

# Cause Mapping® Excel Skills and Shortcuts Summary

Some **must know** tips in Excel to use the *Cause Mapping* Template. Click on each one.

## Excel Overall

1 Undo - Ctrl Z

2 Two Cursors in Excel - Info Sheet



3 Adding Select Objects Cursor

4 Move Toolbar Below the Ribbon

3 pages, 4-steps

5 Rename a Worksheet - 2 Ways

6 Copy a Worksheet - 2 Ways

2 pages

7 Moving a Box - 4 ways

8 Copying a Box - 7 ways

Ctrl

9 Ctrl Drag to Copy an Object

10 Connecting the Tail

11 Connecting the Arrow



12 Adding Elbow Arrow Connector

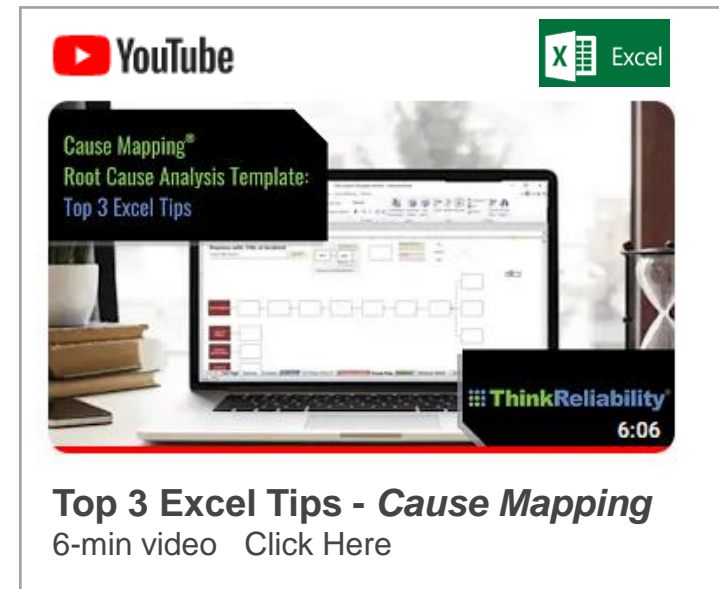
4 pages, 11-steps

13 Using the Alt Shortcuts

## Boxes and Connectors

## Additional Resources:

Watch this **6-min Video** with Tips 3, 9, and 12



Download our **Cause Mapping Template** in Excel

Visit our website [www.thinkreliability.com](http://www.thinkreliability.com)

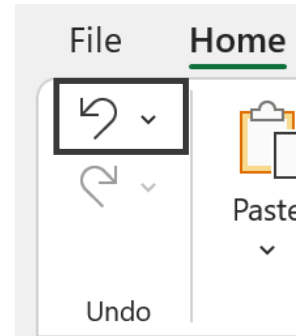


# Undo



Keyboard, **Ctrl Z**

OR



Click the Undo Icon, Home Ribbon or Toolbar

You can Undo multiple times by continuing to type **Ctrl Z** or clicking the undo icon.

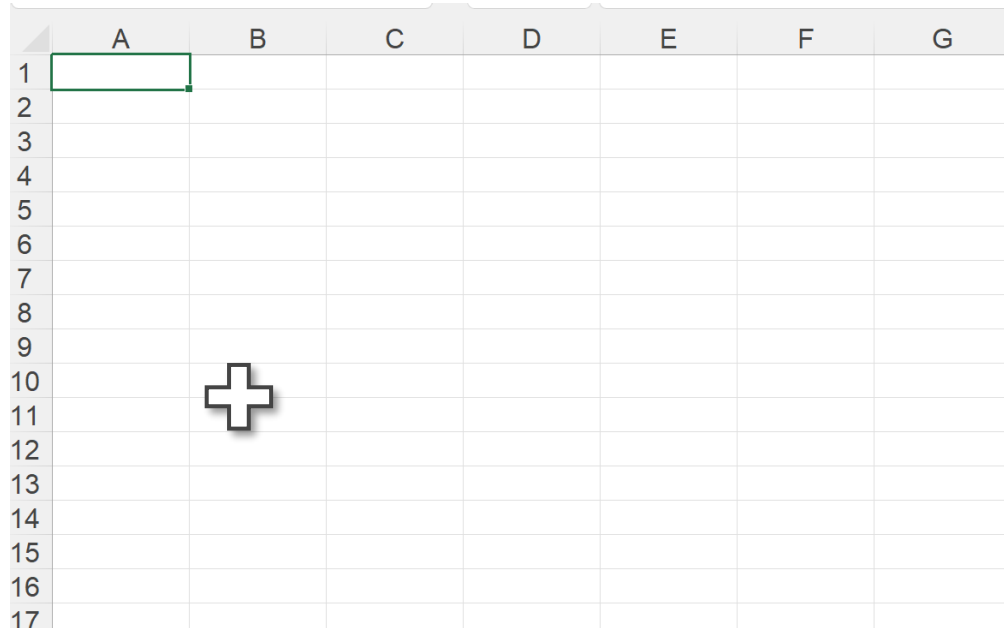
# Two Cursors in Excel

## Select Cells Normal

Cells in the Worksheet

### Data, Calculations, Lists

Numbers and text with calculation and sorting capability. Enter the information within the cells of spreadsheet.

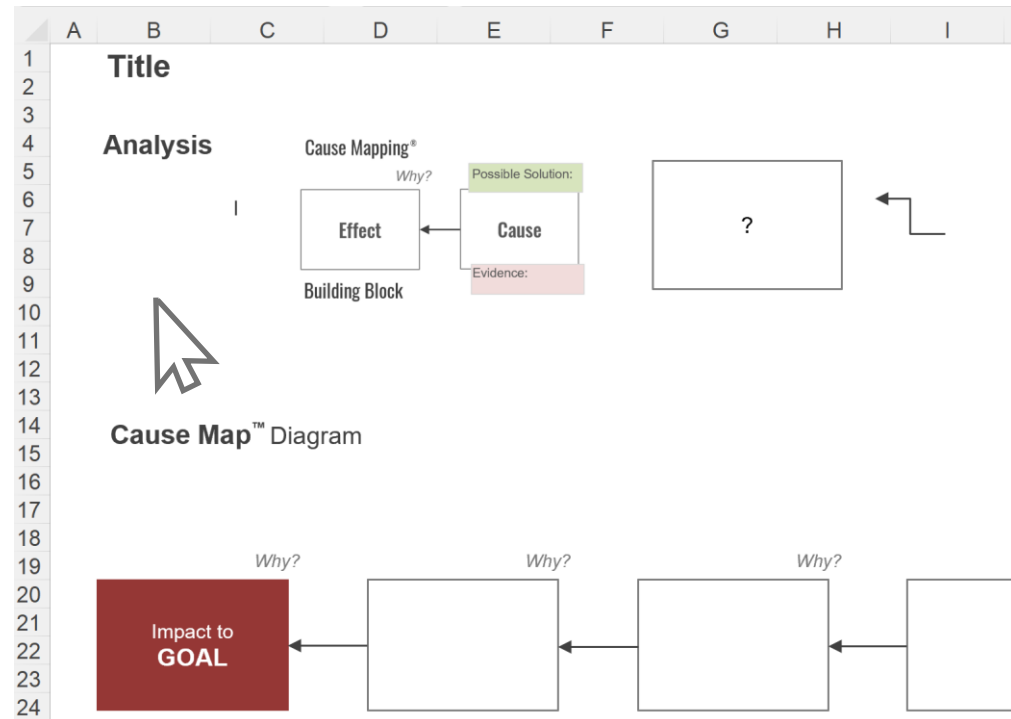


## Select Objects Not Well Known

Objects on the Worksheet

### Shapes, Diagrams, Drawings

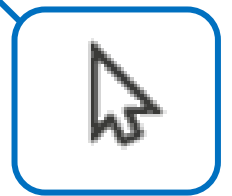
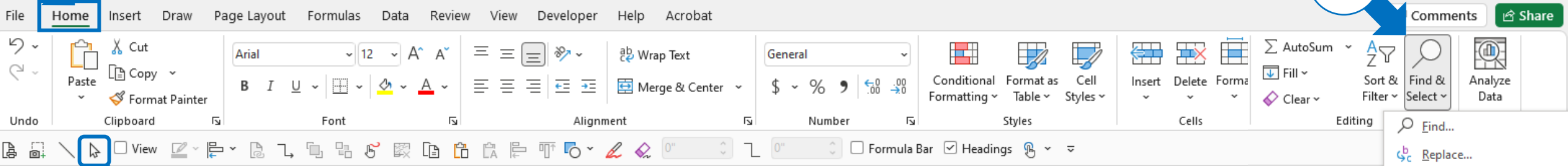
Objects are laying on top of the cells. They can be any shape, layered and moved to any location on the worksheet.



