



Create Documentation V10

PowerPoint User Guide

January 2021

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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.

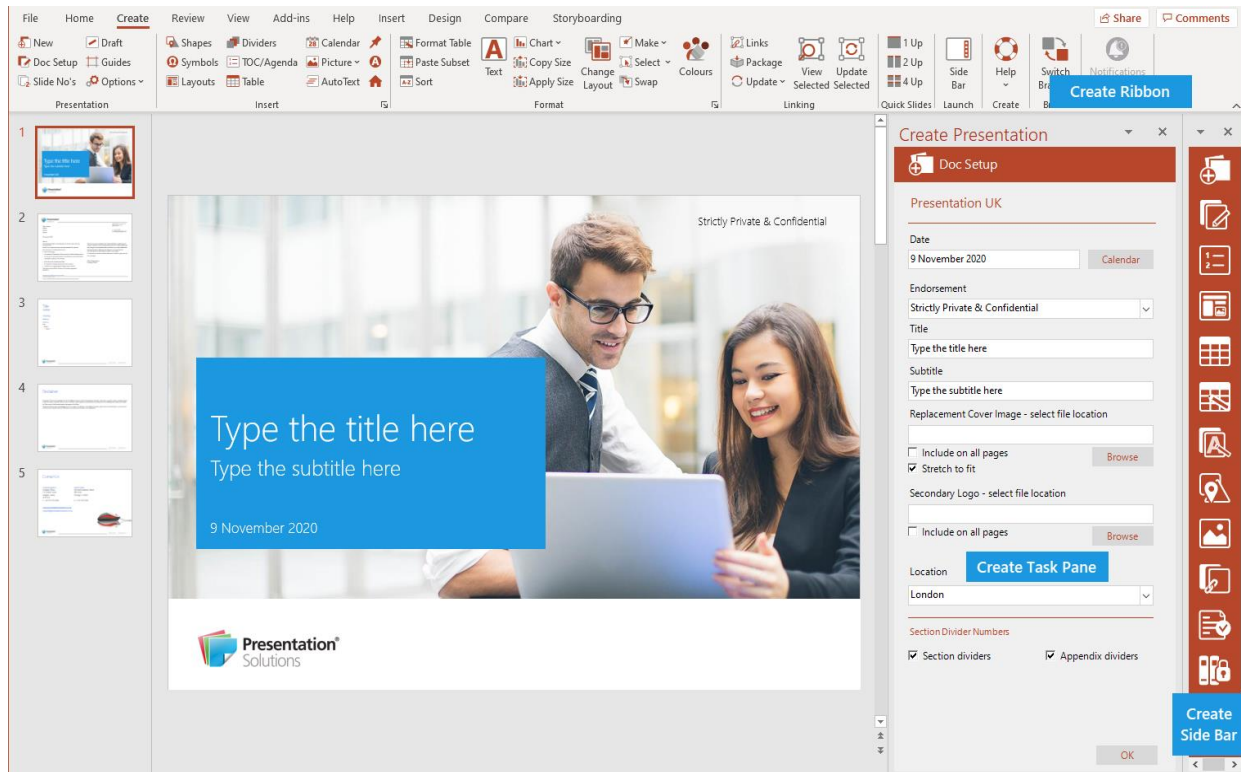
In addition to the software available in Word and PowerPoint, there are tools in Excel to assist with creating, formatting and sizing Excel charts and table data and copying to Word or PowerPoint. Charts and tables can be linked back to source data worksheets in Excel and you will be able to view, update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

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

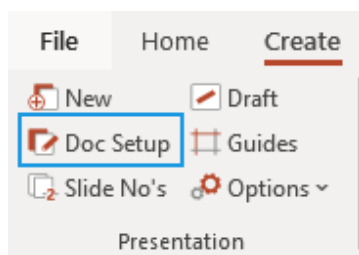
- authoring
 - designated authors can manage and upload new assets for access by users or groups of users
 - office addresses, registered company text and copyright dates can be added, deleted or edited by authors
- asset synchronisation
 - new versions of assets can be made available to other users immediately 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 PowerPoint features including
 - *Brand Checker* - checks a presentation for branding elements, such as fonts and colours and summarises deviations in a task pane
 - automated *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 PowerPoint

The **Create Ribbon** will open in PowerPoint 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.



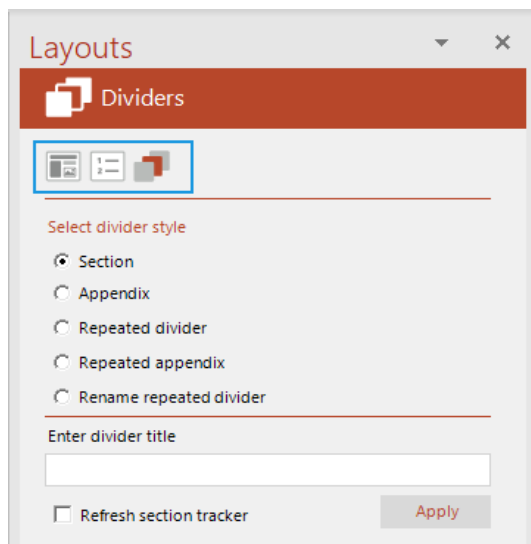
For functions which can be accessed from the **Ribbon** and the **Side Bar**, we'll show you how to access from both locations, for example,



Doc Setup on the ribbon

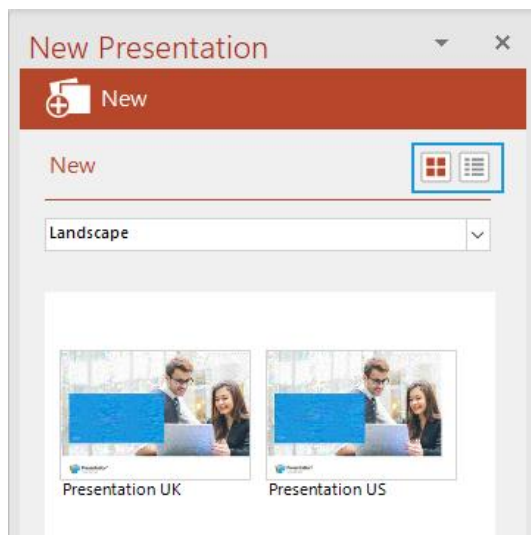


Doc Setup on the side bar



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.



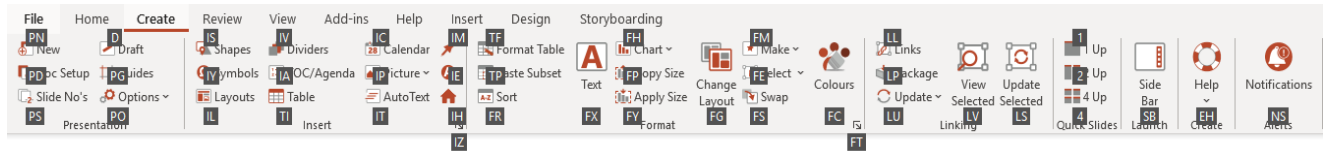
You can change views in some task panes by clicking the **list** or **thumbnail** icons on the top right.

