Miscellaneous Notes

Abbreviations

aka    Also Known As
CWS    Course Web Site (http://www.student.cs.uwaterloo.ca/~cs200)
VBE    Visual Basic Editor

intra- a prefix meaning within — thus “intra-cellular” means “within the cell”
inter- a prefix meaning between — thus “inter-galactic” means “between galaxies”

For our purposes, a “macro” and a “script” are the same thing

Optional background reading

Writing Excel Macros, Chapters 3 and 4, (in library)
Excel Review (Learn)
Excel Review Exercises (Learn)

A good reference if you’re interested in learning more about Excel Scripting is

Writing Excel Macros (2/e), by Steven Roman
Administrativia

Please read and highlight the assignment and course notes before lab
Staff suggests reading the assignment before lecture

There are hyper-text commented source files for most of the Excel macros used in this lecture
see "Handouts > Commented Excel Macros" on the course website

Files used in this lecture are on Learn
Week 7: Application Scripting (Excel): Files for Lecture

Today
Scripting in Excel
The Copy Pearl
Remember that the CWS contains material on the pearls

Warning
We are running Office 2011, in the Mac Labs
—test Windows docs in the lab before submitting

Assumption
You have used a spreadsheet before
You understand a simple program/algorithm
Things to Think About

What are the data objects in a Spreadsheet program?

How does the interface differ from the other applications we have seen so far?

What are the efficiencies/deficiencies of the interface?

When would I use a spreadsheet?

How does a spreadsheet compare to a database?

How would macros be useful in other applications we have seen so far?

---

The Copy Pearl

Keep copies of your old stuff around
   in well-named files and folders
   works better if you comment what you do

Lurk on news groups and capture examples as they come by

Check out what comes with the app

Build a list of what examples can be found where
Application Scripting in Excel

What is “(intra-)application scripting”?
- a way to automate lengthy manual procedures
- a way to customize / extend an application
- a way to create a different interface
- “programming in the small”

Recording a script
- “record” a manual procedure (once)
  - and “play it back” many times
  - sort of like a player piano
- record a script to learn how to do something
  - look up terms in the script as necessary
- “anything you can do manually, you can script” — & more

Edit a recorded script
- to make it more general
- to eliminate unnecessary steps
- to wrap a loop around it
- to do something similar

Why Scripting in CS 200?

Most major apps have some sort of scripting
- eg Word, Excel, Photoshop, FileMaker...
- eg system-level macro languages
  - hooked to key presses or menu selection (eg iKey, UI Actions)
  - or sometimes to user-defined palettes
  - to move data between apps & tell those apps how to process the data (eg AppleScript, VBA)
- eg JavaScript in HTML pages, DreamWeaver, Acrobat...
  - in fact, some have more than one!
  - Photoshop supports three (or four, depending on how you count)

Scripting can save you a LOT of work
Automating Spreadsheet Creation — Format with a Macro (1)

The macro

```
' Rule_Left_and_BOTTOM Macro
' Macro recorded 10/12/95 by John C. Beatty
'
Sub Rule_Left_and_Bottom()
    Selection.BorderAround    _
    Weight := xlThin, _
    ColorIndex := xlAutomatic
    Selection.Borders(xlRight).LineStyle = xlNone
    Selection.Borders(xlTop).LineStyle   = xlNone
End Sub
```

Note the comments, introduced by the character ' — anything from there to the end of the line is ignored (add your own to remind yourself later of things you figure out)

This example illustrates speeding spreadsheet development

- macros are easy to read & usually you can RECORD what you want to do, or something close to it, and just edit the recording
- look up terms you don’t know with online help (in the VBE environment)
  eg select a term like ColorIndex and press the help key
Automating Use Of A Spreadsheet — Sort Marks

This illustrates speeding the use of a spreadsheet

Sort Marks — By Name

Sub Sort_By_Name2()
   Range("B3:D14").Select
   Selection.Sort
      Key1 := Range("C3"), _
      Order1 := xlAscending, _
      Header := xlGuess, _
      OrderCustom := 1, _
      MatchCase := False, _
      Orientation := xlTopToBottom
   Range("A1").Select
End Sub

“_” means “the statement continues on the next line”

It’s pretty easy to guess what each piece of the Selection.Sort statement does, right?
Sort Marks — By Mark

Sub Sort_By_Mark2()
    Range("B3:D14").Select
    Selection.Sort
        Key1        := Range("D3"),
        Order1      := xlDescending,
        Header      := xlGuess,
        OrderCustom := 1,
        MatchCase   := False,
        Orientation := xlTopToBottom
    Range("A1").Select
End Sub