# Add the Select Objects Cursor to the Toolbar

**1** Left click mouse 

Left click mouse **2** 

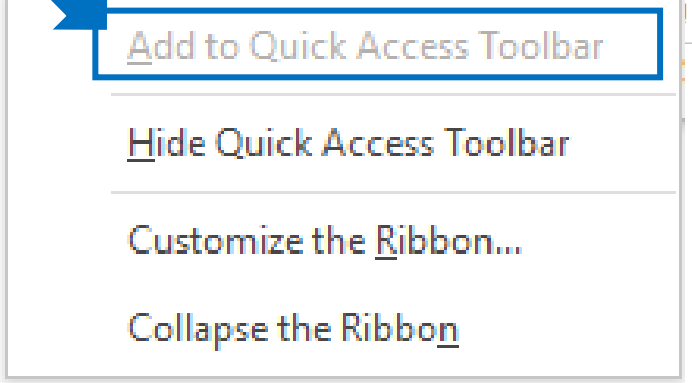


## Select Objects Cursor

Learning how to use this cursor will change the way you use Excel. It allows you to quickly and easily make any Cause Map™ diagram, process map, diagram or drawing in Excel.

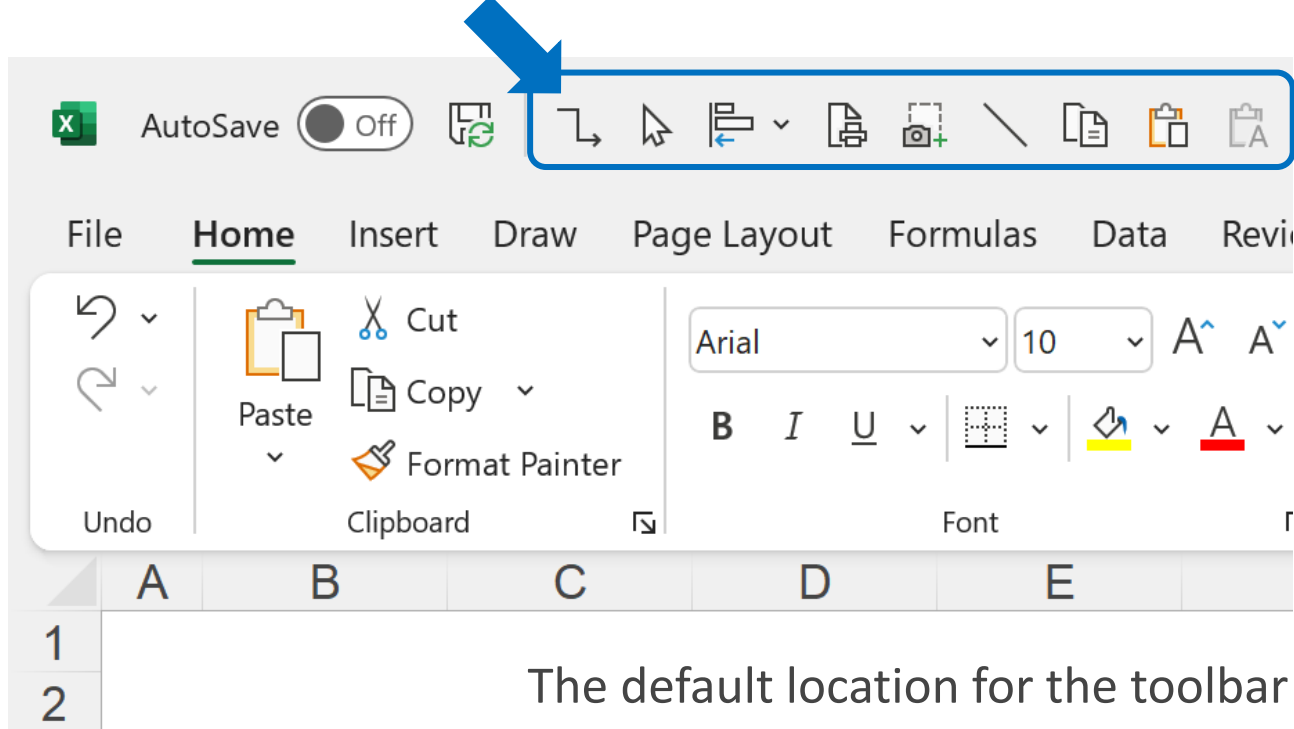
Left click mouse **4** 

Right click mouse **3** 



# Toolbar Location

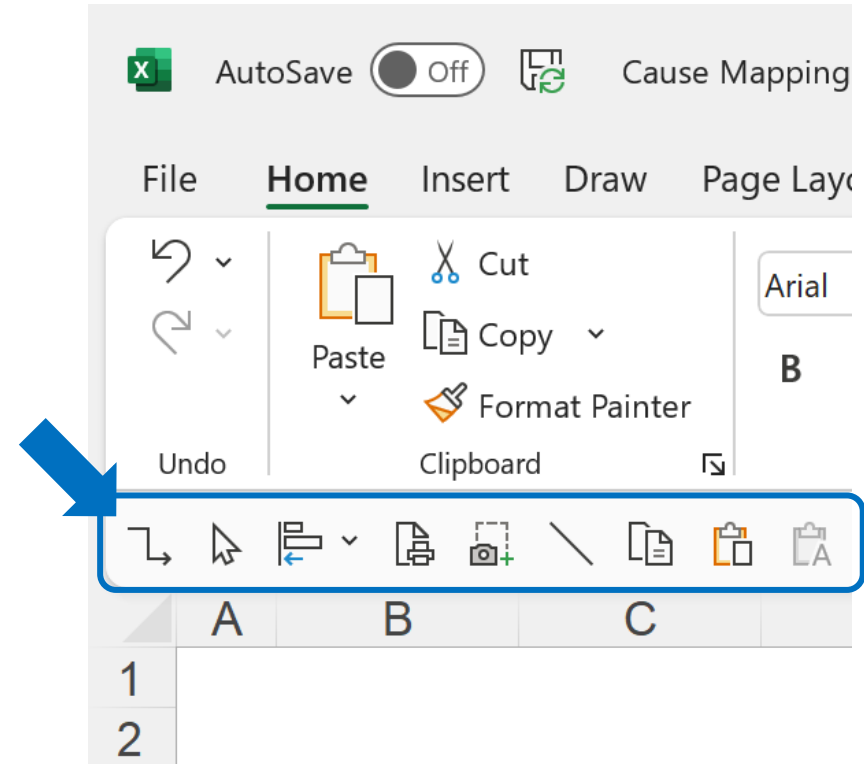
## Toolbar Above the Ribbon



The default location for the toolbar is above the ribbon.

Moving the toolbar below the ribbon places it closer to the worksheet. It also provides additional room for more shortcuts.

