



1. Removing Grid Lines

Tools – Options - Window Options - uncheck the box next to Gridlines to turn off the gridlines for that worksheet. Click OK.

2. Adding the Drawing Toolbar

View – Toolbars - 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

Left click on the arrow to the right of the word Draw on the Drawing Toolbar.

4. Making a Text Box

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

A hashed border shows that the inside of the box has a cursor so that text can be added or edited. A dotted border is for selecting the entire box.

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.

7. Moving Boxes

Click on the border so that it becomes dotted, hold down the left mouse button and drag the box to the desired location. The box 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.

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. Edit - Copy. Edit - Paste.

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

9-3. Right click - Copy. Right click - Paste.

9-4. 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

10. Aligning Text inside a Box

Format - Alignment. You can align both horizontally and vertically.

11. Changing, Adding, or Removing Borders

Select an object (hashed lines) – double click - Format - Colors and Lines, under Lines, you can select the color for your border.

12. Adding Color to the Boxes

Select an object (hashed lines) – double click - Format - Colors and Lines, under Fill, you can select the color for the box.

13. Using Connectors (Great Tip)

Drawing Toolbar - Auto Shapes on the Drawing Toolbar –left click Connectors (box of nine connectors will appear). 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). 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

When moving a box hold down the shift key to move the box only at 90-degree angles: left, right, up or down.

16. Zoom-in, Zoom-out

View – 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

This tip sheet is for documenting Cause Maps and Process Maps using Excel 2003. Detailed instructions can be found in the Microsoft Excel Cause Mapping Templates. To download a template, please visit our website at www.thinkreliability.com

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