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 insert a table you would select ALT+CTI).



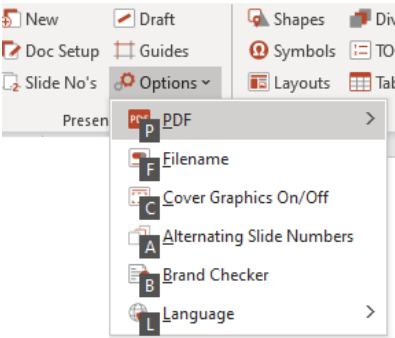
Shortcut Keys for Main Functions

ALT C +	PN	New	ALT C +	TF	Format Table
	PD	Document Setup		TP	Paste Subset
	PS	Slide No's		FR	Sort
	D	Draft		FX	Text
	PG	Guides		FH	Chart
	PO	Options		FP	Copy Size
	IS	Shapes		FY	Apply Size
	IY	Symbols		FG	Change Layout
	IL	Library		FM	Make
	IV	Dividers		FE	Select
	IA	TOC/Agenda		FS	Swap
	TI	Table		FC	Colour Palette
	IC	Calendar		FT	Show Text Formats
	IP	Picture		LL	View Links
	IT	AutoText		LP	Package
	IM	Insert Map Point		LU	Update
	IE	Select Map Point		LV	View Selected
	IH	Insert Home Link		LS	Update Selected
	IZ	Show Symbols		1	1 Up Layout
				2	2 Up Layout
				4	4 Up Layout
				SB	Side Bar
				EH	Help
				BS	Switch Brand

Note:

Using the **Undo (CTRL+Z)** command will group and undo the preceding Create actions and anything else you may have done, in a logical way.

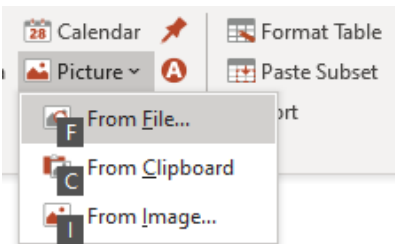
Shortcut Keys for Dropdown Functions



ALT C + PO

Options

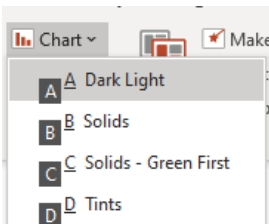
P, C	PDF to the Current Location
P, D	PDF to a Different Location
F	Filename
C	Cover Graphics On/Off
A	Alternating Slide Numbers
B	Brand Checker
L	Language



ALT C + IP

Picture

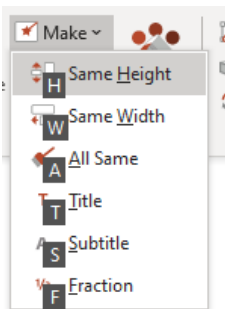
F	From File
C	From Clipboard
I	From Image



ALT C + FH

Chart

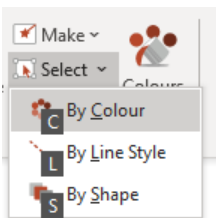
A	Theme A
B	Theme B
C	Theme C
D	Theme D



ALT C + FM

Make

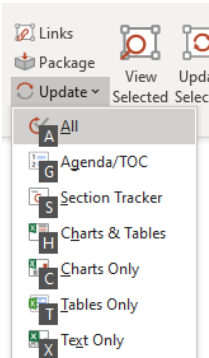
H	Same Height
W	Same Width
A	All Same
T	Title
S	Subtitle
F	Fraction



ALT C + FE

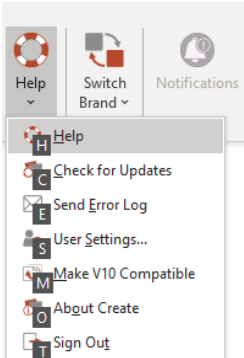
Select

C	By Colour
L	By Line Style
S	By Shape



ALT C + LU

Update	
A	All
G	Agenda/TOC
S	Section Tracker
H	Charts & Tables
C	Charts Only
T	Tables Only
X	Text Only



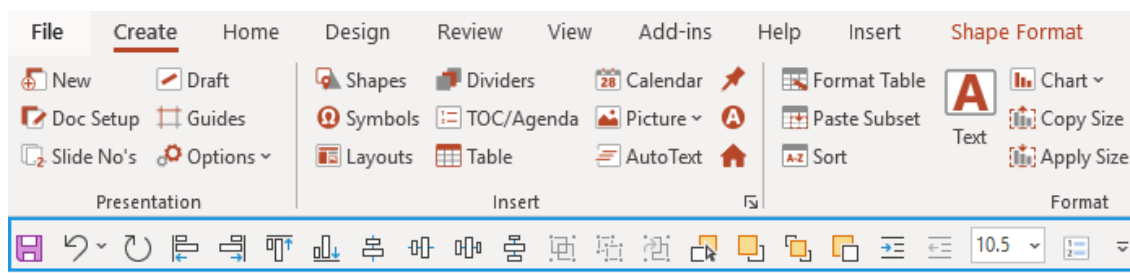
ALT C + EH

Help	
H	Help
C	Check for Updates
E	Send Error Log
S	User Settings
M	Make V10 Compatible
O	About Create
T	Sign Out

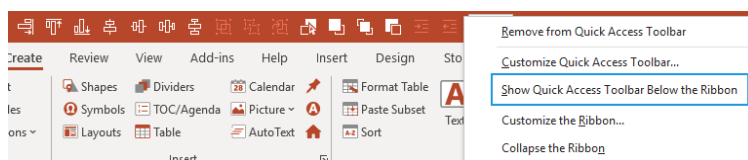
Quick Access Toolbar

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

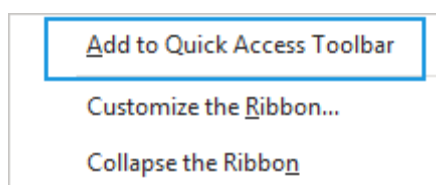


Right-click the Quick Access Toolbar (QAT).