## Toolbar Below the Ribbon



Move the Toolbar Below the Ribbon

The image shows the Microsoft Excel interface with the Quick Access Toolbar (QAT) at the top. A blue arrow points from the QAT to the ribbon area. The 'Excel Options' dialog box is open, showing the 'Quick Access Toolbar' section. The 'Customize the Quick Access Toolbar' section is active, showing a list of commands and a 'Customize Quick Access Toolbar' list. The 'Below Ribbon' option is selected in the 'Customize Quick Access Toolbar' list. The 'Always show this toolbar below the ribbon' checkbox is checked. The 'Export' button is highlighted.

1: Points to the Quick Access Toolbar (QAT) at the top of the Excel window.

2: Points to the 'Options' button in the bottom right corner of the Excel window.

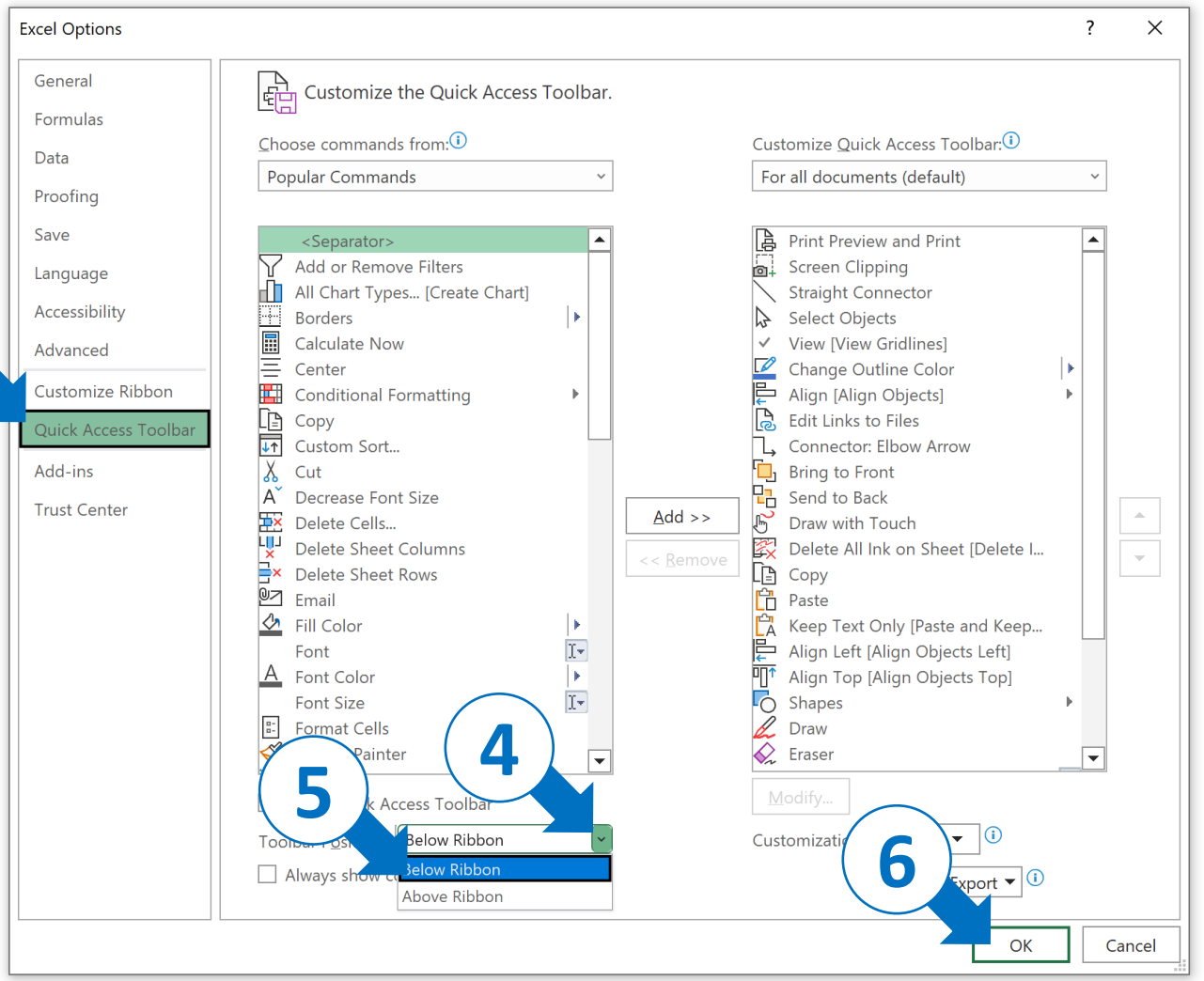
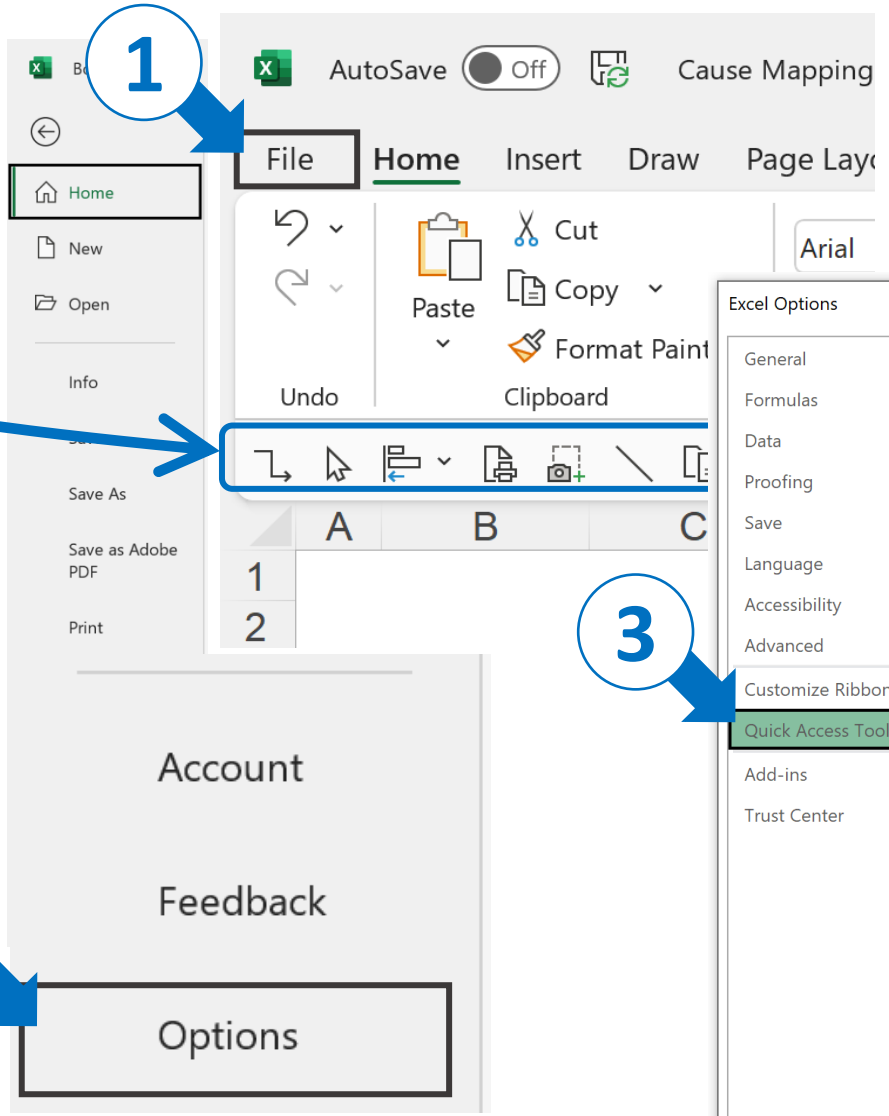
3: Points to the 'Quick Access Toolbar' option in the 'Excel Options' dialog box.

4: Points to the 'Below Ribbon' option in the 'Customize Quick Access Toolbar' list.

5: Points to the 'Always show this toolbar below the ribbon' checkbox.

6: Points to the 'Export' button in the 'Customize Quick Access Toolbar' section.

