** tab, click **Options**.
2. In the **Excel Options** dialog box, click **Customize Ribbon**.
3. Under the **Main Tabs** list, click **New Tab**.
4. In the **Main Tabs** list, click **New Tab (Custom)**, and then click the **Rename** button.
5. In the **Rename** dialog box, type a display name for the custom tab and click **OK**.
6. In the **Main Tabs** list, click **New Group (Custom)** under the tab you created, and then click **Rename**.
7. Type a display name for the group, and select a symbol if you don't want to use the default icon Excel provides.
8. In the **Choose commands from** list, select **Macros**.
9. Select the macro you want to add, and then click **Add**.

► To add a macro to a built-in tab

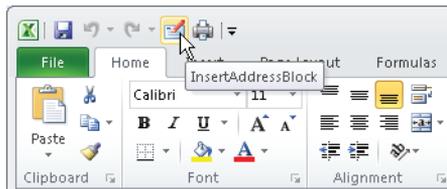
1. On the **File** tab, click **Options**.
2. In the **Excel Options** dialog box, click **Customize Ribbon**.
3. In the **Main Tabs** list, select the tab where you want to add the macro and then click **New Group**.
4. In the **Main Tabs** list, click **New Group (Custom)**, and then click **Rename**.
5. Type a display name for the group, and select a symbol if you don't want to use the default icon Excel provides.
6. In the **Choose commands from** list, select **Macros**.
7. Select the macro you want to add, and then click **Add**.

Adding a Macro Button to the Quick Access Toolbar

One of the most convenient ways to run a macro is to add a button for that macro to the Quick Access Toolbar. You assign the macro to a button by using the Excel Options dialog box.

On the Customize The Quick Access Toolbar page, open the Choose Commands From list and select Macros. In the list of macros, select the one you want to add to the Quick Access Toolbar and then click Add. In the Customize Quick Access Toolbar list, select For All Documents if you want the button to appear on the Quick Access Toolbar for all workbooks. You can also select the current workbook if you want to use the macro within that scope.

To rename the button or to change the icon associated with it, select it in the list of commands on the Quick Access Toolbar and then click Modify. Use the Modify Button dialog box to change the display name and to choose an icon. The display name appears in a ScreenTip when you point to the button with the mouse.



For macros you run frequently, add a button for that macro to the Quick Access Toolbar. Excel displays the name you provide in a ScreenTip.

► To add a custom macro button to the Quick Access Toolbar

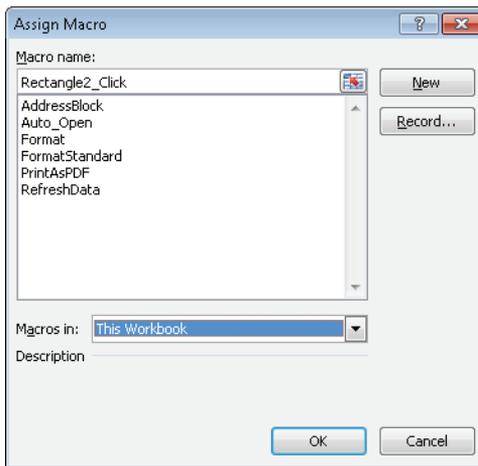
1. Click the arrow at the right end of the Quick Access Toolbar, and then click **More Commands**.
2. In the **Choose commands from list**, choose **Macros**.
3. In the list of macros, select the macro you want to place on the Quick Access Toolbar and then click **Add**.
4. Click **Modify**, and then select the icon you want to use and change the display name for the button.

Creating an Action Macro

In a worksheet that includes graphical objects—an image, for example, or clip art or a shape—you can assign a macro to all or a portion of the object and run that macro when you click the object (or a particular spot on the object). For example, in a worksheet to which you've added several shapes (using the Shapes gallery on the Insert tab)

to illustrate a process or a decision path, you can assign a macro to one or more of the shapes. You can assign a macro to a diagram you insert using SmartArt (but not to the individual shapes in the diagram). You can also place an object on a picture, assign a macro to that object, and then apply formatting that hides the object. Using these steps, you effectively create a hidden hot spot on the picture that runs a macro when you click it.

To run a macro from an object, right-click the object and choose Assign Macro. In the Assign Macro dialog box, Excel provides a default name for the macro by appending *Click* to the type of object (for example, Rectangle2_Click). Use the default name, or type one of your own. You can select a macro from the list of available macros (by using the Macros In list to display macros from your Personal Macro Workbook or from other open workbooks), click Record to record a new macro, or click New to open the Visual Basic editor and write a macro using VBA. You can also edit an existing macro by selecting it and clicking Edit.