Select **Show Below/Above the Ribbon**

Adding a Command that is on the Ribbon

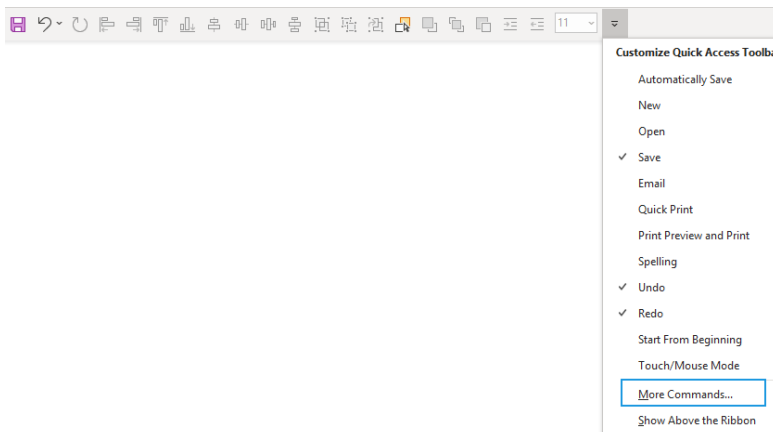
On the ribbon, click the appropriate ribbon or group to display the command that you want to add to the Quick Access Toolbar.



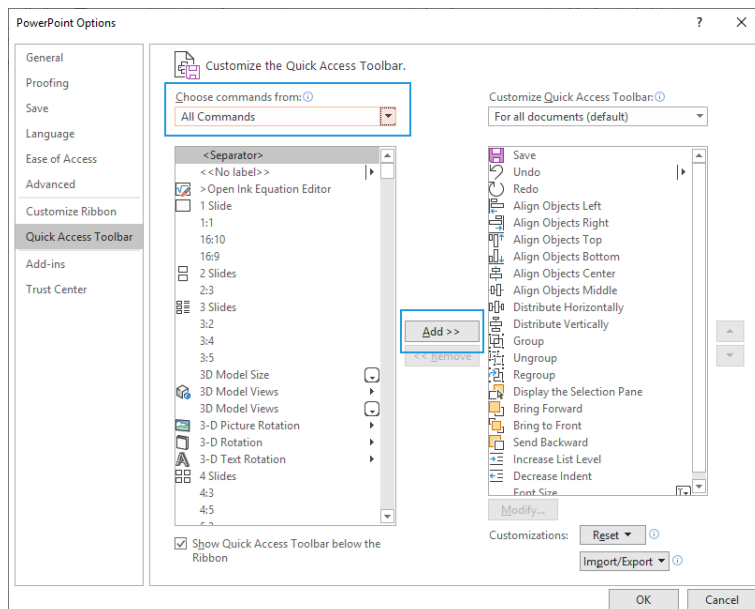
Right-click the command, and then click **Add to Quick Access Toolbar** on the shortcut menu

Adding a Command that is not on the Ribbon

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



Select **More Commands**.

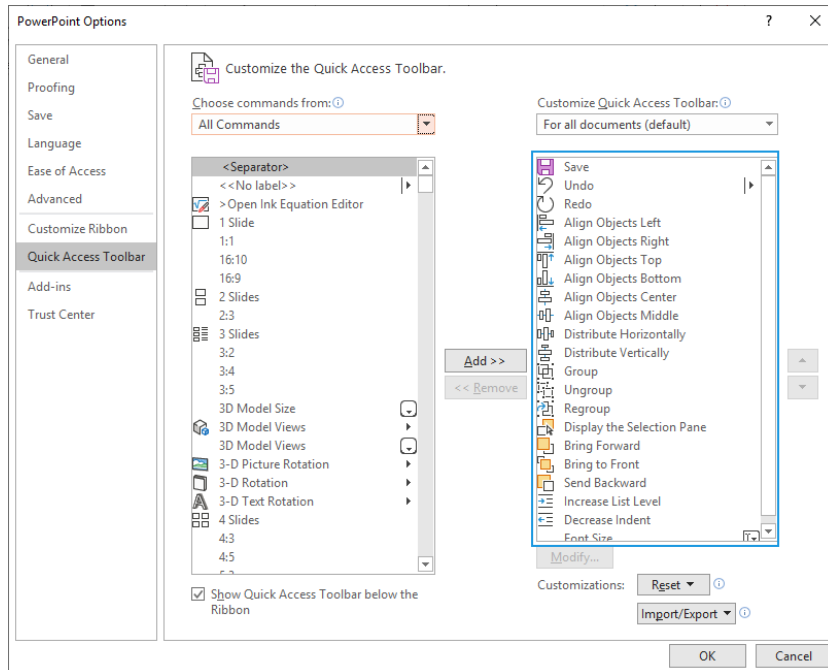


The PowerPoint Options dialog will open. Make sure **All Commands** is displayed under *Choose commands from*:

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 PowerPoint

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



Notes

From the **Create** ribbon you could also add *Update Selected* and *Update TOC*

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

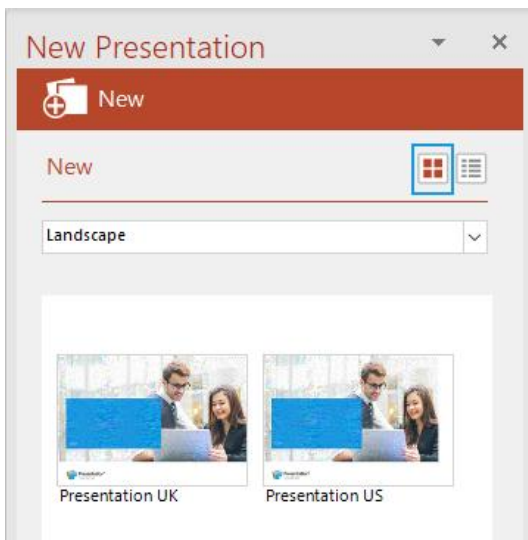
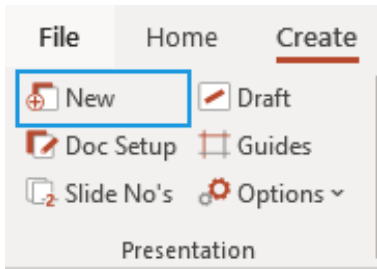
The high contrast setting is an accessibility feature built into Windows that assists people with vision impairment. The Create interface has been designed so that it can be used in high contrast mode.

Getting Started

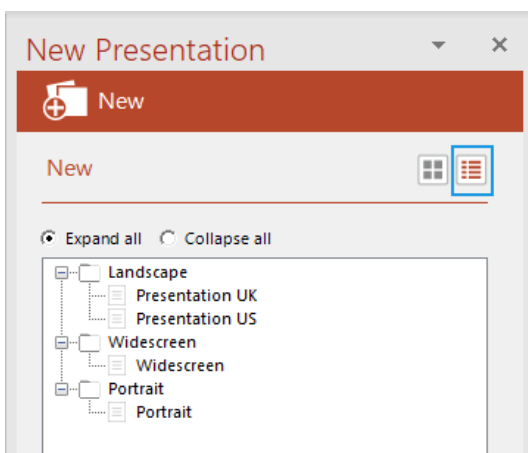
Your organisation's PowerPoint templates are accessible from the **New** task pane. These templates are built into the Create software by Presentation Solutions and not uploaded by authors.