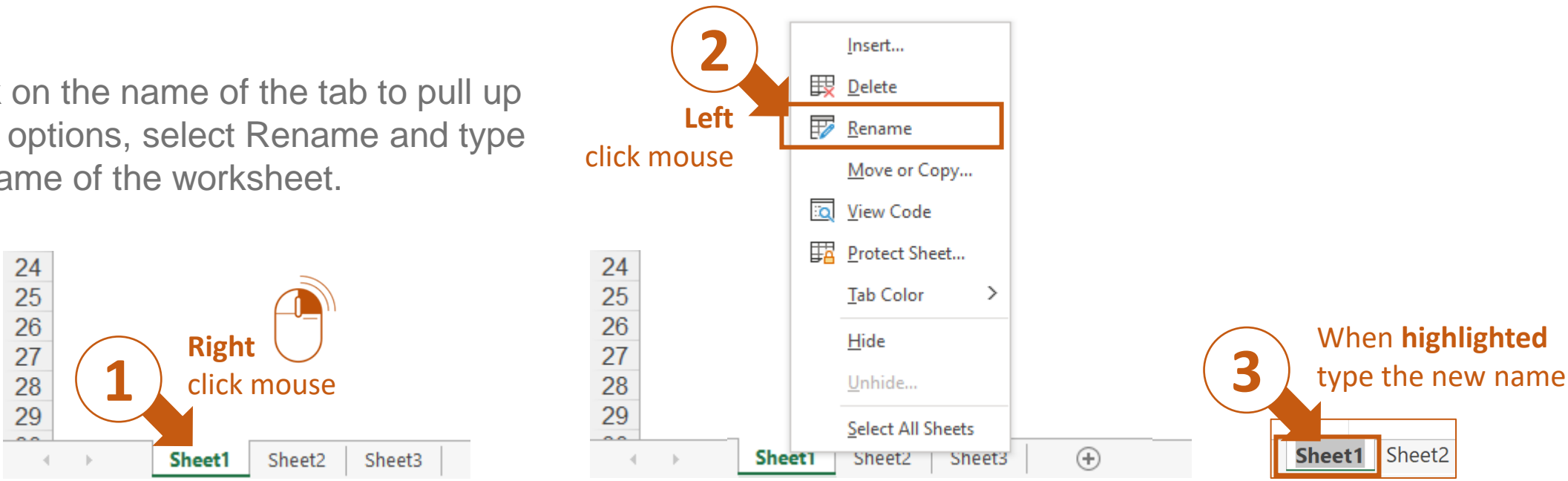
Move the Toolbar Below the Ribbon



# Rename a Worksheet - 2 options

## Menu

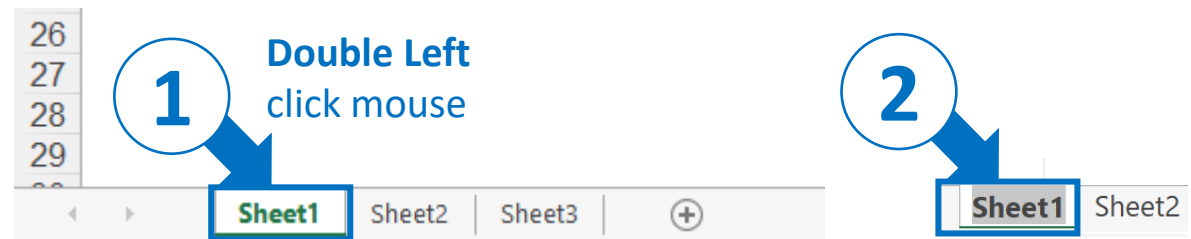
Right click on the name of the tab to pull up a menu of options, select Rename and type the new name of the worksheet.



OR

## Mouse

Double click directly on the name of the tab. It will highlight the name. Begin typing to rename the worksheet.