In the Assign Macro dialog box, you can select a macro, click New to write a macro yourself, or click Record to record a macro you want to run from an object.

You'll know that a macro is assigned to an object because the cursor appears as a hand with a pointing finger (the same icon you see when you point to a hyperlink). Click the object to run the macro.

To hide a shape or other object to which you've assigned a macro, right-click the shape and choose Format Shape. In the Format Shape dialog box, choose No Fill on the File page and No Line on the Line Color page.

Tip If you are applying this formatting to a picture or another object, the Format command and dialog box will be named with the type of object.

► **To assign a macro to a shape or other object**

1. Right-click the shape or object and choose **Assign Macro**.
2. In the **Assign Macro** dialog box, use the **Macros in** list to select the macros you want to see (This Workbook, All Open Workbooks, or another option).
3. Select the macro you want to assign to the shape and click **OK**, or click **Record** to record the macro, or click **New** to write the macro in the Visual Basic editor.

► **To hide a shape or other object to which a macro is assigned**

1. Right-click the shape and choose **Format Shape**.
2. In the **Format Shape** dialog box, on the **Fill** page, click **No Fill**.
3. On the **Line Color** page, click **No Line**.

Practice Tasks

The practice files for these tasks are located in the folder for Microsoft Excel 2010. You can save the results of these exercises in the same folder. Change the file name so that you don't overwrite the sample files. When you are done, try performing the following tasks:

- Open a blank worksheet. Record a macro named **GetResults** that performs the following operations:
 - Uses the **From Text** command in the **Get External Data** group (on the **Data** tab) to import the text file **Results.txt** (which is included in the sample files folder). Click **Next** in the **Text Import Wizard's** first step. In the second step, select **comma** as the delimiting character and then click **Finish**.
 - Select the top row of the data, and apply **bold** formatting.
 - Select the cells containing the data, and format them as **currency**.
 - Stop recording the macro at this point. Delete the data you imported, and then run the macro from the **Macro** dialog box to test it.
- Open the workbook **SampleMacros.xlsm**. Using the macros in this workbook, practice running the macros from the ribbon, from the **Quick Access Toolbar**, and from an object you add to the workbook.

4.2 Insert and Manipulate Form Controls

One way in which you can collect and present data in Excel is through the use of form controls you add to a worksheet. Controls such as list boxes, check boxes, and command buttons help structure a worksheet and manage its data, and they allow you and other users to work with data and objects on a worksheet in specific ways. The sections that follow describe how to add controls, define their behavior and values, and set properties for the controls.

Inserting Form Controls

Excel displays two groups of controls when you click Insert in the Controls group on the Developer tab—form controls and ActiveX controls. You can set up a form control, such as a list box, by using data on a worksheet. ActiveX controls are often handled programmatically by using Visual Basic for Applications, although you can set properties for ActiveX controls and use them without writing any code. The focus in this section is on form controls. You'll learn more about ActiveX controls in the section "Making Use of ActiveX Controls" later in this chapter.

Excel provides nine types of form controls:

- **Command button** Use a command button to run a macro when a user clicks the button.
- **Combo box** A combo box creates a drop-down list that lets users select an item from a set of items you define or enter an item in the list.
- **Check box** Use a check box to let users make selections from a series of options. A user selects the check box to indicate yes (or true). A user clears a check box to indicate no (or false). You can place a set of check boxes in a group box to present them as a single element. Users can select more than one check box in a group to indicate a range of choices. (For example, on an order form, users could select each of the product categories they want to review.)
- **Spin button** Add a spin button to increase or decrease the value (within a minimum and maximum value that you define) in a specific cell. When you click the up or down arrow on the spin button, the value in the cell that the button is linked to changes, and you can see how these changes affect the results of formulas, for example.
- **List box** Use a list box to display a set of items from which users can choose (a set of nine colors, for example). You can define a list box so that users can select

only a single item, multiple items that are adjacent, or multiple items that are not adjacent.

- **Option button** An option button marks one in a set of exclusive options. For example, Update Manually or Update Automatically. As you do with check boxes, you often present option buttons within a group box.
- **Group box** A group box organizes a set of controls into a single element. You usually use a group box with check boxes or option buttons.
- **Label** Use a label to identify or describe the function of a cell, cell range, or another control. You can use a label as you would a caption.
- **Scroll bar** The scroll bar control is similar to the spin button. As you change the position of the scroll bar, you change a value in the cell the scroll bar is linked to.

