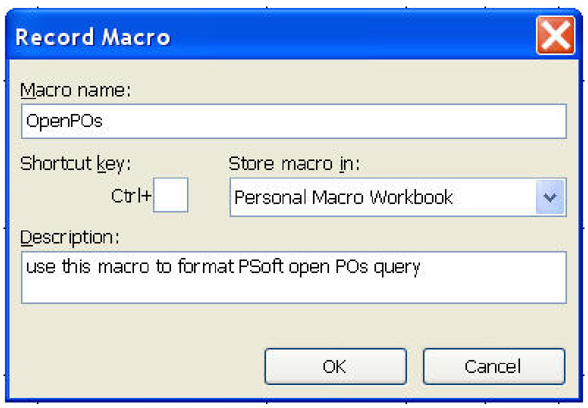
Using Macros to Format Queries from PeopleSoft

Formatting queries that you run from PeopleSoft can become tedious. You probably end up doing the same thing every time – formatting cells to currency, removing or hiding unnecessary columns, sorting, adding subtotals, and setting up page properties to name a few common ones. You can run all of these tasks by creating a macro.

Recording a Macro

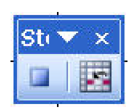
Login to PeopleSoft and run query. Save to your computer as an Excel document.

- Open the query in Excel
- Tools
- Macro
- Record New Macro
  Name your macro something that makes sense to you, give it a shortcut key (optional) and save it to your personal macro workbook (that way you can use the macro anytime you open Excel on your computer)



- Click OK. This starts the macro. Now - anything that you do will become part of the macro. You can format cells, sort data, add subtotals, go into Page Setup – everything that you normally do to a query to format it the way you want it to look.

- Click on the stop recording button to end your macro. You can also stop the recording by going to Tools – Macro – Stop Recording.



Running a Macro

To run a macro:

- go to Tools – Macro - Macros – Select the appropriate macro and click Run

\- or –

- press the hot key that you associated with the macro

\- or –

- click on the macro icon on your customized toolbar

Creating a Custom Toolbar For Macros

Create a toolbar to store all of your newly created macros. You can display the macros as icons, text or a combination.

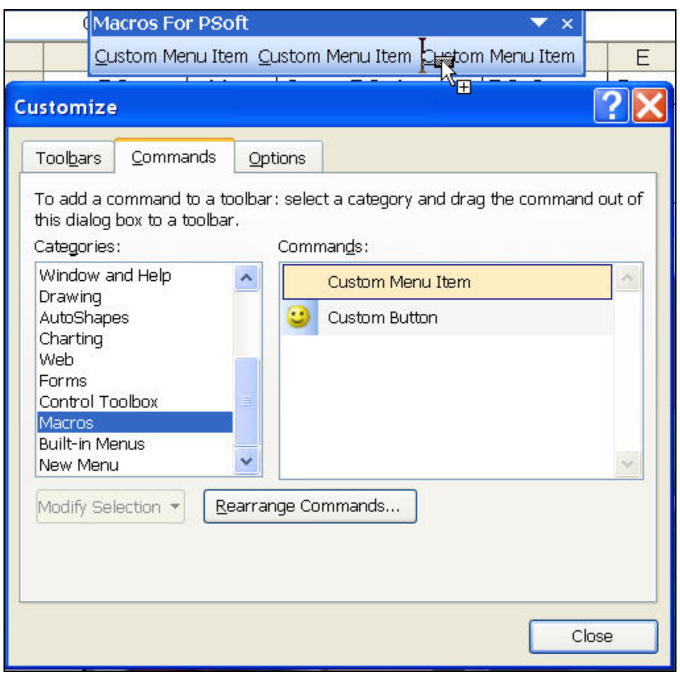
Creating a custom Toolbar

- Tools
- Customize
- Click Toolbars tab
- Select New
- Name the toolbar – ok

The newly created toolbar is now in the Toolbars list and a new floating toolbar shows up with nothing on it. Now you need to add the macros