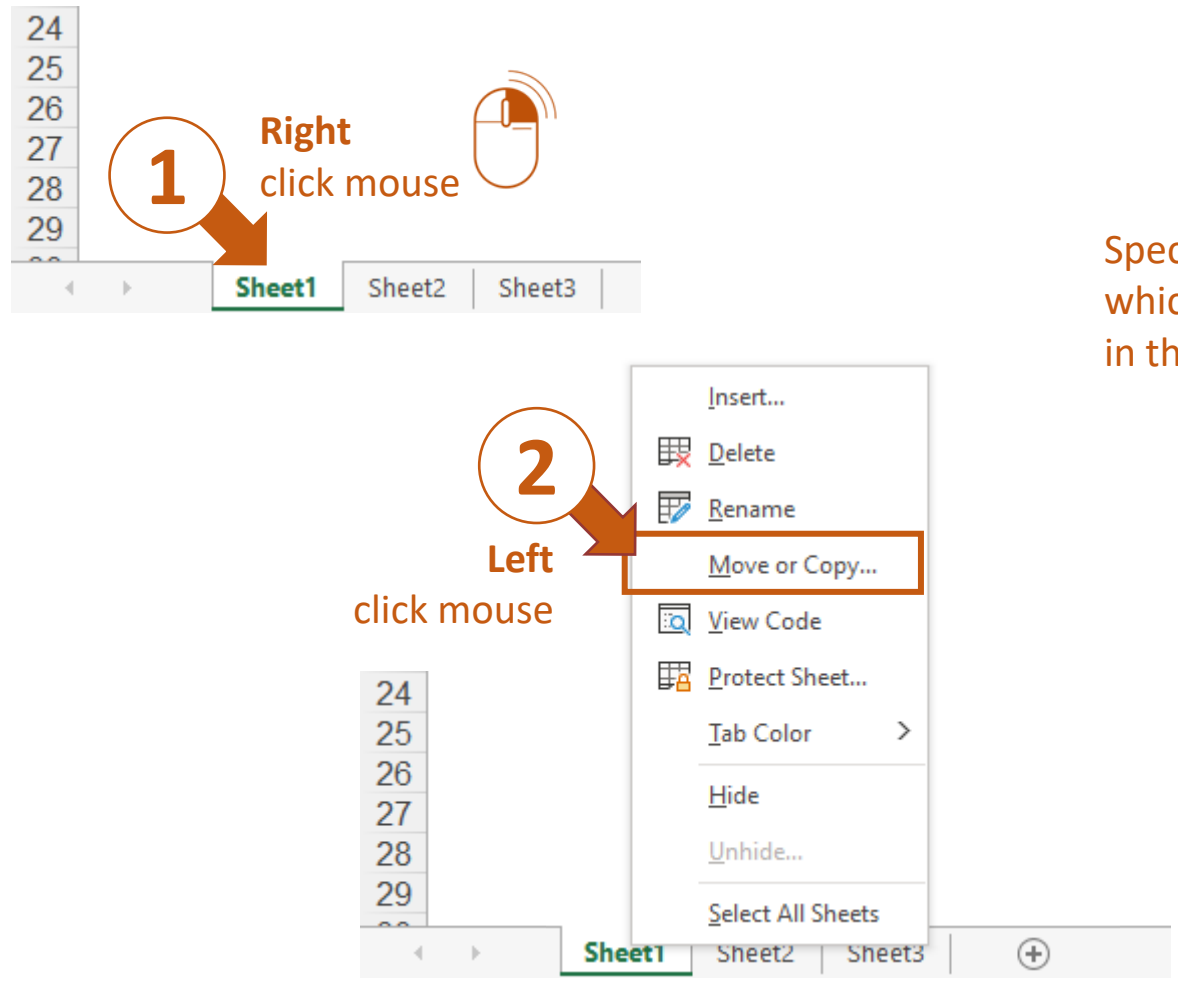




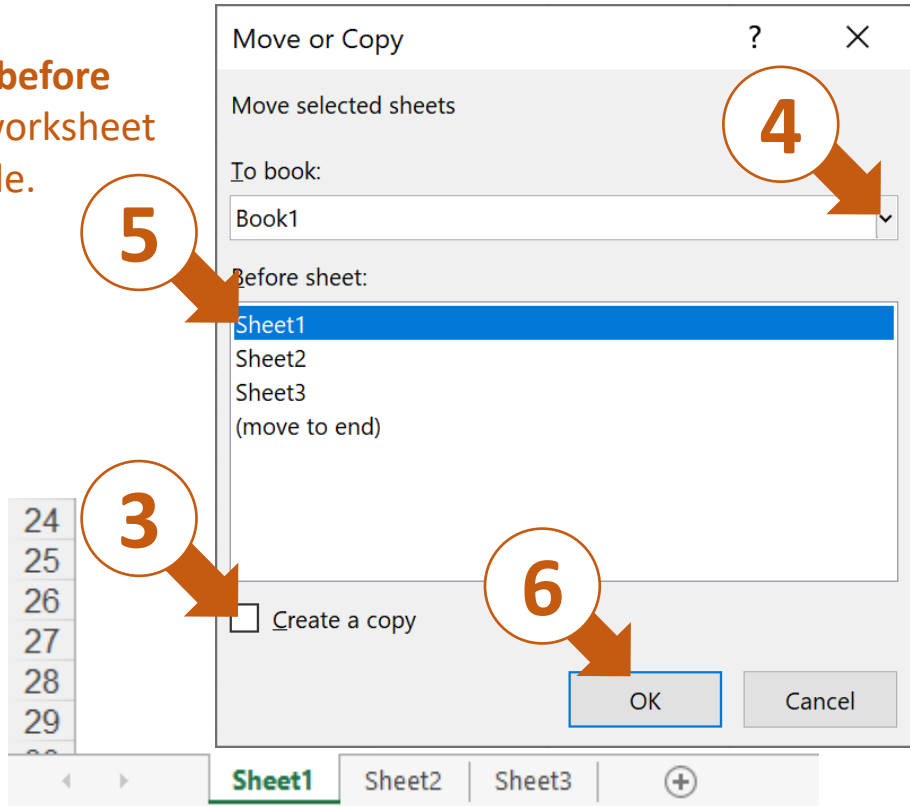
# Copy a Worksheet - 2 options. This is the first one.

## Menu

Right click on the name of the tab to pull up a menu of options, select Move or Copy... to open the dialog box.



Specify before which worksheet in the file.


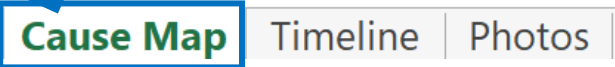


Pick from any open Excel file.


# Copy a Worksheet - Ctrl Drag. This is second option.

## Select the Worksheet

**1** Left click **Hold** on the worksheet name.


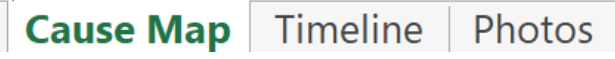
**2** Hold down **Ctrl** on keyboard.




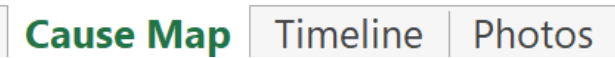
**Reminder:** Do not release the **Ctrl** until Step 6.

## Specify 'move to' Location

**3** A small **Triangle** appears above the worksheet name





**4** With the mouse, drag the **Triangle** to the right one (or more) worksheets.



## Copy the Worksheet

**5** Release the Left mouse.



**Reminder:** The **Ctrl** key must be held down during the 'move' and *until the mouse is released*.

**6** Release **Ctrl** on keyboard

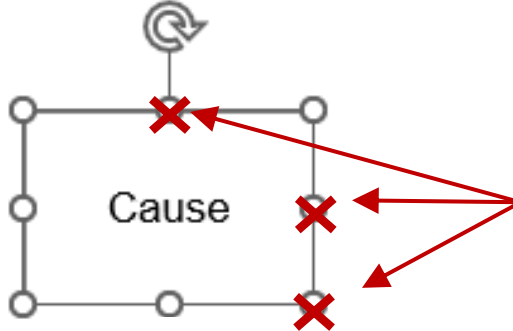
The copied worksheet will have the same name with a version number in parenthesis.

# Moving a Box - 4 Options

Select the Box by clicking once anywhere along the border of a box with either cursor. Sizing dots will appear on the corners and sides when the box is selected. If there is no text in the box, you can grab the inside of the box, too.



Box Not Selected

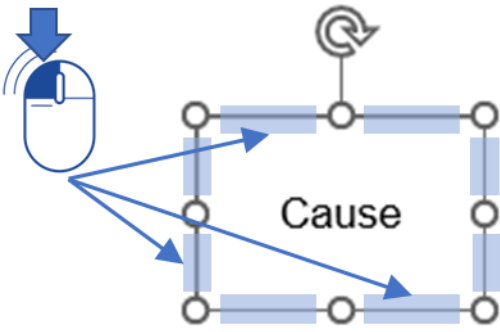


Box Selected

Do not click on the sizing dots to move the box.

**Mouse** **1** Drag the Box Left click the mouse and hold down anywhere along the border of the box. Drag the box to a new location then release the mouse.

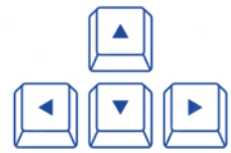
Left click and hold anywhere along the border to drag the box.



**Mouse** **2** Move Only in a Straight Line by holding down the shift before releasing the left mouse. The box will only move at a 90° angle to the left, right, up, or down.

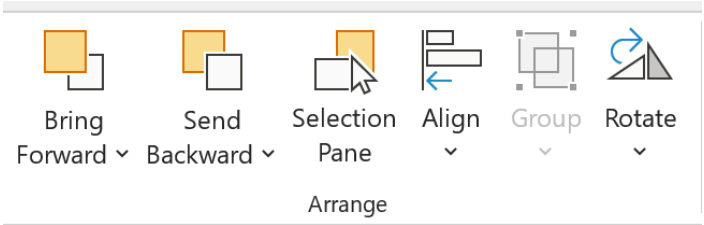


**Arrows** **3** Use the Arrows on the keyboard to move the box left, right, up, or down.



**Align** **4** Use the Alignment Function  
Select Shape Format from the ribbon tabs. In the Arrange section click on Align, select the preferred alignment direction. You must have more than one object (box) selected to use Align.

## Shape Format

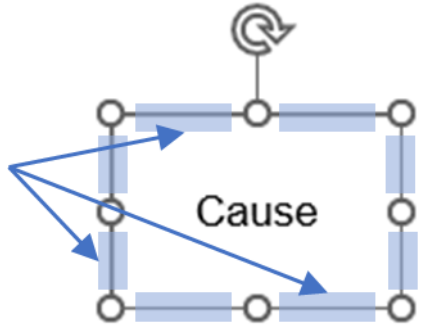


# Copying a Box - 7 options

**1** Ctrl C (copy), Ctrl V (paste)  
Well Known Shortcut

Copy: Ctrl C  
Paste: Ctrl V

**First - Select the Box**  
Recall, click the border, but not the sizing dots.



**2** Home Ribbon



**3** Toolbar Icons - Copy, Paste

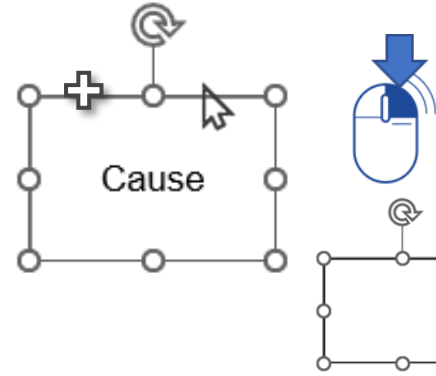
Left click

**4** Toolbar Alt-Copy, Alt-Paste

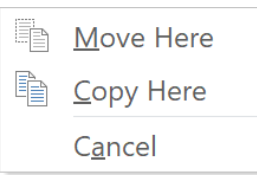
**5** Ctrl D (duplicate)

Ctrl D

**6** Right click and hold on the border of the box (object) using either cursor then **drag the box** to the new destination and release the mouse for the menu to appear. Click copy.