Starting a New Presentation

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



The **New Presentation** task pane launches, showing all available templates. Select a template category from the dropdown list and then double click to select a template.



You can change views by clicking the **list** or **thumbnail** icons on the top right of the task pane.

In **list** view, select **Expand all**, to see all templates, or click the **+** to expand a single category.

Select the required template and click **OK**.

Once you've selected the template you wish to use, a task pane appears containing the fields available in your document. These fields will change depending on the template.

Create Presentation

Doc Setup

Presentation UK

Date
9 November 2020 Calendar

Endorsement
Strictly Private & Confidential

Title
Type the title here

Subtitle
Type the subtitle here

Replacement Cover Image - select file location
Browse

☐ Include on all pages
☒ Stretch to fit

Secondary Logo - select file location
Browse

☐ Include on all pages

Location
London

Section Divider Numbers

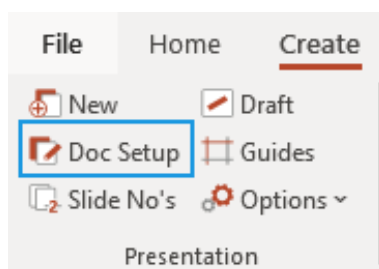
☒ Section dividers ☒ Appendix dividers

OK

Complete the fields – these will differ between templates – then click **OK** to launch your presentation.

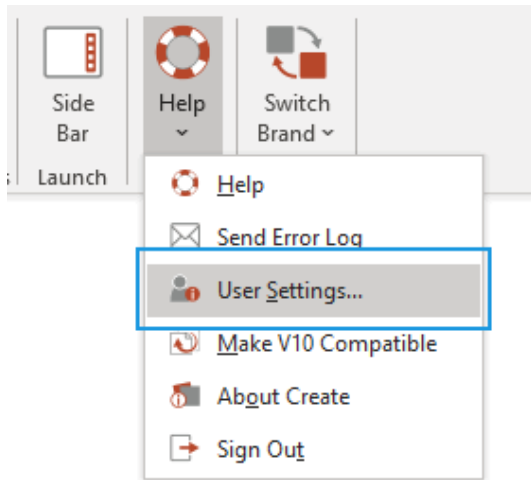
Editing the Doc Setup

To edit the main information at any time, select **Doc Setup** on the ribbon or side bar to reopen the Doc Setup task pane.

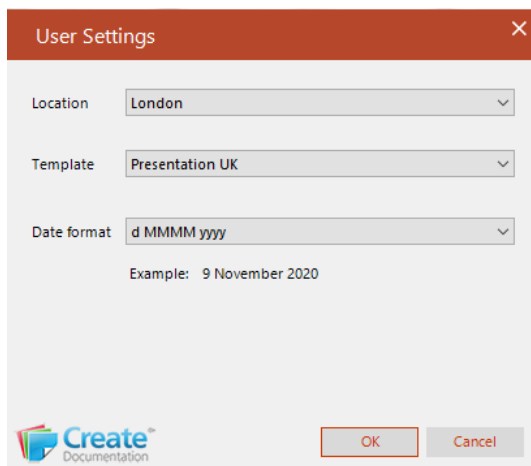


Changing the User Settings

Before using Create for the first time, set your default *User Settings*. Once you have selected your preferred PowerPoint template and defaults, all new PowerPoint presentations created using Create will be assigned these settings.



From the **Help** dropdown on the **Create** ribbon select *User Settings*.



This is a customisable feature and the fields you see in the dialog may be different from those shown.

Select your preferred defaults and click **OK**.

Notes

Please note that these are example fields, and that your product may not have some of these and may include others not listed here.

Updating your *User Settings* will only take effect when you start a new document.

To effect the change on an existing document, make the changes in *User Settings*, click on **Doc Setup**, click **OK** and the presentation will update to contain the new settings.

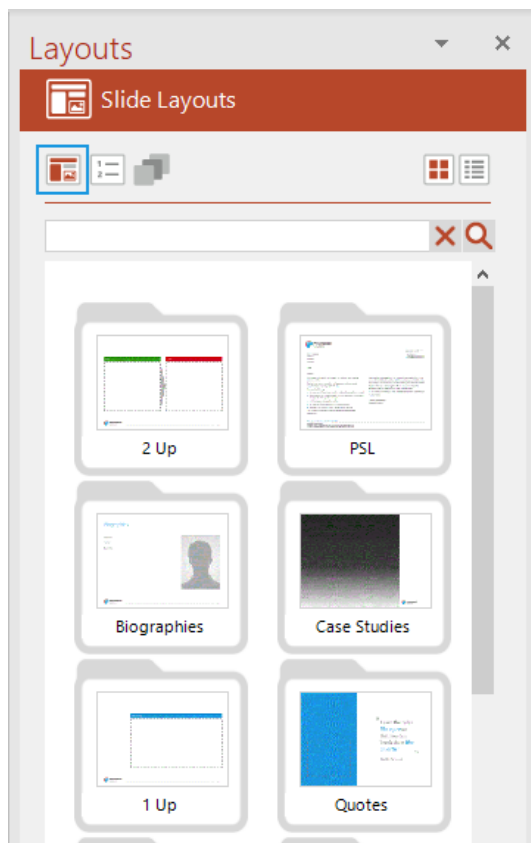
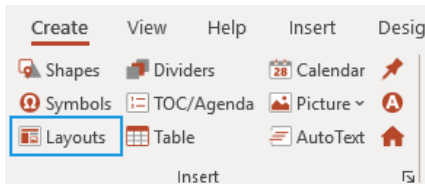
Inserting Slide Layouts and Shapes

Use Create to insert slides, shapes or images in your presentation rather than native PowerPoint. Any slides you insert from Create will be formatted according to your company's branding.

These "assets" will have been either built in to the Create software or uploaded by designated authors within your organisation. See [Uploading Assets in PowerPoint](#) on page 67.