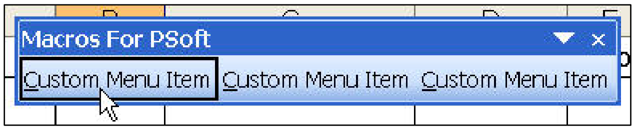
Adding Macros to Toolbar

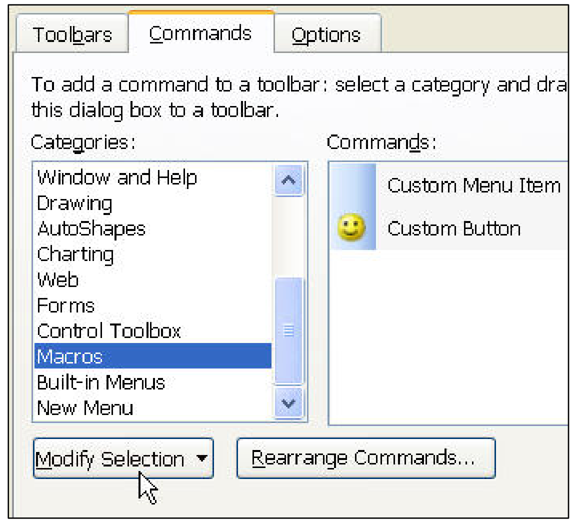
- Go to Tools
- Customize
- Click the Commands tab
- Scroll down the Categories list until you find Macros
- Select Macros – a different list will show in the Commands list on the right
- Select Custom Menu Item
- Drag Custom Menu Item onto the newly created floating toolbar
- Add as many Custom Menu Items as needed



Now you need to associate each of the ‘Custom Menu Items’ with a specific macro

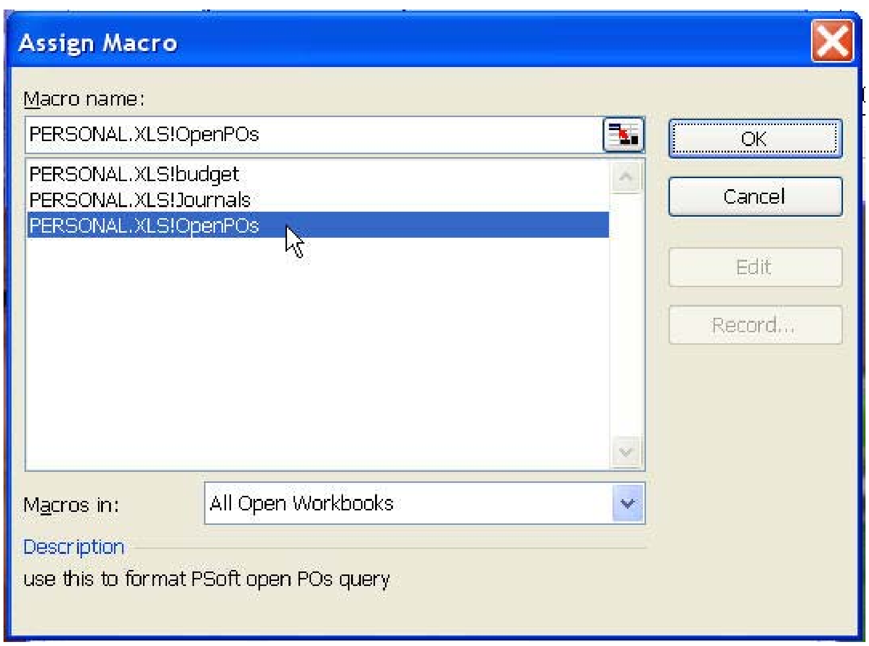
- Open Tools – Customize – Commands tab
- Select ‘Custom Menu Item’ from your newly created toolbar

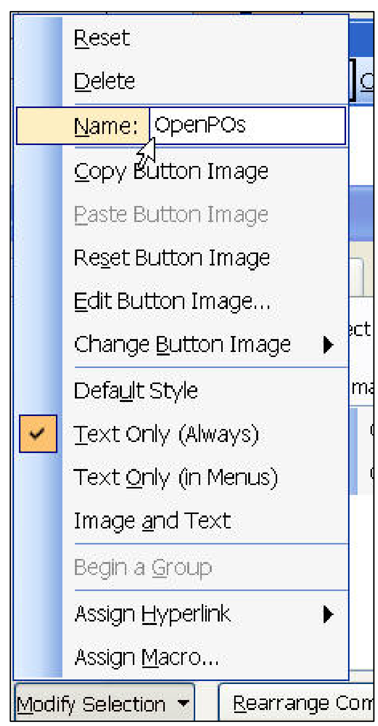




With that selected, go to ‘Modify Selection’ on the Commands tab

- Select ‘Assign Macro’ from the pull-down list
- From the list that shows up, select the macro you want
- OK





Go back into ‘Modify Selection’ to name the shortcut
Close the Customize Dialog box and your toolbar is ready to use.

Removing Macros and Toolbars

The macros you create are saved in your PERSONAL.XLS workbook. In order to remove a macro, the first thing you need to is to UNHIDE the PERSONAL.XLS.

- Go to Windows
- Unhide
- Select PERSONAL.XLS
- OK – now you can delete the macros associated with this workbook.

Remove the macro:
- Tools – Macro – Macros (or Alt + F8)
- Select the Macro you would like to remove
- Delete

When you are finished, you can RE-HIDE your PERSONAL.XLS workbook

Removing a Toolbar

If you no longer need a toolbar, you can remove it by doing the following:
- Tools
- Customize
- Toolbars
- Highlight the toolbar you would like to remove
- Delete – OK - Close