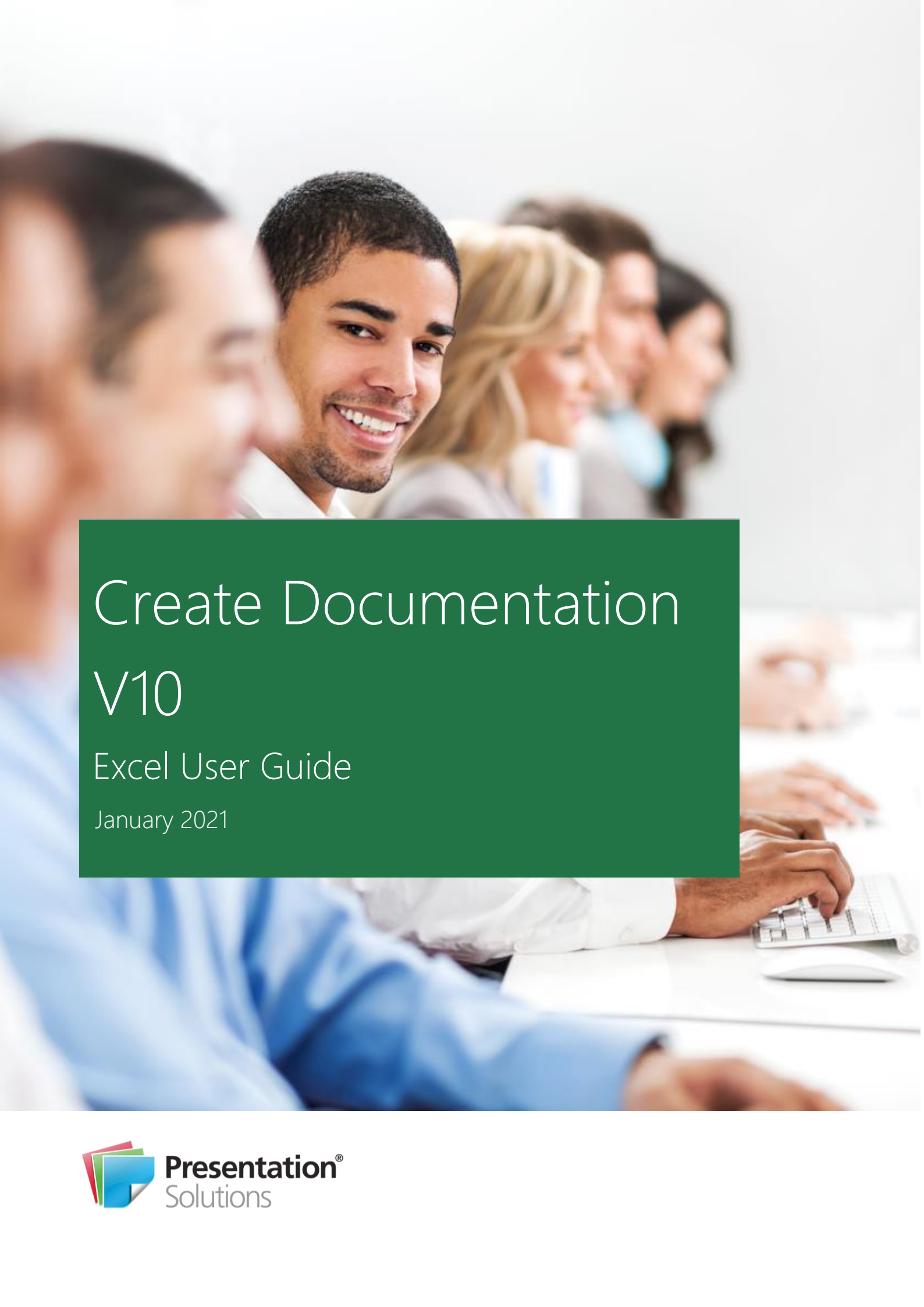




Create Documentation V10

Excel User Guide

January 2021

Table of Contents

Welcome to Create Version 10.....	5
Create in Excel.....	6
Shortcut Keys.....	8
Shortcut Keys for Dropdown Functions.....	9
Quick Access Toolbar.....	10
Display the QAT Below/Above the Ribbon.....	10
Adding a Command that is on the Ribbon.....	10
Adding a Command that is not on the Ribbon.....	11
Recommended Additions to the Quick Access Toolbar in Excel.....	12
Accessibility.....	13
Keyboard Navigation.....	13
Screen Reader Navigation.....	14
High Contrast Mode.....	14
Workbooks.....	15
Starting a New Workbook.....	15
Library.....	15
PDF.....	16
Create Undo.....	17
Create Undo-enabled functions:.....	17
Clear Undo.....	17
Inserting Symbols.....	18
Tables.....	19
Formatting Tables.....	19
Formatting Cells.....	20
Formatting Borders.....	21
Table Tools.....	21
Copy Subset.....	22
Copying Tables from Excel to PowerPoint or Word.....	22
Quick Send.....	22
Other Methods of Copying Tables to PowerPoint.....	22
Other Methods of Copying Tables to Word.....	24
Linking One Cell's Content from Excel.....	26
Updating Linked Objects.....	27
Updating Linked Objects in PowerPoint.....	27
Updating Linked Objects in Word.....	27
Named Ranges in Excel.....	28
Naming a Range in Excel.....	28
Updating Named Range Data in Word or PowerPoint.....	28

Hiding Excel Error Indicators	29
Formatting Tools	30
Multiplying Values.....	30
Dividing Values.....	30
Wrapping text.....	31
Footnotes	31
Custom Number Formats.....	31
Colour Palette.....	32
Text Formats	33
Charts	34
Creating Charts.....	34
Bar Gantt Charts.....	35
Bubble Charts.....	36
Column and Line Charts	38
Marimekko Charts.....	39
Price/Volume Charts	40
Scatter Charts.....	41
Stacked/Cluster Charts.....	42
Timeline Charts.....	43
Waterfall/Bridge Charts	44
Formatting Charts.....	46
Changing the Chart Type	46
Adding Labels.....	47
Removing Labels.....	48
Pie Labels.....	48
Setting X-Axis Labels.....	49
Adding a Comment to a Chart.....	50
Calculating a CAGR.....	51
Adding a CAGR Line to a Chart.....	52
Adding an Average Area or Line.....	53
Adding a Forecast Period	54
Removing a Forecast Period	55
Switching Axes.....	55
Adding a Second Y Axis	56
Splitting the Y Axis.....	57
Removing an Axis Split	59
Changing a Data Series to a Line.....	60
Copying the Size of a Chart.....	61
Previewing Charts.....	62
Copying Charts from Excel to PowerPoint or Word.....	62
Quick Send.....	62

Other Methods of Copying Charts to PowerPoint.....	62
Other Methods of Copying Charts to Word	63
Help and Support	65
Check for Updates	65
Send Error Log	65
About Create.....	66
Instruction Manuals, Quick Reference Guides and FAQs	66
Notifications.....	67
Author Controlled Content.....	68
Authoring in Create V10.....	69
Uploading Assets in PowerPoint.....	70
Uploading Layouts	70
Uploading Images	73
Uploading Shapes	74
Editing Assets	75
Editing Layouts	77
Editing Images	81
Editing Shapes	85
Managing Company Information	86
Company Information Records	86
Office Addresses	89
Locations	90
Uploading Workbooks in Excel.....	92

Welcome to Create Version 10

Create software simplifies the document creation process for all users by automating tasks that would normally require higher levels of skill, while ensuring consistency in all presentations and printed matter.

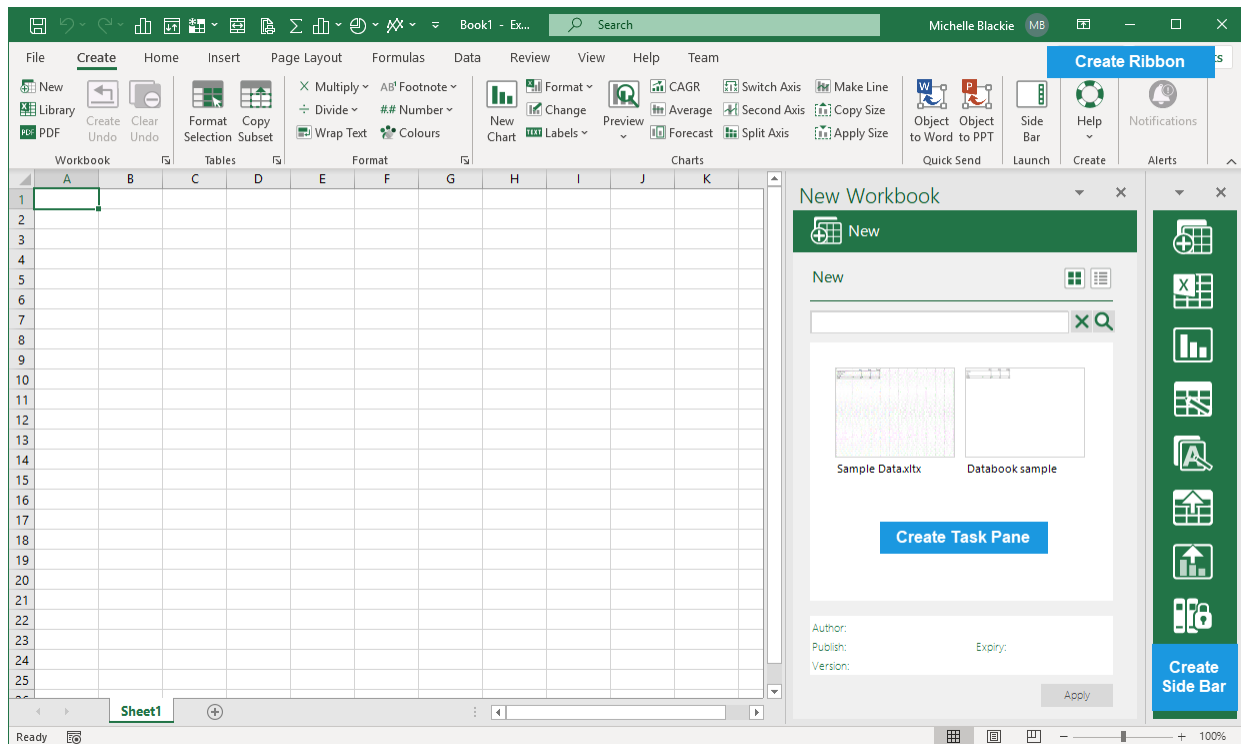
In addition to the software available in Word and PowerPoint, there are tools in Excel to assist with creating, formatting and sizing Excel charts and table data and copying to Word or PowerPoint. Charts and tables can be linked back to source data worksheets in Excel and you will be able to view, update and refresh linked tables and charts from your Word or PowerPoint presentation.

The latest version of Create, Version 10, includes the following new features

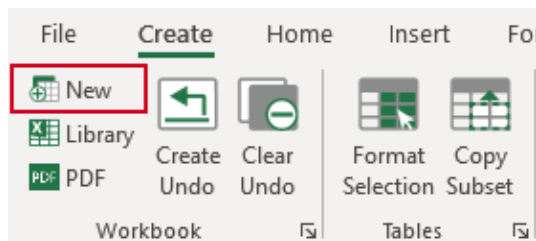
- authoring
 - designated authors can manage and upload new assets for access by users or groups of users
 - office addresses, registered company text and copyright dates can be added, deleted or edited by authors
- asset synchronisation
 - new versions of assets can be made available immediately to other users or on a fixed date in the future
- updateable content
 - users can insert updateable slides, shapes and images into PowerPoint documents
 - when a document containing updateable content is opened, Create checks if a new version of any updateable assets is available. The user can then select which, if any, content to update.
- quicker installation and updating
 - the new version of Create takes seconds to install or update
- new features including
 - **Brand Checker** - checks a PowerPoint presentation for branding elements, such as fonts and colours and summarises deviations in a task pane
 - automated mini **Section Table of Contents** on section dividers, listing the slide titles in the section
 - improved **Agenda/TOC** with ability to pick which items to include
 - **Quick Send** in Excel which allows you to send tables and charts to Word or PowerPoint with one-click with a link back to the source data
 - simplified table formatting
 - ability to send text from Excel to PowerPoint or Word as a linked object
 - improved **PDF** function in Excel allowing you to select which worksheets to include
 - improved **CAGR** function in Excel with new option to calculate a CAGR or a range of data and to the worksheet (as well as charts)

Create in Excel

The **Create Ribbon** will open in Excel alongside the Office ribbons. Certain functions will open **Task Panes**. The **Side Bar** contains key functions plus the Author function, when a user has permission.



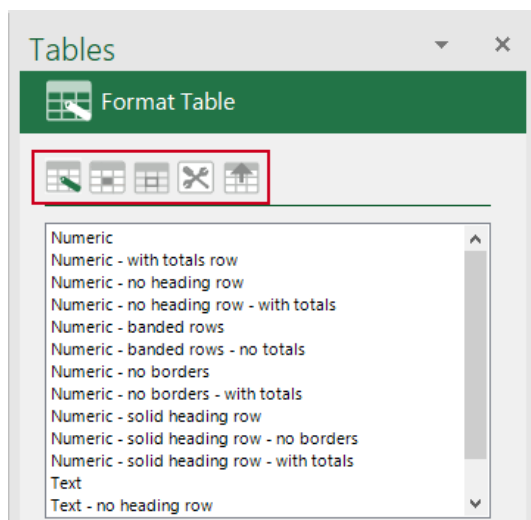
For functions which can be accessed from the **Ribbon** and the **Side Bar**, we'll show you how to access from both locations, for example,



New on the ribbon

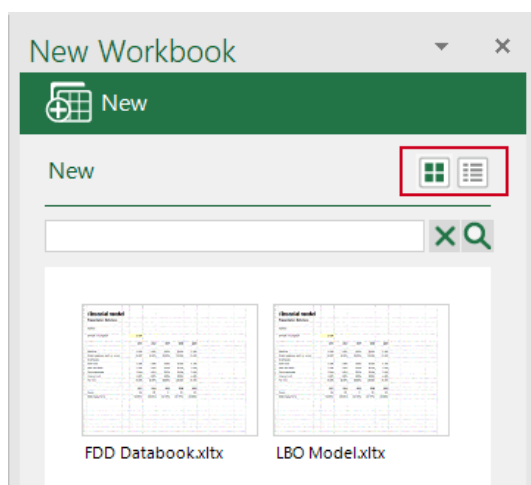


New on the side bar



Within task panes there are related functions – select one of the small icons on the left to toggle to the function.

As you click on an icon, the relevant panel will open on the task pane.



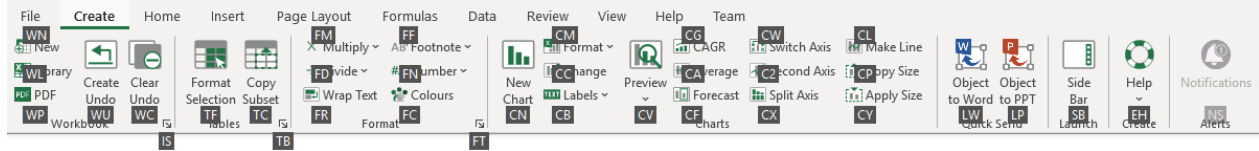
You can change views in some task panes by clicking the [list](#) or [thumbnail](#) icons on the top right.

Shortcut Keys

In all versions of Create we employ native menu keyboard shortcuts.

When you select ALT on your keyboard, letters in the ribbon names indicate the keyboard access to that ribbon's functions. For example, ALT+C opens the **Create** ribbon.

The keyboard shortcuts for each command are then displayed. To access a feature in the **Create** ribbon, press ALT-C and then the letters shown (for example to format a table you would select ALT+CTF).



ALT C +	WN	New	ALT C +	CN	New Chart
	WL	Library		CM	Format
	WP	PDF		CC	Change
	WU	Create Undo		CB	Labels
	WC	Clear Undo		CV	Preview
	IS	Create Symbols		CG	CAGR
	TF	Format Selection		CA	Average
	TC	Copy Subset		CF	Forecast
	TB	Show Create Tables		CW	Switch Axis
	FM	Multiply		C2	Second Axis
	FD	Divide by		CX	Split Axis
	FR	Wrap Text		CL	Make Line
	FF	Footnote		CP	Copy Size
	FN	Number		CY	Apply Size
	FC	Colours		LW	Send to Word
	FT	Show Text Formats		LP	Send to PPT
				SB	Side Bar
				EH	Help
				BS	Switch Brand

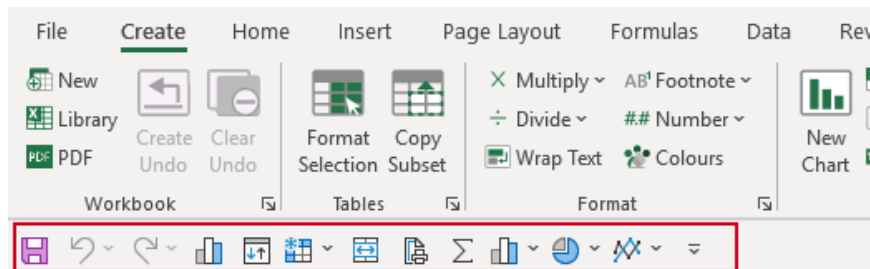
Shortcut Keys for Dropdown Functions

ALT C +	CM	Format
	P	For PPT
	A	<i>Chart Theme A</i>
	B	<i>Chart Theme B</i>
	X	For Excel
	W	For Word
	CB	Labels
	A	Add Data Labels
	R	Remove Data Labels
	P	Set Pie Labels
	S	Set Axis Labels
	C	Add Comment
	CV	Preview
	R	For PPT Resized Only
	F	For PPT Fully Formatted
	A	<i>Chart Theme A</i>
	B	<i>Chart Theme B</i>
	Z	For Word Resized Only
	L	For Word Fully Formatted
	A	<i>Chart Theme A</i>
	B	<i>Chart Theme B</i>
	EH	Help
	H	Help
	C	Check for Updates
	E	Send Error Log
	S	User Settings
	M	Make V10 Compatible
	O	About Create

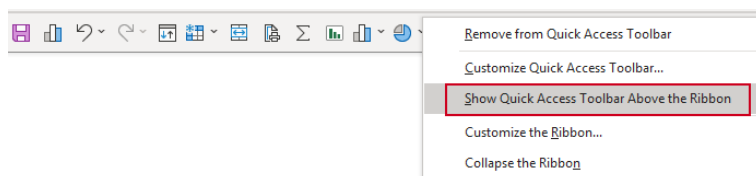
Quick Access Toolbar

The native Microsoft Quick Access Toolbar lets you access common commands no matter which ribbon you are on. It can be customised for Word, PowerPoint and Excel. By default, it shows the **Save**, **Undo**, and **Repeat** commands. You can add other commands to make it more useful for you.

You can show the Quick Access Toolbar above or below the ribbon, and you can add buttons that represent commands to the Quick Access Toolbar, including **Create** functions from the ribbon.



Display the QAT Below/Above the Ribbon

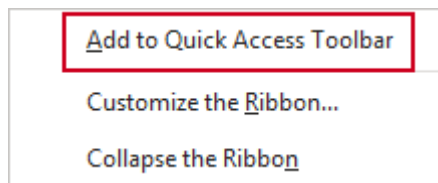


Right-click the Quick Access Toolbar (QAT).

Select **Show Below/Above the Ribbon**

Adding a Command that is on the Ribbon

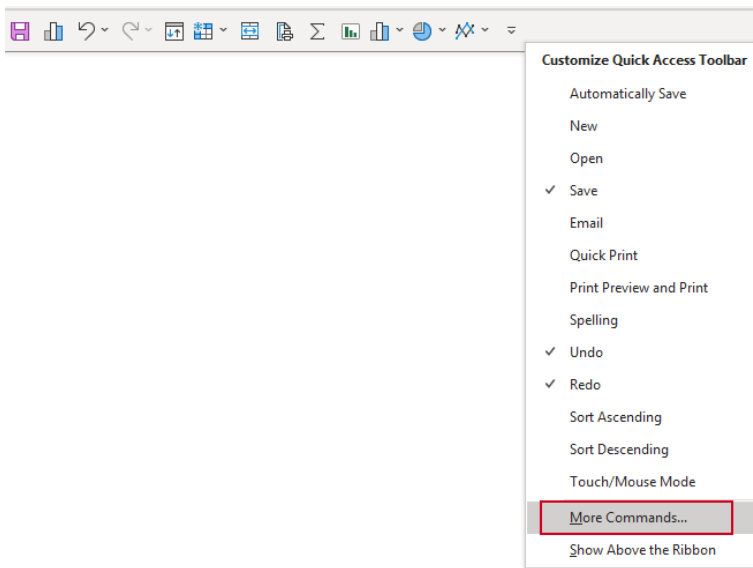
On the ribbon, click the appropriate tab or group to display the command that you want to add to the Quick Access Toolbar.



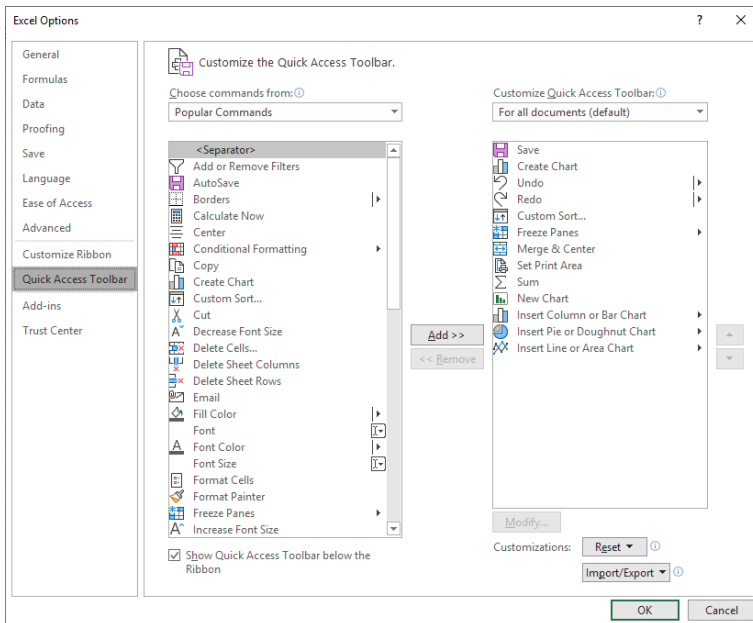
Right-click the command, and then click **Add to Quick Access Toolbar** on the shortcut menu.

Adding a Command that is not on the Ribbon

On the Quick Access Toolbar, click the dropdown arrow on the right.



Select **More Commands**.

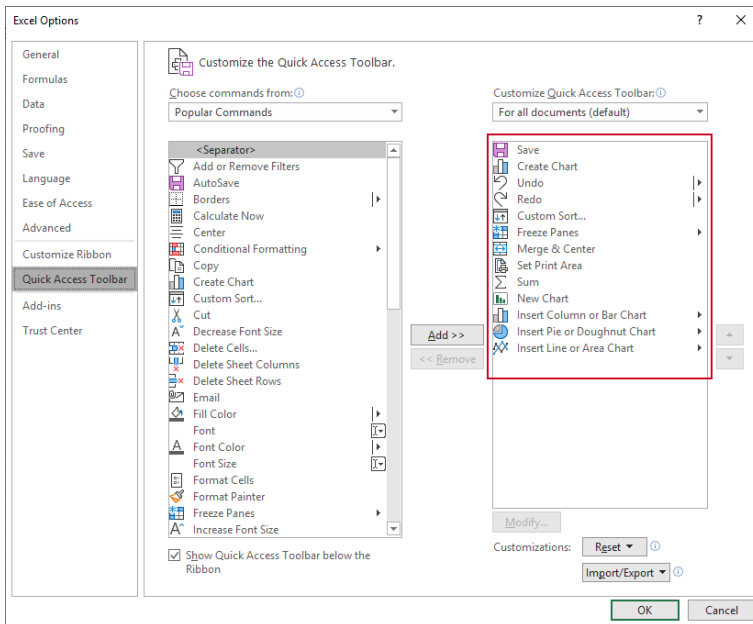


The Excel Options dialog will open. Make sure **All Commands** is displayed under *Choose commands from*:

Scroll through the list of commands, select the required command and select **Add**. The requested command will be added to the list on the right which displays the commands currently on your Quick Access Toolbar.

Recommended Additions to the Quick Access Toolbar in Excel

Any frequently used commands, including those from the **Create** ribbon, should be added to the Quick Access Toolbar for easy access.



Accessibility

Keyboard Navigation

Create has been developed for use with a mouse but also for keyboard-only users. Keyboard users can navigate through the content using the keyboard shortcuts shown below. When users navigate through the keyboard, the access to the links on the screen is sequential: users must tab through all the links one by one before reaching a required function.

The table below shows the standard controls

Action	Key/Control	Notes
Switch focus between task panes/side bar/ribbon	F6	The focus will be indicated by a border or an outline
Opening a task pane from the side bar	Space bar	Use the up and down arrows to select a button/icon on the side bar, then press the space bar
Navigating through controls	Tab	Pressing tab will go through each control or group of controls in a sensible order
Navigating backwards through controls	Shift + Tab	Holding Shift and pressing tab will go backwards through each control or group of controls
Selecting a button/preview	Space bar/Enter	Can press either key to 'click' on a button
Switching radio buttons	Arrow keys	Once focused on a radio button in a group, the arrow keys can be used to switch between the radio buttons
Switching buttons/icons	Left/right arrow keys	To switch buttons/icons (e.g. in the Tables task pane) use the left/right arrow keys
Checking/unchecking a checkbox	Space bar	Once focused on a checkbox in a group, the space bar can be used to check and uncheck
Navigating a list box	Arrow keys	Once tabbed into a list box, you can use the arrow keys to switch between the items
Selecting item in list box	Enter	Once you have selected an item in the list box, you can use enter to select it
Picking item in dropdown list box	Arrow keys	When tabbed onto a dropdown box, the up and down arrow keys will scroll through the selections
Selecting an item	CTRL + Enter	To select an item e.g. a template in a task pane press CTRL + Enter
Ok, Apply	Enter	
Closing a task pane	CTRL + Space bar	Press F6 until the task pane has the focus. Press CTRL + Space bar. A drop-down menu appears in the title bar of the task pane. Press C to close. You could also use the down arrow key until the command is selected and then press Enter

Accessing buttons on ribbon	ALT	Pressing the ALT key will display all the shortcuts for using the ribbon
Close dialog box	Escape	Pressing escape when a dialog box is open will close it.
Accept dialog box	Enter	Usually pressing accept when on a dialog box will accept, even when the button does not have focus.

Screen Reader Navigation

Screen readers are a form of assistive technology that reads text that is displayed on the screen aloud. Create is compatible with screen readers.