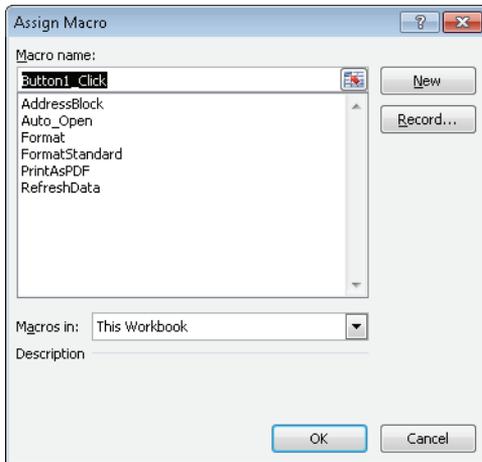
To add any of these controls to a worksheet, click Insert in the Controls group, click the icon for the type of control you want to add (ScreenTips identify each control), and then click the cell on the worksheet where you want to place the control. Your next step is usually to right-click the control and choose Format Control. You use the Format Control dialog box to specify a cell range for a list, for example, or to specify whether a check box is selected by default, or to set up the maximum and minimum values for a spin button or a scroll bar. In the sections that follow, you'll learn more details about setting up each type of control.

Important The text field, combo list edit control, and combo drop-down edit controls do not apply in Excel 2010, nor does the Run Dialog button. These controls are used in Excel 5.0 dialog sheets.

Inserting a Command Button

Form control command buttons are designed to run macros. When you add a command button to a worksheet, Excel displays the Assign Macro dialog box and assigns a default name to the macro it will associate with the button. To assign a macro that you already recorded or developed in VBA, use the Macros In list to specify the list of macros you want to choose from (All Open Workbooks or Personal.xlsm, for example). Then select the macro and click OK. (If you want to make changes to a macro after you select it, click Edit.)

To work with a new macro, click New to write the macro in the Visual Basic editor or click Record to open the Record Macro dialog box, where you can name and describe the macro and then record it.



Excel opens the Assign Macro dialog box when you add a command button form control to a worksheet.

To change the label on a command button, click Design Mode in the Controls group, right-click the control, and choose Edit Text. The cursor is positioned at the start of the default text (something like Button 1). Select that text, delete it, and then type a label that describes the button's operation.

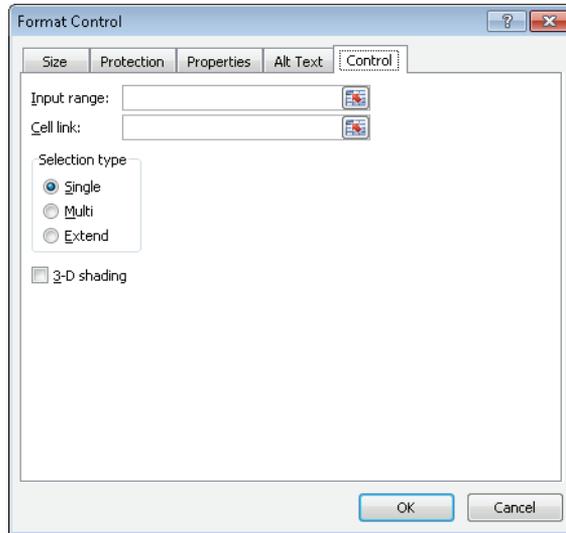
Setting Up a Combo Box or a List Box

You define the items that appear in a combo box or list box control by entering them in a cell range. You can list the items on the same worksheet or on a different worksheet in the workbook. (The source of the items can come from a cell range in a separate workbook, but that workbook must be open to populate the list in the control.)

Click the combo box icon in the group of form controls, and then drag across the worksheet to position the combo box and set its initial size. You can resize the control by dragging one of the handles on its borders and at the corners. To reposition the control, point to the border (you'll see the cursor appear as a four-way arrow) and then drag it to a new location.

Right-click the control and choose Format Control to open the dialog box in which you specify properties for the control. On the Control tab of the Format Control dialog box, click in the Input Range box and then specify the cell range for the list. You can type the range or drag through it on the worksheet where the list appears.

In the Cell Link box, specify a cell (or a cell range) in which you want to capture the value that reflects which item a user selects in the list. The items are numbered sequentially. You might use this value in a formula, for example, or to control other aspects of the form.



