Cause Mapping®
Excel® Quick Start Guide
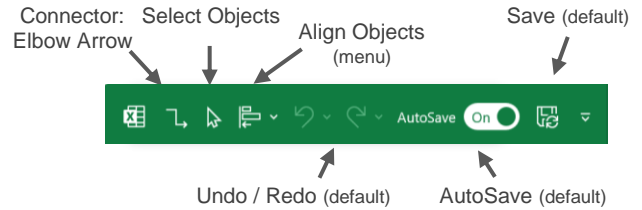
ThinkReliability®
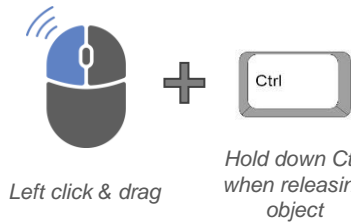
Quick Access Toolbar Setup

The Quick Access Toolbar, located in the upper left corner of Excel, allows you add commands for easy access. To customize, select **File**, then **Options**, and click on **Quick Access Toolbar**. Change the command list from *Popular Commands* to *All Commands*, then select the commands you want to add. Commonly added Cause Mapping commands are shown to the right.

Connector: Elbow Arrow   Select Objects   Align Objects (menu)   Save (default)

Undo / Redo (default)   AutoSave (default)

3 Key Functions You Should Know

Control-Drag *(copy shortcut)*

To copy and paste a new box, left-click on the border of an existing box. While holding the click, drag the box to the desired location. Before releasing the left mouse button, hold down the Ctrl key. Release the left click before releasing the Ctrl key.

Left click & drag + *Hold down Ctrl when releasing object*

Connector Alt Shortcut

Pressing the Alt key in Excel activates keyboard shortcuts for the Quick Access Toolbar. Tap and release Alt to display shortcut numbers for each command.

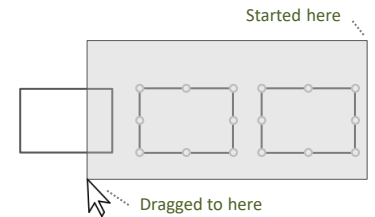NOTE: Connector: Elbow Arrow in 1 position

`1` `2` `3` `4` `5` `6` `7`

If the Connector: Elbow Arrow is in the `1` position, then tapping the 1 key will immediately select a connector that can be used to connect boxes.

Alt *then…* ! 1 *then…* *Connect the boxes (see Connector Basics below)*

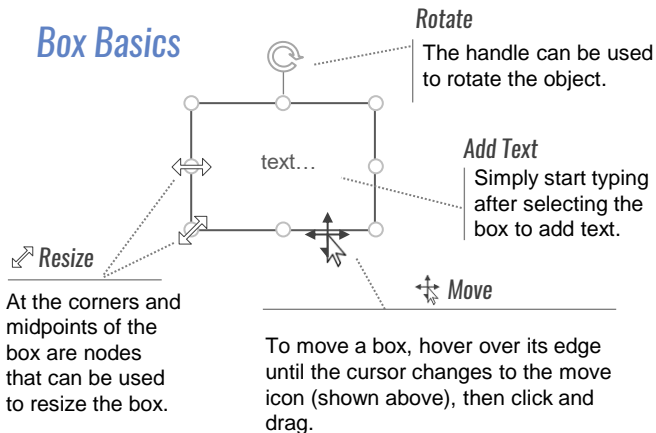*Tap & release*   *Tap & release*

Select Objects Cursor

The select objects cursor allows you to select objects. For easy access, add this function to your Quick Access Toolbar (see above). To select multiple objects, left-click and drag in open space to create a selection window—only objects fully inside the shaded area will be selected.
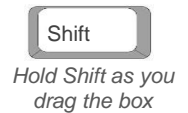
Started here

Dragged to here

Box Basics

Rotate
The handle can be used to rotate the object.

text…

Add Text
Simply start typing after selecting the box to add text.

Resize
At the corners and midpoints of the box are nodes that can be used to resize the box.

Move
To move a box, hover over its edge until the cursor changes to the move icon (shown above), then click and drag.

Connector Basics

Once you have used the Alt shortcut to select a Connector: Elbow Arrow (tip listed above), left click and hold on the box node.

Drag the end connector end point to the box you want to connect to and release the left click.
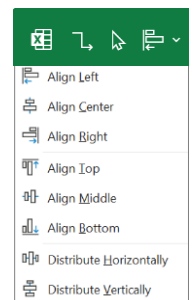
Other Useful Functions

Move Boxes in a Straight Line

To move boxes in a straight line, hold the **Shift** key while dragging the box. This restricts movement to 90-degree angles (left, right, up, or down). You can also use this method when copying objects to keep them aligned (**Ctrl-Shift-Drag)**.

Shift

Hold Shift as you drag the box
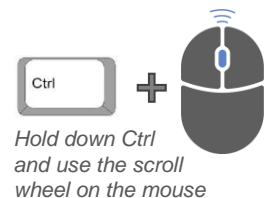
Align Multiple Boxes

To align multiple objects, select them using the Select Objects cursor or by holding down the Shift key while selecting. Once selected, click the alignment command of your choice.

Tip: Be sure not to select any connectors, as they will align along with the objects.

Align Left
Align Center
Align Right
Align Top
Align Middle
Align Bottom
Distribute Horizontally
Distribute Vertically

Zoom with Control-Scroll

To quickly zoom in and out, hold the **Ctrl** key and scroll up or down with the mouse wheel.

Ctrl +

Hold down Ctrl and use the scroll wheel on the mouse

Questions? Contact us at support@thinkreliability.com