High Contrast Mode

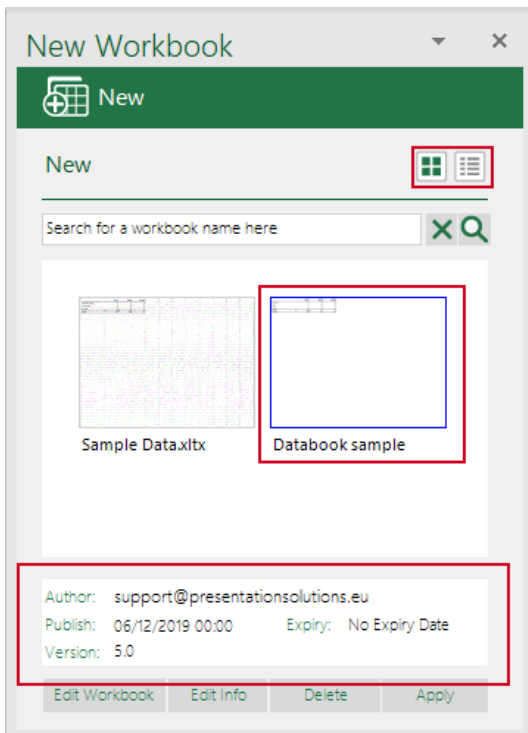
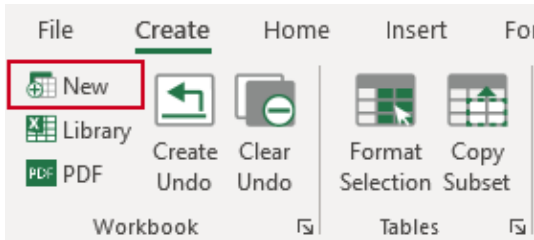
The high contrast setting is an accessibility feature built into Windows that assists people with vision impairment. The Create interface has been designed so that it can be used in high contrast mode.

Workbooks

Frequently used workbooks are accessible from the **New** task pane. These workbooks can be built into the Create software by Presentation Solutions or they can be uploaded by authors. (see **Authoring in Create V10** on page 69).

Starting a New Workbook

Select **New** on the ribbon or side bar to view all your customised workbooks.



The **New Workbook** task pane opens, showing all available templates.

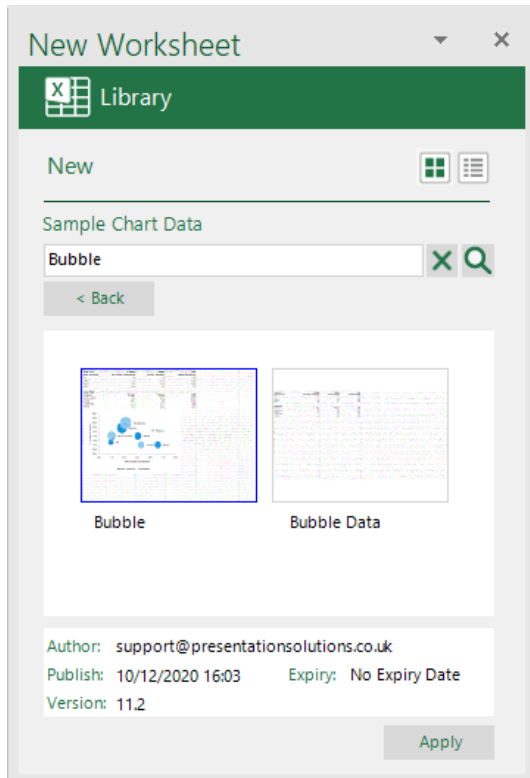
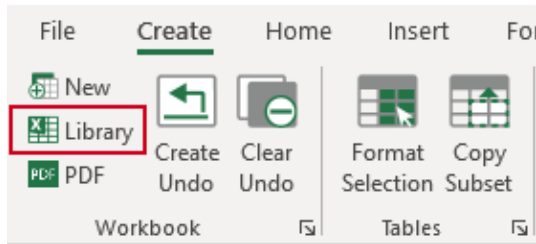
- You can change views by clicking the **list** or **thumbnail** icons on the top right.
- In **list** view, select **Expand all**, to see all templates, or click the **+** to expand a single folder.
- Search for a particular workbook by typing the workbook name in the search field.
- Double-click on the workbook to open it or select it and click **Apply**.

If a workbook has been uploaded by an author in your organisation, the author's email address will be displayed in the information panel at the bottom of the task pane.

Library

Access your frequently used worksheets, which can be individually inserted into workbooks, from the **Library**. The workbooks containing the sheets that appear in the Library can be customised but are uploaded by Presentation Solutions rather than authors.

Select **Library** on the ribbon or the side bar to view all your customised worksheets.



The **Library** task pane opens, showing the workbooks containing worksheets. Double-click to select a workbook to view a list of available worksheets.

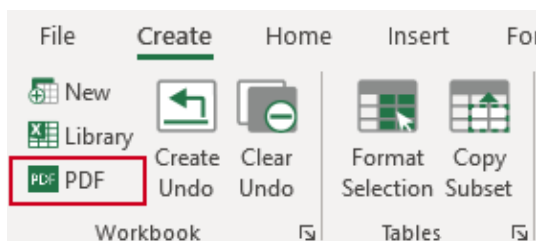
- You can change views by clicking the list or thumbnail icons on the top right.
- In **list** view, select **Expand all**, to see all templates, or click the + to expand a single folder.
- Once you have selected a workbook you can search for a worksheet by typing the worksheet name in the search field.

Double-click on the worksheet to open it or select it and click **Apply**.

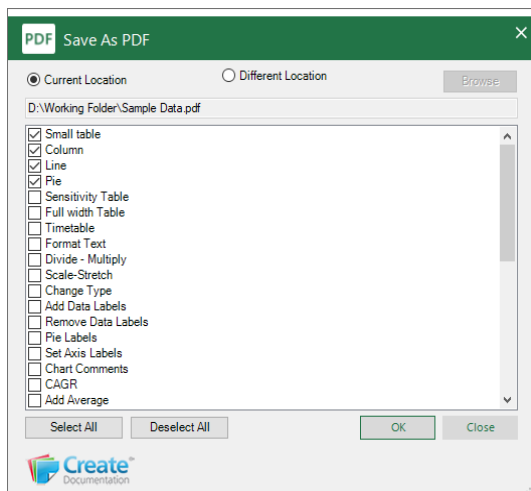
PDF

You can save your current workbook as a PDF either to the current location or to a new location with a different name. Both options will prompt you to save the Excel file, and then create a PDF with non-printing information and properties removed.

Set the appropriate print settings, if necessary, in the Excel file and save the file.



Select **PDF** on the ribbon.



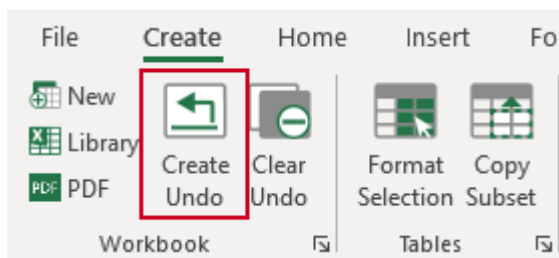
The PDF dialog will open.

- Select **Current Location** to save the PDF with the same name, to the current location.
- Select **Different Location** and **Browse** to open the *Save as* dialog to save the PDF to a different location.
- Select the worksheets to be included in the PDF.

Click **OK**.

Create Undo

This will undo the previous Create action such as, for example, applying a table or chart format. The *Create Undo* function is enabled for certain Create functions and will store the last five supported actions.



Create Undo-enabled functions:

- Tables, Format Selection
- Apply a border from the Borders task pane
- Apply a text format from the Formats task pane
- Format, Multiply/Divide
- Format, Number
- Format, Colours
- Charts, Format
- Charts, Change

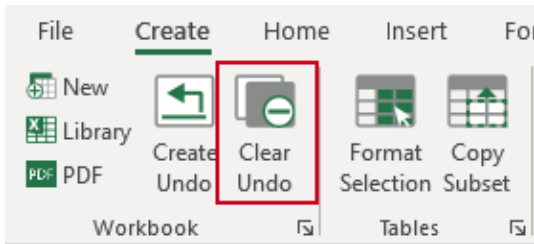
WARNING: clicking *Create Undo* will return the chart or data range to the format that was applied before the Create action that was undone. Therefore, some actions applied after the undone action (using native Excel actions or actions applied with Create functions that are not supported by undo) may also be undone.

When the workbook is saved the undo list is cleared automatically, the *Create Undo* button will be greyed out and previous Create actions will not be able to be undone.

Clear Undo

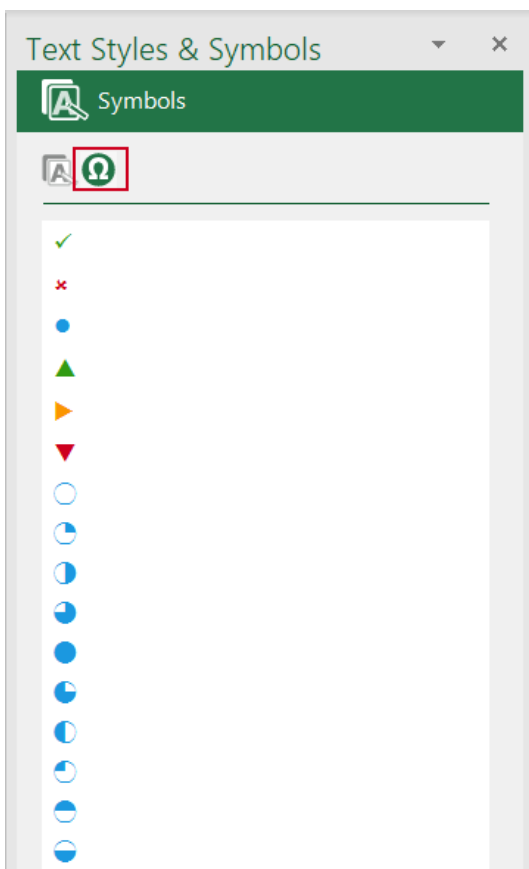
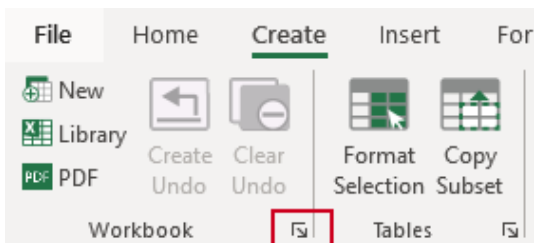
This function will clear the *Create Undo* list, thereby preventing any previous Create actions being "undone". At the same time, it will clear any underlying data (including any Excel Very Hidden Sheets)

that have been stored in the workbook for *Create Undo* to work. This happens automatically when the workbook is saved so it's only necessary to use this function if you wish to clear the undo list manually. The *Clear Undo* function will only be available if the *Create Undo* function is enabled – otherwise it will be greyed out.



Inserting Symbols

Select *Symbols* on the ribbon or on the *Text Styles & Symbols* task pane to view a list of formatted symbols. These can be customised and uploaded by Presentation Solutions.



The *Shapes & Symbols* task pane opens at the **Symbols** panel.

Click on the symbol once to insert it.

Please note – for a symbol to appear correctly, the corresponding font must be installed.

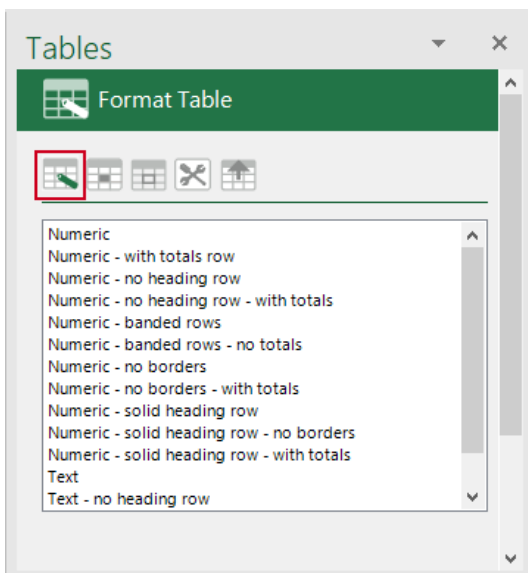
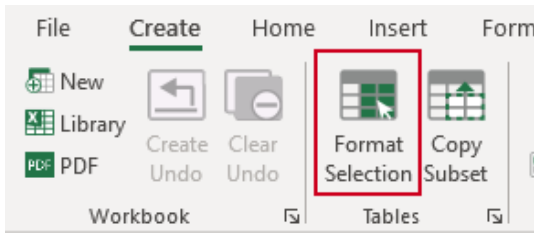
Tables

The **Tables** task pane enables you to format selected cells on your worksheet, in your organisation's branding.

Formatting Tables

To format data on your worksheet use the tools on the **Tables** task pane. Apply a base table format and then apply additional formatting, to e.g. totals and subtotals, if required.

Select **Format Selection** on the ribbon or side bar.



The **Tables** task pane opens at the **Format Table** panel.

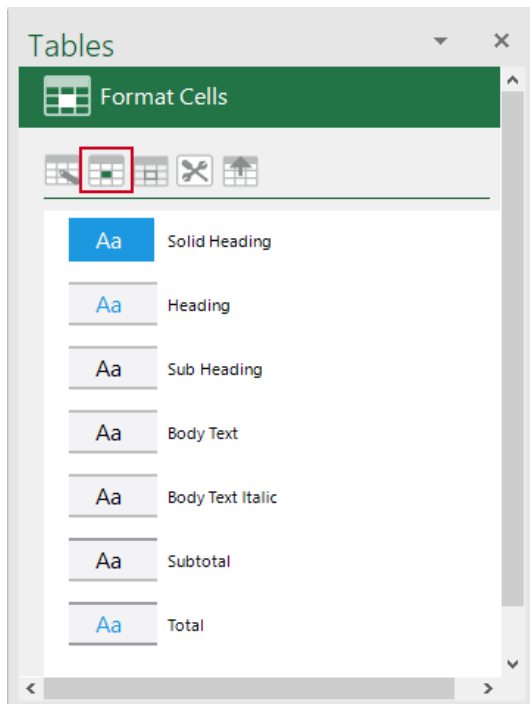
On your worksheet, select the data to be formatted.

Select a base table format from the list to format your selected data.

Applying one of these table formats will apply the correct font, font size, alignment and border style.

Formatting Cells

Once you have applied a whole table format to a selection of cells, you can apply additional cell formatting e.g. totals or subtotals.

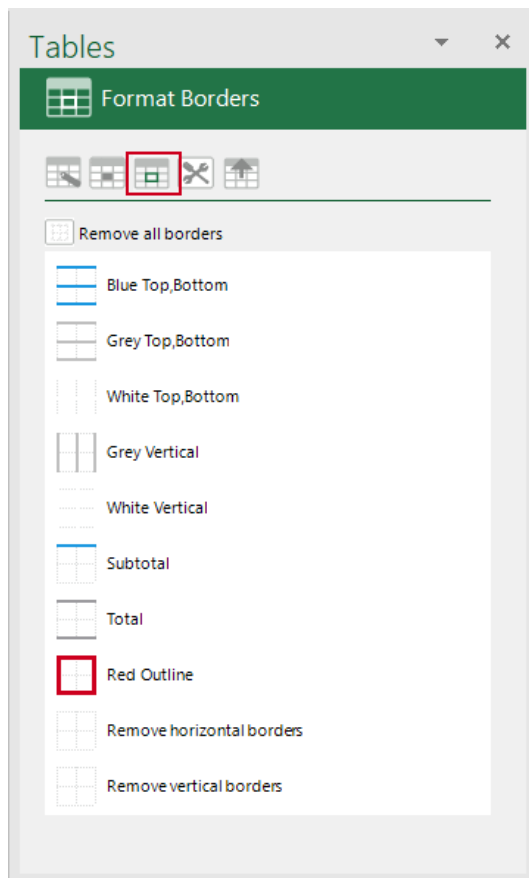


From the **Format Cells** panel, on the *Tables* task pane click an option in the list to apply a cell format to the selected cells.

Applying a cell format will apply the correct font, and border style. It will not affect the font size or alignment.

Formatting Borders

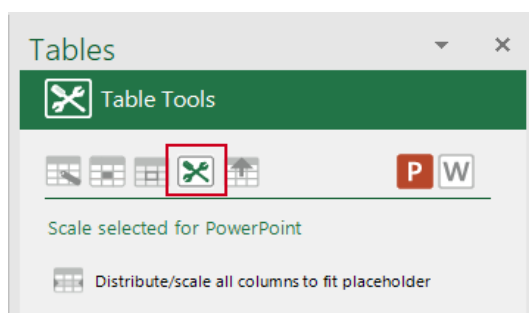
Borders will be applied accordingly when you apply a whole table format (see **Formatting Tables**) but to change these or to apply additional borders to the table, use the *Format Borders* function rather than native Excel. The line weights and colours will be in line with your organisation's branding.



From the **Format Borders** panel click an option in the list to apply a border format to the selected cells or use the *Remove all borders* button to clear all borders.

Table Tools

You can resize a range of table data proportionately to fit the selected placeholder in PowerPoint or Word, while it is still in Excel. This is useful if you will be sending the tables to PowerPoint or Word as pictures and do not want them to be scaled to fit the placeholder when sending (as with **Quick Send, Send to PPT, As Picture Scale to Fit**). The selected columns will be sized to the correct proportions in Excel and once in PowerPoint and Word they will be sized at 100%. Use this function before you copy across to PowerPoint or Word.

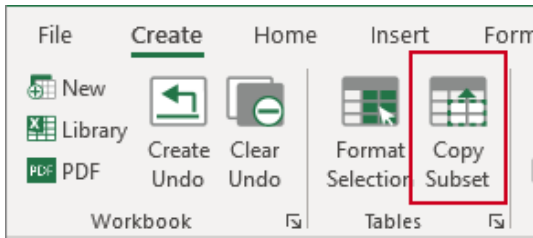


Select the cells or named range containing your data.

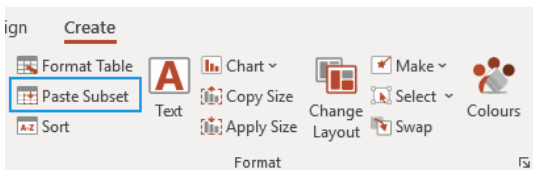
From the **Table Tools** panel select *Distribute/scale all columns to fit placeholder*.

Copy Subset

This function is useful if a table has been typed and formatted in PowerPoint (not linked to Excel), and partially new data becomes available for a column or cells – in a new Excel source. This will save you typing in manually, as without **Paste Subset** it is not possible to copy just the content from Excel, retaining the PowerPoint formatting.



In Excel, select the new range of data and choose **Copy Subset**.



ALT+Tab (or navigate) back to PowerPoint, place your cursor where you want the paste to start and choose **Paste Subset**.

Copying Tables from Excel to PowerPoint or Word

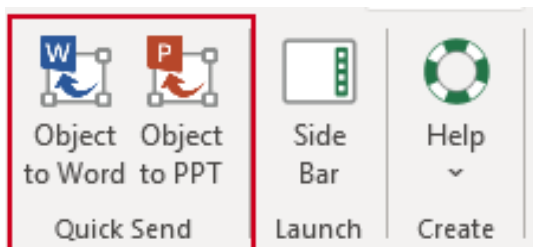
Use Create to export table data or a named range (see **Named Ranges in Excel**) from an Excel worksheet and paste it into PowerPoint or Word. This data can then be updated in PowerPoint and Word using Create.

Make sure you copy the table into a placeholder in PowerPoint or Word to ensure correct sizing and positioning on the page/slide.

There are a number of options available when copying table data to PowerPoint or Word.

Quick Send

Use this function to quickly send tables to PowerPoint or Word. Create will detect whether you have a chart or table selected in Excel, and send it to PowerPoint or Word, using a pre-defined method. Tables will be copied across as pictures and scaled to fit the selected placeholder in PowerPoint or Word. Charts will be resized in Excel to fit the selected PowerPoint or Word placeholder and then copied as charts (not pictures).



Make sure you have a placeholder selected in PowerPoint or Word.

In Excel, select the table data and from the **Quick Send** group, select **Object to PPT** or **Object to Word**.

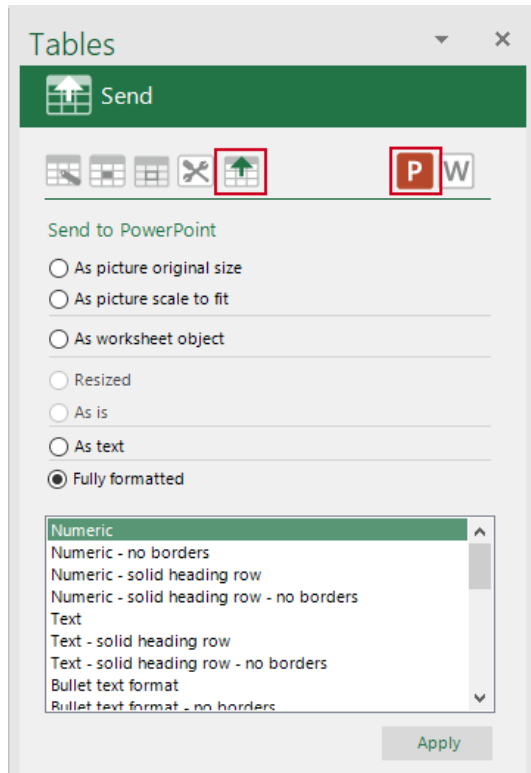
Other Methods of Copying Tables to PowerPoint

In addition to using **Quick Send** to send tables from Excel, there are other methods available on the **Tables** task pane.

Make sure you have a placeholder selected in PowerPoint to ensure correct sizing and positioning on the slide. Select the cells or data range to be copied to PowerPoint.



Select **Send Table** on the side bar.



The **Tables** task pane will open at the **Send** panel.

Choose PowerPoint and then select your preferred method of copying

- **As picture original size** - copies and pastes the selection or named range into the placeholder without resizing it but reflecting the exact size in Excel including font size.
- **As picture scale to fit** - this is the same method used by **Quick Send**. The selection will be proportionally sized to fit the width of the selected placeholder.
- **As worksheet object** – copies the selection or named range and pastes it into PowerPoint as a linked Excel worksheet object. Use Create to view and update the data so that you still have access to the Create tools in Excel.
- **As text** - see **Linking One Cell's Content from Excel**
- **Fully formatted** - copies a range of data or named range from an Excel worksheet and pastes it into PowerPoint as a formatted table. Once in PowerPoint, the Excel data source details can be viewed, and the data can be updated or the table reformatted (if you have used Create to produce your PowerPoint presentation).

Notes

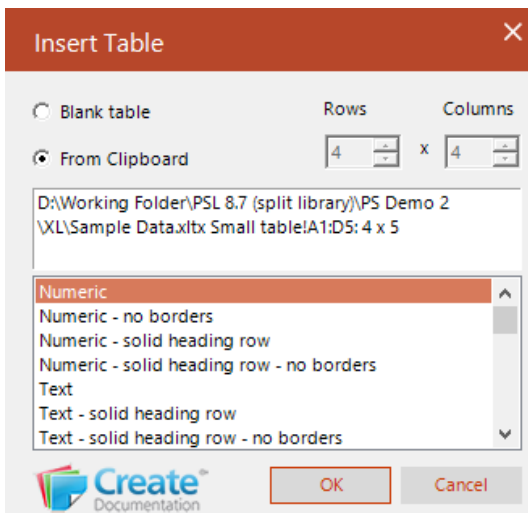
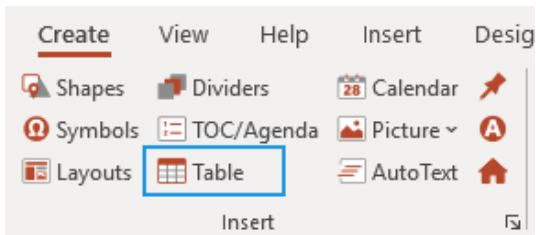
If the data changes in Excel, you can update the linked data via the **Update** button on the **Create** ribbon in your PowerPoint presentation.

Copying Table Data from the Clipboard to PowerPoint

You can also copy data from Excel to the clipboard and use Create to paste it into PowerPoint with a link back to the original data.

In Excel, select the table data and press **CTRL+C** to copy it to your clipboard.

In PowerPoint, select a placeholder on the slide so that the table is sized and positioned correctly. Select **Table** on the ribbon or the **Insert** table icon on the side bar to insert a new table.



The dialog will highlight *From Clipboard* and the cell range and worksheet name.

Select a table format, click **OK** and the table data will be inserted, formatted and linked back to the Excel source.

Notes

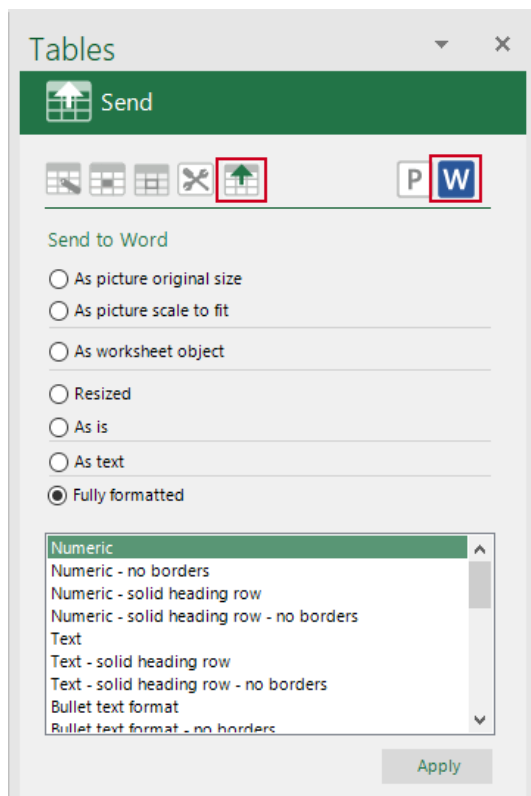
If the data changes in Excel, you can update the linked data via the **Update** button on the **Create** ribbon in your PowerPoint presentation.

Other Methods of Copying Tables to Word

Make sure your cursor is in a placeholder or exhibit in Word to ensure correct sizing and positioning on the page. Select the cells or data range to be copied to Word.



Select **Send Table** on the side bar.



The **Table** task pane will open at the **Send** panel.

Choose Word and then select your preferred method of copying

- **As picture original size** - copies and pastes the selection or named range into the placeholder without resizing it but reflecting the exact size in Excel including font size.
- **As picture scale to fit** - this is the same method used by **Quick Send**. The selection will be proportionally sized to fit the width of the selected placeholder.
- **As worksheet object** - copies the selection or named range and pastes it into Word as a linked Excel worksheet object. Use Create to view and update the data so that you still have access to the Create tools in Excel.
- **Resized** - copies the data, then resizes it to fit the placeholder in Word and pastes it as a table with no new formatting applied (useful if you have done all your formatting in Excel).
- **As is** - copies the data, then pastes it as a table with no new formatting or sizing applied (useful if you have done all your formatting in Excel).
- **As text** - see **Linking One Cell's Content from Excel**
- **Fully formatted** - copies a range of data or named range from an Excel worksheet and pastes it into Word as a formatted table. Once in Word, the Excel data source details can be viewed, and the data can be updated or the table reformatted (if you have used Create to produce your Word document).