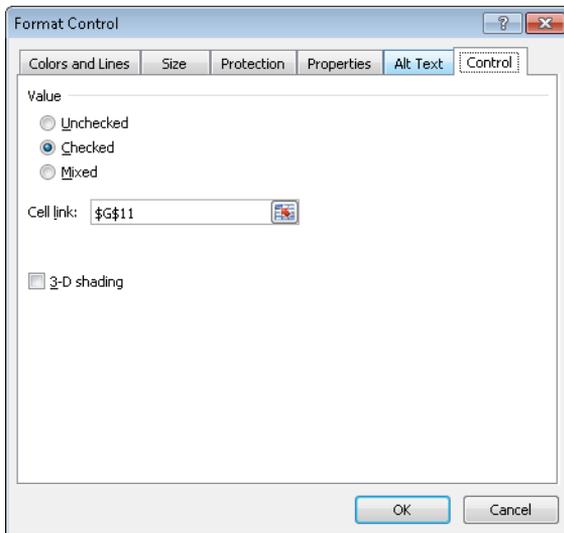
For a combo box and a list box control, you specify the input range for the list and the linked cell that shows which option is selected in the control. For a list box, you also specify a selection type.

You follow the same steps for defining an input range and a linked cell for a list box. On the Controls tab for a list box, you also need to specify an option in the Selection Type area. The options in this area are Single, Multi, and Extended. Use Single if you want a user to select only one item from the list. The Multi option enables users to select multiple adjacent items, and Extended lets users select items that are not adjacent.

See Also You can learn more about the options on the other tabs of the Format Controls dialog box in the section “Defining Form Control Properties” later in this chapter.

Inserting Check Boxes and Option Buttons

After you insert a check box or an option button control (or a set of these controls), right-click the control and choose Format Control. On the Controls tab for these controls, use the Value area to specify whether the control should be selected or deselected as its default state. A Mixed value applies to multiple selections. Also specify the linked cell. When a check box is selected, the linked cell displays the value True. You can use this condition to affect the results of formulas. For example, you could refer to the linked cell in an IF statement that inserts a value in the cell with the IF formula depending on the state of the check box.



When you add a set of options buttons to a group control, right-click one of the option buttons and then specify the linked cell in the Cell Link box on the Control tab. You need to set the linked cell only once. Each option button enclosed in the group control uses the same linked cell.

To change the label for a check box, option button, or group control, right-click the control (be sure you have Design Mode enabled) and choose Edit Text. The cursor appears at the start of the default text. Select that text, delete it, and then type a label that identifies the control.

Using Spin Buttons and Scroll Bars

Add a spin button or a scroll bar to a worksheet when you need a control with which you can increase or decrease the value (within a range that you define) in a specific cell. On the Control tab for a spin button, you specify the current value (which you can leave blank or at the default value 0), the minimum and maximum value, and the interval for incremental changes. You might specify a range of 1,000 to 10,000 with incremental changes of 500, for example. You also need to specify the cell (in the Cell Link box) where the value set by the control appears. Here again, you can use this value in calculations as you need to. For example, if the value in the linked cell equals or exceeds a certain amount, you can use an IF statement to set the value in another cell accordingly.

Tip If you want to use a spin button to change a cell's value as a percentage instead of as a set increment, enter a formula in another cell that divides the value in the linked cell by 100.

A scroll bar control also adjusts the value in a cell as you move the scroll bar up or down. You can use a scroll bar to continuously change the value of the linked cell as you scroll. On the Controls tab, set the values for the current value, the minimum and maximum values, and the value for incremental change. The Page Change field affects the speed at which the scroll bar changes values. Scroll up to move toward the minimum value; scroll down to move incrementally toward the maximum value for the control.

The screenshot shows the 'Format Control' dialog box with the 'Control' tab selected. The settings are as follows:

Property	Value
Current value:	40
Minimum value:	0
Maximum value:	100
Incremental change:	1
Page change:	10
Cell link:	\$G\$31
3-D shading	<input type="checkbox"/>

Spin buttons and scroll bars change the value in the linked cell when you interact with the control. Specify the maximum and minimum values you want to use.

Adding a Label

Use a label control to identify controls (or other items on a worksheet) that don't have labels of their own. You probably won't add a label for a command button or a check box, for example, but you might use a label for a combo box or a list box. To enter the text for a label, right-click the control and choose Edit Text.