Extending Excel — F to C Conversion

The macro
Function FtoC( fTemp )
    FtoC = (fTemp - 32) * 5 / 9
End Function

illustrates extending an application by means of a macro

Note the use of “Function” instead of “Sub”
“functions” return a value (the value assigned to their name)
“subroutines” don’t — they just “do something”

FtoC can be used anywhere a built-in Excel function can be used

See also “Marks to Grades” in
Week 7 / Files for Lecture: Excel Macros
Making a spreadsheet look like a hand-built app

Excel’s Scripting Environment

Selecting Macros... opens the dialog shown above right

Note the “Record New Macro...” menu item
Editing a Macro

To edit a macro

- click the Edit button in the Macros dialog
- or select “Visual Basic Editor” from the menu shown on the previous slide

Note the new menu bar, & especially the View menu in it

All the active menu items are interesting

<table>
<thead>
<tr>
<th>View</th>
<th>Insert</th>
<th>Format</th>
<th>Ref</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>Insert</td>
<td>Format</td>
<td>Ref</td>
</tr>
<tr>
<td>Object</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Definition</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Position</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Object Browser</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Immediate Window</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Call Stack</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Properties Window</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Toolbox</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tab Order</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Toolbars</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The VBE Environment (The Big Picture)
Excel vs the Visual Basic Editor

A bit like two programs wrapped as one
— one dock icon, but with different menu bars and different windows/palettes

in the VBE, click on a spreadsheet to “flip back to Excel”
(or select “Excel > Close and Return to Microsoft Excel” !)

in Excel, click on a Code window to
“flip back to the VBE”
(or select “Tools > Macros > Visual Basic Editor”)

Excel’s Scripting Environment

The Project Explorer window

Recorded macros go into “Modules”

“Sheets” & “ThisWorkbook” can hold macros, too

Double-click any of the three to edit its macros

Suggestion: keep all your macros in modules
— otherwise you must refer to them as Sheet1.macroName, etc

The Properties window

Click on one of the entries in the Projects window

Its “properties” are displayed in the Properties window

You can change many of them;
you won’t need to for the assignment.
Cell References in Excel Worksheets & Macros

Before row/column insertions

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

After row/column insertions

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The macros

MyLiteralTotal()
MyNamedTotal()

after inserting a new column
at the left edge of the spreadsheet—notice which total is correct!
—and why!

So ... when you insert/delete rows/columns
Excel updates all cell references in a worksheet,
literal references (“E43”, “$R$13”), range definitions, etc,
but the text of macros is untouched

The moral ... you nearly always want to use named ranges in macros

Consider the Sort Marks example with these macros:

Suppose we added a student, or moved the list.
Would the macros still work properly?

Sub Sort_By_Name()
    Range("B3:C14").Select
    Selection.Sort
        Key1 := Range("B3"), _
        Order1 := xlAscending, _
        Header := xlNo, _
        OrderCustom := 1, _
        MatchCase := False, _
        Orientation := xlTopToBottom
    Range("A1").Select
End Sub

Sub Sort_By_Mark()
    Range("B3:C14").Select
    Selection.Sort
        Key1 := Range("C3"), _
        Order1 := xlDescending, _
        Header := xlNo, _
        OrderCustom := 1, _
        MatchCase := False, _
        Orientation := xlTopToBottom
    Range("A1").Select
End Sub
Use a named range instead of explicit literal cell references

What if I want to add a new student?
- adding in the middle of a named range
- adding to the end of a named range
- use a final blank row?
- would the average be correct?

*This is another instance of “indirection”*

```vba
Sub Sort_By_IDnumber2()
    Range("theData3").Select
    Selection.Sort
    Key1 := Range("theData3").Range("A1"), _
    Order1 := xlAscending, _
    Header := xlGuess, _
    OrderCustom := 1, _
    MatchCase := False,
    Orientation := xlTopToBottom
    Range("A1").Select
End Sub
```

### Relevant Programming Concepts

- **Variables and declarations**
- **Assignment statements**
- **Sequential execution**
- **Loops**
  - initialization
  - termination test
  - changing the loop control variable(s)
- **If–then–else statements**
- **Subroutines and functions**
  - parameters (aka arguments)
- **Debugging**
  - interactive source-level debugging
Things We Still Need to Talk About To Do The Assignment

“Objects” in Excel — how to name objects on a spreadsheet

Excel’s debugger

Conveniently triggering macro execution

Cell references
  in worksheets
  in macros

The Assignment For This Week

Given the raw data, duplicate the functionality of this spreadsheet
This Week’s Assignment is “Layered”