Notes

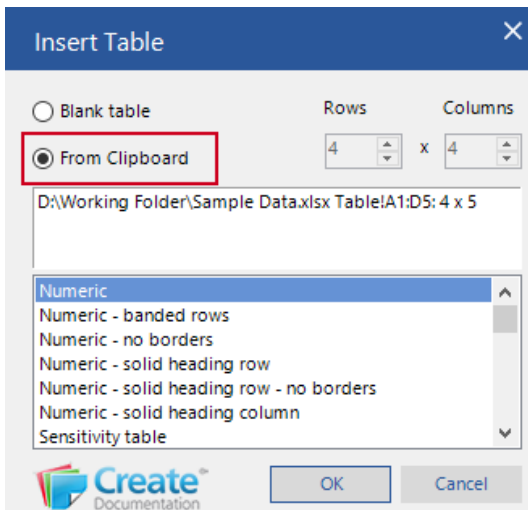
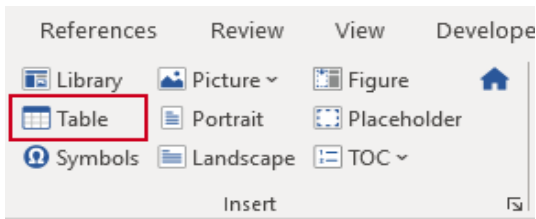
If the data changes in Excel, you can update the linked data via the **Update** button on the **Create** ribbon in your Word document.

Copying Table Data from the Clipboard to Word

You can also copy data from Excel to the clipboard and use Create to paste it into Word with a link back to the original data.

In Excel, select the table data and press **CTRL+C** to copy it to your clipboard

In Word, make sure your cursor is in a placeholder or exhibit to ensure correct sizing and positioning on the page. Select **Table** on the ribbon or **Insert** on the side bar to open the **Insert Table** dialog.



The dialog will highlight *From Clipboard* and the Excel cell range and worksheet name.

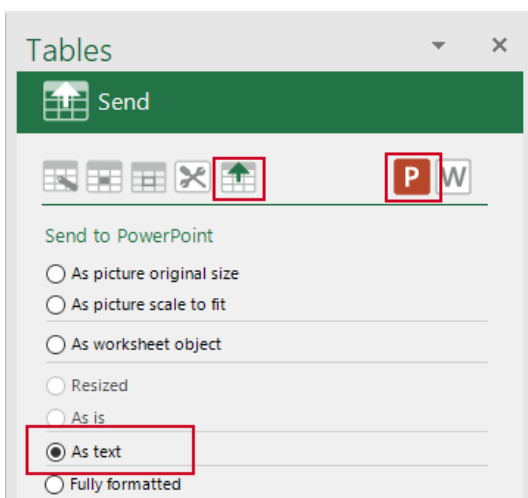
Select a table format, click **OK** and the table data will be inserted, formatted and linked back to the Excel source.

Notes

If the data changes in Excel, you can update the linked data via the **Update Selected** button on the **Create** ribbon in Word.

Linking One Cell's Content from Excel

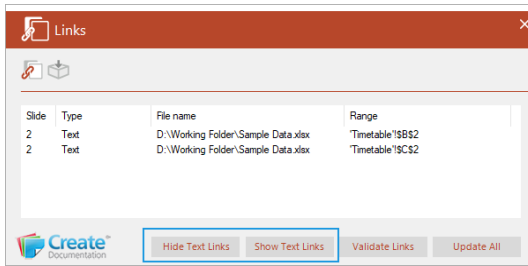
You can copy one cell's content from Excel to PowerPoint or Word as linked text – useful if you need to include figures, that may change at a later date, in a paragraph of text. This linked text can be updated if it changes in the Excel source file and can be displayed as plain or hyperlinked text in Word or PowerPoint - managed in the **Links** dialog.



In PowerPoint or Word position your cursor where the Excel cell text is to be inserted.

Select the cell in Excel and then select *As text* in the **Table** task pane.

The text will be inserted as a hyperlink in PowerPoint or Word. Linked text becomes a linked object and can be updated using Create. See **Updating Linked Objects**

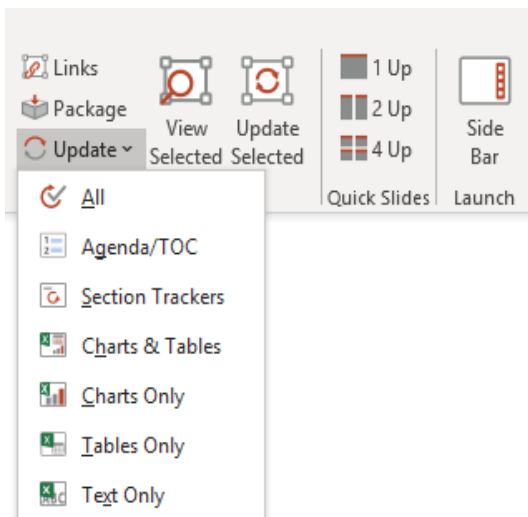


The hyperlinks can be temporarily hidden (and shown again) by selecting *Hide Text Links/Show Text Links* in the *Links* dialog in Word or PowerPoint.

Updating Linked Objects

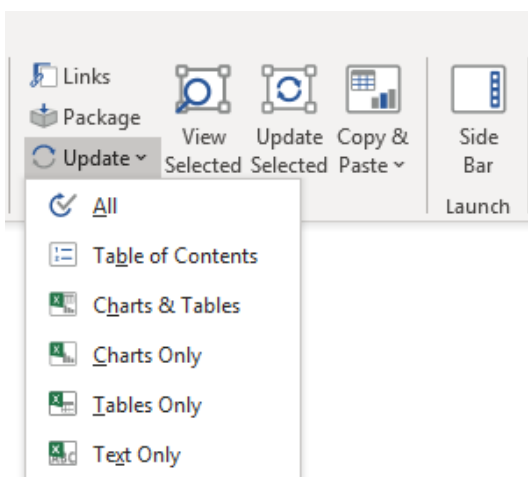
Once table data, charts and text have been copied from Excel they become *linked objects* in your presentation. When the data changes in Excel use the *Update* function to update the data in PowerPoint or Word. Linked objects can be updated individually or by object type (i.e. charts or tables). You can also select *Update, All* which will update the agendas/TOCs and section trackers simultaneously.

Updating Linked Objects in PowerPoint



Update linked objects in PowerPoint by selecting an option from the *Update* dropdown on the **Create** ribbon.

Updating Linked Objects in Word



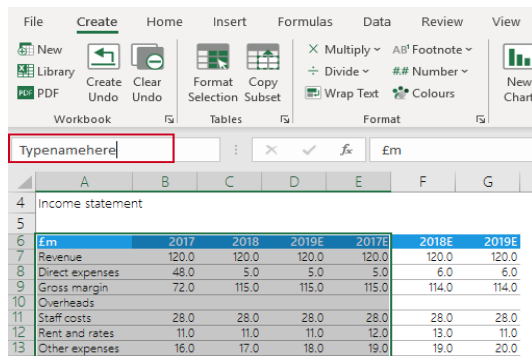
Update linked objects in Word by selecting an option from the *Update* dropdown on the **Create** ribbon.

Named Ranges in Excel

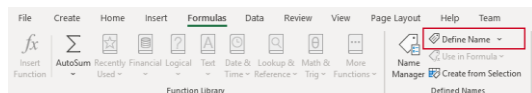
If a range of table data in the Excel workbook has been named, when exporting the data from Excel to Word or PowerPoint the range's name rather than the cell reference is used in the **Links** dialogue box in Word or PowerPoint. This makes the updating of tables more efficient because, regardless of the actual range or its location within a workbook, if the data range increases, decreases or moves (within the sheet), it will still be automatically picked up without having to reset the physical range.

Naming a Range in Excel

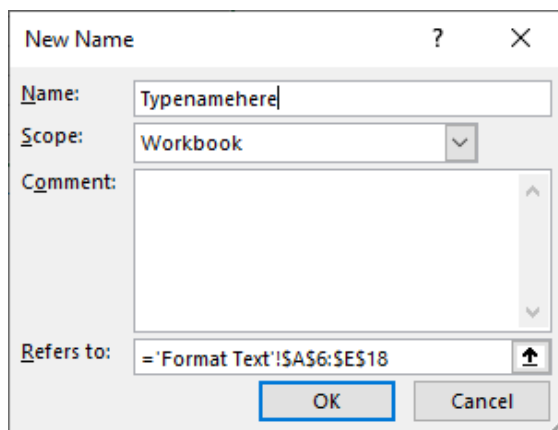
Select the cell range that you want to name.



Enter a range name into the **Name** box located at the left end of the *Formula bar* and press *Enter* to create the name.

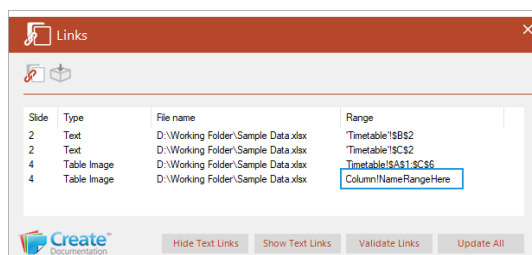


Alternatively, select the cell range that you want to name and on the **Formulas** tab, click **Define Name** in the **Defined Names** group.



In the **Name** text box, type up to a 255-character name for the range (with no spaces). Click **OK**.

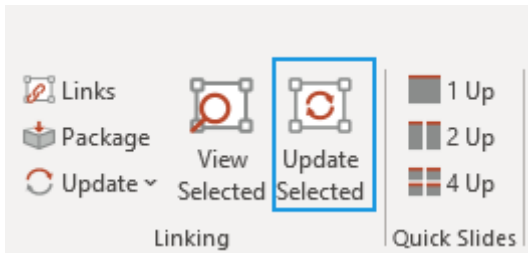
Updating Named Range Data in Word or PowerPoint



If a table has been given a range name in Excel and then copied to PowerPoint or Word using Create its range name will appear in the linked objects list in the **Range** column.

To update a named range in Word or PowerPoint:

In Excel make any changes to the original data, or the range size. **Save** the Excel file.

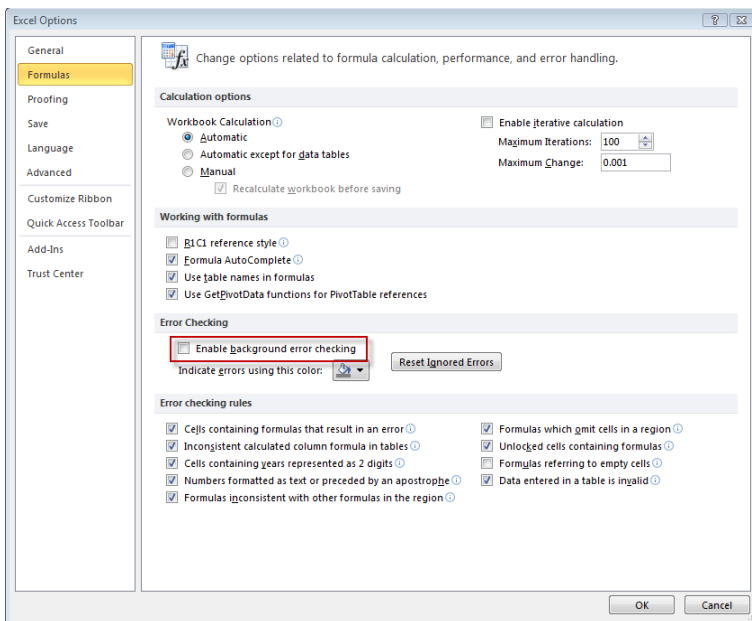


From the **Linking** group on the **Create** ribbon in Word or PowerPoint tab click on **Update Selected**.

Hiding Excel Error Indicators

If your table contains error indicators, you may want to turn these off, so they are not visible in your table picture.

In Excel, from the Office button, select **Options, Formulas**.



Uncheck the *Enable background error checking* box and click **OK**.

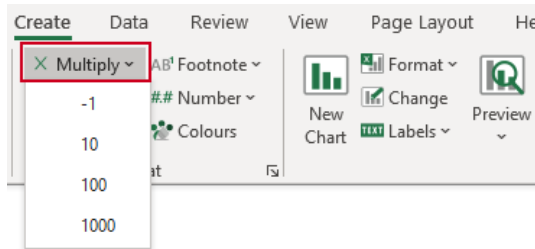
The error indicators will now be hidden and you can recapture your picture as per the steps above (if you have an image you want to replace in PowerPoint, simply click on this and Excel will replace the image and link).

Formatting Tools

The **Format** group contains a selection of worksheet formatting options.

Multiplying Values

The **Multiply** function multiplies a range of Excel data by -1, 10, 100 or 1,000. If the data is the result of a formula, the formula will be multiplied by the selected value and will therefore remain.

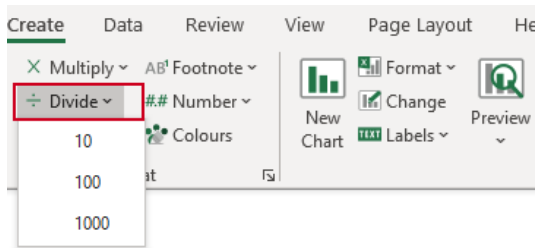


Select the range of data to be multiplied.

Select -1, 10, 100 or 1,000 from the dropdown.

Dividing Values

The **Divide** function divides a range of Excel data by 10, 100 or 1,000. If the data is the result of a formula, the formula will be divided by the selected value and will therefore remain.



Select the range of data to be divided.

Select 10, 100 or 1,000 from the dropdown.

Notes

In the **Divide** dropdown there is no option to divide by -1 because the result is the same as multiplying by -1.

Before using the Multiply by -1 function

	2017	2018	2019E
Manufacturing	17	10	12
Distribution	9	16	16
Service	6	8	3
Total	32	34	32

After using the Multiply by -1 function

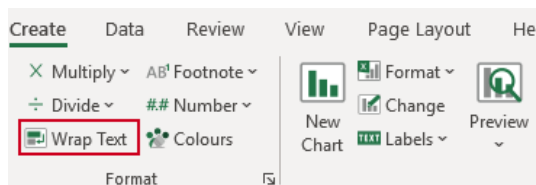
	2017	2018	2019E
Manufacturing	-17	-10	-12
Distribution	-9	-16	-16
Service	-6	-8	-3
Total	-32	-34	-32

After using the Multiply by -1 function for the second time

	2017	2018	2019E
Manufacturing	17	10	12
Distribution	9	16	16
Service	6	8	3
Total	32	34	32

Wrapping text

The **Wrap Text** function wraps text in a cell or a selection of cells on the worksheet. Selecting this function again will turn off text wrapping in the selection.

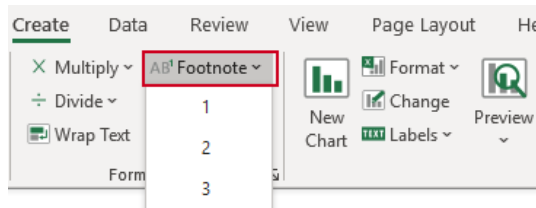


Select the cell or cells you want to format and select **Wrap Text**.

Data in the cell wraps to fit the column width and the row height will become automatic. When you change the column width, data wrapping adjusts automatically.

Footnotes

The **Footnote** function adds a superscript note number to text or data on a worksheet. If the corresponding text appears in a chart, the superscript number will also appear in the chart labels.



Select the cell to which the footnote is to be added.

Select **Footnote** and the relevant number (1, 2 or 3).

Notes

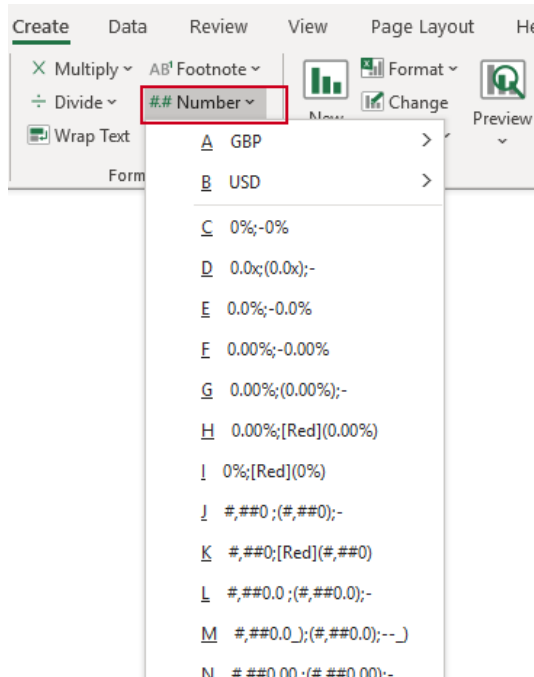
Be careful not to add the footnote to any cells that are creating data, as they will become text rather than data values.

If you require a footnote of 4 and above, create as normal by typing and selecting the number and formatting the font to superscript.

Custom Number Formats

The **Number** function applies number formats to the selected cell or cells enabling greater consistency within your organisation's spreadsheets. These number formats can be customised according to your

organisation and uploaded by Presentation Solutions. They can also be categorised in the dropdown menu by e.g. currency or country.

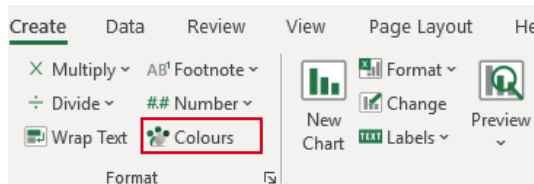


Select the cell/s to which the custom number format is to be applied.

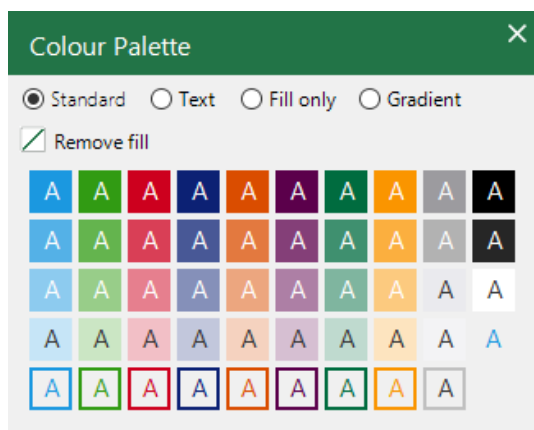
Select **Number** and then select the relevant number format from the dropdown.

Colour Palette

Access your organisation's colour palette from the **Create** ribbon.



Select **Colours**.



- You can "drag" a copy of the palette onto your desktop and it will remain there until closed. The colour hierarchy begins in the first square. If you hover your cursor over the colour, the name of the colour will appear.
- Use the **Standard** colours for cells, drawings and charts (but remember to use the Create Chart Formats initially on any charts you create).
- Use the **Text** colours to apply a colour to text in cells.
- Use the **Fill only** colours to apply a fill to cells.
- Use the pre-set **Gradient** colour palette to apply gradient fills to worksheet cells (if these are part of your branding).
- Remove any fills on cells by selecting **Remove fill**.

Notes

Remember to close the colour palette once you have applied your selection. To close the colour palette, click on the "X" box in the top right-hand corner.

You cannot use the PowerPoint colour palette in Word or Excel or vice-versa.

It is recommended to use the colours in the order shown (left to right).

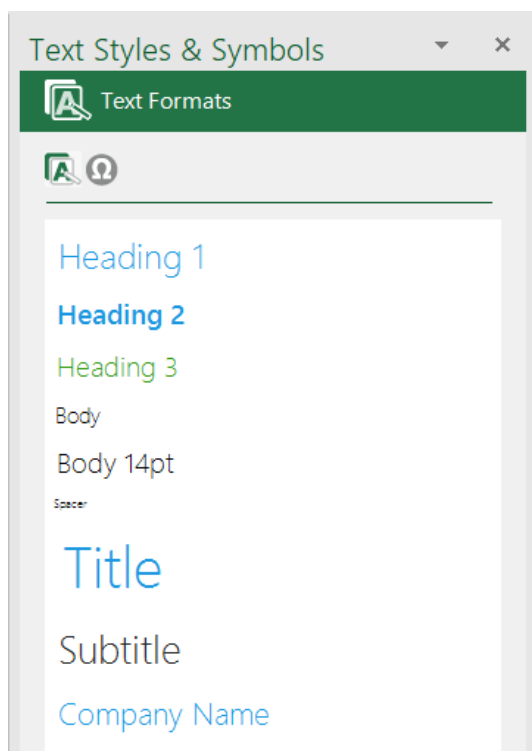
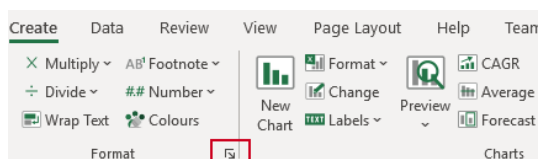
If the colour palette window becomes lost behind other windows, as can happen if the user goes to slide show mode, the palette can be brought back to the front by clicking the colour palette ribbon button.

The palette window is also shown in the task bar.

Text Formats

Format text on your worksheet using the **Text Formats** task pane. This contains text formats that have been customised to match your branding.

Select **Text** on the side bar or the task pane launcher on the ribbon to view the available text formats.



The **Text Styles & Symbols** task pane opens at the **Text Formats** panel, showing all available text formats.

Select a cell or multiple cells and then the required text format.

Charts

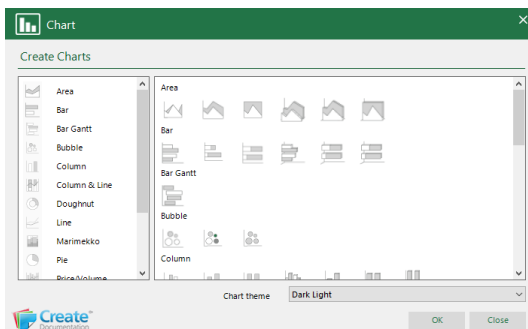
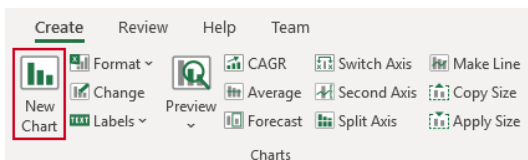
The **Charts** group contains options to create charts, format existing charts with your organisation's branding (by applying a "theme") and send charts to Word or PowerPoint with a link back to the original source data. Other features include adding average lines, forecasts periods, axis splits, secondary axes and labels. There are also tools to help create more complicated charts such as: Bar Gantt; Bridge/Waterfall; Bubble; Column and Line; Marimekko; Price/Volume; Stacked Cluster; Timeline; XY Scatter.

Creating Charts

Use the **New Chart** function to create a chart as this will apply a customised chart theme at the same time. There are also more chart types available than in native Excel e.g. Waterfall charts and Price Volume.

Select the data for your chart.

Select **Charts** on the ribbon or side bar.



In the **Chart** dialog, select the required chart type category on the left and then the required chart type on the right.

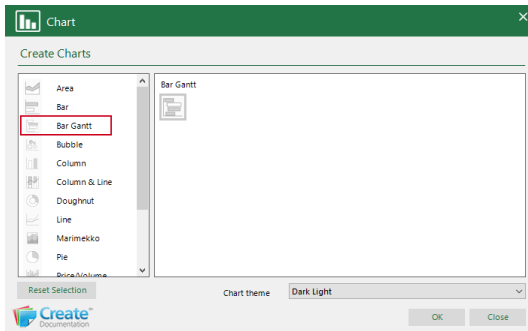
In the *Chart theme* box, select the required customised theme from the dropdown.

Click **OK**.

The chart will be inserted on the worksheet.

Bar Gantt Charts

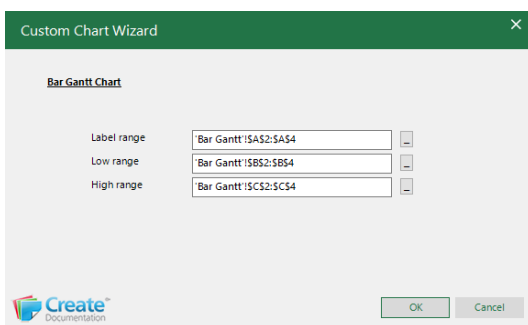
To create a Bar Gantt chart, select the data range (the label, low and high ranges but NOT header rows). Select **New Chart** in the ribbon or side bar.



In the **Chart** dialog select *Bar Gantt*.

Select the required custom chart theme from the dropdown (the chart will be formatted accordingly).

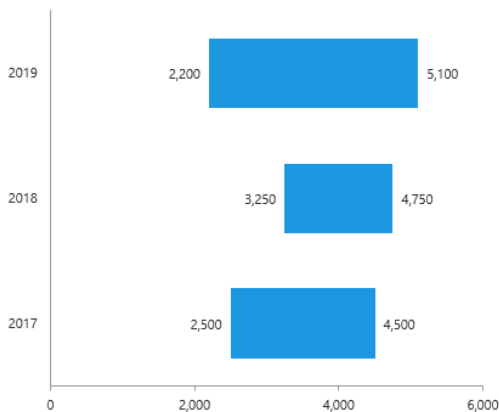
Click **OK**.



The *Custom Chart Wizard* will open with the fields populated based on your selection.

Make any changes to the fields by clicking on the button at the end to collapse the dialog and selecting the correct data.

Click **OK**.



The formatted Bar Gantt chart will appear on the worksheet.

Save the workbook. Send to PowerPoint or Word using **Quick Send**. See **Quick Send**

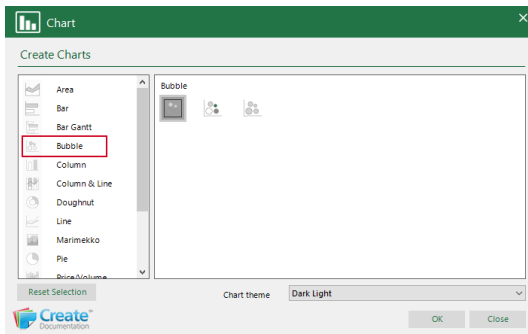
Notes

Use the **Average** function to add an average line or area to the Bar Gantt chart. See **Adding an Average Area or Line**.

Bubble Charts

To create a bubble chart, select the bubble chart data range for the first series (including labels, X data, Y data, Z data and titles if you have them).

Select **New Chart** in the ribbon or side bar.

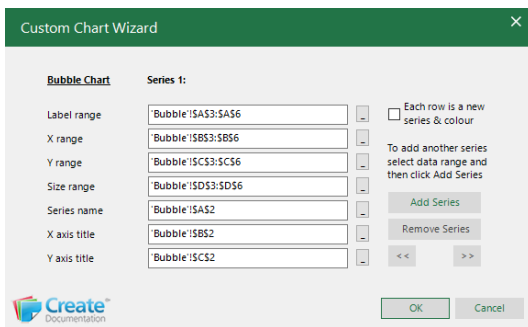


In the **Chart** dialog select *Bubble* and in the sub chart type list on the right select either:

- *Bubble Single Series* (which will apply the same colour to all values in the series); or
- *Bubble Single Series Coloured* (this will apply a different colour to each value in the series).

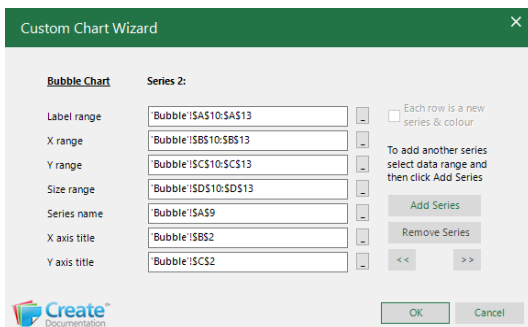
Select the required custom chart theme from the dropdown (the chart will be formatted accordingly).