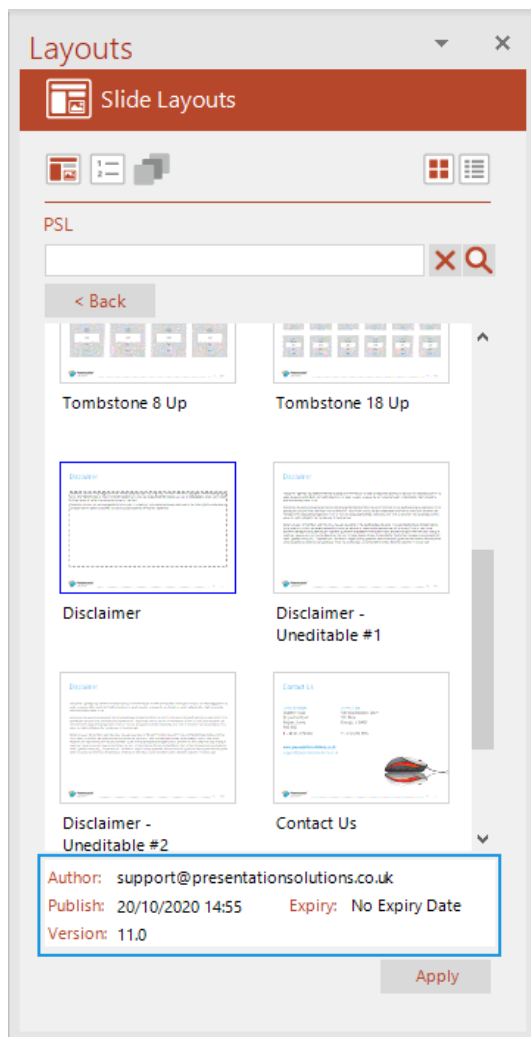
Inserting a Layout

Select **Layouts** on the ribbon or side bar to insert a new slide layout.



The **Layouts** task pane opens at the **Slide Layouts** panel.

- You can change views by clicking the **list** or **thumbnail** icons on the top right.
- Layouts are filed into folders – as shown here.
- In **list** view, select **Expand all**, to expand the folders and see all the layouts, or click the **+** on an individual folder to only expand that one.
- Search for a particular layout or key word tag by typing the name and selecting the magnifying icon. For more information, see [Uploading Layouts](#) on page 67.

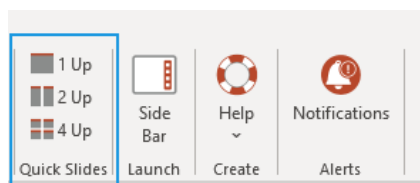


- If a layout has been uploaded by an author in your organisation, the author's email address will be displayed in the information panel at the bottom of the task pane.

Double-click on the slide layout to insert it or select it and click *Apply*.

Quick Slides

This function gives access to the most frequently used slide layouts. The standard options available are 1 Up, 2 Up and 4 Up. However, these can be customised on request.

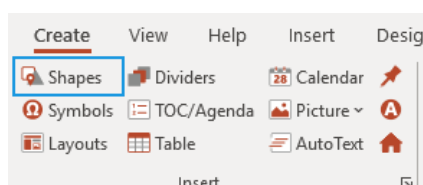


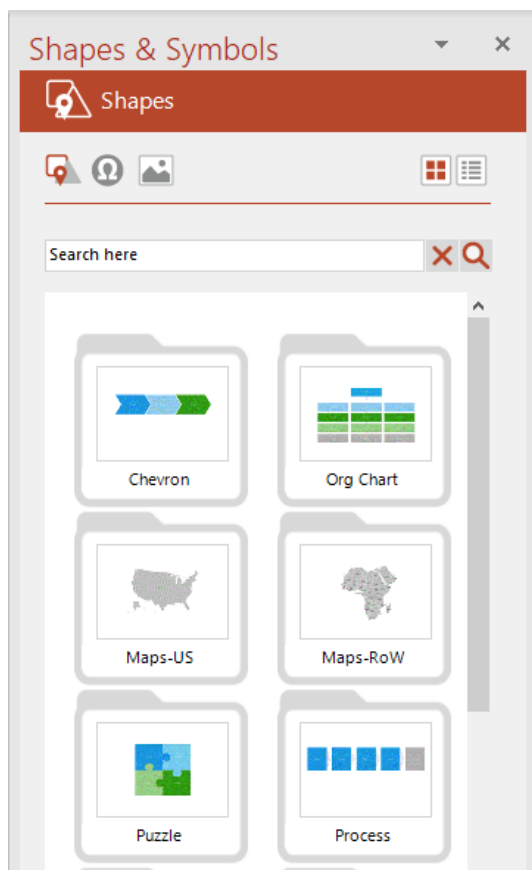
Go to the location where you want to insert the new slide (the slide will appear after the currently selected slide).

From the **Quick Slide** group select the required slide layout.

Inserting Shapes

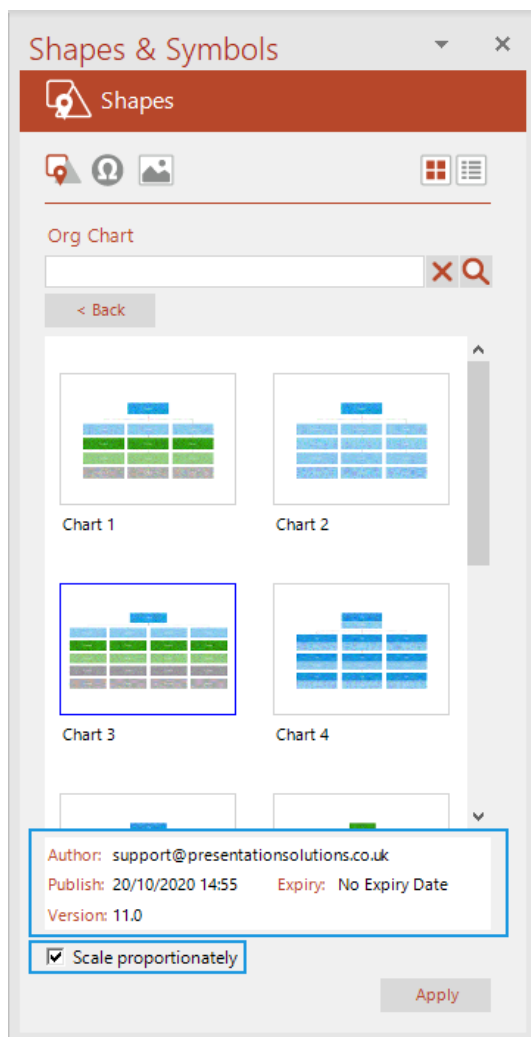
Select **Shapes** on the ribbon or side bar to view a selection of PowerPoint drawing shapes and diagrams such as organisation charts, maps, processes, timelines.





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

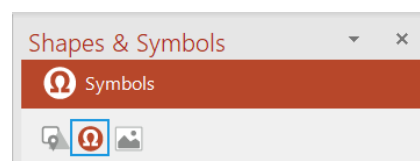
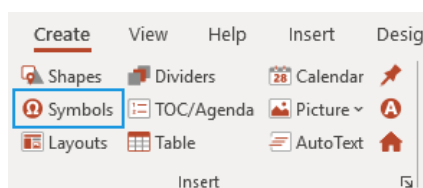
- You can change views by clicking the **list** or **thumbnail** icons on the top right.
- In **list** view, select **Expand all**, to see all templates, or click the **+** to expand a single folder.
- Search for a particular shape or key word tag by typing the name and selecting the magnifying icon. For more information see **Uploading Shapes** on page 71.

