



## Microsoft Excel 2003: Tips and Shortcuts using the Drawing Tool

*This tip sheet is for documenting Cause Maps and Process Maps using Excel 2003.*

### 1. Removing Grid Lines

Click Tools on the menu bar at the top of the screen. Select Options. On the view tab, under Window Options uncheck the box next to Gridlines to turn off the gridlines for that worksheet. Click OK.

### 2. Adding the Drawing Toolbar

Add the Drawing Toolbar by clicking on View/Toolbars. From the different toolbars that appear check Drawing. The Drawing Toolbar, which starts with the word Draw, may appear at the bottom of your Excel screen or directly on the worksheet. It can be moved by left clicking on the vertical line just left of the word Draw. Hold the mouse button down and drag the Drawing toolbar to the desired location.

### 3. Arrow Cursor - Select Objects

There are two cursors in Excel 2003. There is the plus cursor for performing regular functions with the cells and there is an arrow cursor for selecting objects that are located on the worksheet. To select the arrow cursor, left click on the arrow to the right of the word Draw on the Drawing Toolbar.

### 4. Making a Text Box

There is a shortcut button for making text boxes on the Drawing Toolbar with a capital A inside of it with small lines. Click on the text box button and release the mouse. Move the cursor, which now looks like a vertical line with a bar toward the bottom, to the spreadsheet. Click and hold the left mouse button to drag a box to the desired size.

### 5. Box Border – Lines or Dots

Clicking anywhere on a text box highlights that box with hashed lines on each of the four sides. Clicking on the dashed lines will turn the border into dots. A dotted border is for selecting the entire box. A hashed border shows that the inside of the box has a cursor so that text can be added or edited. Click in the middle of the box or directly on the border to move between a hashed line and dotted border.

### 6. Sizing Boxes

The dots in the corners and on the sides of the boxes can be dragged with the mouse to make the box smaller or larger. The boxes can also be sized by right clicking on the box to create the hashed line border, then double clicking the hashed line border with the left mouse button to pull up a format box. Under the Size tab, you can set exact vertical and horizontal dimensions. Several boxes can be sized at the same time by selecting multiple boxes.

### 7. Moving Boxes

To move a box click on the border so that it becomes dotted, hold down the left mouse button and drag the box to the desired location. Once the box has a dotted border, it can also be moved by using the arrows on the keyboard.

### 8. Selecting Multiple Boxes

Hold down the shift key and left click on the each box you wish to add to the selection. Multiple boxes can be selected. This multiple selection using the shift key works for selecting any object including lines. You can also select several boxes at a time using the Select Objects function. Click on the arrow to the right of Draw on the Drawing Toolbar, left click on the worksheet and drag the dashed box to contain all the boxes you wish to select. You can then move all of them together by grabbing the dotted border on any one of the boxes.

## 9. Copying Boxes

To copy a box the border must be dotted. See Tip #5 above.

Here are four basic ways to copy a box:

9-1. Click on the Edit menu, and choose Copy. Then click on the Edit menu and choose Paste.

9-2. Click Ctrl C, then Ctrl V to copy and paste.

9-3. Right click directly on the box border and select Copy from the drop down menu. Then right click again and select Paste.

9-4. Great Tip Left click directly on the border, hold the mouse down and drag the box to the desired location. Before releasing the left mouse button hold down the Ctrl button on the keyboard. This is known as the Ctrl-Drag copy method. It is typically the fastest way to copy many boxes onto a worksheet.

## 10. Aligning Text inside a Box

Click on the box to create the hashed line border. Then double click the hashed line border with the left mouse button to pull up a format box. On the Alignment tab, you can align both horizontally and vertically.

## 11. Changing, Adding, or Removing Borders

Click on the box to create the hashed line border. Then double click the hashed line border with the left mouse button to pull up a format box. On the Colors and Lines tab, under Lines, you can select the color for your border (or select No Line for no border). You can also specify the style and weight of your border line.

## 12. Adding Color to the Boxes

Click on the box to create the hashed line border. Then double click the hashed line border with the left mouse button to pull up a format box. On the Colors and Lines tab, under Fill, you can select the color for the box.

## 13. Using Connectors (*Great Tip*)

Do not use either the line or the arrow that is displayed on the Drawing Toolbar. Instead, click Auto Shapes on the Drawing Toolbar, and select Connectors with the left mouse button so that the box of nine connectors appears. Move your mouse to the gray horizontal bar at the top of the connector box and hold down your left mouse button and drag the connector box to the Toolbar at the top or bottom of your screen (or just drag it onto your worksheet) and let go of the mouse button. Use the connectors called either the Elbow Connector or the Elbow Arrow Connector.

Connect cause boxes by clicking and holding the left mouse button at the beginning connection point then moving the cursor to the ending connection point and releasing the mouse. The connector end is red when it is connected to a box and green when it is not connected. The green end can be dragged to an object.

## 14. Aligning Boxes

Boxes can be aligned by using the mouse or the arrows on the keyboard as explained in Tip #7. Boxes can also be aligned by selecting two or more boxes (Tip #8) and clicking on Draw on the Drawing Toolbar (Tip #4), then selecting Align or Distribute. You will get a drop down containing Align Left, Center, Right, Top, Middle, and Bottom. Align uses the extreme edge of the selected boxes for the chosen alignment.

## 15. Moving Boxes in a Straight Line (*Great Tip*)

When moving a box hold down the shift key to move the box only at 90-degree angles: left, right, up or down. The shift button also works when copying something in only a straight line such as with the Ctrl-Drag copy method in Tip #9-4. This is the Shift-Ctrl-Drag method.

## 16. Zoom-in, Zoom-out

Zooming in and out can be done by selecting View on the menu bar and then selecting Zoom. Zoom can also be done if you have a wheel on your mouse by holding the Ctrl key down as the wheel is moved forward or backward. If you use the wheel to zoom more often than you use it to scroll on a sheet, you can set the wheel button to zoom instead of scroll. On the Tools menu, click Options, click the General tab, and then select the Zoom on roll with IntelliMouse check box under Settings.