Click **OK**.



The *Custom Chart Wizard* will open with the fields populated based on your selection.

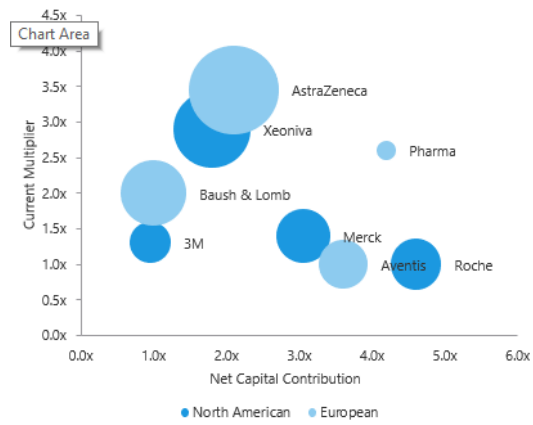
- Make any changes to the fields by clicking on the button at the end of each field to collapse the dialog and selecting the correct data or for titles, typing the text in manually.
- Check *Each row is a new series & colour* if required (this will be checked already if you selected *Bubble Single Series Coloured*).
- To add a second series of data, select the data on the worksheet first and then choose *Add Series*.



A dialog for the second series will open.

- Edit the data range for the second series by clicking on the button at the end of each field to collapse the dialog and selecting the correct data or for titles, typing the text in manually.

Click **OK**.

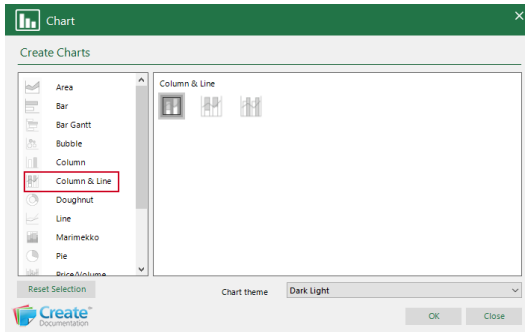


The formatted chart will appear on the worksheet.

Save the workbook. Send to PowerPoint or Word using **Quick Send**. See **Quick Send**

Column and Line Charts

To create a column and line chart with a choice of column chart types for the primary data, select the data for the chart including labels and series names (the last column of data will be plotted as the line)

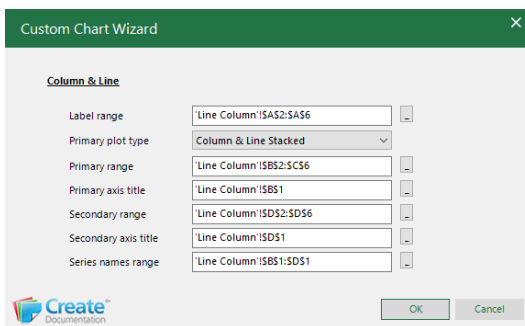


In the **Chart** dialog select *Column & Line* and in the sub chart type list on the right select either:

- *Column & Line Stacked*
- *Column & Line 100% Stacked, or*
- *Column & Line Clustered*

Select the required custom chart theme from the dropdown (the chart will be formatted accordingly).

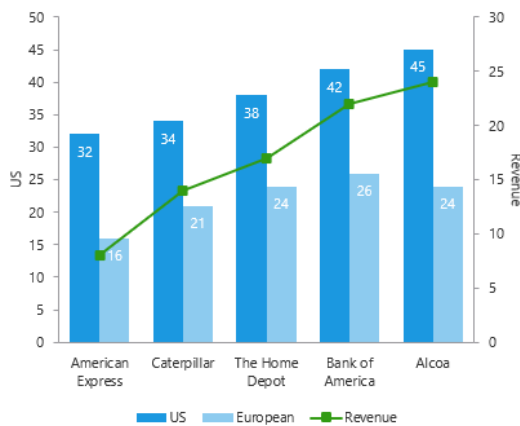
Click **OK**.



The *Custom Chart Wizard* will open with the fields populated based on your selection.

- Edit any of the fields by clicking on the button at the end to collapse the dialog and selecting the correct data or for titles, typing the text in manually.
- In the *Primary Plot Type* field change the subtype for your primary data from the drop-down list if you wish (you can change it to Stacked Column, Clustered Column or 100% Stacked Column).

Click **OK**.

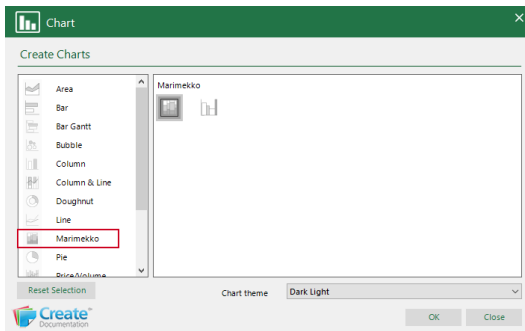


The formatted chart will appear on the worksheet.

Save the workbook. Send to PowerPoint or Word using **Quick Send**. See **Quick Send**

Marimekko Charts

To create a Marimekko chart select the data for the chart – this can be in percentages or in decimals but should add up to 100% or 1 respectively across the rows and columns.

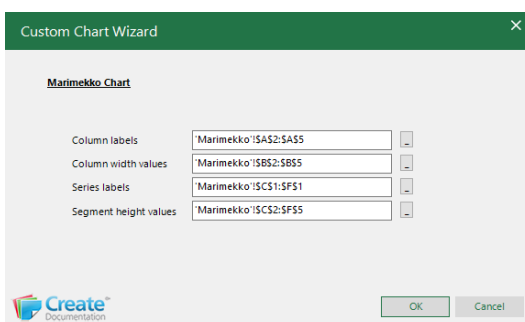


In the **Chart** dialog select *Marimekko* and in the sub chart type list on the right select either:

- *Marimekko*
- *Marimekko-Bar Mekko*

Select the required custom chart theme from the dropdown (the chart will be formatted accordingly).

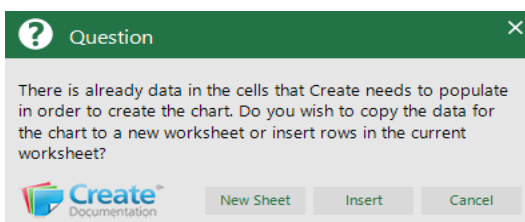
Click **OK**.



The *Custom Chart Wizard* will open with the fields populated based on your selection.

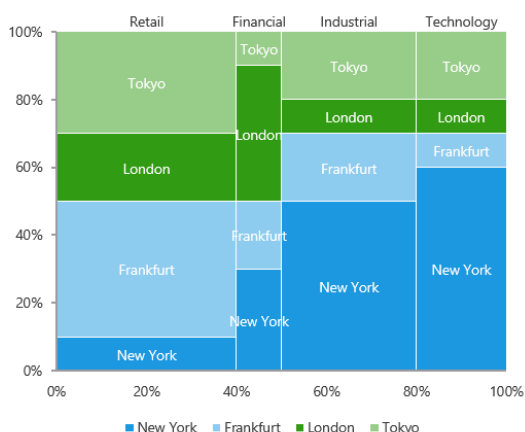
- Edit any of the fields by clicking on the button at the end to collapse the dialog and selecting the correct data or for titles, typing the text in manually.

Click **OK**.



Create needs to add data alongside the original chart data in order to create the Marimekko chart. If there is already data in the worksheet in those cells this message will appear.

Select *New Sheet* to insert the Marimekko chart and the associated data on to a new worksheet OR select *Insert* to insert it on the current worksheet (Create will insert rows and columns for the new data).

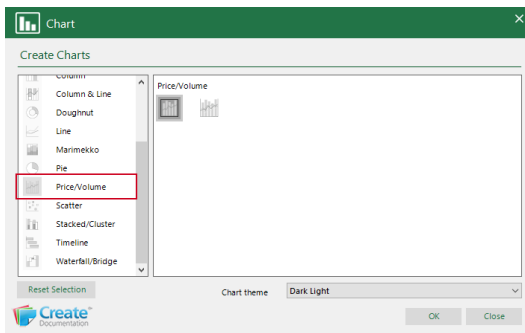


The formatted chart will appear on the worksheet.

Save the workbook. Send to PowerPoint or Word using **Quick Send**. See **Quick Send**

Price/Volume Charts

To create a price/volume chart, select the data for the chart including labels and series names.

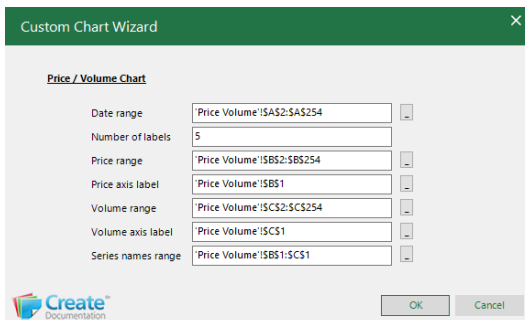


In the **Chart** dialog select *Price/Volume* and in the sub chart type list on the right select either:

- *Price/Volume Single Price* or
- *Price/Volume Multi Price*

Select the required custom chart theme from the dropdown (the chart will be formatted accordingly).

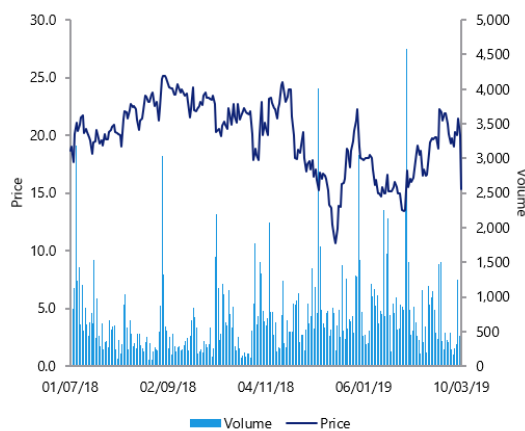
Click **OK**.



The *Custom Chart Wizard* will open with the fields populated based on your selection.

- Edit any of the fields by clicking on the button at the end to collapse the dialog and selecting the correct data or for titles, typing the text in manually.
- In the **Number of labels** field type in the number of labels you wish to display on the X-axis.

Click **OK**.

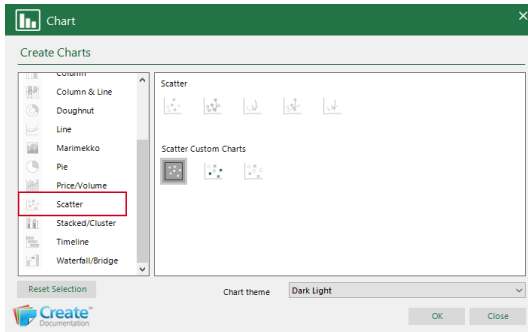


The formatted chart will appear on the worksheet.

Save the workbook. Send to PowerPoint or Word using **Quick Send**. See **Quick Send**

Scatter Charts

To create a scatter chart with an optional second series and automatic data labels, select the first series of chart data, including labels. A second series can be added at a later stage.

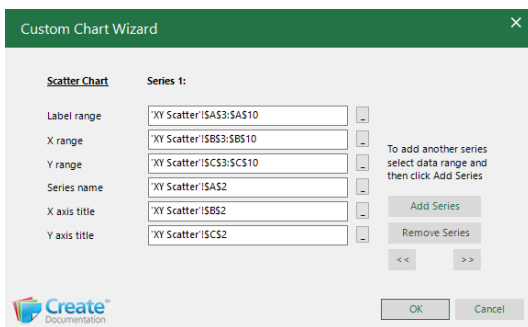


In the **Chart** dialog select *Scatter* and in the sub chart type list on the right select either:

- *XY Scatter Single Series*
- *XY Scatter Single Series Coloured*
- *XY Scatter Multi Series*

Select the required custom chart theme from the dropdown (the chart will be formatted accordingly).

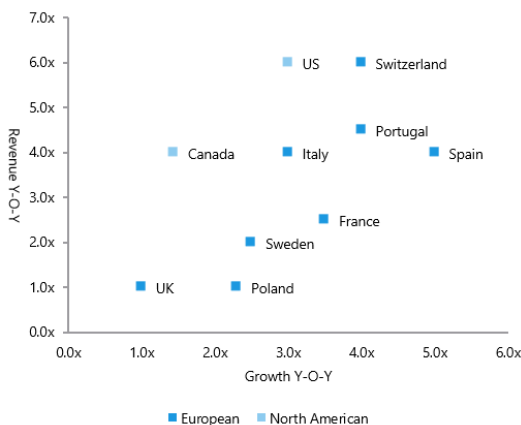
Click **OK**.



The *Custom Chart Wizard* will open with the fields populated based on your selection.

- Edit any of the fields by clicking on the button at the end to collapse the dialog and selecting the correct data or for titles, typing the text in manually.
- To add a second series of data, select the data on the worksheet first and then choose **Add Series**

Click **OK**.

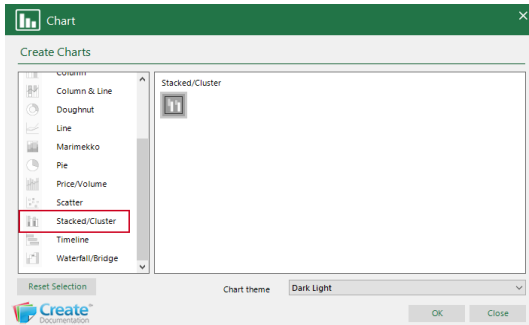


The formatted chart will appear on the worksheet.

Save the workbook. Send to PowerPoint or Word using **Quick Send**. See **Quick Send**

Stacked/Cluster Charts

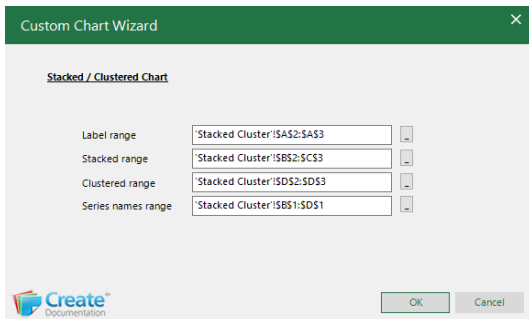
To create a stacked/cluster chart, select the data. Create will assume that the last column of data will be the clustered range by default. This function will add data to and manipulate the original chart data. In order that your original data remains unaffected, you should copy your chart data to a blank area of the worksheet and use this to create the chart



In the **Chart** dialog select *Stacked/Cluster*.

Select the required custom chart theme from the dropdown (the chart will be formatted accordingly).

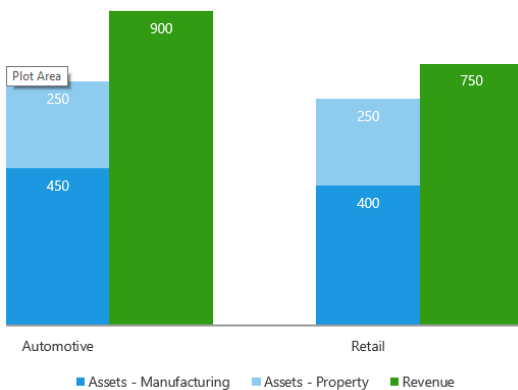
Click *OK*.



The *Custom Chart Wizard* will open with the fields populated based on your selection.

- Edit any of the fields by clicking on the button at the end to collapse the dialog and selecting the correct data or for titles, typing the text in manually.

Click *OK*.

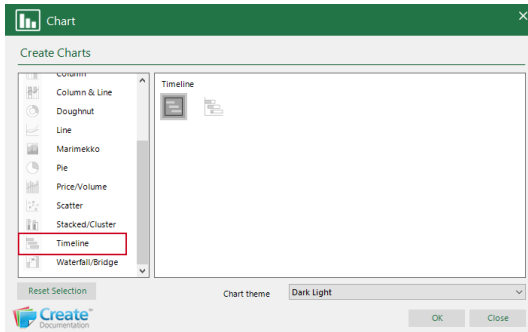


The formatted chart will appear on the worksheet.

Save the workbook. Send to PowerPoint or Word using **Quick Send**. See **Quick Send**

Timeline Charts

To create a timeline chart with either a single or multiple series, select the data (this should include the data for the “invisible” bars).

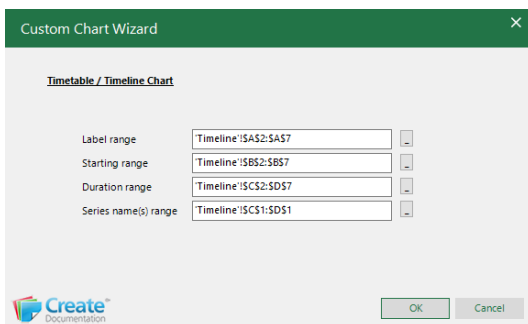


In the **Chart** dialog select *Timeline*.

- *Timeline Single* or
- *Timeline Stacked*

Select the required custom chart theme from the dropdown (the chart will be formatted accordingly).

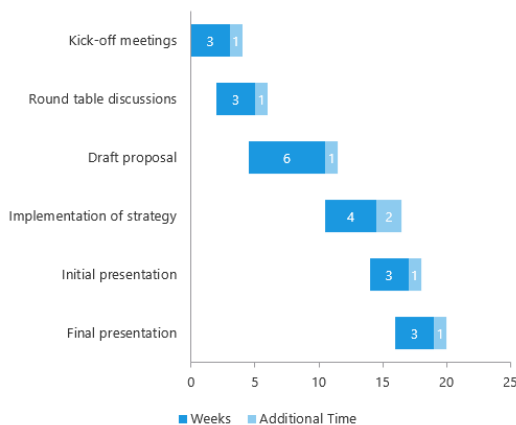
Click **OK**.



The *Custom Chart Wizard* will open with the fields populated based on your selection.

- Edit any of the fields by clicking on the button at the end to collapse the dialog and selecting the correct data or for titles, typing the text in manually.

Click **OK**.



The formatted chart will appear on the worksheet.

Save the workbook. Send to PowerPoint or Word using **Quick Send**. See **Quick Send**

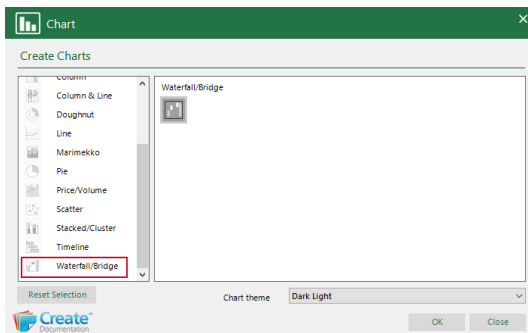
Waterfall/Bridge Charts

You can create a formatted waterfall chart (sometimes referred to as a bridge chart), and a stacked waterfall chart. There's also an option to include a comparison column to either of these. Values and differentiating formats for positive and negative numbers, together with leader lines and data labels are automatic. In addition, you can adjust the data table and see the changes reflected in your chart.

Single Series Waterfall Chart

To create a waterfall chart with a single series, select the data.

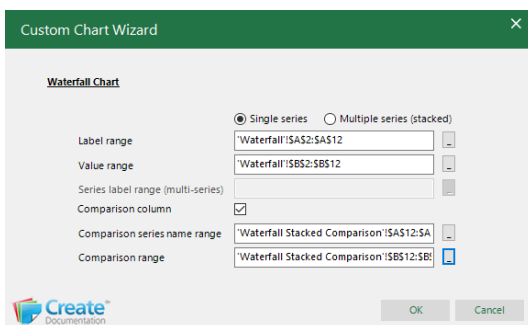
- The data should be in two columns: the first containing the axis labels and the second the values.
- The values can be positive or negative.
- The first row is assumed to contain the data for the starting bar.
- Rows for interim and final totals should include appropriate labels but the cell for the value should be left blank.
- Create will calculate the totals from the other values.



In the **Chart** dialog select *Waterfall/Bridge*.

Select the required custom chart theme from the dropdown (the chart will be formatted accordingly).

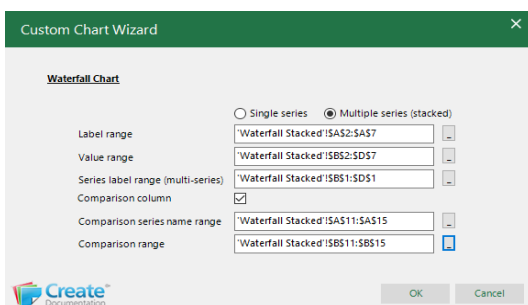
Click **OK**.



The *Custom Chart Wizard* will open with the fields populated based on your selection.

- Edit any of the fields by clicking on the button at the end to collapse the dialog and selecting the correct data.
- To include a comparison column, check the **Comparison column** box, and click the buttons at the end of the **Comparison series name range** and **Comparison range** fields to collapse the dialog and select the relevant data.

Click **OK**.



The formatted chart will appear on the worksheet.

Save the workbook. Send to PowerPoint or Word using **Quick Send**. See **Quick Send**

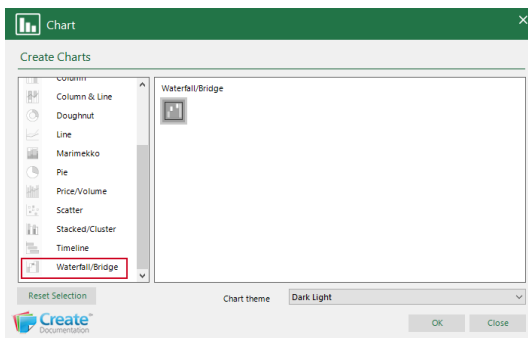
Notes

To create the Waterfall charts, Create needs to add dummy data to the worksheet. This data is inserted 100 columns to the right of the bottom extent of any existing data on the worksheet, so that it doesn't interfere with the existing data. However, because this additional data is on your worksheet you will need to make sure that you manually set your print area so that it is not included if you print. If you delete the chart, the associated data remains.

Multiple Series Waterfall Chart

To create a waterfall chart with multiple series, select the data.

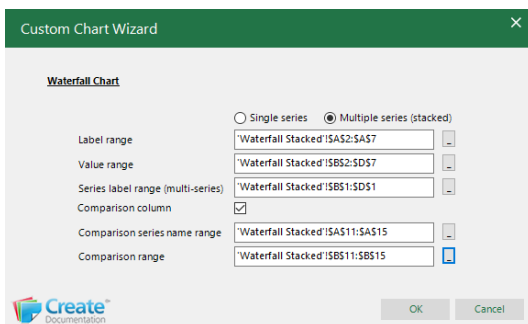
- The first column should contain the axis labels and the columns for each consecutive series should contain the values.
- The values can be positive or negative.
- The first row is assumed to contain the data for the starting bar.
- The second row is assumed to contain the data for the starting bar.
- Rows for interim and final totals should include appropriate labels but the cell for the value should be left blank.
- Create will calculate the totals from the other values.



In the **Chart** dialog select *Waterfall/Bridge*.

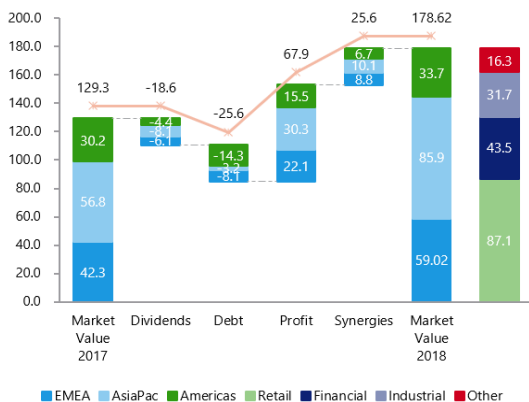
Select the required custom chart theme from the dropdown (the chart will be formatted accordingly).

Click **OK**.



- Check *Multiple series (stacked)*
- Edit any of the fields by clicking on the button at the end to collapse the dialog and selecting the correct data.
- To include a comparison column, check the **Comparison column** box, and click the buttons at the end of the **Comparison series name range** and **Comparison range** fields to collapse the dialog and select the relevant data.

Click **OK**.



The formatted chart will appear on the worksheet.

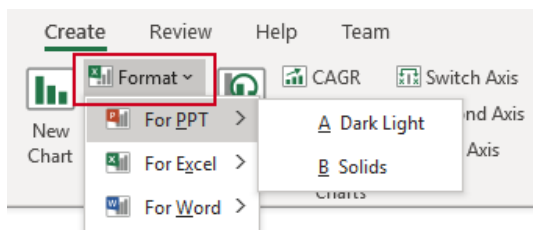
Save the workbook. Send to PowerPoint or Word using **Quick Send**. See **Quick Send**

Notes

To create the Waterfall charts, Create needs to add dummy data to the worksheet. This data is inserted 100 columns to the right of the bottom extent of any existing data on the worksheet, so that it doesn't interfere with the existing data. However, because this additional data is on your worksheet you will need to make sure that you manually set your print area so that it is not included if you print. If you delete the chart, the associated data remains.

Formatting Charts

You can apply one of your organisation's customised chart themes to any chart on your Excel worksheet, without sending it to, or sizing it for insertion into a placeholder in PowerPoint or Word. You might do this when there is no destination presentation yet in PowerPoint or Word or you wish to view how a chart would look before sending to Word or PowerPoint.

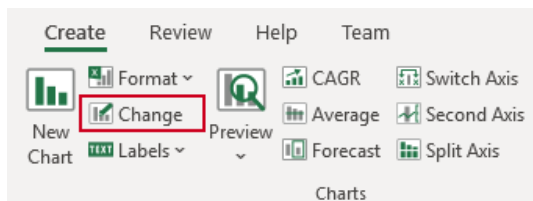


Select the chart and select **Format** on the ribbon.

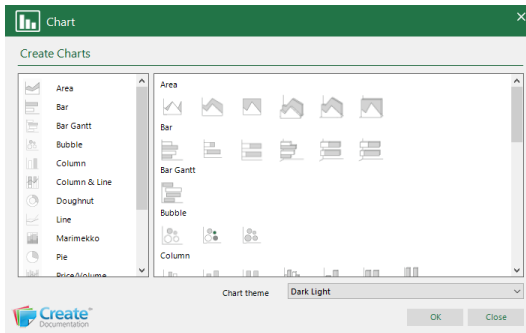
Select **For PPT**, **For Excel**, or **For Word** and the required theme.

Changing the Chart Type

This function changes the chart type of the existing selected chart and applies a theme.



Select the chart and select **Change** on the ribbon.



The **Chart** dialog will open with the available chart types.

Select a chart type and a chart theme.

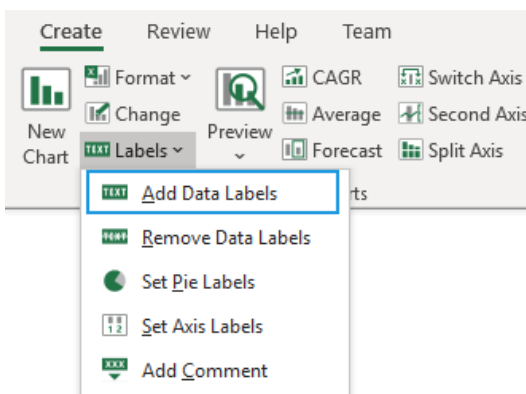
Click **OK**.