Creating a Data Form

Excel can create a data form from the column headings in a table or a cell range. A data form is especially useful for entering and updating information in a worksheet in which you frequently scroll to enter data in many columns. A data form presents the columns in a single dialog box that also includes command buttons that let you delete a row or add a new row.

The first step in creating a data form is to add the Forms button to the Quick Access Toolbar. Click the arrow at the right end of the Quick Access Toolbar, click More Commands, and then choose All Commands from the Choose Commands From list. Scroll down to the Forms button, select it, click Add, and then click OK. Open the workbook in which you want to create a data form (which should be organized with column headings, of course), and then click the Forms button. Excel creates the dialog box, which you can then use to work with the data in the workbook.

The screenshot shows a dialog box titled "2011 Submission List" with a scrollable list of data. The current record is displayed in the following fields:

No.:	1
Year:	2011
Title:	The Painted Bird
First Name:	Jerzy
Middle Initial:	
Last Name:	Kosinski
Birth date:	6/14/1933
Death Date:	5/3/1991
Genre:	Fiction
Category:	2
Room:	Emerald
Aisle:	23
Condition:	Fair
Provenance:	Unknown
Price:	14.99

On the right side of the dialog box, there are several buttons: "New", "Delete", "Restore", "Find Prev", "Find Next", "Criteria", and "Close". A status bar at the top right indicates "1 of 108" records.

► To insert a command button

1. On the **Developer** tab, click **Insert** in the **Controls** group.
2. In the **Form Controls** group, click the command button icon, and then click on the worksheet where you want to place the button.

Excel displays the Assign Macro dialog box.

3. In the dialog box, type a name for the button's macro (or use the default name Excel provides.)
4. Select the macro you want the button to run, or click **New** to write a macro in the Visual Basic editor, or click **Record** to record a new macro.

► **To insert a combo box or list box control**

1. On the **Developer** tab, click **Insert** in the **Controls** group.
2. In the **Form Controls** group, click the combo box or list box icon, and then click on the worksheet where you want to place the control.
3. Right-click the control and choose **Format Control**.
4. On the **Control** tab of the **Format Control** dialog box, specify the input range and the linked cell for the control.
5. For a list box, choose the selection type (**Single**, **Multi**, or **Extended**).

► **To insert a check box or option button control**

1. On the **Developer** tab, click **Insert** in the **Controls** group.
2. In the **Form Controls** group, click the check box or option button icon, and then click on the worksheet where you want to place the control.
3. Right-click the control and choose **Format Control**.
4. On the **Control** tab of the **Format Control** dialog box, use the Value area to specify whether the control should be selected or deselected by default.
5. In the **Cell link** box, specify the cell that you want to link to the control.
6. To create a group of check boxes or option buttons, click **Insert** in the **Controls** group, click the group box icon, and then click on the worksheet where you want to add the group.
7. Drag the check box or option button controls into the group control.

► **To insert a spin button or scroll bar control**

1. On the **Developer** tab, click **Insert** in the **Controls** group.
2. In the **Form Controls** group, click the spin button or scroll bar icon, and then click on the worksheet where you want to place the control.
3. Right-click the control and choose **Format Control**.

4. On the **Control** tab of the **Format Control** dialog box, enter values in the **Current value**, **Minimum value**, **Maximum value**, and **Incremental change** boxes. For a scroll bar, also enter a value for the **Page change** box.
5. In the **Cell link** box, specify the cell that you want to link to the control.

► **To insert a label control**

1. On the **Developer** tab, click **Insert** in the **Controls** group.
2. In the **Form Controls** group, click the label icon, and then click on the worksheet where you want to place the control.
3. Right-click the control and choose **Edit Text**.
4. Delete the default text, and then type the text you want to use.

► **To change the default label for a command button, option button, or check box**

1. Right-click the control and choose **Edit Text**.
2. Delete the default text, and then type the text you want to use.

Defining Form Control Properties

The **Format Controls** dialog box contains several other tabs that you work with to manage the size, display, and behavior of form controls:

- **Size tab** On the **Size** tab, you can adjust the height and width of controls (and the proportional scale). Use the **Lock Aspect Ratio** option to keep the height and width of the control proportionate.
- **Protection tab** The **Protection** tab lets you lock a control (and the text contained in some controls), but as information on the **Protection** tab explains, the options you set on this tab “have no effect unless the sheet is protected.” To protect the worksheet, click **Protect Sheet** on the **Review** tab, or click **Format** on the **Home** tab and choose **Protect Sheet**.