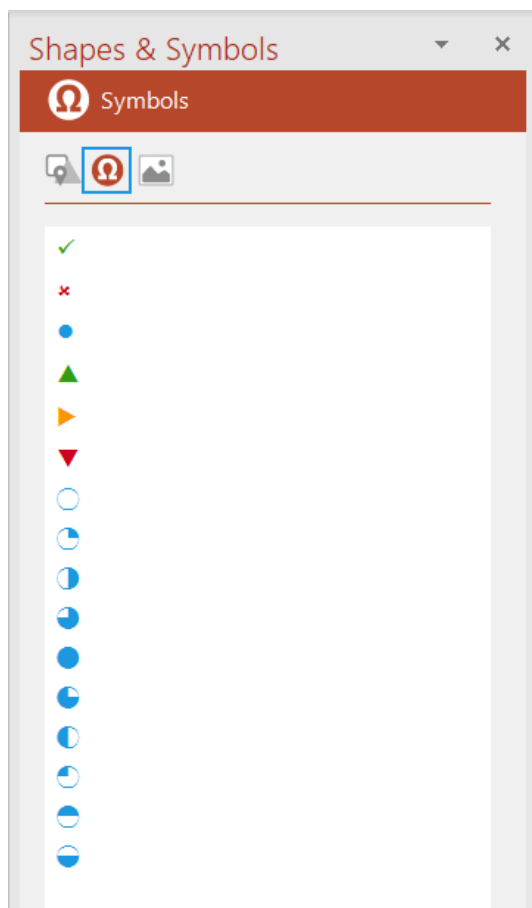


- Select a placeholder in your presentation to insert the new shape inside it. If you select *Scale proportionately*, the shape will be resized proportionately within the selected placeholder.
- If a shape has been uploaded by an author in your organisation, the author's email address will be displayed in the information panel at the bottom of the task pane.
- Double-click on the shape to insert it or select it and click *Apply*.

Inserting Symbols

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





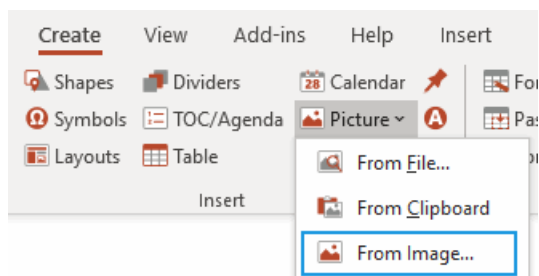
The *Shapes & Symbols* task pane opens at the **Symbols** panel.

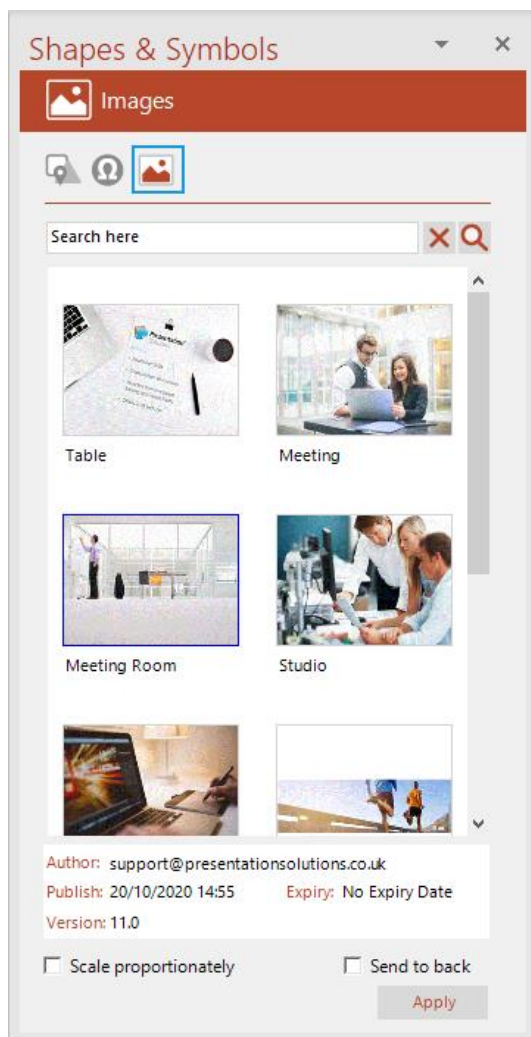
Click on the symbol once to insert it.

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

Inserting Images

Select **Picture**, **From Image** on the ribbon or **Images** on the side bar to view all your approved images.





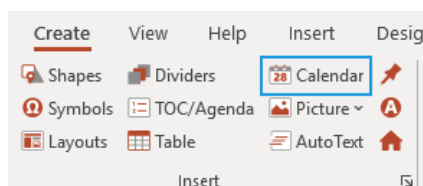
The **Shapes & Symbols** task pane opens at the **Images** panel.

- You can search for a particular image or key word tag by typing the name and selecting the magnifying icon. See **Uploading Images** on page 70.
- Check **Scale proportionately** to scale the image within a selected placeholder (otherwise it will stretch to fit the placeholder).
- Check **Send to back** to insert the image behind all other elements on the slide. Note though, that if any slide elements are in the Slide Master the image will not be placed behind those.

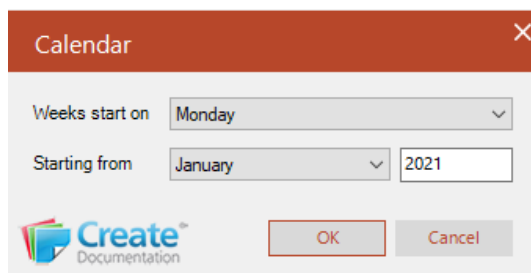
Double-click on the image to insert it or select it and click **Apply**.

Inserting a Calendar Slide

This will insert a slide containing four preformatted monthly calendars.



Select **Calendar** on the **Create** ribbon.

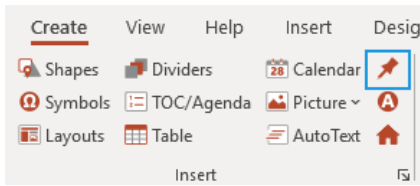


Select the day, month and year (type this manually) from which you want the calendar to start.

Click **OK**.