Notes

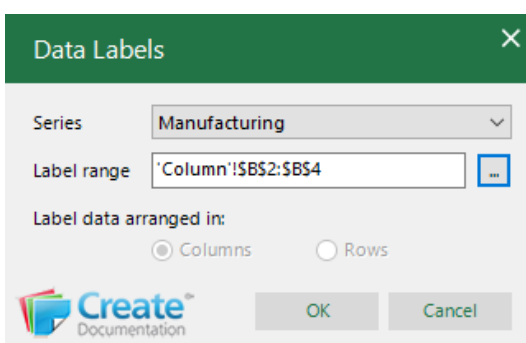
This function will work on standard charts rather than charts that have been created using the custom chart wizard such as Bar Gantt or waterfall.

Adding Labels

This function adds chart labels as standard Excel data labels. They are linked to the chart data, but do not have to be part of the original source data and will therefore update accordingly if the data changes. They cannot be resized but individually they can be moved.



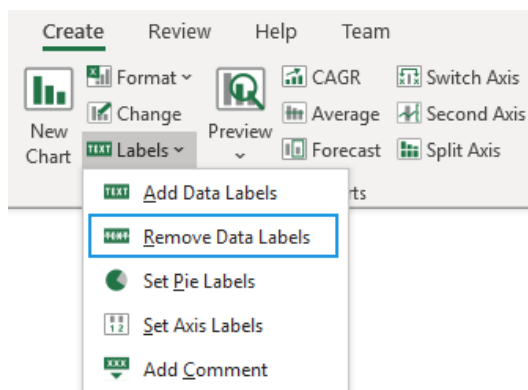
Select the chart and select **Labels, Add Data Labels** on the ribbon.



- Select the series to which the labels are to be applied from the Series dropdown menu.
- Click on the *Label range* button to collapse the dialog.
- A dialog will appear. Click into the worksheet and select the cells containing the category labels you wish to display.
- The selected range will populate the *Label range* field. Click **OK**.

Removing Labels

This function removes all native Excel data labels with one click, rather than having to select the labels for each data series. It also removes data labels that have been created via the [Add](#) function, from a selected chart.

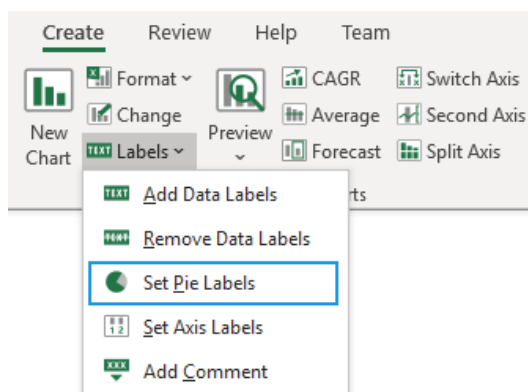


Select the chart and select [Labels](#), [Remove Data Labels](#) on the ribbon.

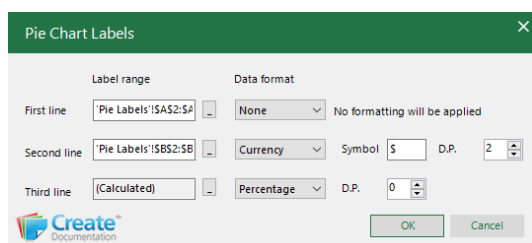
Pie Labels

This function adds pie labels to a pie chart as unattached text boxes linked to your worksheet data. This is useful if you wish to customise the labels in any way (e.g. add a currency symbol), to fix text wrapping, or if the labels are too long - as they cannot be resized in native Excel. You can have up to three lines of data in the pie labels.

Select the pie chart. Delete the Excel generated pie labels – use the [Remove Data Labels](#) function for this.

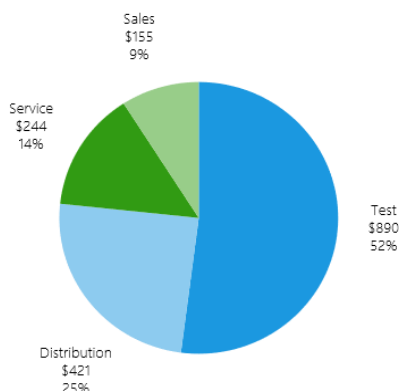


Select [Labels](#), [Set Pie Labels](#) on the ribbon.



- Click on the [Label range](#) for each line field (the dialog will collapse).
- Select the data for each line of your data labels.
- Choose a [Data format](#) for the label from the dropdown list (optional).

Click [OK](#).



The new pie labels will be added to the chart.

The labels are unattached text boxes linked to the data on your worksheet. You may need to move and resize them. They can also be formatted e.g. to change text alignment, size and colour.

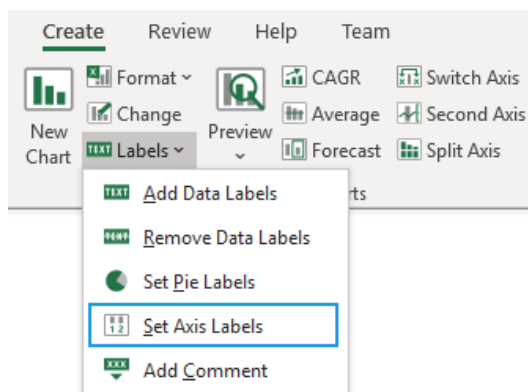
To delete these labels, click on them and select **Remove Data Labels** from the **Labels** group.

Notes

If you are working in Excel 2007, the pie chart labels are not linked to the data and will have to be updated manually.

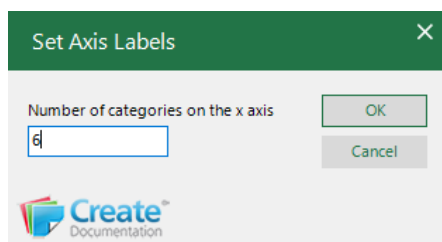
Setting X-Axis Labels

You can set a specific start and end date for category X-axis labels on an X-Y scatter line chart and set the number of axis labels. For example, if your chart data shows a year of daily plot points (e.g. 365 labels) it can be customised to display 12 category X-axis labels including the start and end dates.

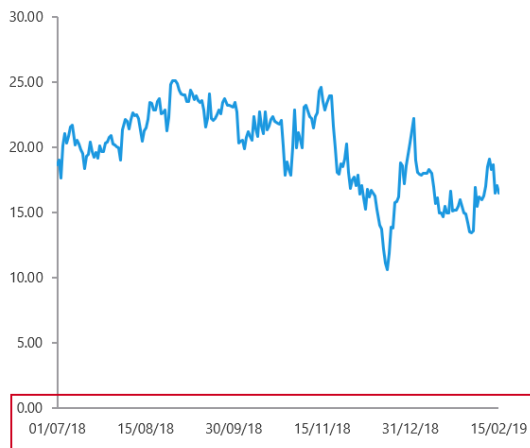


Select the chart in Excel.

Select **Labels**, **Set Axis Labels** on the ribbon.



Type in the number of X axis labels to be displayed.
Click **OK**.



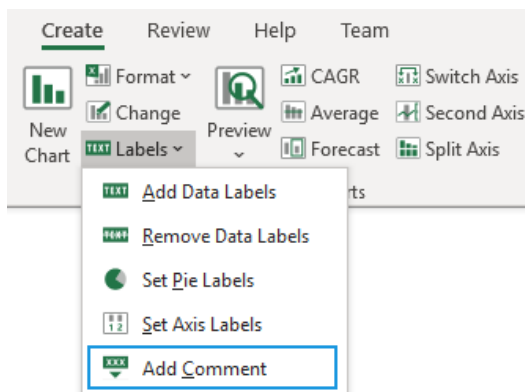
The required number of X-axis labels will be added to the chart.

Notes

This function can only be used on X-Y scatter line charts.

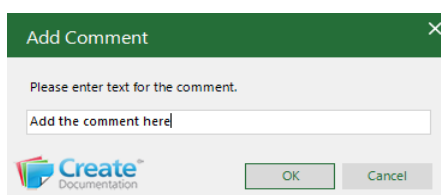
Adding a Comment to a Chart

This function adds a comment/text box with custom text to a data point on a chart.

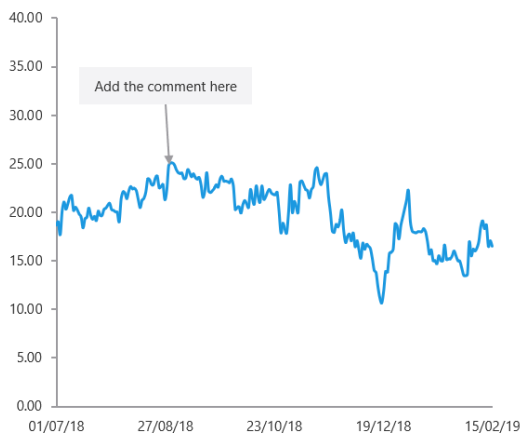


Select the data point to which you wish to add the comment on the Excel chart.

Select **Labels**, **Add Comment** on the ribbon.



Type the comment in the dialog.
Click **OK**.



The comment will be added to the selected point on the chart.

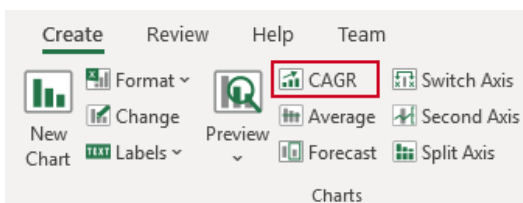
You can click and drag to move it if required.

Calculating a CAGR

This function will calculate a CAGR (Compound Annual Growth Rate) of a data selection on a worksheet.

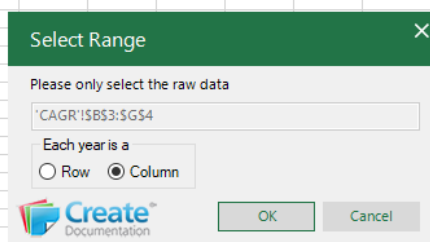
Sales Volume (\$ millions)	2015	2016	2017	2018	2019	2020
Sales	300	110	115	119	153	181
Another	300	110	115	119	153	181
				CAGR		

Select the cell on the worksheet where you want the result to be inserted.



Select **CAGR** on the ribbon.

Sales Volume (\$ millions)	2015	2016	2017	2018	2019	2020E
Company A	116	125	127	135	145	155
Company B	125	130	115	120	110	120



- With the *Select Range* dialog open, select the data of which you wish to calculate the CAGR.
- If the data range selected includes multiple rows or columns, select *Each year is a Row* or *Column* depending on how the data is arranged.

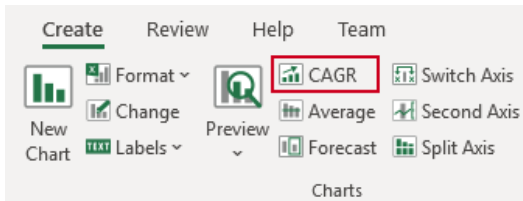
Click **OK**.

Sales Volume (\$ millions)	2015	2016	2017	2018	2019	2020E
Company A	116	125	127	135	145	155
Company B	125	130	115	120	110	120
					CAGR	+2.7%

The CAGR will be inserted in the selected cell.

Adding a CAGR Line to a Chart

This function will calculate the CAGR of a single data series on a column chart or on multiple series on a stacked column chart and add a CAGR line and label. If the data changes, the CAGR line on the chart will update.

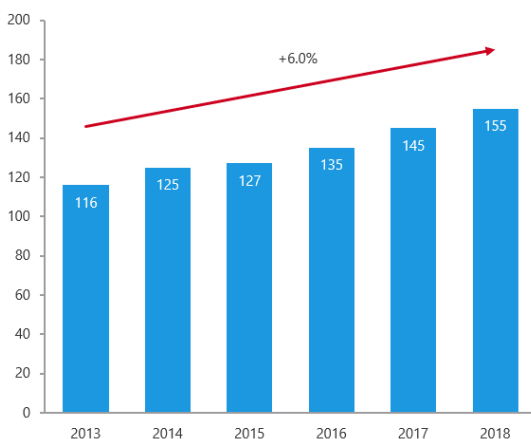


Select the column chart.

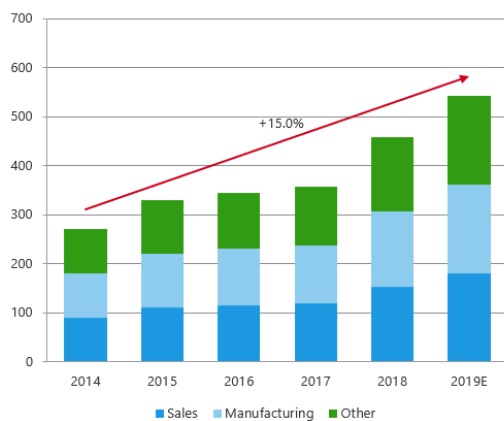
Select **CAGR** on the ribbon.

- If the displayed data ranges in the *Date range* and *Value range* fields are not correct, or if you wish the CAGR to be applied to a portion of the chart and not the whole chart, click on the button next to each field. This will collapse the dialog and take you to your worksheet where you can reselect the data.
- Select *Arrow* to add a straight, thicker arrowed line.
- Select *Actual values as curve* to add a slimmer curved non-arrowed line.
- *Offset from columns* is the required distance between the CAGR line and the top of the columns. Type over the default number if you wish to change this.
- Select *Each year is a Row* or *Column* depending on how the data is arranged on the worksheet (this is only enabled if the chart selected is a stacked column chart).
- From the chart theme dropdown select your current chart theme.

Click **OK**.



A CAGR line or arrow based on your selections will be added to the selected chart.



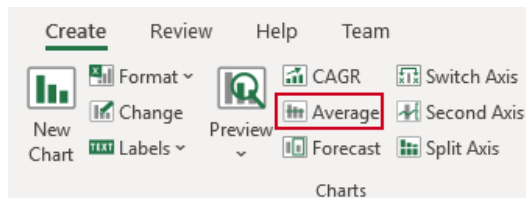
Notes

To calculate and add the CAGR to a chart, Create needs to add dummy data to the worksheet. This data is inserted 100 columns to the right of the bottom extent of any existing data on the worksheet, so that it doesn't interfere with the existing data. However, because this additional data is on your worksheet you will need to make sure that you manually set your print area so that it is not included if you print. If you delete the CAGR line, this associated data remains.

Do not reformat the chart after you have added the CAGR line as it will lose its formatting. Instead, delete the existing line and reinsert.

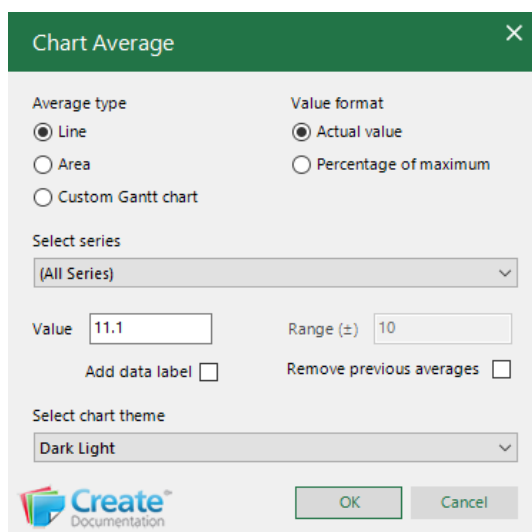
Adding an Average Area or Line

This function calculates and inserts an average line or area on a chart.

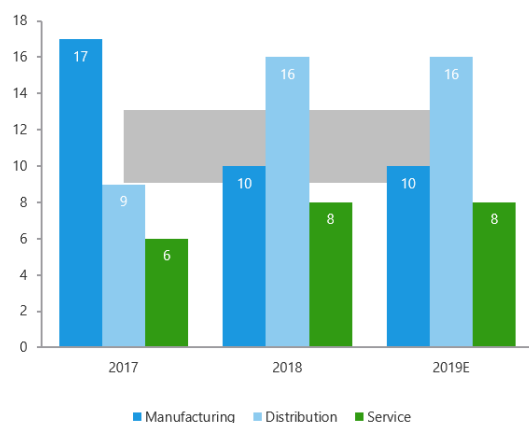
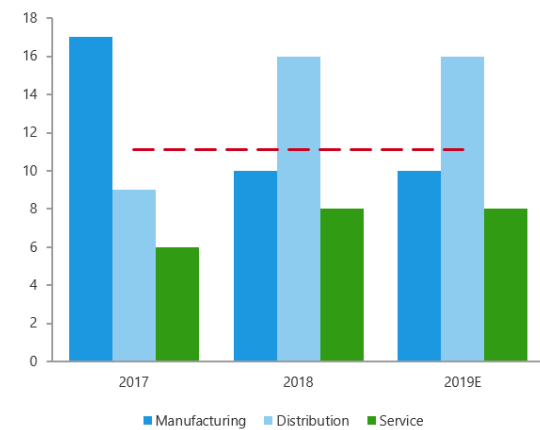


Select the chart.

Select **Average** on the ribbon.



- Under **Average type**, select *Line*, *Area* or *Custom Gantt chart* (see **Bar Gantt Charts** on page 35)
- Under **Value Format**, select *Actual value* or *Percentage of maximum* and the value will be calculated.
- The **Value** field will contain the calculated value, but this can be overwritten.
- Under **Select series**, select the series from which the average is to be calculated.
- Select **Add data label** to display the average value label on the chart.
- Select **Remove previous averages** if there is already an average line or area displayed.
- From the chart theme dropdown select your current chart theme. Click **OK**.



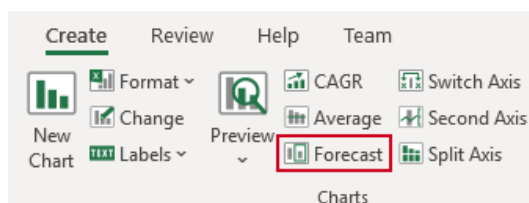
An average line or area will be added to the selected chart, depending on your selection.

Notes

Do not reformat the chart after you have added an Average line or area as it will lose its formatting. Instead, delete the existing one and reinsert.

Adding a Forecast Period

This function adds a shaded region to a chart to represent forecasts. This function can be applied to a chart with a date-based or value category axis.



Select the chart.

Select **Forecast** on the ribbon.

Add Forecast Period

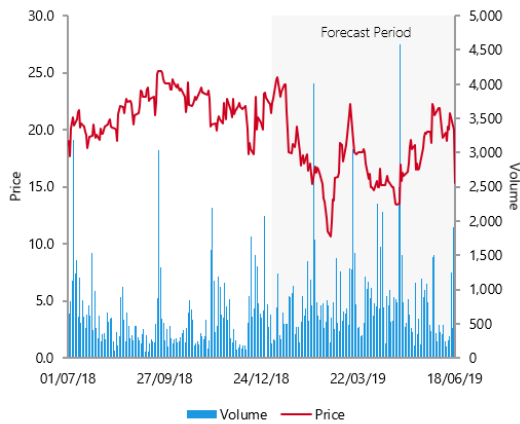
Select forecast period start date

☒ Category axis contains dates

Chart theme

- Select the value or date from which you wish the forecast period to start.
- If the category axis contains dates, check the *Category axis contains dates* box. This will be checked automatically if Create recognises a true value date axis e.g. on a price volume chart.

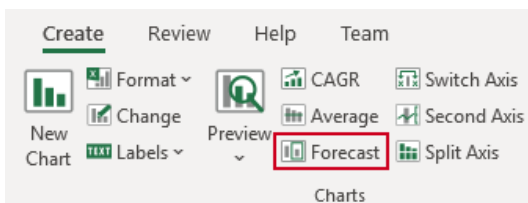
Click **OK**.



A shaded region will be added to the chart with the text *Forecast Period*.

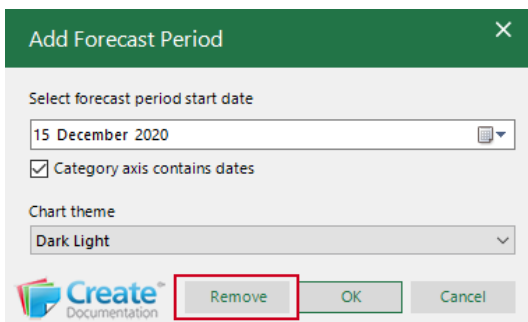
Removing a Forecast Period

This function removes a forecast period that has been inserted using the [Forecast](#) function.



Select the chart containing the forecast period.

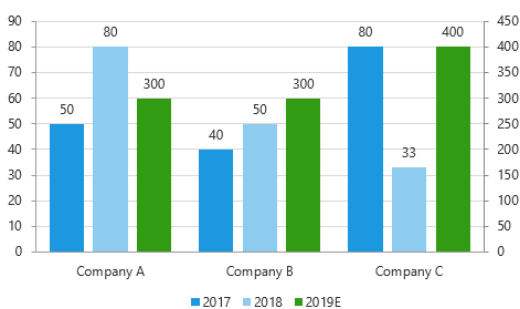
Select [Forecast](#) on the ribbon.



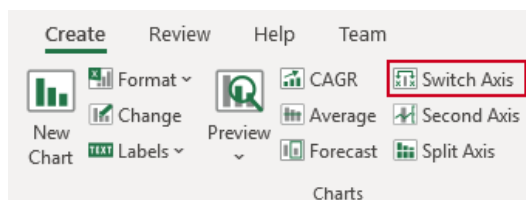
Click [Remove](#).

Switching Axes

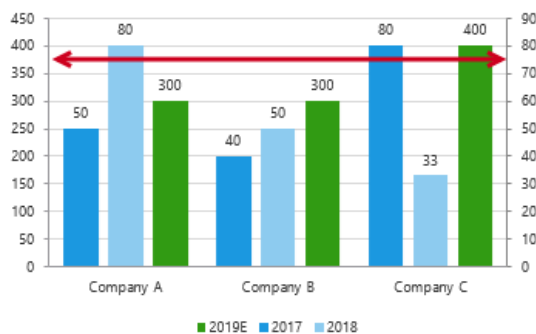
This function swaps the axes on a chart that has two Y-axes.



Select the chart with two axes.



Select **Switch Axis** on the ribbon.



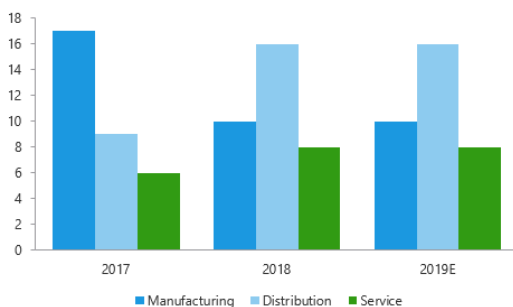
The axes will switch, and the data series will follow.

Notes

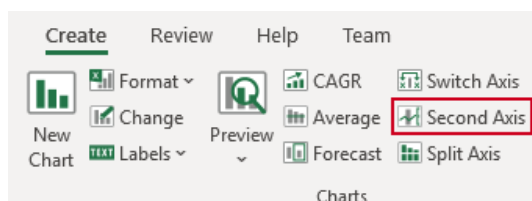
It may be necessary to check formatting of the X and Y axes and scale settings after running this function. If necessary, reformat the chart by selecting *For Excel*, *For PowerPoint* or *For Word* from the Format dropdown in the **Charts** group.

Adding a Second Y Axis

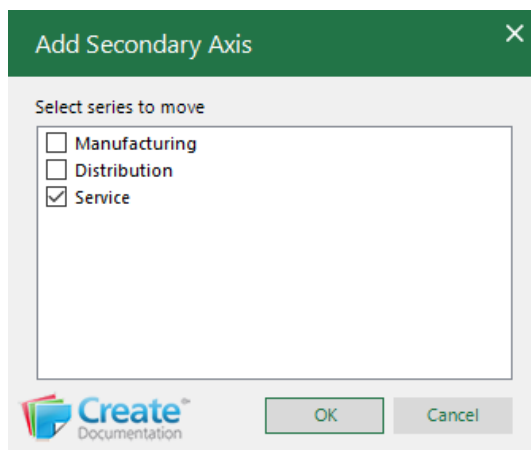
This function adds a secondary value axis to the selected chart and moves one or several selected series to that axis. Where there is an existing secondary axis the user is offered a list of the series on the primary axis to add to the secondary axis.



Select the chart.

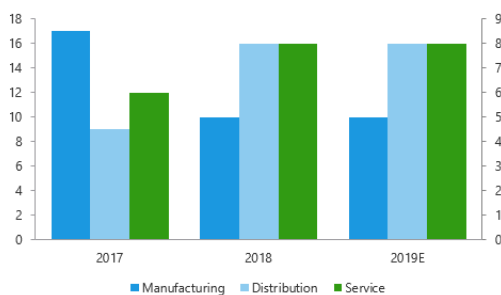


Select **Second Axis** on the ribbon.



Select one or more series that are to be replotted on the secondary axis.

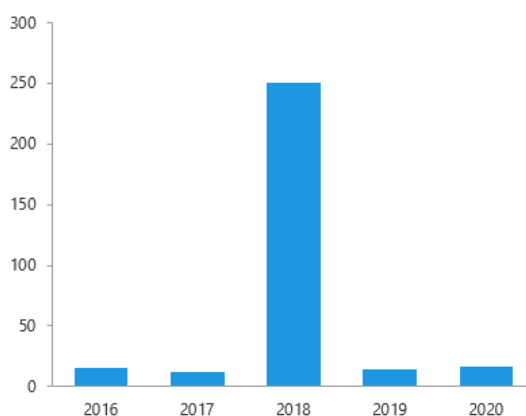
Click **OK**.



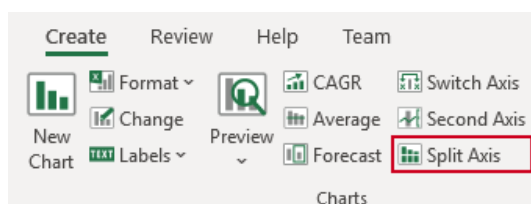
A secondary axis will be added to the chart and the selected series will be replotted on to the new axis.

Splitting the Y Axis

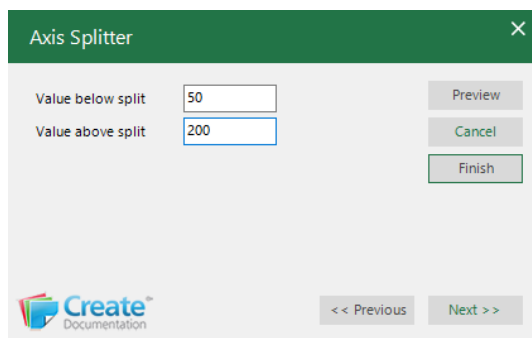
The *Split Axis* wizard guides users through a few simple steps to create a split in the axis, including negative data, to achieve a better representation of the data that would otherwise not be very prominent. It will also update the axis labels accordingly. Make sure you have formatted the chart before you use this function as formatting cannot be applied afterwards.



Select the chart.