**Trivial formulas**
- eg for Actual Balance

**Simple formulas**
- eg for Statement Balance or Next Transaction Number

**Not quite so simple formulas**
- eg for the CD Charge cell for US$ purchases

**Simple macros**
- eg for scrolling, sorting, or filtering

**Not quite so simple macros**
- eg for making new entries

Note that you can create all of these macros by recording them, you do not need to use VBA

---

Strategy For The Assignment

**Start with the simple stuff**
- and proceed in stages towards the more difficult

**Test as you go**

**Make a copy of your spreadsheet at each successful stage**
- eg, when you have the simple formulas working,
- ie, squirrel a copy of that away
- in case you totally muck up the next step
- and want to start over on it
- (remember “backups”?)
“Objects” in Excel Macros

Just about everything you see in a workbook is an “object”

There is a natural hierarchy to objects

You can have multiple instances of everything except the Application

These are Excel’s “application data objects” (remember the Model pearl?)

A “module” is for holding macros (aka “scripts”)

think of it as a document containing multiple macro definitions

in the VBE: Insert > Module and type

or ... a module is created automatically when you record a macro

Objects

Objects have “properties” like “Color,” “Value,” “Font”

that you can read or set in macros

sometimes a property is just a value (eg 2)

sometimes a property is another object

Objects have “methods” like “ClearContents,” “Sort,” “Worksheets”

that cause something to be done to or with the object

a “method” is just another kind of built-in function or subroutine that does something to or with the object it’s attached to

methods often have “parameters” (aka “arguments”)

— information they need

— just like built-in Excel functions

eg C4, ForEx, and 2 in VLOOKUP( C4, ForEx, 2 )

“Member” is programmer-speak for both properties and methods

All objects of a particular kind are a “class” of objects
Especially Useful Properties

**Application.ActiveWorkbook**
you can just write ActiveWorkbook
for the frontmost workbook

**Application.ActiveSheet**
you can just write ActiveSheet
for the worksheet whose tab was last clicked

**Application.ActiveCell**
you can just write ActiveCell
for the currently selected cell

And usually you can omit Application.ActiveSheet
eg `Range(...)` instead of Application.ActiveSheet.Range...

eg `Selection(...)` instead of ...

**How do you find out about objects, properties and methods?**
record a macro, then highlight a method or property name & press the help key
ie if you see something and wonder about it
use the “object browser”
if you want to go looking to see, for example, if worksheets have a particular property

---

**The Object Browser**

Click in the “Classes” or “Members” lists
type to scroll their contents automatically

click on ? to open the help window on that object or member
this is the best way to discover what members a class has

NB: “Excel” is selected in the pull-down top left
Online Help for the Range Method

You can also access help for a property or method by
- highlighting it in a macro module and pressing the help key

Hints for the assignment!
- The “Remarks” info about Ranges may be useful

Warning: Excel and VB have different Help databases.

Watching Your Macros Run

This dot marks a “breakpoint”
Debugging (The Big Picture)

Using the Debugger

Set a breakpoint  
by clicking in the left margin  
to halt a macro when it gets to that statement  
“clear” the breakpoint by clicking again in the left margin

Use

? variableName <return> in the Immediate Window to display the value of the variable

Use

Debug > Step Into (does dive into functions or subroutines)  
Debug > Step Over (doesn’t dive into functions or subroutines)  
to execute one statement and stop again

Use

Run > Continue  
to turn the macro loose

The Visual Basic Editor’s Debug toolbar has buttons for all of these  
(View > Toolbars... > Debug)
Putting It Together: Tools > Macro > Macros...

To

- run a macro
- delete a macro
- edit a macro

And via the Options... button

you can attach a macro to a key (or key combination) on the keyboard.

Attaching a Macro to a Spreadsheet Button

Draw a button after selecting on the Forms toolbar

Ctrl-click on the button to open the Assign Macro dialog

Select and OK the desired macro
Strategies For Working With Macros

Record
• to learn how to do something
• to build a macro faster

Edit recorded macros to customize / elaborate them

Use on-line help and the object browser to find object names, properties, & methods that you need

Experiment
• with toy macros & documents
• eg the workbooks used in lecture (see Learn Week 6: Application Scripting (Excel) / Files For Excel Scripting)

Use the debugger
• to understand what your macros are doing!

Save everything you do, and include comments (they start with the single quote character ‘ ‘)

The Assignment For This Week

Given the raw data, duplicate the functionality of this spreadsheet