Map Markers

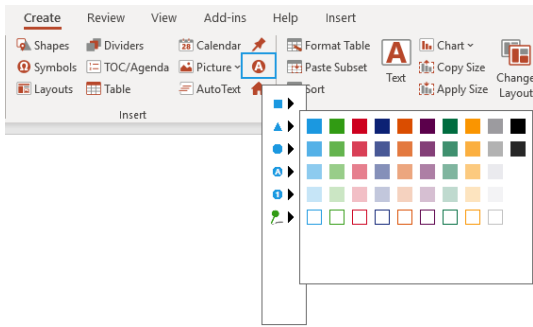
Use this function to insert formatted markers on a map (to indicate a city or office location etc.).



Select **Insert Map Point** on the **Create** ribbon.

A map point will be inserted in the top left corner of your slide. Click and drag the map point onto the map in the required position.

To choose a different style map marker i.e. select from the **Select Map Point** options.



Select **Select Map Point** on the **Create** ribbon.

Choose the style and colour. Once you have a selected a preferred map point this will become the default style.

Notes

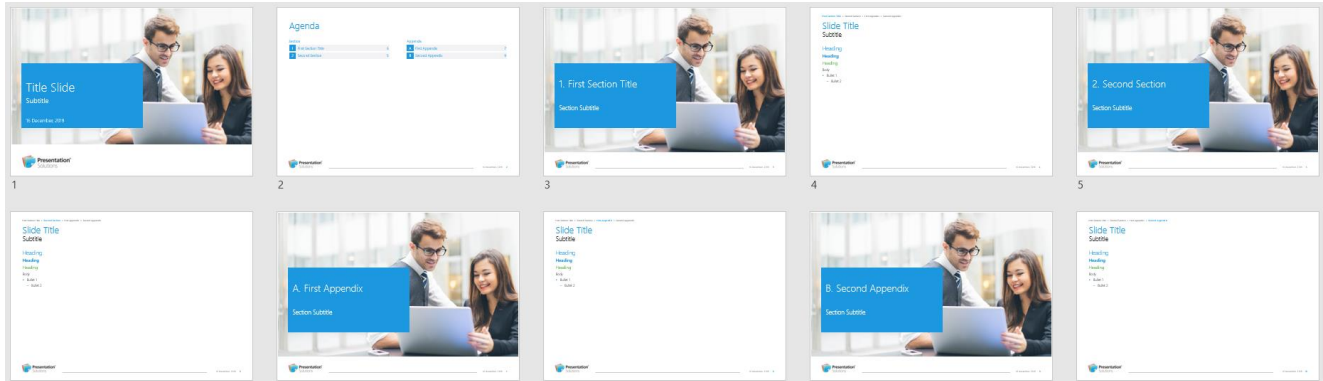
If a numbered map point is chosen (A or 1), subsequent map points which are inserted via the **Insert Map Point** function will contain the next letter or number i.e. B, C, D etc. or 2, 3, 4 etc

Slides containing a selection of preformatted world and country maps are stored in **Shapes**

Organising your Presentation

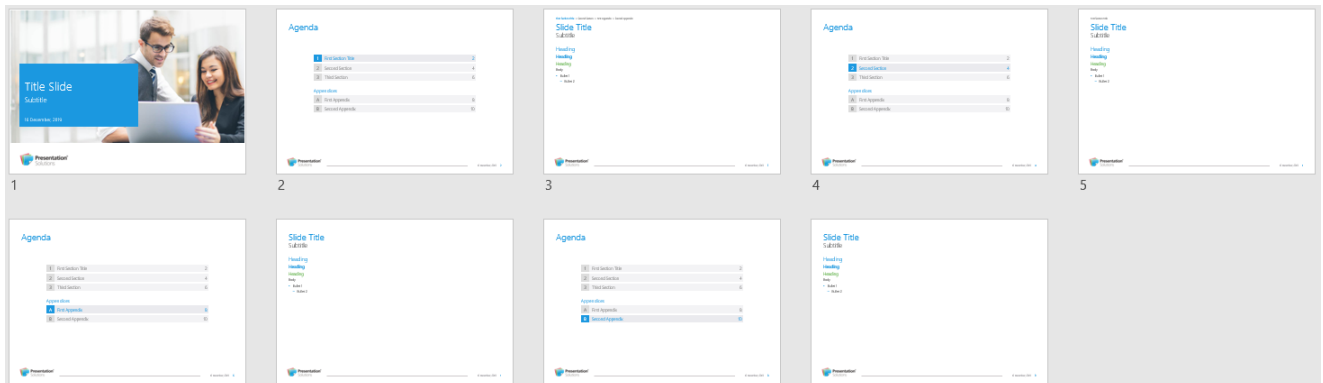
Presentations can be divided into sections and appendices. There are two types of section and appendix divider slides:

A slide displaying the section/appendix name and number (and an agenda/table of contents at the beginning of the presentation)

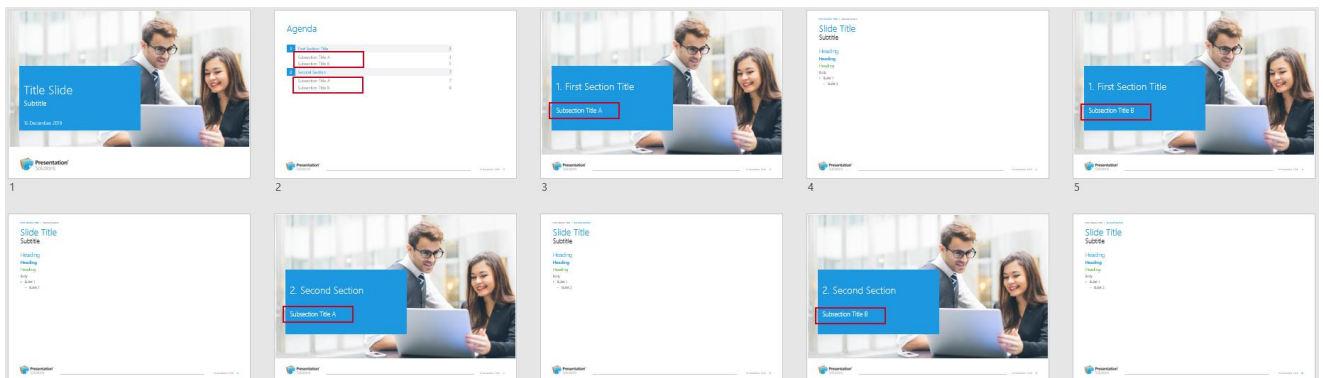


OR

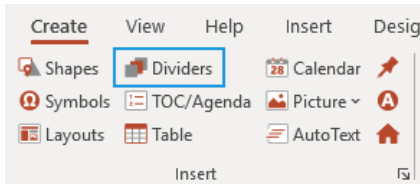
“Repeated dividers” which list all the sections and appendices in the presentation with the current section/appendix highlighted (therefore no agenda/table of contents at the beginning of the presentation).