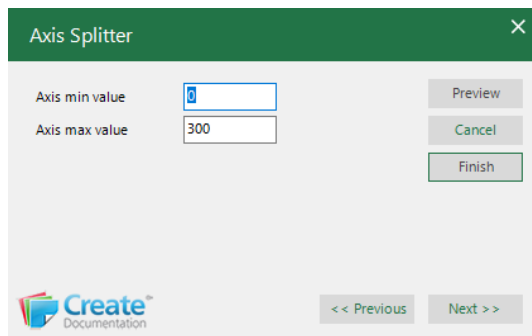


Select **Split Axis** on the ribbon.



The 'Axis Splitter' dialog box has a green header bar with a close button. It contains two input fields: 'Value below split' with the value 50 and 'Value above split' with the value 200. To the right of these fields are three buttons: 'Preview', 'Cancel', and 'Finish'. At the bottom left is the 'Create Documentation' logo, and at the bottom right are '<< Previous' and 'Next >>' buttons.

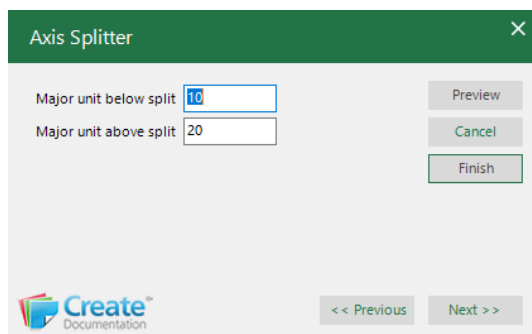
In *Value below split* and *Value above split*, type in the values to appear on the Y-axis below and above the split. Click *Next*.



The 'Axis Splitter' dialog box has a green header bar with a close button. It contains two input fields: 'Axis min value' with the value 0 and 'Axis max value' with the value 300. To the right of these fields are three buttons: 'Preview', 'Cancel', and 'Finish'. At the bottom left is the 'Create Documentation' logo, and at the bottom right are '<< Previous' and 'Next >>' buttons.

In *Axis min value* type in the required minimum Y-axis value.

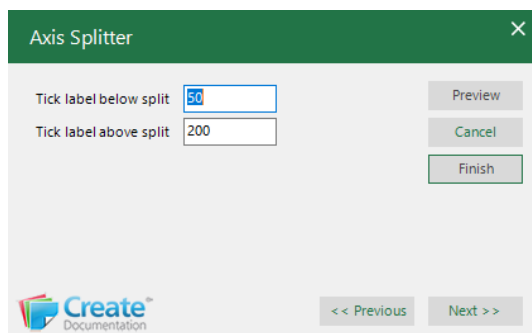
In *Axis max value* type in the required maximum Y-axis value. Click *Next*.



The 'Axis Splitter' dialog box has a green header bar with a close button. It contains two input fields: 'Major unit below split' with the value 10 and 'Major unit above split' with the value 20. To the right of these fields are three buttons: 'Preview', 'Cancel', and 'Finish'. At the bottom left is the 'Create Documentation' logo, and at the bottom right are '<< Previous' and 'Next >>' buttons.

In *Major unit below split* type in the required major units below the split.

In *Major unit above split* type in the required major units above the split. Click *Next*.



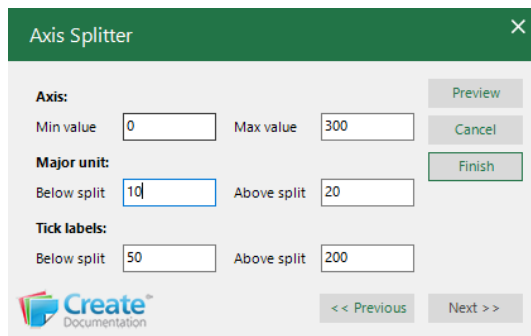
The 'Axis Splitter' dialog box has a green header bar with a close button. It contains two input fields: 'Tick label below split' with the value 50 and 'Tick label above split' with the value 200. To the right of these fields are three buttons: 'Preview', 'Cancel', and 'Finish'. At the bottom left is the 'Create Documentation' logo, and at the bottom right are '<< Previous' and 'Next >>' buttons.

The next dialog will appear with suggested values already completed.

If you wish to change the suggested values, in *Tick label below split* type in the value of the tick label on the Y-axis where you wish the split to start.

In *Tick label above split* type in the value of the tick label on the Y-axis where you wish the split to finish.

Click *Next*.



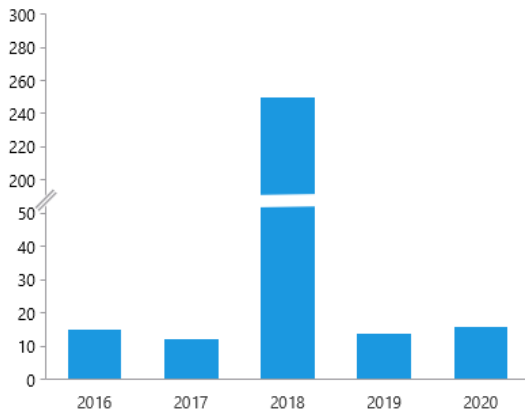
Axis Splitter

Axis:
 Min value: 0 Max value: 300
 Major unit:
 Below split: 1d Above split: 20
 Tick labels:
 Below split: 50 Above split: 200

Buttons: Preview, Cancel, Finish, << Previous, Next >>

The following dialog will appear with all the values displayed.

You can make any changes at this point or to check that the split is correct, you can select Preview before selecting **Finish**. The axis will split, and the axis labels will update accordingly.



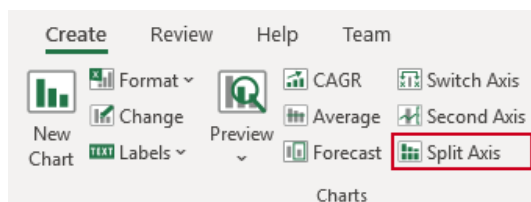
The axis will display a split and the axis labels will update accordingly.

Notes

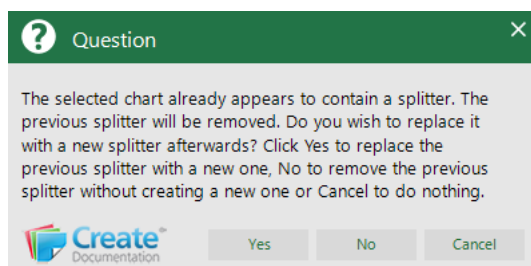
When using this function to create an axis split some dummy data is created on the worksheet. Do not delete or rearrange the data, as this is necessary to ensure the chart is generated correctly.

Removing an Axis Split

You can remove an axis split that has been added using Create by using the **Split Axis** tool again.



Select **Split Axis** on the ribbon.



Question

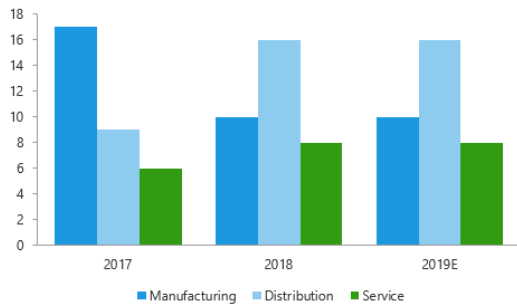
The selected chart already appears to contain a splitter. The previous splitter will be removed. Do you wish to replace it with a new splitter afterwards? Click Yes to replace the previous splitter with a new one, No to remove the previous splitter without creating a new one or Cancel to do nothing.

Buttons: Yes, No, Cancel

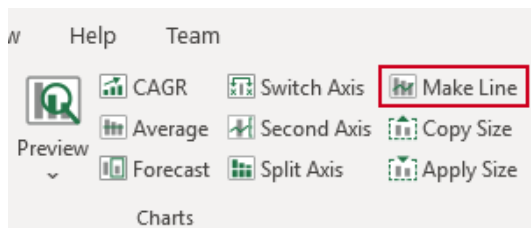
This message will appear. Click **No** to remove the split.

Changing a Data Series to a Line

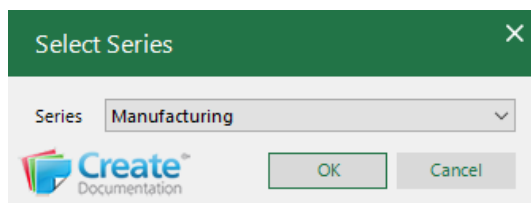
This function changes the chart type of a selected series to a line.



Select the chart.

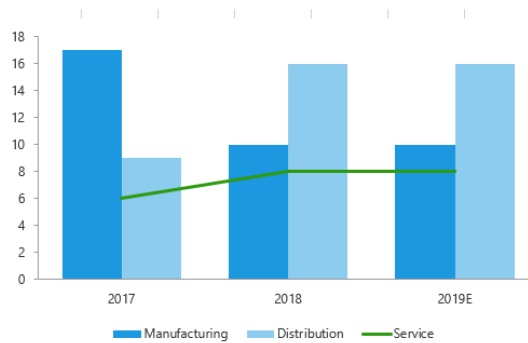


Select **Make Line** on the ribbon.



From the **Series** dropdown, select the series that is to be made into a line.

Click **OK**.

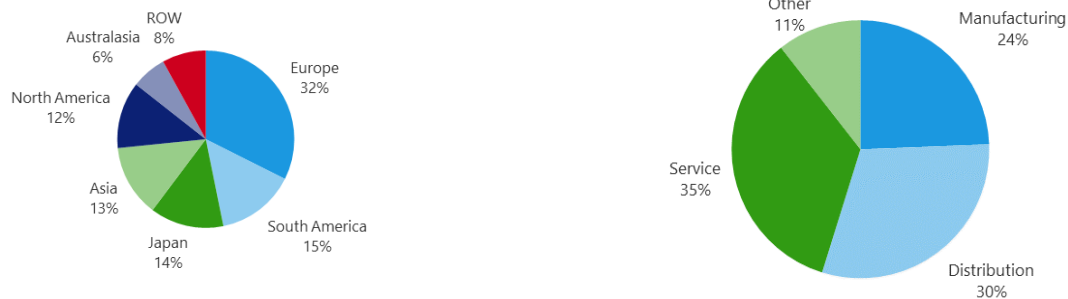


The chart type of the selected series will become a line.

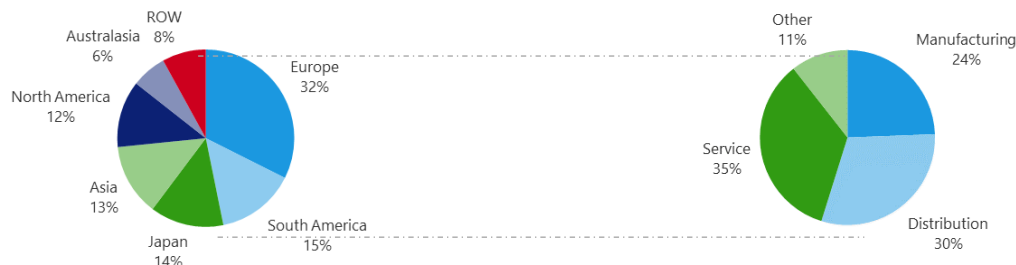
Copying the Size of a Chart

This function copies the size of the chart area, the size of the plot area and the position of the chart so that these attributes can be applied to the plot area of another chart resulting in consistency in the look of charts.

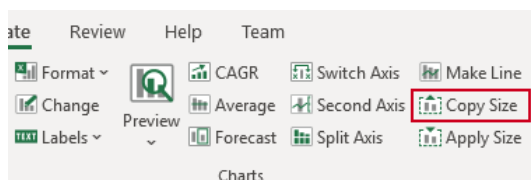
Before using the copy/apply size function



After using the copy/apply size function

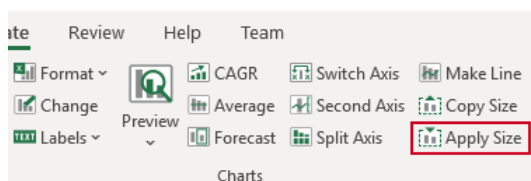


Firstly, make you sure have formatted and resized all charts to fit the placeholders in PowerPoint or the exhibits in Word.



Select the chart whose properties you wish to copy.

Select **Copy Size** on the ribbon.

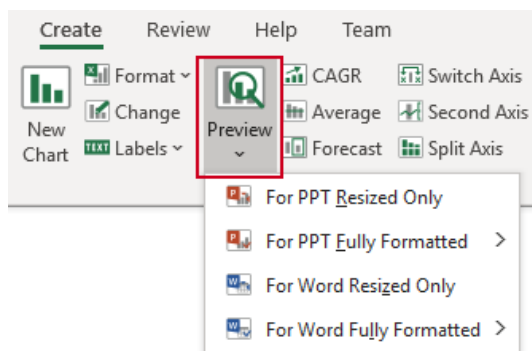


To apply the properties to another chart, select the chart and select **Apply Size**.

Apply to more charts if required.

Previewing Charts

You can preview charts with formatting or resizing applied before sending them to PowerPoint or Word.



To resize the chart to fit a placeholder in PowerPoint or Word, select the placeholder first.

In Excel, select the chart.

From the **Preview** dropdown, select one of the following

- **For PPT or Word Resized Only** resizes to fit the placeholder only
- **For PPT or Word Fully Formatted** formats with one of your organisation's customised chart themes and resizes the chart to fit the placeholder.

Copying Charts from Excel to PowerPoint or Word

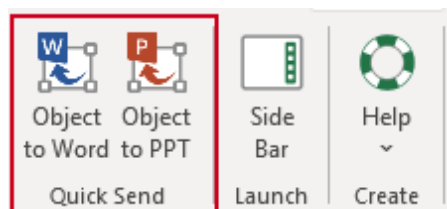
Use Create to export charts from Excel to PowerPoint or Word. These charts can then be updated in PowerPoint and Word using Create because they are linked to the original data.

There are several options available when copying charts to PowerPoint or Word.

Make sure you copy the chart into a placeholder in Word or PowerPoint to ensure correct sizing and positioning on the page/slide.

Quick Send

This function will detect whether you have a chart or table selected in Excel, and send it to PowerPoint or Word, using a pre-defined method. Tables will be copied across as pictures and scaled to fit the selected placeholder in PowerPoint or Word. Charts will be resized in Excel to fit the selected PowerPoint or Word placeholder and then copied as charts (not pictures).



Make sure you have a placeholder selected in PowerPoint or Word.

In Excel, select the chart and from the **Quick Send** group, select **Object to PPT** or **Object to Word**.

The chart will be pasted into Word or PowerPoint with a link to the original in Excel.

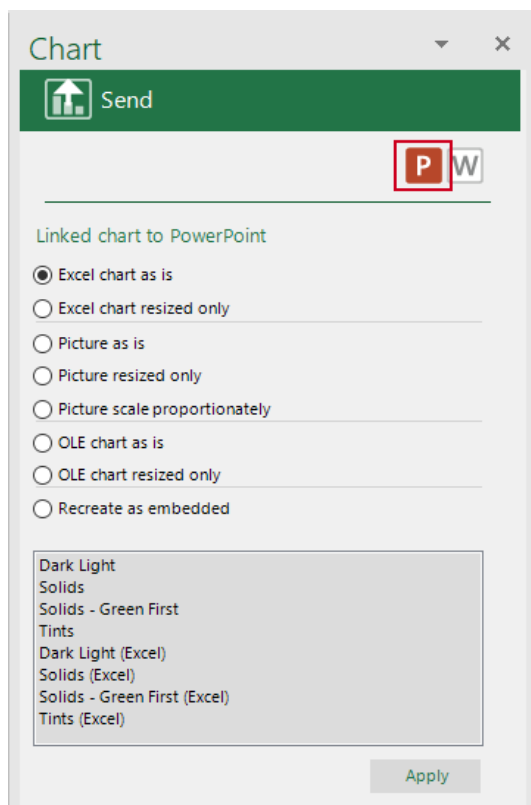
Other Methods of Copying Charts to PowerPoint

In addition to using **Quick Send** to send charts from Excel, there are other methods available on the **Chart** task pane.

Select a placeholder in PowerPoint first, to ensure correct sizing and positioning on the slide. In Excel, select the chart.



Select **Send Chart** on the side bar.



The **Chart** task pane will open at the **Send** panel.

Choose **PowerPoint** and then select your preferred method of copying

- **Excel charts** – this method does not embed the Excel file into the object in PowerPoint, but it does link the chart to the Excel source data, allowing you to update the chart in PowerPoint if the data changes in Excel. Once in PowerPoint you can resize the Excel chart, but you will need to return to the source in Excel to edit the data.
- **Pictures** – this method does not allow you to edit the chart in PowerPoint, but it does link the chart to the Excel source data, allowing you to update the chart in PowerPoint if the data changes in Excel.
- **OLE charts** – sends the chart to PowerPoint as an OLE chart, without resizing or formatting. OLE charts are linked to the original Excel source data and will update automatically in PowerPoint without the need to use the *Update* function or to save the Excel file.
- **Recreated as embedded charts** – copies the data and format of the chart, recreates and resizes the chart into a selected PowerPoint placeholder, as an embedded object. Charts can then be edited in PowerPoint by right-mouse-clicking and choosing *Edit Data*. When selecting this option, the choice of chart themes will become available.

Additionally

- **As is** – does not make any changes to either the formatting or the size of the Excel chart before copying it as an Excel chart into PowerPoint.
- **Resized only** - resizes the chart in Excel to fit a PowerPoint placeholder.
- **Scale proportionately** - copies the chart and scales it proportionately for a better fit to the selected PowerPoint placeholder.
- Click **Apply**

The chart will be copied to the placeholder in PowerPoint using the method selected.

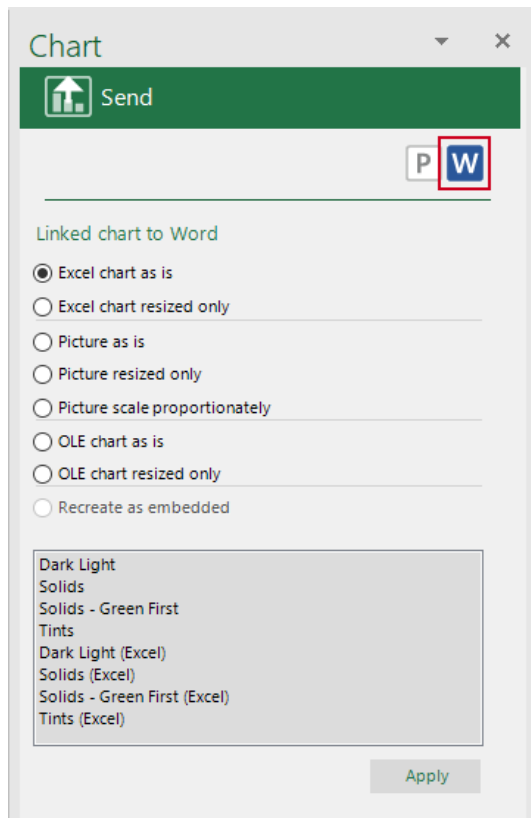
Other Methods of Copying Charts to Word

In addition to using **Quick Send** to send charts from Excel, there are other methods available on the **Chart** task pane.

Place your cursor in a placeholder in Word, to ensure correct sizing and positioning on the page. In Excel, select the chart.



Select **Send Chart** on the side bar.



The **Chart** task pane will open at the **Send** panel.

Choose **Word** and then select your preferred method of copying

- **Excel charts** – this method does not embed the Excel file into the object in Word, but it does link the chart to the Excel source data, allowing you to update the chart in Word if the data changes in Excel. Once in Word you can resize the Excel chart, but you will need to return to the source in Excel to edit the data.
- **Pictures** – this method does not allow you to edit the chart in Word, but it does link the chart to the Excel source data, allowing you to update the chart in Word if the data changes in Excel.
- **OLE charts** – sends the chart to Word as an OLE chart, without resizing or formatting. OLE charts are linked to the original Excel source data and will update automatically in Word without the need to use the *Update* function or to save the Excel file.

Additionally

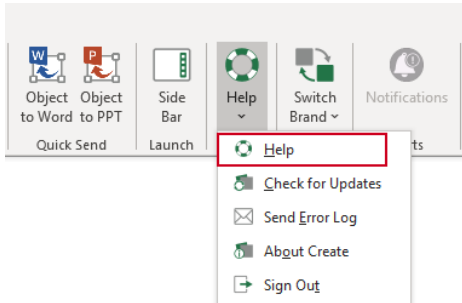
- **As is** – does not make any changes to either the formatting or the size of the Excel chart before copying it as an Excel chart into PowerPoint.
- **Resized only** - resizes the chart in Excel to fit a PowerPoint placeholder.
- **Scale proportionately** - copies the chart and scales it proportionately for a better fit to the selected PowerPoint placeholder.
- Click **Apply**

The chart will be copied to the placeholder in PowerPoint using the method selected.

Help and Support

An online help is available in each programme in Create (i.e. Word, PowerPoint and Excel).

To access the help menu:



On the **Create** ribbon select **Help**.

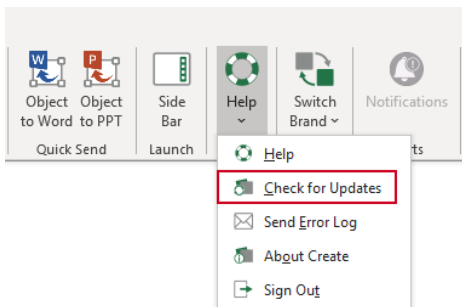
From the dropdown menu select **Help**.

On the contents pane, main topic headings are listed on the left of the window. A tick next to a topic indicates that further subtopics are available under the selected topic. A plus sign indicates that selecting the topic will display the topic text and no further subtopics.

Check for Updates

This option allows the user to download any recent updates to the **Create** software including updates to client customisations, licensing, product features, enhancements and fixes and the **Help** user guide.

To check for updates:



On the **Create** ribbon select **Help**.

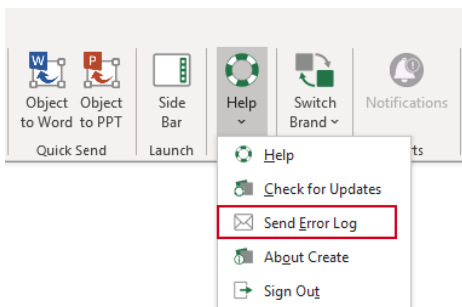
From the dropdown menu select **Check for Updates**

This will prompt the software to download any updates.

Send Error Log

Sending us the Create error log if you have experienced problems using Create will allow us to investigate the issue promptly. This function will generate the error log to the support helpdesk (support@presentationsolutions.co.uk) in the background. If you send the error log, please follow up with an email describing the problem and what you were trying to achieve, so that we can follow up with you.

To send the error log:



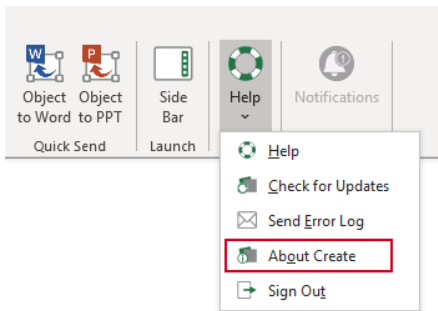
On the **Create** ribbon select **Help**.

From the dropdown menu select **Send Error Log**

The error log will be sent to the support team at Presentation Solutions who will contact you to help resolve the issue.

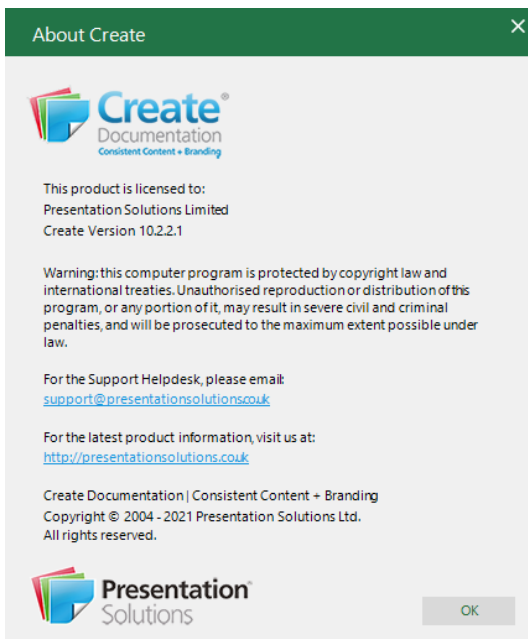
About Create

This option tells you which version of the software is installed on your computer. The **Create** software in Excel, PowerPoint and Word (if your version includes Word) will be the same version number.



On the **Create** ribbon select **Help**.

From the dropdown menu select **About Create**.



The dialog will contain details of the current version of Create you are using and a link to the support team email inbox at Presentation Solutions.

Instruction Manuals, Quick Reference Guides and FAQs

For further copies of the instruction manuals, quick reference guides (QRG) and Frequently Asked Questions (FAQ) click the link below.

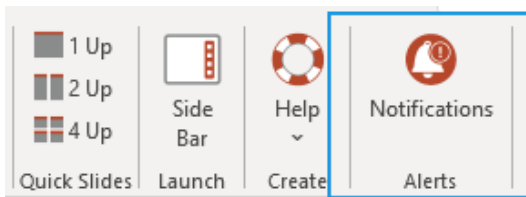
Create V10 Documentation

Notifications

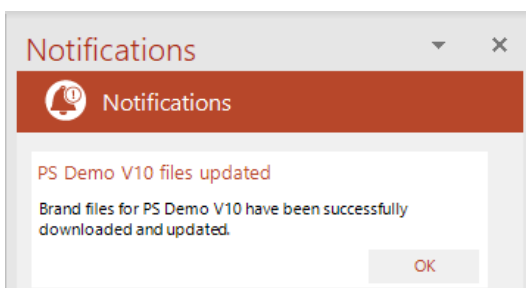
Assets are uploaded by designated authors within your organisation and can be marked as *updateable*. The *Notifications* button will be enabled if:

- there have been updates to your brand files from Presentation Solutions
- there have been changes to any updateable PowerPoint assets in your brand
- an author (including yourself, if you are an author) has uploaded new assets to Create in PowerPoint, Word or Excel.

The Notifications panel will display the same information whether you are in PowerPoint, Excel or Word (if your version of Create includes Word). The examples below are from PowerPoint.



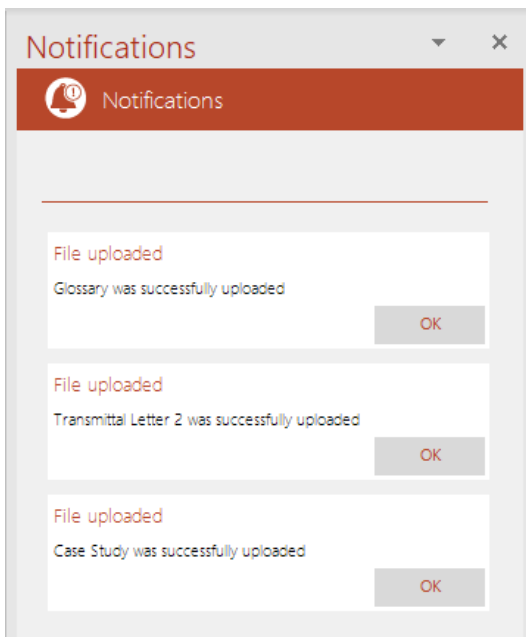
Click on **Notifications** in the ribbon.