Right click hold  
drag, then release.



**7** Right Click on the border of the object, then release - click Copy, Paste

# Copying a Box - Ctrl Drag Sequence

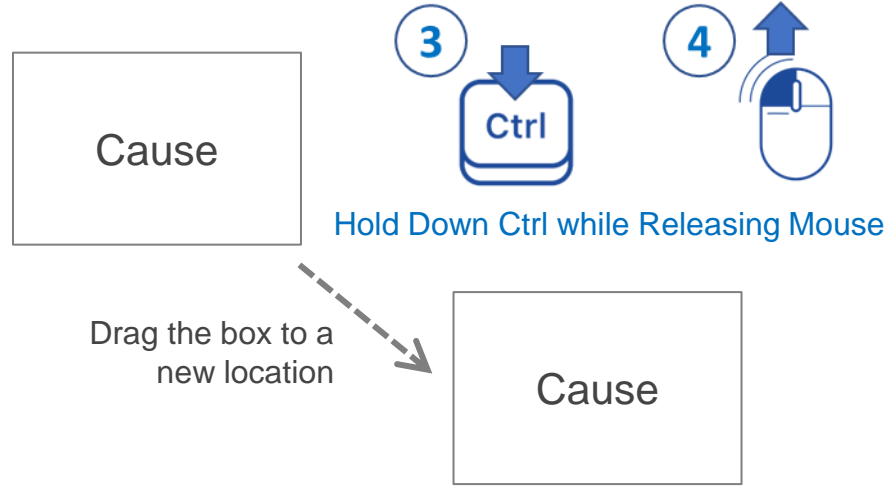
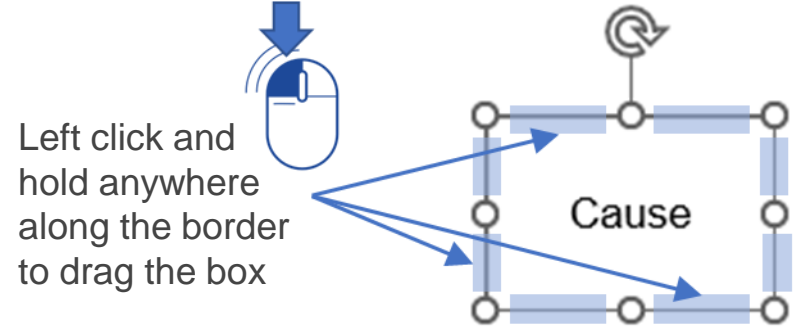
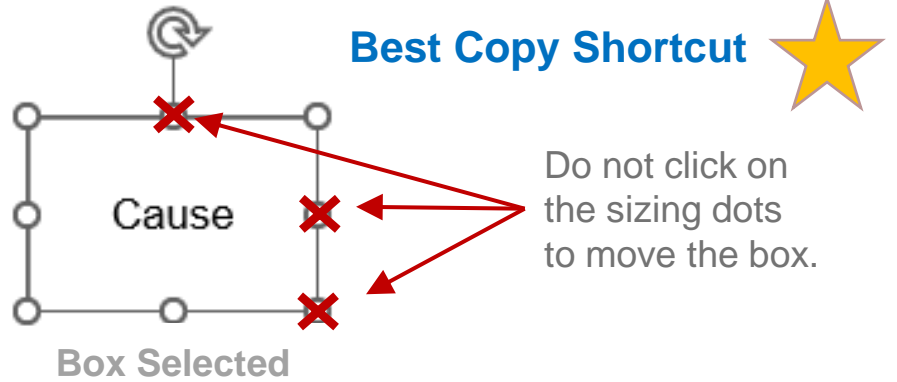
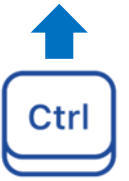
**1** Select the Box by clicking once anywhere along the border of a box with either cursor. Sizing dots will appear on the corners and sides when the box is selected. If there is no text in the box, you can grab the inside of the box, too.

**2** Drag the Box by clicking and holding down the left mouse anywhere along the border of the box. Drag the box to a new location. Do not click on the sizing dots.

**3** Hold Down Ctrl on the keyboard. The Ctrl key can also be held down before Step 2.

**4** With the Ctrl Key Pressed, Release the Mouse. This makes a copy of the box. The Ctrl key must be held down when the mouse is released.

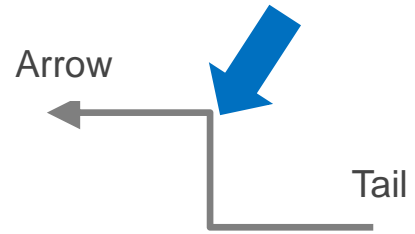
**5** Release the Ctrl key once the copy is made.



# Connecting the Connector Tail to a Cause Box

1

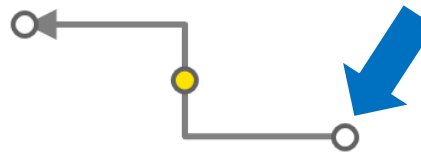
To select a connector, click it anywhere.



Connector - Not Selected

2

When a connector is selected, the ends will show as white dots if they're not connected to a box.



Select the Connector (click on it)  
*Click and hold the white dot.*

3

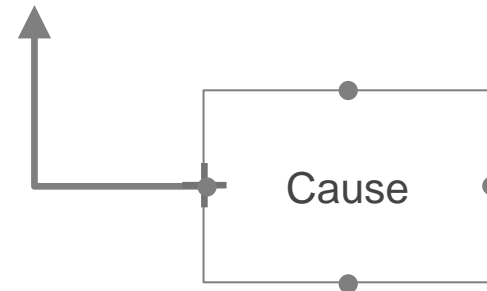
Left click-hold on the white dot which changes to a small plus sign. While holding the left-mouse drag the plus to the right side of the cause box.



*Drag the tail of the connector to the connect point on left side of the box.*

4

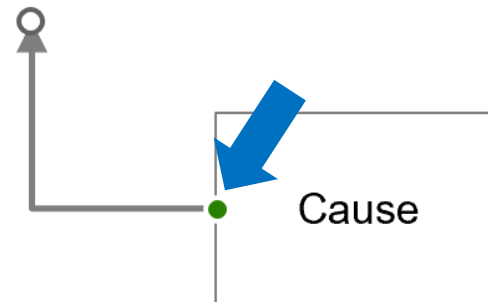
When the plus sign (tail end) is moved near a box, connect points will appear on each of the sides.



*Release the mouse directly on the connect point on the left side of the cause box.*

5

Release the mouse when the plus sign is directly on the chosen connect point. The end of the connector will turn **green** when it's connected to the box.



*The end of the connector will be **green** when it's connected.*

# Connecting the Arrow to an Effect

6

Select the connector by clicking on it anywhere. The unconnected end will be a white dot.

7

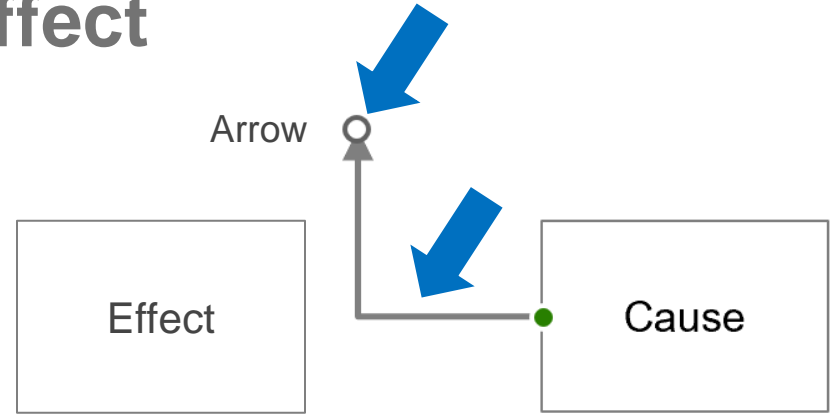
Left click-hold on the white dot which changes to a small plus sign. While holding the mouse drag the plus to the right side of the effect.