See Also For more information about applying protection to a worksheet, see “**Protecting Worksheets and Workbooks**” in **Chapter 1** in this section of the book.

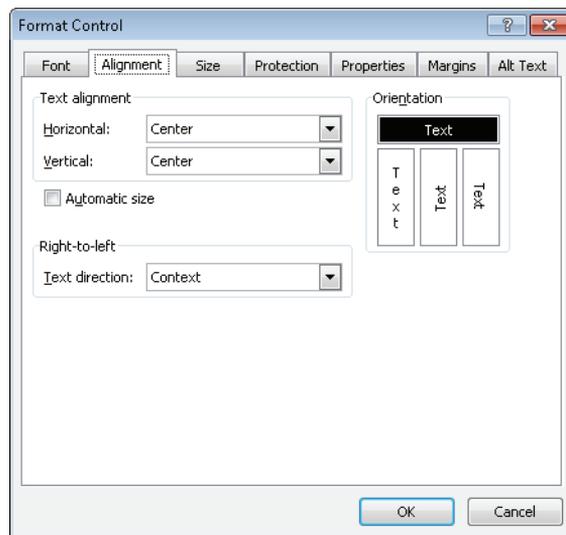
- **Properties tab** Options on the **Properties** tab affect the positioning of a control and whether the control appears when you print the worksheet. The positioning options are **Move And Size With Cells**, **Move But Don't Size With Cells**, and **Don't Move Or Size With Cells**. These settings affect the behavior of the control when you resize or move cells that appear behind them.

The default settings for the options on the Properties tab depend on the type of control. For example, the Print Object option is not selected for a command button, but this option is set by default for a check box. The Move And Size With Cells option is enabled for a command button, but this option is not available for many other types of controls.

- **Alt Text tab** The Alt Text tab lets you provide text that is displayed while a form is loading in a web browser. Alt text is also used in search engines and can provide people with disabilities with information about a control.

Some types of controls include other tabs. For example, the Format Control dialog box for check boxes and option buttons includes the Colors And Lines tab. Use this tab to specify a fill color and degree of transparency, as well as a line color, style, and weight. (The options for arrow styles are not available.)

You can apply additional formatting to a command button control by using the Font, Alignment, and Margins tabs in the Format Control dialog box. The settings on the Margins tab affect the positioning of the button's label.



For a command button control, use the Font and Alignment tabs to modify how the button is displayed.

► To set properties for form controls

1. Right-click the control and choose **Format Control**.
2. Use the **Size**, **Protection**, **Properties**, and **Alt Text** tabs in the **Format Control** dialog box to specify options for the control's behavior.

3. For a command button control, use the **Font**, **Alignment**, and **Margins** tabs to apply additional formatting to the button and its label.
4. For check boxes and option button controls, use the **Colors and Lines** tab to apply line styles and fill colors.

Making Use of ActiveX Controls

The types of basic ActiveX controls you can insert on a worksheet form are similar to the types of form controls. You can insert a command button, a combo box, a list box, a check box—all the same types of controls except for a group box. You can also insert an ActiveX text box control, an image control, and a toggle button control.

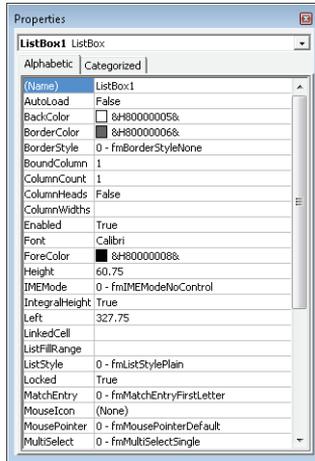
- In a text box, you can type, edit, or display data that is linked to a cell.
- Use a toggle button control to signify Yes/No or On/Off. A toggle button changes its appearance when it is enabled and when it is not.
- Use an image control to embed an image on a form.

When you click More Controls in the ActiveX Controls group, Excel displays a dialog box that lists numerous ActiveX controls that are installed with Excel. These are generally advanced controls that require programming.

To insert an ActiveX control, click the icon for the control in the ActiveX Controls group (click Insert in the Controls group to display the menu of controls), and then click the spot where you want to place the control on the worksheet. The steps you take at this point depend on the type of control you are inserting.