The **Notifications** task pane will open.

If there have been updates to any files in your brand, the *Brand name updated* message will appear.

Click **OK** to open the next pane which will list the updates.



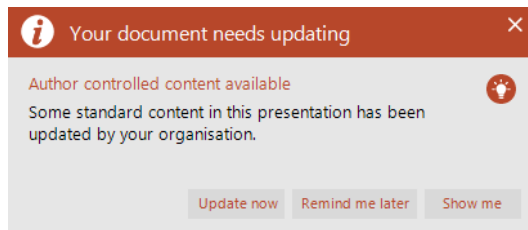
The files will be uploaded and you can close the task pane.

This information will be the same in PowerPoint, Excel and Word (if Word is included in your Create customisation).

Notes

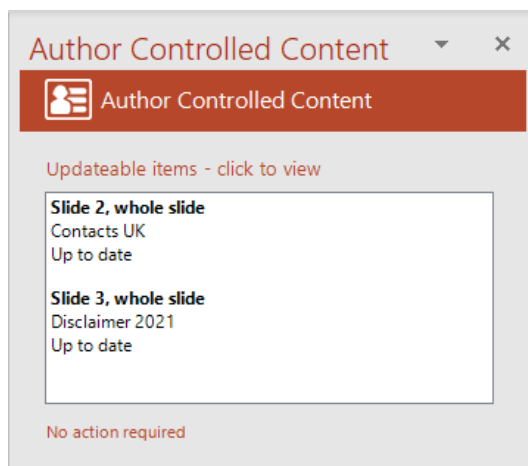
If you do not select it, the **Notifications** button will remain enabled and any updated assets in your presentation will not be updated.

Author Controlled Content



If you have opened a PowerPoint presentation that contains updateable assets that have been updated, this message will appear.

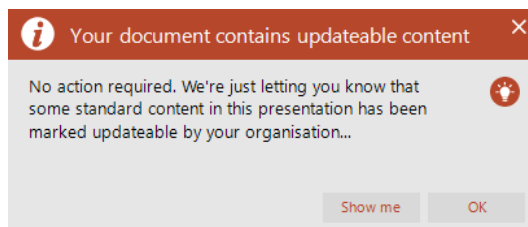
Click *Update* to update the assets in your presentation or *Remind me later* to close the message without updating the content – the message will reappear until you update. Click *Show me* to open the **Author Controlled Content** pane.



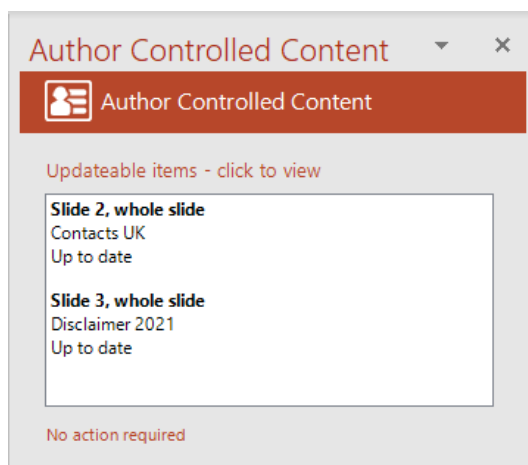
The **Author Controlled Content** pane will open listing the assets that have been updated.

Click on an item in the list to go to that place in the presentation.

Deleted assets will also be listed here but they will not be deleted from your presentation.



If you have opened a PowerPoint presentation that contains updateable assets that have not been updated, this message will appear – for information only.



Click *Show me* to view the content or *Ok* to close the pane.

Authoring in Create V10

Authors can upload content or assets to the Create software by means of cloud synchronisation. All uploaded assets can be centrally controlled by the author. For example, in PowerPoint, they can add a new slide to the Create Layouts and allow certain users or groups of users to access it. This means users always have access to the latest versions of corporate information. If a new version of the slide is uploaded by the author and that slide has been marked as *updateable* the user will be reminded to update to the latest version if they open a presentation containing that layout.

Assets that can be uploaded to PowerPoint include Layouts, Images and Shapes. In Excel, authors can upload workbooks (the updateable feature is not available).

Additionally, authors can manage company information which can include office addresses, registered company text and copyright dates. This can be done in Word, PowerPoint or Excel.

If you are an author in your organisation, you will see the **Author** button on the Create side bar in Word, PowerPoint or Excel.



Select **Author** on the side bar.

The **Author** task pane will open and will look different depending on the application.

Uploading Assets in PowerPoint

In PowerPoint authors can upload additional slide layouts, images and shapes and make them available to groups of users. These uploaded assets are edited from the *Layouts, Images* or *Shapes & Symbols* task pane.

Uploading Layouts

Go to the Layout slide you wish to upload. Make sure the presentation is saved.



Select *Author* on the side bar.

Author

Upload Assets

Name (e.g. Contact slide)
Contact slide New

Publish date
18 December 2020

Expiry date (optional)
☐ Set expiry date
18 December 2020

Updateable
☐ Item can be automatically updated in a document

Upload to
☒ Layouts ☐ Images ☐ Shapes

Use a current search folder or create new search folder
☒ Use existing ☐ Create new

PSL

Create new search tags (add a space between each tag)
Contacts Addresses

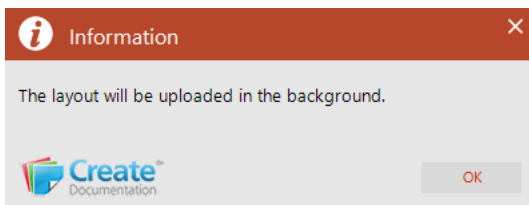
OK

The **Author** task pane will open at the **Upload Assets** panel.

Complete the details of the new layout:

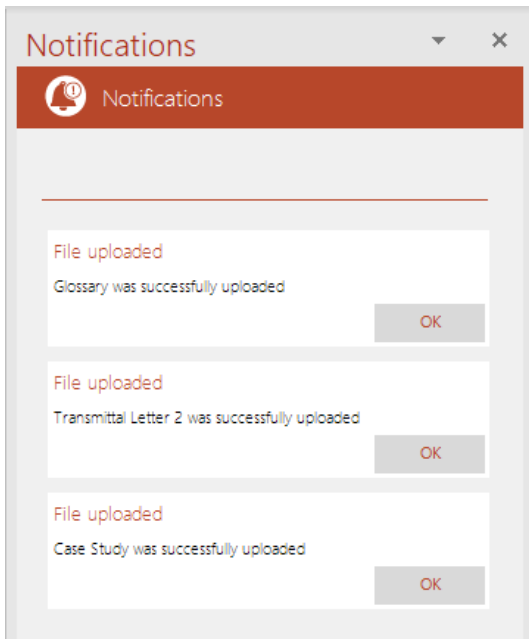
- **Name:** The name that you choose will appear underneath the layout thumbnail in the **Layouts** task pane once the layout is uploaded.
- **Publish date:** Defaults to the current day, month and year. To choose a future date, click on the calendar button and select the date. The recorded publish date and time will be in the same time zone as that of the author. **Users** will not be able to see any assets that have a future publish date until that date. Other **authors** will be able to see it before the publish date.
- **Expiry date:** This field is optional. If you want a layout to be available for a limited period only, check *Set expiry date*, click on the calendar button and select the date. The recorded expiry date will be in the same time zone as that of the author.
- **Updateable:** This field is optional. Check the box to mark a layout as updateable. When a presentation containing updateable out-of-date layouts is opened, the user will be prompted to update.
- **Upload to:** Defaults to *Layouts* to upload to the **Layouts** task pane.
- **Use a current search folder or create a new search folder:** Defaults to *Use existing*. Select the folder in which you would like to place your layout from the drop-down list or select *Create new* to create a new folder to contain your layout.
- **Create a new search tag:** This field is optional. Add relevant searchable tags for the slide with a space between tag names. Note, tags are automatically created based on the content of the slide (i.e. all the text) – the tags added here are additional.
- **Select User Groups:** This is enabled if multiple user groups are enabled for your organisation on the client portal. Check the boxes for all the user groups who should have access to the asset that you are uploading.

Click **OK**.



- If you haven't saved the presentation you will be prompted to do so.
- A message confirming that the layout will be uploaded appears.

Click **OK**.



Select the **Notifications** button on the ribbon, once it's enabled, to view a list of the updates.

Click **OK** to clear the notifications, or you can just close the dialog.

Users will receive their own notifications informing them of any updates to updateable assets. See **Notifications** on page 67.

Uploading Images

Select the image you wish to upload.



Author

Upload Assets

Name (e.g. Contact slide)
Office

Publish date
06 January 2021

Expiry date (optional)
☐ Set expiry date
06 January 2021

Updateable
☒ Item can be automatically updated in a document

Upload to
☐ Layouts ☒ Images ☐ Shapes

Create new search tags (add a space between each tag)
Office desk telephone

OK

Select **Author** on the side bar.

The **Author** task pane will open at the **Upload Assets** panel.

Complete the details of the new image:

- **Name:** The name that you choose will appear underneath the image thumbnail in the **Images** task pane once the image is uploaded.
- **Publish date:** Defaults to the current day, month and year. To choose a future date, click on the calendar button and select date from the calendar that appears. The recorded publish date will be in the same time zone as that of the author.
- **Expiry date:** This field is optional. If you want an image to be available for a limited period only, check *Set expiry date*, click on the calendar button and select the date. The recorded expiry date will be in the same time zone as that of the author.
- **Updateable:** This field is optional. Check the box to mark an image as updateable. When a presentation containing updateable out-of-date images is opened, the user will be prompted to update to the latest version.
- **Upload to:** Select *Images* to upload to the **Images** task pane.
- **Create a new search tag:** This field is optional. Add relevant searchable tags for the slide with a space between tag names.
- **Select User Groups:** This is enabled if multiple user groups are enabled for your organisation on the client portal. Check the boxes for all the user groups who should have access to the asset that you are uploading.

Uploading Shapes

Select the shape you wish to upload.



Author

Upload Assets

Name (e.g. Contact slide)
Company Org Chart

Publish date
07 January 2021

Expiry date (optional)
☒ Set expiry date
07 January 2021

Updateable
☒ Item can be automatically updated in a document

Upload to
☐ Layouts ☐ Images ☒ Shapes

Use a current search folder or create new search folder
☒ Use existing ☐ Create new

Org Chart

Create new search tags (add a space between each tag)
Company Organisation Roles

OK

Select **Author** on the side bar.

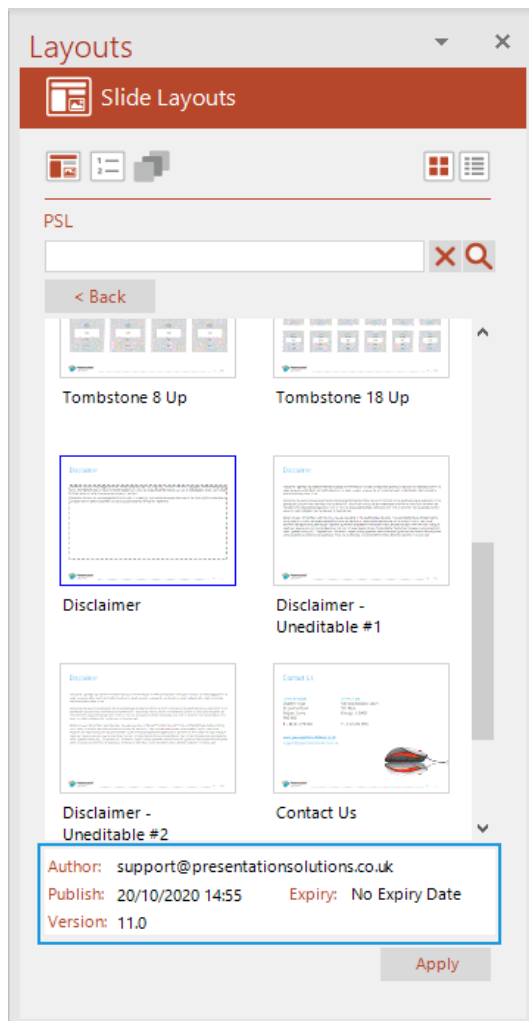
The **Author** task pane will open at the **Upload Assets** panel.

Complete the details of the new shape:

- **Name:** The name that you choose will appear underneath the shape thumbnail in the **Shapes & Symbols** task pane once the shape is uploaded.
- **Publish date:** Defaults to the current day, month and year. To choose a future date, click on the calendar button and select date from the calendar that appears. The recorded publish date will be in the same time zone as that of the author.
- **Expiry date:** This field is optional. If you want a shape to be available for a limited period only, check *Set expiry date*, click on the calendar button and select the date. The recorded expiry date will be in the same time zone as that of the author.
- **Updateable:** This field is optional. Check the box to mark a shape as updateable. When a presentation containing updateable out-of-date shapes is opened, the user will be prompted to update to the latest version.
- **Upload to:** Select *Shapes* to upload to the **Shapes & Symbols** task pane.
- **Use a current search folder or create a new search folder:** Defaults to *Use Existing*. Select the folder in which you would like to place your shape from the drop-down list or select *Create new* to create a new folder to contain your shape.
- **Create a new search tag:** This field is optional. Add relevant searchable tags for the slide with a space between tag names. Note, tags are automatically created based on the content of the slide – the tags added here are additional.
- **Select User Groups:** this is enabled if multiple user groups are enabled for your organisation on the client portal. Check the boxes for all the user groups who should have access to the asset that you are uploading.

Editing Assets

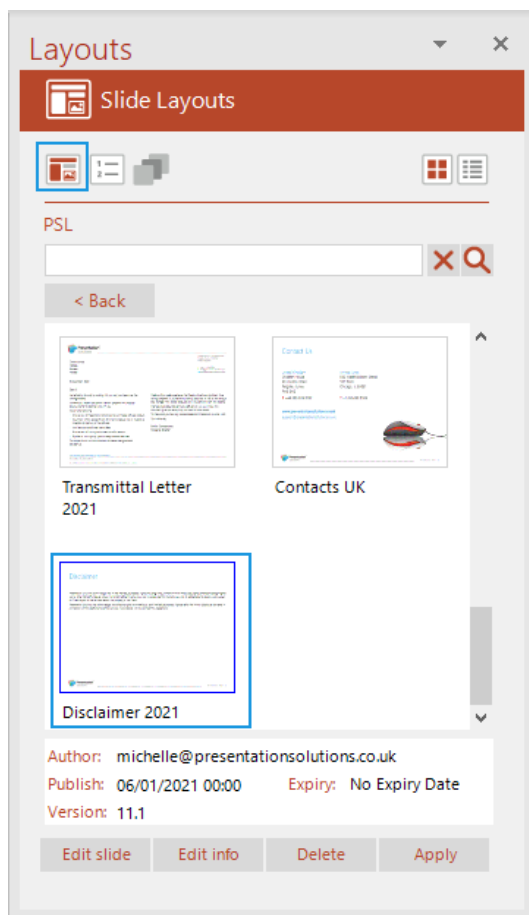
Existing assets are edited using the pane from which they are inserted (i.e. the **Layouts** or **Shapes** task panes). Only assets which have been uploaded by a client author can be edited. Assets built into Create by Presentation Solutions cannot be edited by authors.



This is the **Layouts** task pane for an author-generated layout as seen by a **user**.

Users will only see assets that are within the publish date and expiry date.

When a user selects an author-generated asset in the task pane, they will see the following information: *author email address, publish date, expiry date and version number*.



This is the **Layouts** task pane for an author-generated layout as seen by an **author**.

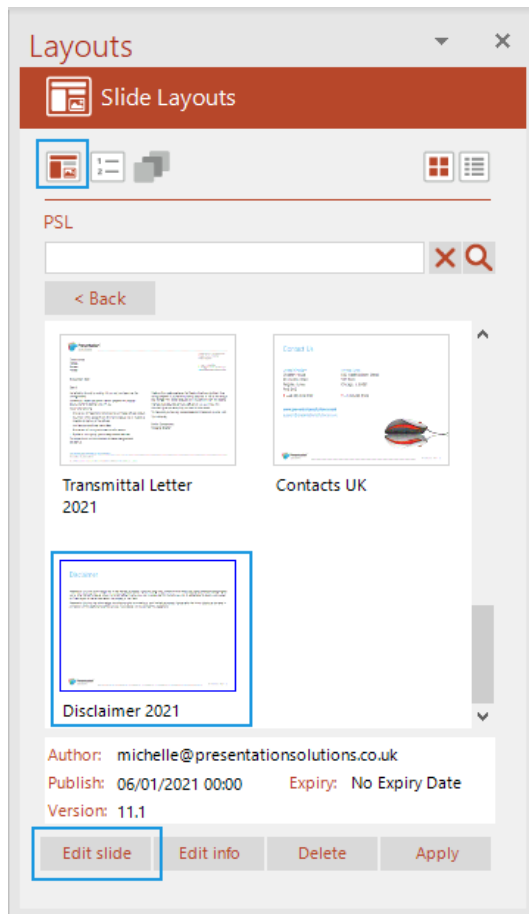
Authors will see all assets, including those that are not yet published.

When an author selects an asset, they also get the option to *Edit Slide*, *Edit Info* and *Delete* the asset.

Editing Layouts

As an author, you can *Edit Slide* which allows you to make changes to the slide itself, or *Edit Info* which allows you to make changes to the information pertaining to the slide such as expiry or publish date.

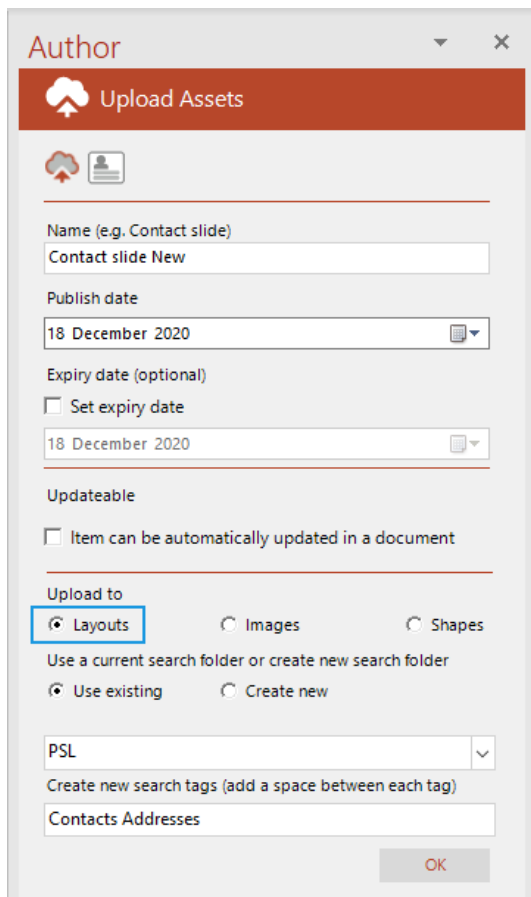
If you are an author and you wish to **replace** an existing author-generated slide:



Go to the new version of the layout in your presentation.
Save the file.

Open the *Layouts* task pane at the **Layouts** panel.

Select the layout you wish to replace and select *Edit Slide*.



The screenshot shows the 'Author' task pane with the 'Upload Assets' sub-pane active. It contains the following fields and options:

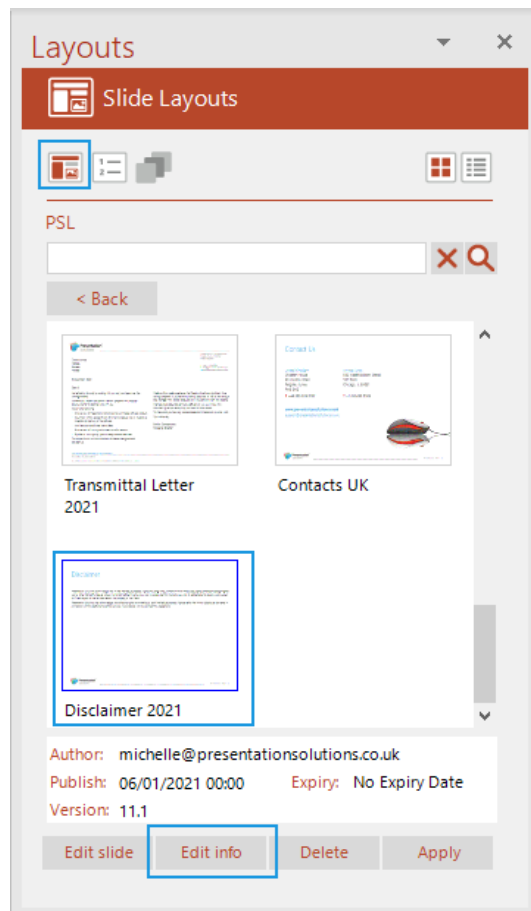
- Name (e.g. Contact slide):** Text input field containing 'Contact slide New'.
- Publish date:** Date picker showing '18 December 2020'.
- Expiry date (optional):** A checkbox labeled 'Set expiry date' is unchecked. Below it, a date picker shows '18 December 2020'.
- Updateable:** A checkbox labeled 'Item can be automatically updated in a document' is unchecked.
- Upload to:** Three radio buttons: 'Layouts' (selected and highlighted with a blue box), 'Images', and 'Shapes'.
- Use a current search folder or create new search folder:** Two radio buttons: 'Use existing' (selected) and 'Create new'.
- PSL:** A dropdown menu showing 'PSL'.
- Create new search tags (add a space between each tag):** Text input field containing 'Contacts Addresses'.
- OK:** A button at the bottom right.

The **Author** task pane will open and the existing information for the slide will be displayed.

You can also make any required changes to the information if you need to. Otherwise click **OK**.

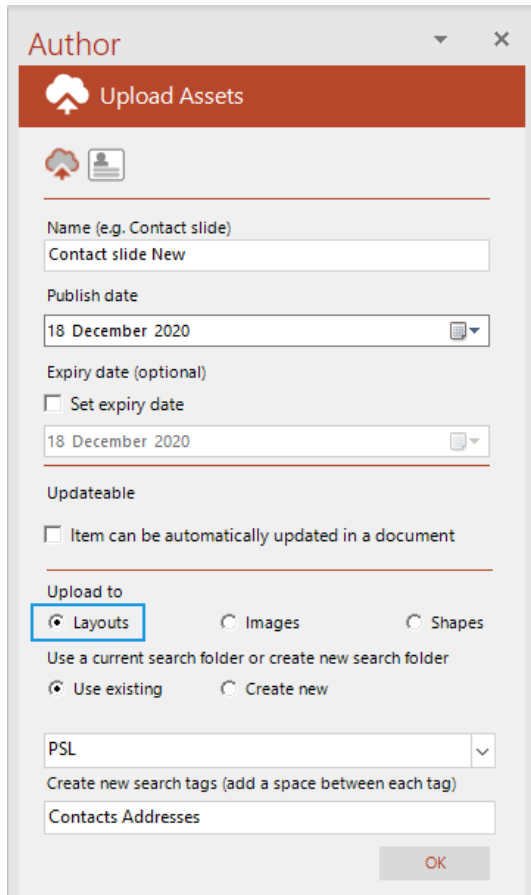
The new slide that you had selected in your presentation will replace the one that had previously been uploaded.

If you are an author and you wish to **edit the info** of an existing author-generated slide:



Open the **Layouts** task pane at the **Layouts** panel.

Select the layout whose info you wish to edit and select **Edit Info**.



The screenshot shows the 'Author' task pane with the 'Upload Assets' section active. The 'Name' field is set to 'Contact slide New'. The 'Publish date' is '18 December 2020'. The 'Expiry date (optional)' is also '18 December 2020'. The 'Updateable' checkbox is unchecked. The 'Upload to' section has 'Layouts' selected. The 'Use a current search folder or create new search folder' section has 'Use existing' selected. The 'PSL' dropdown is set to 'PSL'. The 'Create new search tags' field contains 'Contacts Addresses'. The 'OK' button is at the bottom right.

Author

Upload Assets

Name (e.g. Contact slide)
Contact slide New

Publish date
18 December 2020

Expiry date (optional)
☐ Set expiry date
18 December 2020

Updateable
☐ Item can be automatically updated in a document

Upload to
☒ Layouts ☐ Images ☐ Shapes

Use a current search folder or create new search folder
☒ Use existing ☐ Create new

PSL

Create new search tags (add a space between each tag)
Contacts Addresses

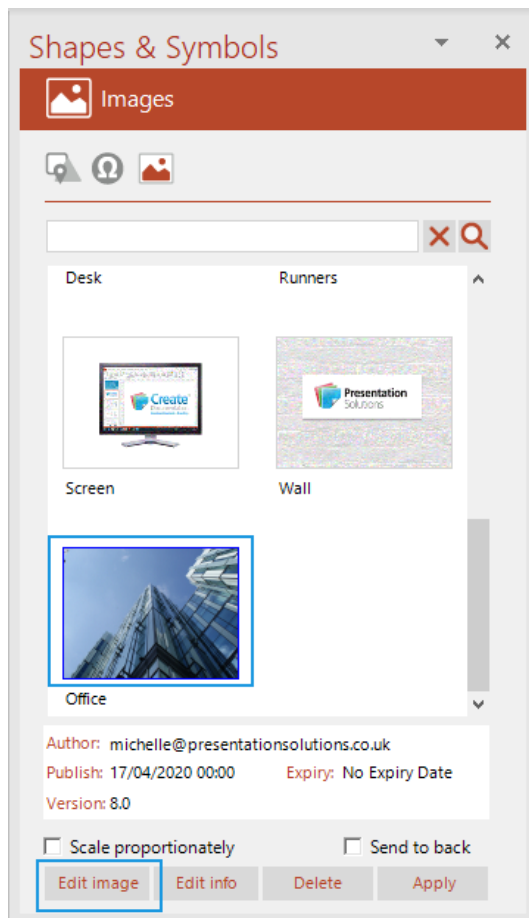
OK

The **Author** task pane will open and the existing information for the slide will be displayed.

Make any required changes to the information e.g. the name and click **OK**.

Editing Images

If you are an author and you wish to **replace** an existing author-generated image:

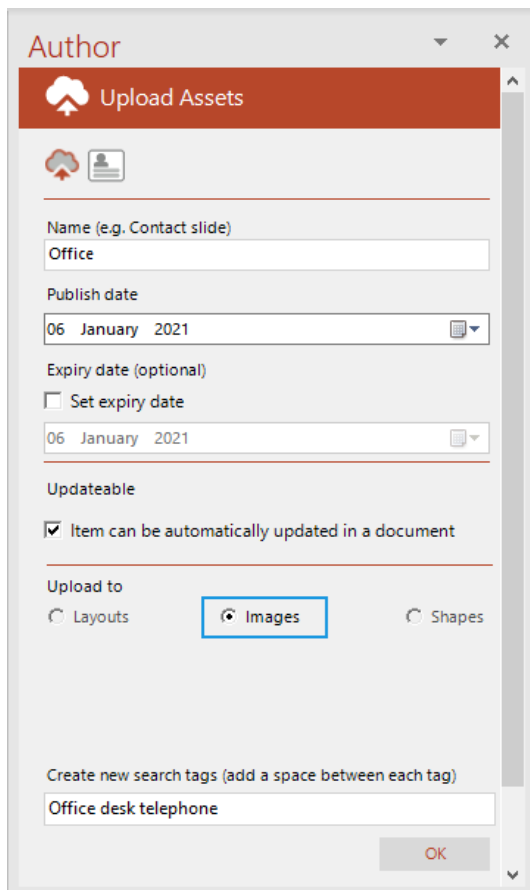


Select the new version of the image in your presentation.