8

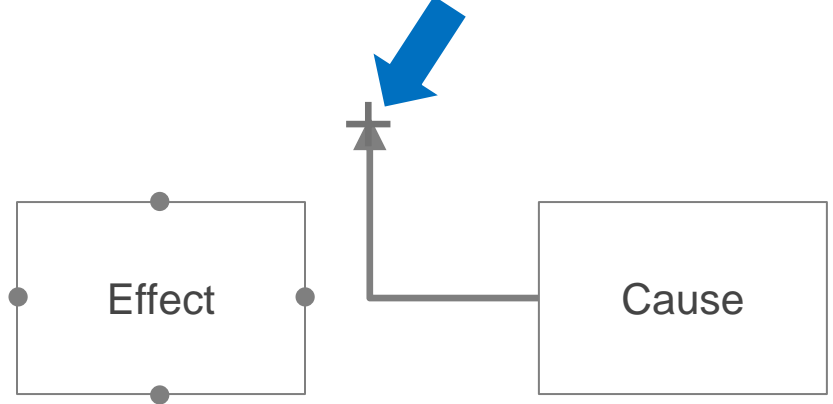
When the plus sign (arrow end) is moved near a box, connect points will appear on each side.

9

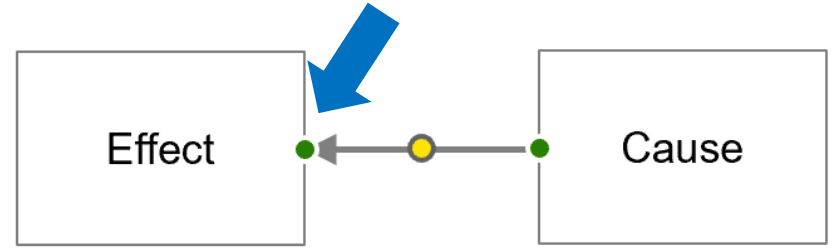
Release the mouse when the plus sign is directly on the connect point on the side of the box. The end of the connector will turn **green** when it's connected.



*Click and hold the white dot end of the connector.*

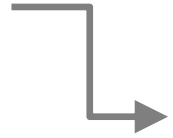


*Drag the connector end to the connect point on the right side of the box.*



*Release the mouse on the connect point to turn the end **green**.*

# Add the Elbow Connector to the Toolbar



2

Account

Feedback

Options

1

File Home Insert Draw Page Layout Formulas Data Review View Developer Help Acrobat

Home

New

Open

Info

Save

Save As

Save as Adobe PDF

Print

Share

Export

3

Excel Options

- General
- Formulas
- Data
- Proofing
- Save
- Language
- Accessibility
- Advanced
- Customize Ribbon
- Quick Access Toolbar
- Add-ins
- Trust Center

4

Customize the Quick Access Toolbar

Choose commands from: Popular Commands

Select the drop down to pick All Commands

- <Separator>
- Add or Remove Filters
- All Chart Types... [Create Chart]
- Borders
- Calculate Now
- Center
- Conditional Formatting
- Copy
- Custom Sort...
- Cut
- Decrease Font Size
- Delete Cells...
- Delete Sheet Columns
- Delete Sheet Rows
- Email
- Fill Color
- Font
- Font Color
- Font Size
- Format Cells
- Format Painter

Print Preview and Print

Screen Clipping

Straight Connector

Select Objects

View [View Gridlines]

Change Outline Color

Align [Align Objects]

Edit Links to Files

Connector: Elbow Arrow

Bring to Front

Send to Back

Draw with Touch

Delete All Ink on Sheet [Delete I...

Copy

Paste

Keep Text Only [Paste and Keep...

Align Left [Align Objects Left]

Align Top [Align Objects Top]

Shapes

Draw

Eraser

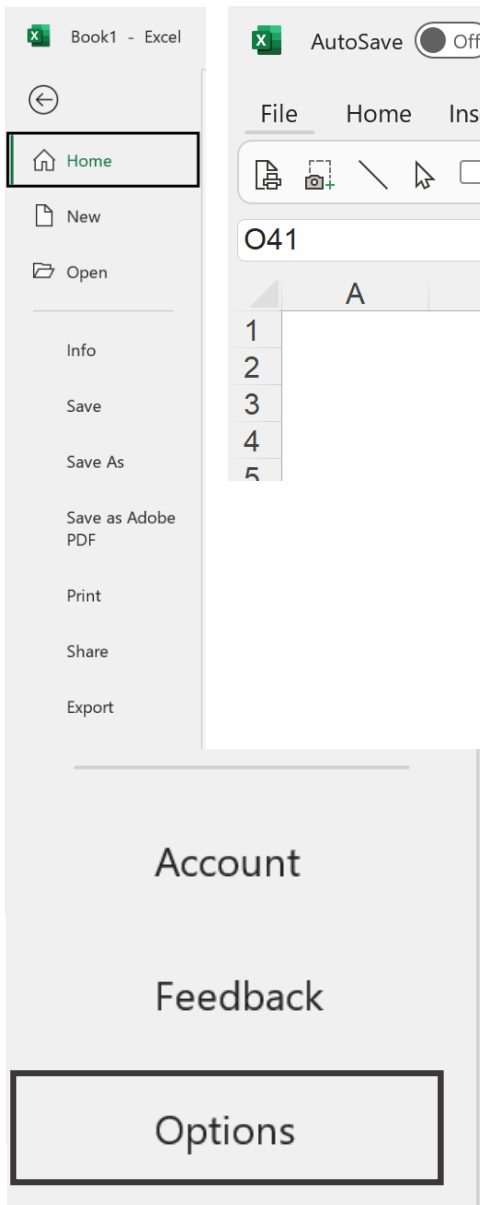
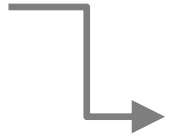
Modify...

