**Use What You Have:**

**Creating Automated Visual Displays Using MS Word and Excel**

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**Step 1: Make a model report in Word**

* Create a model of what you want your “final” copy to look like and populate your charts and tables with fictional data

**Step 2: Add bookmarks to your model report**

1. Print your model report and circle every single detail that needs to change from one report to another – words, letters, numbers, tables, charts, etc.
2. Add bookmarks in Word
   1. Make your bookmarks visible to keep yourself organized: Word Options → Advanced → Show document contents → Show bookmarks
3. Make a list of every single one of the bookmarks you just created
4. Save this Word document with the bookmarks as a .dotx file (This is called a “template” in Word)

**Step 3: Organize the data in Excel**

1. Make a “setup” sheet with 3 columns:
   * Column of dashboard data – the column where the datum is going to come from
   * Bookmark name
   * Short description of the bookmark to keep yourself organized
2. Make a “data” sheet
   * Transpose the data from the “Setup” into the first 3 rows of the “Data” sheet
   * Fill in your data!
     + Use the =text() function to convert all numbers to text
3. Make your “charts” sheet
   * Generate all the charts beforehand (and edit them individually before finalizing the report)
   * Each chart has a name, and you have to record that name

**Step 4: Run the code!**

1. Code info sheet
2. Run the macro

Want to learn more? Check out our AEA Coffee Break Webinar – Thursday, December 8