Open the *Shapes & Symbols* pane at the **Images** panel.

Select the image you wish to replace in the *Layouts* task pane and choose *Edit Image*.

The new image that you had selected in your presentation will replace the one that had previously been uploaded.

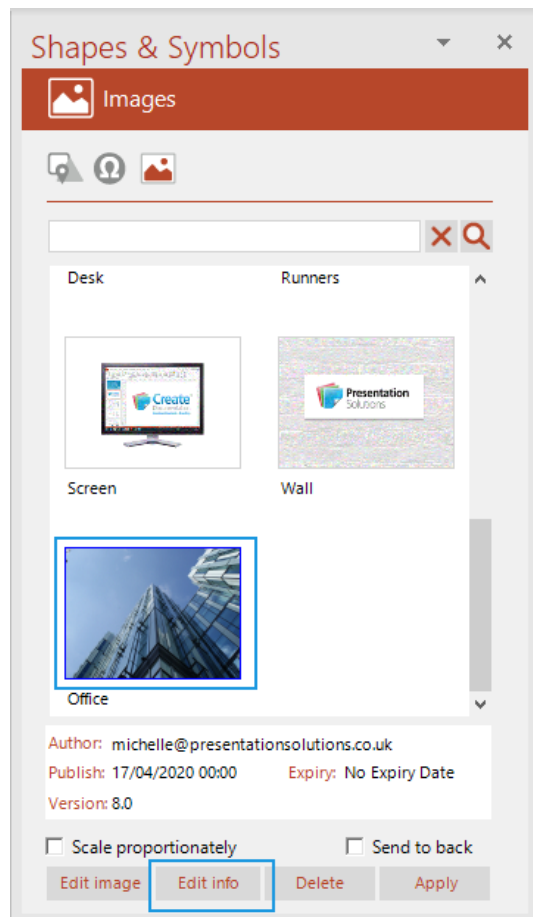


The screenshot shows the 'Author' task pane with a red header bar containing a cloud icon and the text 'Upload Assets'. Below the header, there are two icons: a cloud and a person. The main content area is divided into sections by horizontal lines. The first section is 'Name (e.g. Contact slide)' with a text input field containing 'Office'. The second section is 'Publish date' with a date picker showing '06 January 2021'. The third section is 'Expiry date (optional)' with a checkbox labeled 'Set expiry date' and a date picker showing '06 January 2021'. The fourth section is 'Updateable' with a checked checkbox labeled 'Item can be automatically updated in a document'. The fifth section is 'Upload to' with three radio buttons: 'Layouts', 'Images' (which is selected and highlighted with a blue border), and 'Shapes'. The sixth section is 'Create new search tags (add a space between each tag)' with a text input field containing 'Office desk telephone'. At the bottom right, there is an 'OK' button.

The *Author* task pane will open and the existing information for the image will be displayed.

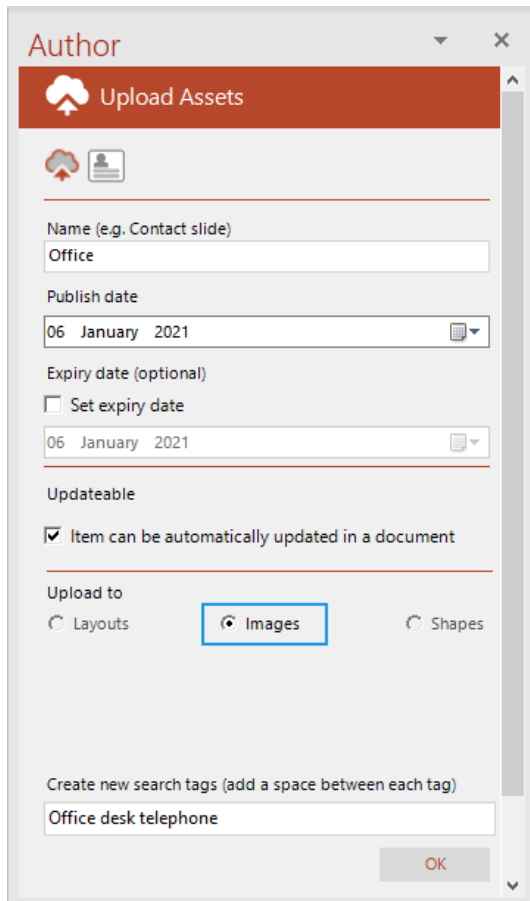
Make any required changes to the information and click *OK*.

If you are an author and you wish to **edit the info** of an existing author-generated image:



Open the *Shapes & Symbols* pane at the **Images** panel

Select the image whose info you wish to edit and select *Edit Info*.



The screenshot shows the 'Author' task pane with the 'Upload Assets' sub-pane active. It contains several input fields and checkboxes for asset management. The 'Name' field is set to 'Office'. The 'Publish date' is '06 January 2021'. The 'Expiry date' is also '06 January 2021', with a checkbox for 'Set expiry date' which is currently unchecked. Under the 'Updateable' section, the checkbox 'Item can be automatically updated in a document' is checked. In the 'Upload to' section, the 'Images' radio button is selected and highlighted with a blue box, while 'Layouts' and 'Shapes' are unselected. At the bottom, there is a text field for 'Create new search tags' containing 'Office desk telephone' and an 'OK' button.

Author

Upload Assets

Name (e.g. Contact slide)
Office

Publish date
06 January 2021

Expiry date (optional)
☐ Set expiry date
06 January 2021

Updateable
☒ Item can be automatically updated in a document

Upload to
☐ Layouts ☒ Images ☐ Shapes

Create new search tags (add a space between each tag)
Office desk telephone

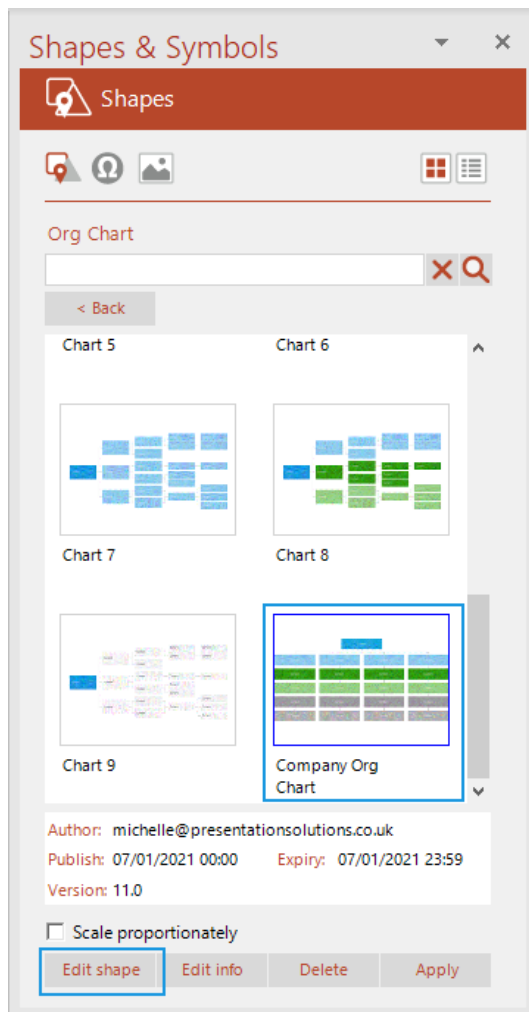
OK

The **Author** task pane will open and the existing information for the image will be displayed.

Make any required changes to the information and click **OK**.

Editing Shapes

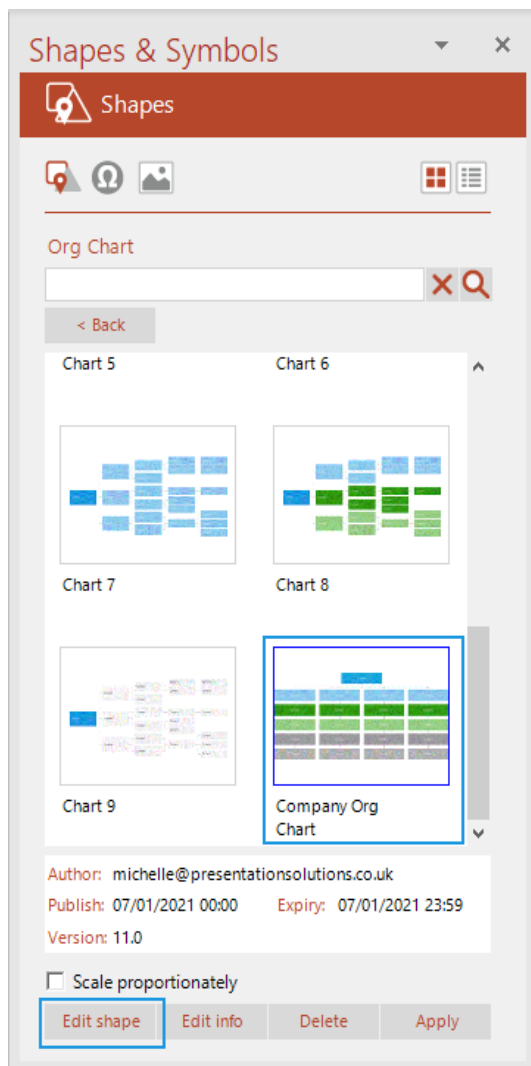
If you are an author and you wish to **replace** an existing author-generated shape:



Select the new version of the shape in your presentation.

Open the *Shapes & Symbols* pane at the **Shapes** panel.

Select the shape you wish to replace and select *Edit Shape*.



The **Author** task pane will open and the existing information for the shape will be displayed.

Make any required changes to the information and click **OK**.

The new shape that you had selected in your presentation will replace the one that had previously been uploaded.

Managing Company Information

The company information fields in use in your company's documents will have been predefined in the customisation set up for you by Presentation Solutions. These fields may include the office addresses, registered company text and copyright dates applicable to a number of locations within your company. As an author, you can make changes to the data that populates these fields. The user is then able to make personalised selections from *User Settings* in PowerPoint or Word.

Changes to company information are made by generating an Excel workbook containing the current data, making changes to the workbook and then importing the data from the revised workbook into Create. This can be done in PowerPoint, Word or Excel – the process is the same across all three applications. The examples shown are in PowerPoint.

Company Information Records

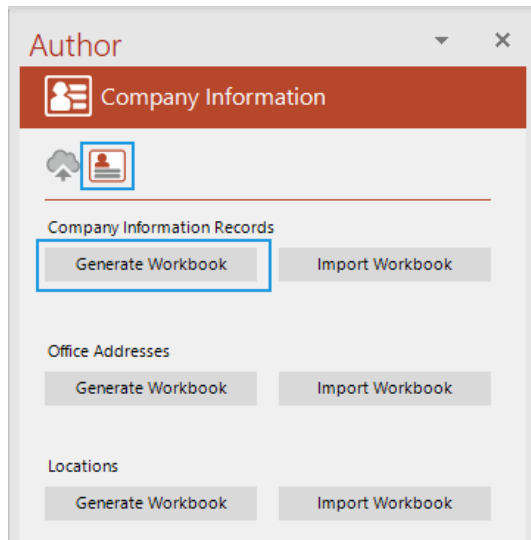
Company information records can contain a range of fields such as registered company text and copyright dates. The fields included will vary according to your company's customisation of Create.

Generating the Company Information Workbook

This will generate a workbook containing the current company information records stored in Create and allow an author to make changes.



Select **Author** on the side bar.



The **Author** task pane will open. Select the **Company Information** panel.

Select **Generate Workbook** below **Company Information Records**.

The *Browse for Folder* dialog will appear. Browse to the location in which you want to save the workbook. Click **OK**.

Once the workbook has generated it will be opened in Excel.

Editing the Company Information Workbook

In the generated workbook, note the instructions at the top of the worksheet carefully before starting to edit.

Make your required changes to the existing fields or add a new row to add new records.

Save the workbook.

Notes

Set up the Company Information Records as desired.

When you are satisfied, save this workbook and import it back into Create.

Only data in the 1st sheet will be imported.

Rows with empty cells in the Company Information Record Name column will be IGNORED.

Rows with incorrect data will cause the import to fail.

Layouts which cannot be found in Create will cause the import to fail.

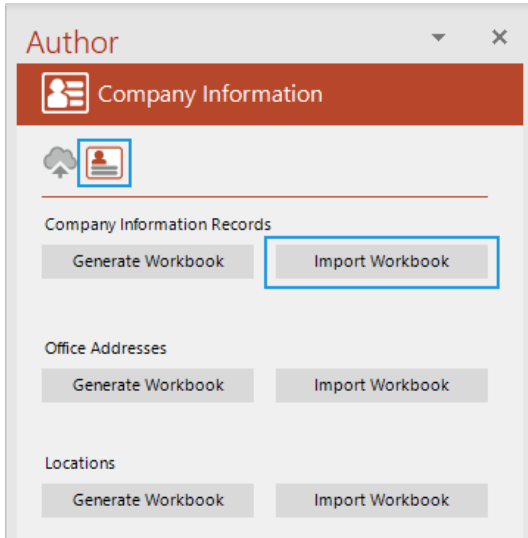
Blank or unrecognised values in ID (PLEASE LEAVE!!) will be treated as new Company Information Records.

WHEN IMPORTED ANY EXISTING RECORDS NOT ENTERED IN THIS SHEET BUT PRESENT IN CREATE WILL BE REMOVED FROM CREATE!

Importing the Company Information Workbook



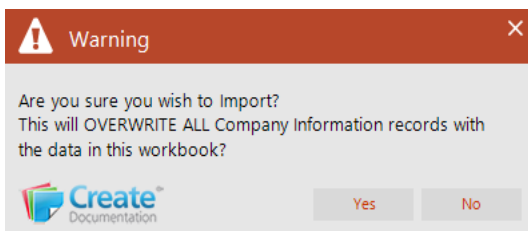
Select **Author** on the side bar.



Open the **Author** task pane and select the **Company Information** panel.

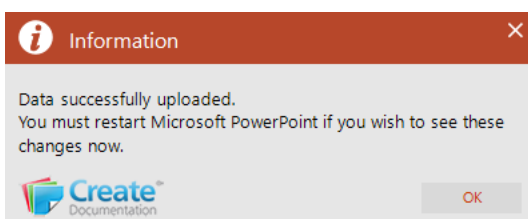
Select **Import Workbook** below **Company Information Records**.

The *Browse for Folder* dialog will appear. Browse to the workbook that you want to upload. Click **OK**.



A message confirming that the new records fill will replace the previous one will appear.

Click **Yes** to confirm.



Once the update is complete this dialog will open.

Click **OK**.

Office Addresses

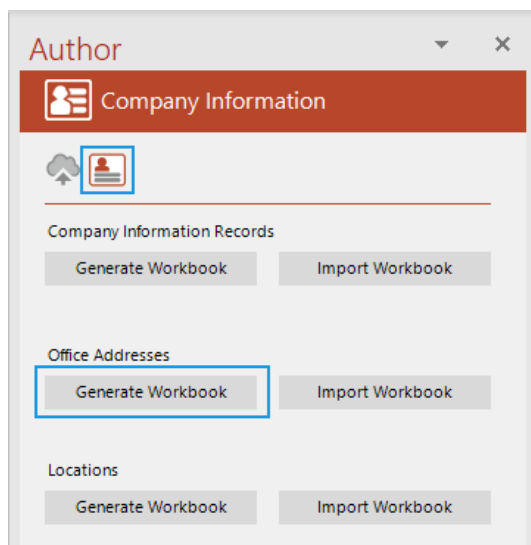
Office addresses can contain a range of fields including telephone numbers and web addresses. The fields included will vary according to your company's customisation of Create.

Generating the Office Addresses Workbook

This will generate a workbook containing the current company information records stored in Create.



Select **Author** on the side bar.



The **Author** task pane will open. Select the **Company Information** panel.

Select **Generate Workbook** below **Office Addresses**.

The *Browse for Folder* dialog will appear. Browse to the location in which you want to save the workbook. Click **OK**.

Once the workbook has generated it will be opened in Excel.

Editing the Office Addresses Workbook

In the generated workbook read the instructions at the top of the worksheet carefully before starting to edit.

Make your required changes to the existing fields or add a new row to add new records.

Save the workbook.

Notes

Set up the Office Addresses as desired.

When you are satisfied, save this workbook and import it back into Create.

Only data in the 1st sheet will be imported.

Rows with empty cells in the Office Address Name column will be IGNORED.

Rows with incorrect data will cause the import to fail.

Layouts which cannot be found in Create will cause the import to fail.

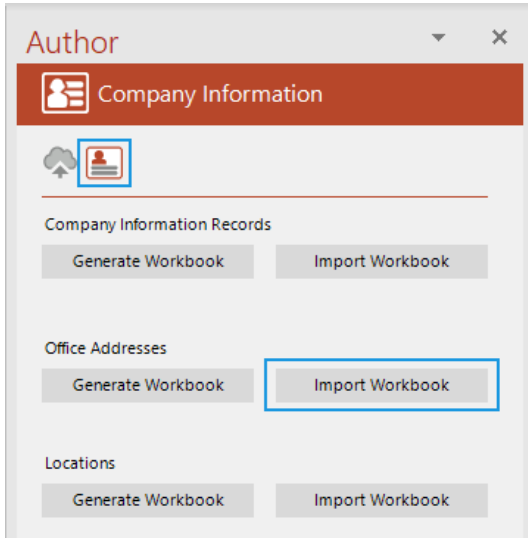
Blank or unrecognised values in ID (PLEASE LEAVE!!) will be treated as new Office Addresses.

WHEN IMPORTED ANY EXISTING RECORDS NOT ENTERED IN THIS SHEET BUT PRESENT IN CREATE WILL BE REMOVED FROM CREATE!

Importing the Office Addresses Workbook



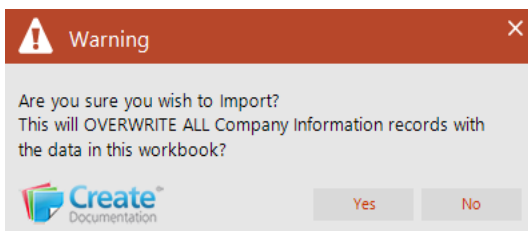
Select **Author** on the side bar.



The **Author** task pane will open. Select the **Company Information** panel.

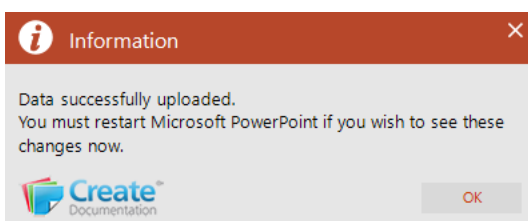
Select **Import Workbook** below **Office Addresses**.

The *Browse for Folder* dialog will appear. Browse to the workbook that you want to upload. Click **OK**.



A message confirming that the new records fill will replace the previous one will appear.

Click **Yes** to confirm.



Once the update is complete this dialog will open.

Click **OK**.

Locations

Locations tie together the company information and office addresses for a particular location. There are also the following options that should be set for each location: default PowerPoint template and default PowerPoint date format. There is also an option to group locations into regions if there are numerous locations.

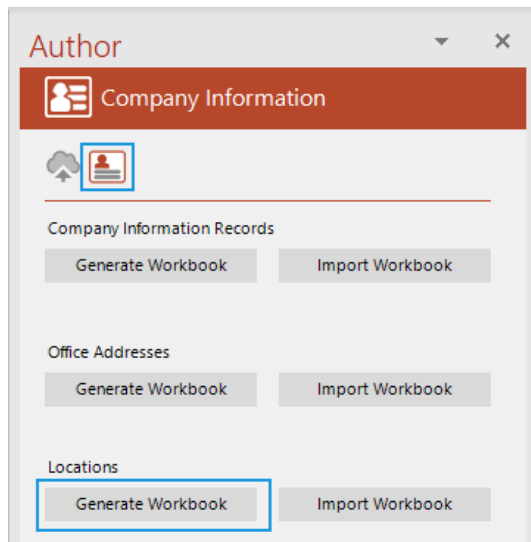
An end user picks the location appropriate to them from **User Settings**.

Generating the Locations Workbook

This will generate a workbook containing the current locations stored in Create.



Select **Author** on the side bar.



The **Author** task pane will open. Select the **Company Information** panel.

Select **Generate Workbook** below **Locations**.

The *Browse for Folder* dialog will appear. Browse to the location in which you want to save the workbook. Click **OK**.

Once the workbook has generated it will be opened in Excel.

Editing the Locations Workbook

In the generated workbook read the instructions at the top of the worksheet carefully before starting to edit.

Make your required changes to the existing fields or add a new row to add new records.

Save the workbook.

Notes

Set up the Locations as desired.

When you are satisfied, save this workbook and import it back into Create.

Only the data on the 1st sheet will be imported.

Rows with empty cells in the Location Name column will be IGNORED.

Rows with incorrect or blank data will cause the import to fail (except the Region (optional) column).

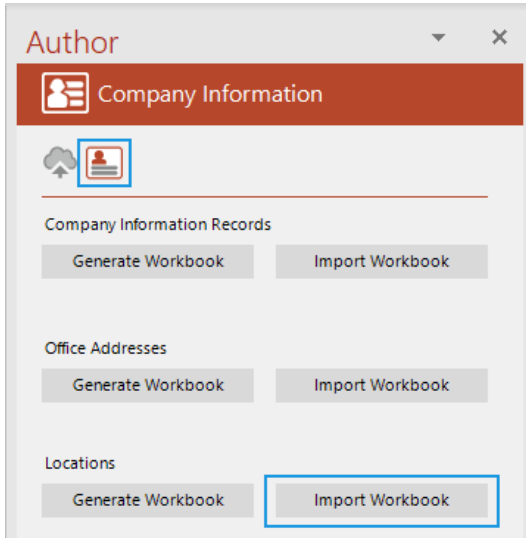
Blank or unrecognised values in ID (PLEASE LEAVE!!) will be treated as new Locations

WHEN IMPORTED ANY EXISTING RECORDS NOT ENTERED IN THIS SHEET BUT PRESENT IN CREATE WILL BE REMOVED FROM CREATE!

Importing the Locations Workbook



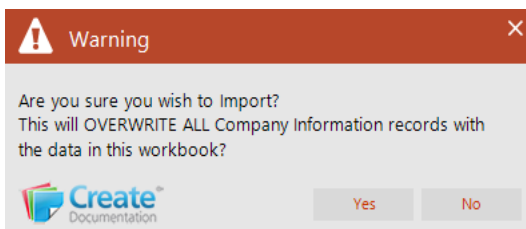
Select **Author** on the side bar.



The **Author** task pane will open. Select the **Company Information** panel.

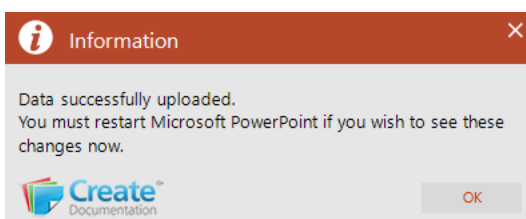
Select **Import Workbook** below **Locations**.

The *Browse for Folder* dialog will appear. Browse to the workbook that you want to upload. Click **OK**.



A message confirming that the new records fill will replace the previous one will appear.

Click Yes to confirm.



Once the update is complete this dialog will open.

Click OK.

Uploading Workbooks in Excel

This pane allows authors to upload new workbooks and make them available to groups of users. Go to the workbook you wish to upload. Make sure the workbook is saved.



Select **Author** on the side bar.

Author

Upload Assets

Name
UK Databook

Publish date
07 January 2021

Expiry date (optional)
☐ Set expiry date
07 January 2021

Browse to file
D:\Working Folder\UK Databook.xlsx

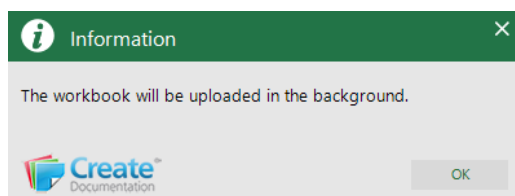
Use active Browse OK

The **Author** task pane will open at the **Upload Assets** panel.

Complete the details of the new layout:

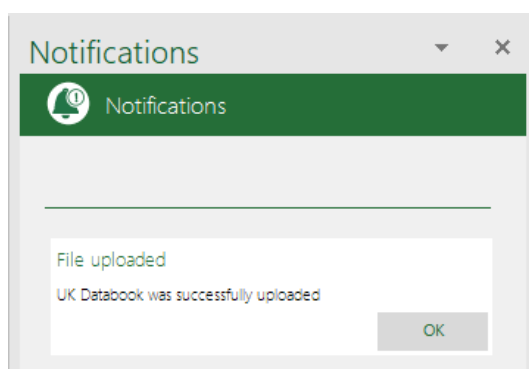
- **Name:** The name that you enter will appear underneath the layout thumbnail in the **Workbook** task pane once the layout is uploaded.
- **Publish date:** Defaults to the current day, month and year. To choose a future date, click on the calendar button and select the date. The recorded publish date and time will be in the same time zone as that of the author. **Users** will not be able to see any assets that have a future publish date until that date. Other **authors** will be able to see it before the publish date.
- **Expiry date:** This field is optional. If you want a layout to be available for a limited period only, check *Set expiry date*, click on the calendar button and select the date. The recorded expiry date will be in the same time zone as that of the author.
- **Use active:** Uploads the file currently open in Excel.
- **Browse:** Opens the browse dialog to open and upload from another location.

Click **OK**.



A message confirming that the workbook will be uploaded appears.

Click **OK**.



Select the **Notifications** button on the ribbon, once it's enabled, to view a list of the updates

Click **OK** to clear the notifications, or you can just close the dialog.

Users will receive their own notifications informing them of any updates to updateable assets. See Notifications on page 67.



United Kingdom

Chapter House
33 London Road
Reigate
Surrey RH2 9HZ

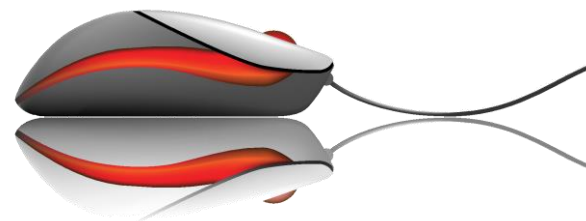
T +44 333 939 0100

www.presentation solutions.co.uk
support@presentation solutions.co.uk

United States

500 West Madison Street
10th Floor
Chicago IL 60661

T +1 312 283 8505



Presentation Solutions Limited

Copyright © 2004-2021 Presentation Solutions Limited. All rights reserved.

Registered in England, number 5334920 at Chapter House, 33 London Road, Reigate, Surrey RH2 9HZ.

PowerPoint, Word, Excel and Microsoft are registered trademarks of Microsoft Corporation in the United States and/or other countries.