Customizations: Reset Import/Export

OK Cancel



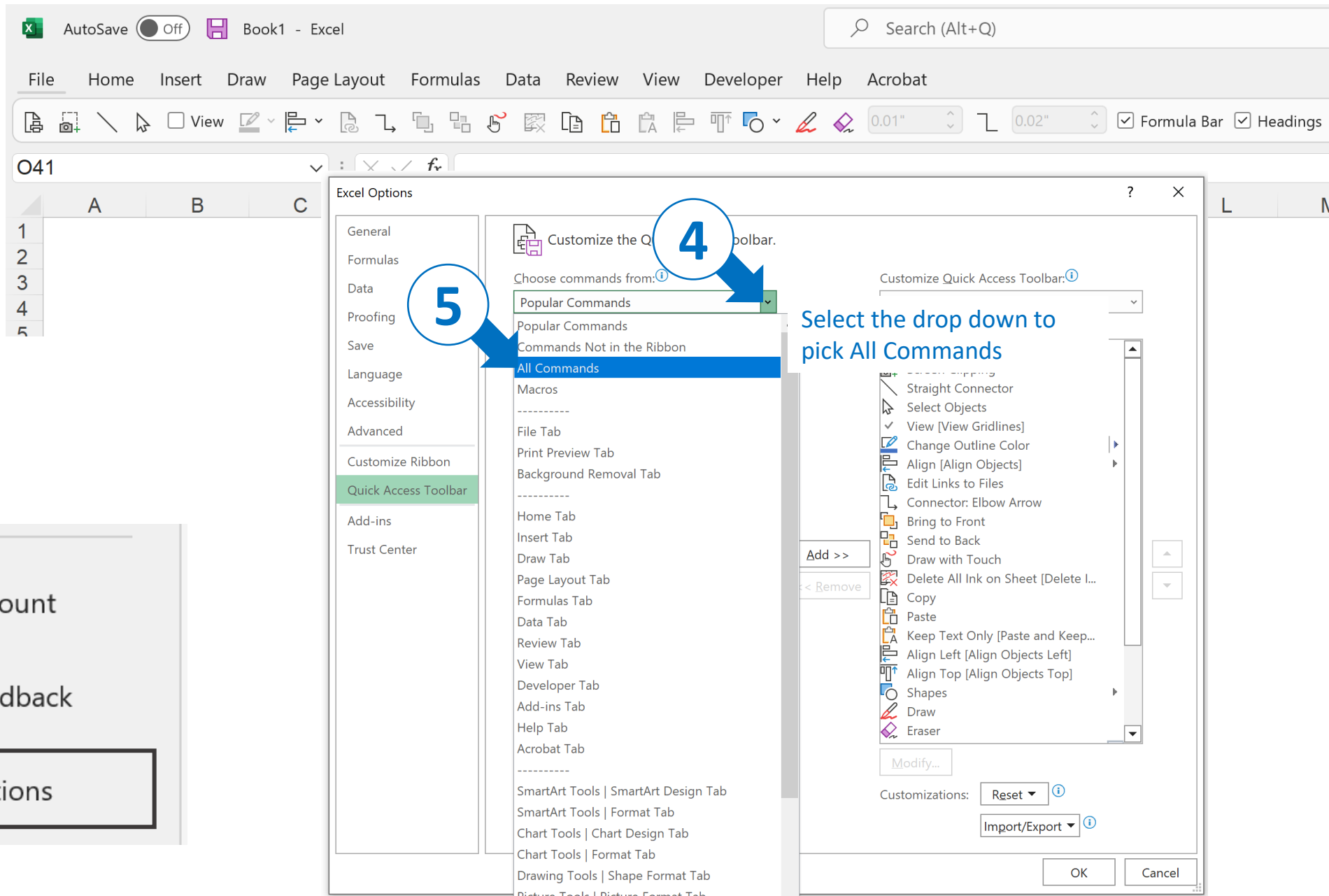
# Add the Elbow Connector to the Toolbar



Account

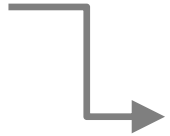
Feedback

Options



Select the drop down to pick All Commands

# Add the Elbow Connector to the Toolbar



Excel Options

General  
Formulas  
Data  
Proofing  
Save  
Language  
Accessibility  
Advanced  
Customize Ribbon  
**Quick Access Toolbar**  
Add-ins  
Trust Center

Customize the Quick Access Toolbar.

Choose commands from: **All Commands** **6**

- Comments
- Comments
- Comments
- Comments [Go To Comments]
- Community
- Compare and Merge Workbook...
- Compatibility
- Compatibility Checker
- Compress Pictures...
- Conditional Formatting
- Conditional Formatting [Go To ...]
- Connection Properties...
- Connector: Elbow
- Connector: Elbow Arrow**
- Consolidate Data
- Constants [Go To Constants]
- Constrain Numeric
- Contact Support...
- Contrast
- Controls
- Convert

Customize Quick Access Toolbar: **For all documents (default)**

- View [View Gridlines]
- Change Outline Color
- Align [Align Objects]
- Edit Links to Files
- Connector: Elbow Arrow
- Bring to Front
- Send to Back
- Draw with Touch
- Delete All Ink on Sheet [Delete I...
- Copy
- Paste
- Keep Text Only [Paste and Keep...
- Align Left [Align Objects Left]
- Align Top [Align Objects Top]
- Shapes
- Draw
- Eraser

Add >> << Remove

Modify...

Customizations: Reset Import/Export

OK Cancel

# Add the Elbow Connector to the Toolbar



Excel Options

General  
Formulas  
Data  
Proofing  
Save  
Language  
Accessibility  
Advanced  
Customize Ribbon  
**Quick Access Toolbar**  
Add-ins  
Trust Center

Customize the Quick Access Toolbar.

Choose commands from: All Commands

Connector: Elbow Arrow

Connector: Elbow Arrow

10

11

7

8

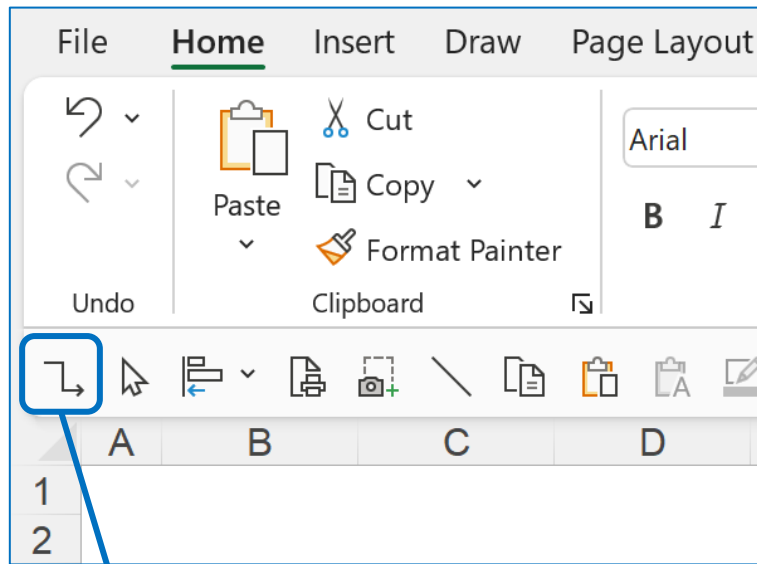
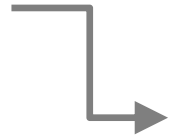
9

Put the Elbow Connector in the first spot.

Use the Up arrow to move the Elbow Connector up to the top spot.

OK Cancel

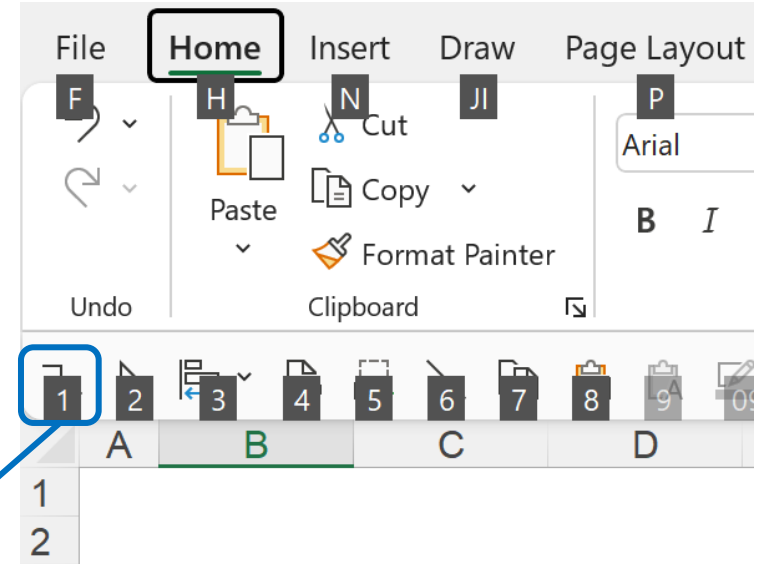
## Using the Alt Shortcuts for a Connector



Tap the Alt key on the keyboard.



Letters and numbers appear.



Once the Connector is on the Toolbar tap and release the ALT key on the Keyboard to show the ALT shortcut letters and numbers.

Type the number from the toolbar using the keyboard. Press Alt + 1 to load a connector into the cursor. This allows a connector to be selected using the keyboard while your other hand remains on the mouse. With a little repetition this is a simple and quick way to add connectors to a *Cause Map* diagram.

The previous instructions for adding a connector between boxes still applies. See Tip 10 and 11 in this document.

- 1 - Click and hold on the connection point in the middle of the left side of a cause box. This connects the tail of the connector.
- 2 - Hold and drag the mouse to the connection point in the middle of the right side of an effect.
- 3 - Release the mouse on the connection point to add a connector between two boxes.