When you add an ActiveX command button control, for example, you won't see the Assign Macro dialog box. To provide the code you want the button to execute, right-click the button and choose View Code to open the Visual Basic editor. In the Code window, you will see the opening and closing lines of a subprocedure for the button's *Click* event. If you aren't familiar with VBA, you can enter the name of a macro you recorded here or copy and paste the code for a macro you recorded.

You can set properties for a command button (such as BackColor, Locked, Height, Width, and others) and for other controls by clicking Design Mode, right-clicking the button, and then choosing Properties. (You can also click Properties in the Controls group.) The Properties pane that's displayed lets you view a control's properties alphabetically or by category.



One advantage of using ActiveX controls is the extensive list of properties you can use to affect how the control is displayed and behaves.

Some properties are the same as for form controls. For example, ActiveX controls have a `LinkedCell` property that serves the same purpose as the `Linked Cell` box on the `Format Control` dialog box you use with form controls. The `Placement` property is comparable to the options that control moving and sizing a control that you can select on the `Properties` tab of the `Format Controls` dialog box.

You can use the `Font` property for an ActiveX list box control, for example, to change the font and font formatting applied to the list items. Other properties you can set for a list box include `BackColor`, `BorderStyle`, `TextAlign`, and `Visible` (which lets you hide the control if you want to). Other types of controls have the same or similar properties.

Two important properties to keep in mind are the `Name` property and the `Caption` property. The `Name` property identifies the control (such as `CommandButton1`). The `Caption` property, which does not apply to all control types, sets the text displayed in a control. For a check box or a command button, for example, type the text you want the control to display in the `Caption` property.

Here are some of the other important properties you work with in setting up different types of ActiveX controls:

- Check box** Set the `Value` property to `True` to select the check box; set this property to `False` if you want the check box to be cleared. Among the formatting properties for a check box are `BackColor`, `Shadow`, `SpecialEffect`, and `TextAlign`.

- **Combo box** Use the ListFillRange property to specify the cell range that includes the items you want the combo box to display. (You need to type the cell range here; you can't drag through the worksheet as you can for a form control.) To set up a two-column combo box, specify 2 for the ColumnCount property, set the ColumnHeads property to True, and set the ColumnWidths property so that each column is displayed at the size you want it. The BoundColumn property controls which column (in a multicolumn combo box) provides a value. The ListRows property sets the maximum number of rows to display.
- **List box** As you do for a combo box, use the ListFillRange property to specify the input range. The MultiSelect property controls whether users can select one or more items in the list box. Use fmMultiSelectSingle for selecting a single item. Use fmMultiSelectMulti to allow selection of multiple adjacent items. The fmMultiSelectExtended option is the value to choose if you want users to be able to select multiple nonadjacent items.
- **Option button** Set the Value property to True or False to specify whether the option button is selected by default.
- **Scroll bar** Use the Max and Min properties to set the range of values controlled by the scroll bar. The SmallChange property specifies the increment in which the value changes when you click the up or down arrow. The LargeChange property specifies the increment of change when you click the area of the scroll bar between the arrows.
- **Spin button** Use the Max, Min, and SmallChange properties to specify the maximum value, minimum value, and increment of change. Here, as with other controls, the LinkedCell property specifies the cell in which the value associated with the spin button appears.

Security Settings for ActiveX Controls

As it does for macros, the Trust Center provides a page in which you can review and change security settings for ActiveX controls. With the default setting, Excel notifies you that a workbook contains active content. You need to click Enable Content in the message bar to let ActiveX controls run. You can also choose an option to disable all ActiveX controls or to enable all controls without restrictions (this option is not recommended because some ActiveX controls could run code that harms your computer). Or you can choose an option to be prompted to enable

controls that are marked by a developer as Safe for Initialization (SFI). If a control is not marked, it is not considered safe (making it a UFI—Unsafe for Initialization—control) and is not enabled.

To change these settings, click Options on the File menu. In the Excel Options dialog box, click Trust Center. Click Trust Center Settings, and then click the ActiveX Settings page.

► **To insert and set properties for an ActiveX control**

1. On the **Developer** tab, click **Insert** in the **Controls** group.
2. In the **ActiveX Controls** group, click the icon for the control you want to add, and then click on the worksheet where you want to place the control.
3. In the **Controls** group, click **Design Mode**.
4. Right-click the control, and then click **Properties**.
5. Use the properties pane to specify values for the control's properties.

Tip For a summary of ActiveX control properties, see the previous section. See the Excel help topics under Forms and Controls for extensive lists of properties you set for specific ActiveX controls.

A Simple Order Form

Combining form controls and ActiveX controls with formulas and functions is what makes forms most useful. For example, here are some steps you could follow to create a simple order form that uses several combo boxes, matching spin buttons, a group of option buttons, and a command button (all form controls), together with the INDEX, IF, and SUM functions.

	A	B	C	D	E	F	G	H	I	J
1										
2	Order Form									
3										
4		Product	Product ID	Quantity			Price		Total	
5		Baguette	5	3			\$ 5.49		\$ 16.47	
6										
7		Chevres	3	10			\$ 7.99		\$ 79.90	
8										
9		Manchego	4	3			\$ 8.99		\$ 26.97	
10										
11		Amber Ale	6	5			\$ 8.99		\$ 44.95	
12										
13							Total		\$ 168.29	
14							1 Shipping		\$ 12.95	
15										
16							Discount		\$ (16.83)	
17							Grand total		\$ 164.41	
18										
19							Print Order			
20										

1. Add four combo boxes (or some appropriate number of them) to a worksheet. Stack the combo boxes in the same column. You can size them so that they fit in a single row. The input range for these combo boxes will be the same and refer to the cell range where you list your products. (In this example, the list is included in a cell range on a separate worksheet.) Set the Cell Link box in the Format Controls dialog box to point to the cell adjacent to the combo box in the next column (column C here, the product ID).
2. Add matching spin buttons with which users can specify a quantity. Set the minimum and maximum range and the incremental change to appropriate values (1 to 25 with an increment of 1). Set the Cell Link box for each spin button to the cell adjacent to the control (column E in this example).
3. In the sample order form, prices for each product are listed on a separate worksheet next to the corresponding product. Products are identified in the linked cell for the combo box by the number of their order in the list. By using the INDEX function and a reference to the linked cell, the product price is entered in column G. The full formula (for row 5) is `=INDEX(Sheet2!B1:B10,C5)`. The first argument for the INDEX is the cell range with the prices. The second argument (C5) is the linked cell for the combo box. When a user selects a different product from the combo box, the value in cell C5 (or cells C7, C9, and C11) changes and the INDEX function returns the price for that product.
4. The value for each entry in the Total column is calculated by multiplying the quantity (column E) with the price in column G. The total in cell I13 is just the sum of the item totals.

5. The shipping amount is also determined by the INDEX function in conjunction with the group of option buttons that identify shipping options. The amount charged for each option is listed on a separate worksheet. The linked cell for the option button group is F14. When a user selects a shipping option, the value in the linked cell reflects that choice. The formula in cell I14 uses the INDEX function to look up shipping charges: `=(INDEX(Sheet2!E1:E3,F14))`.
6. An IF statement in cell I16 determines whether the order is large enough to receive a 10 percent discount. The formula is `=IF(I13>=100,I13*-.1,0)`. If the value of the order (in cell I13) is greater than or equal to 100, a discount of 10 percent of that amount is entered in cell I16. If the order is less than 100, the formula enters 0 and the value is displayed as '-'
7. To finish off the order form, the command button runs a macro that saves the form as a PDF file.

Practice Tasks

The practice files for these tasks are located in the folder for Microsoft Excel 2010. You can save the results of these exercises in the same folder. Change the file name so that you don't overwrite the sample files. When you are done, try performing the following tasks:

- Open the file `LoanCalculator.xlsx`. Sheet1 identifies the cells whose input is required for the PMT function, which you can use to calculate loan payments based on interest rate, loan amount, and number of payments.
- Insert form controls to automate the formula by using the named cells as the linked cells for various controls. Add a spin button control that changes the interest rate between 3 and 9 percent. (You need to divide the value by 100 to insert a percentage in the formula.) Add a scroll bar that changes the amount of a loan between \$5,000 and \$30,000 in \$1,000 increments.
- Create a list for the possible number of payments (12 through 60). In the adjoining column, number these options 1 through 5. Add a list box control to your form, and use the cell range that contains the list of payment options as the input range. Specify the Number of Payments cell as the linked cell.
- Now use the LOOKUP function to equate the output from the list box with the number of payments. The syntax for the LOOKUP function is `=LOOKUP(lookup_value,lookup_vector,[result_vector])`. Here, you look up the value in the Number of Payments cell, compare it to the numbered list 1–5, and return the matching result from the list of payment options to the PMT formula.

Objective Review

Before finishing this chapter, be sure you have mastered the following skills:

- 4.1** Create and manipulate macros
- 4.2** Insert and manipulate form controls

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