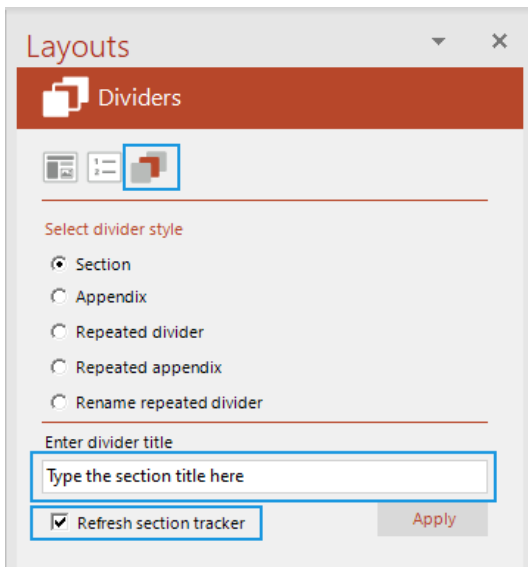
Subsection titles are optional and can be added to the section divider slides and included in the agenda/table of contents



Adding Section and Appendix Dividers



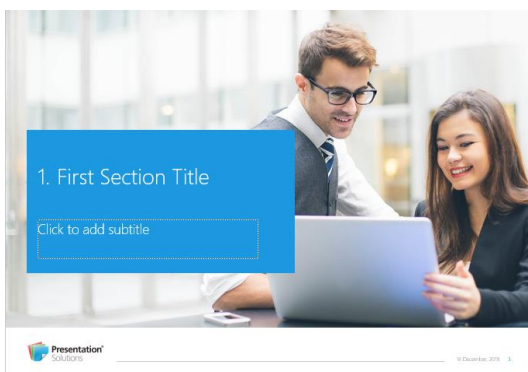
Select **Dividers** from the ribbon.



The **Layouts** task pane opens at the **Dividers** panel.

To insert a standard section or appendix divider, select *Section* or *Appendix*, type in the section or appendix title and click **Apply**.

If your presentation contains Section Trackers, you can refresh/update them at the same time. See **Adding Section Trackers** on page 33

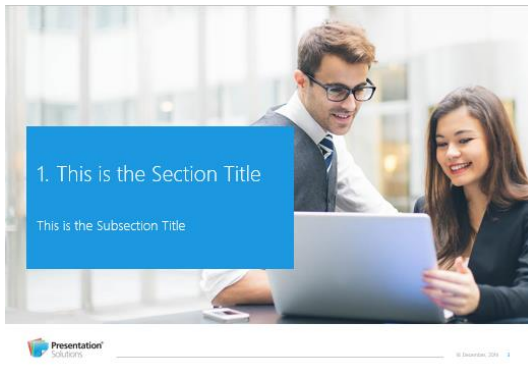


A section or appendix divider slide will be inserted. The slide will be inserted after the slide that was selected in the presentation. Add a subsection title to the slide if required. You can move them to elsewhere in the presentation.

You can use the task pane to insert further dividers or you can duplicate existing ones.

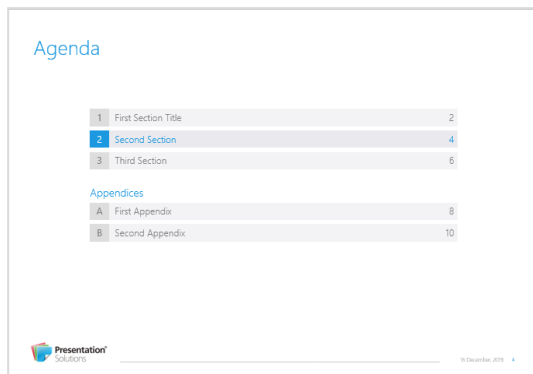
Subsections

If you wish to display subsections in the agenda/table of contents, you need to ensure that the main section title is identical on all subsection divider slides in order that the section title only displays once on the agenda/table of contents.

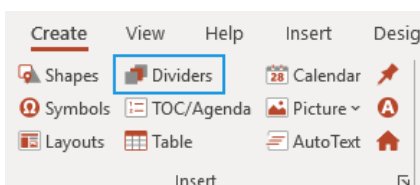


Retype the section title in subsequent divider slides OR duplicate the first section divider (CTRL+D) of the group, change the subsection title and move to the desired location.

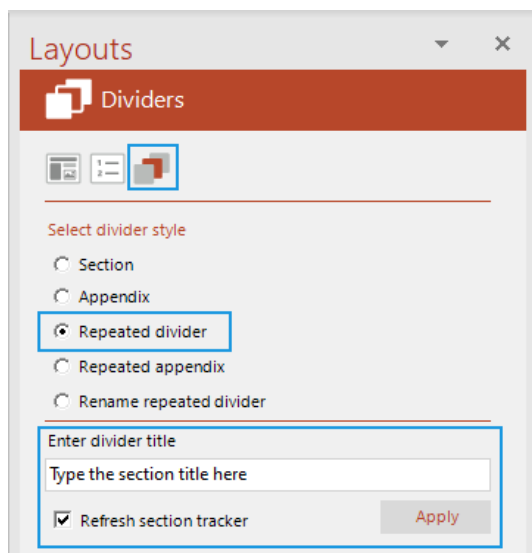
Repeated Dividers



This will insert a section divider slide displaying all the section and appendix titles and numbers throughout the presentation with the current section highlighted.



Select **Dividers** from the ribbon.



The **Layouts** task pane opens at the **Dividers** panel.

Select *Repeated divider* or *Repeated appendix* and type in the section or appendix title. Click *Apply*.

For further repeated dividers, make sure you insert them from the task pane rather than duplicating an existing one so that Create can pick up all the information from all dividers.

If your presentation contains Section Trackers, you can refresh/update them at the same time. See **Adding Section Trackers** on page 33

If you need to edit a section title in a presentation containing repeated dividers, use the Create function, *Rename repeated divider*. This will ensure that all the repeated agenda/toc slides are updated accordingly.

Notes

There is no option to display subsection titles on repeating agenda/toc dividers.

If you need to change the title on one of the repeated agenda/toc divider slides, you must use the *Rename repeated divider* function to do this so that it is updated on all the relevant dividers and also on the main agenda/toc.

Depending on your design there are a maximum number of sections that can be displayed in a repeating agenda/toc (to ensure that the section divider remains on a single slide).

Never type directly into the repeated agenda/toc dividers.

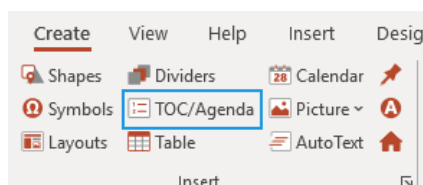
If you delete a repeated agenda/toc slide, update the remaining ones using *Update, Agenda/TOC*.

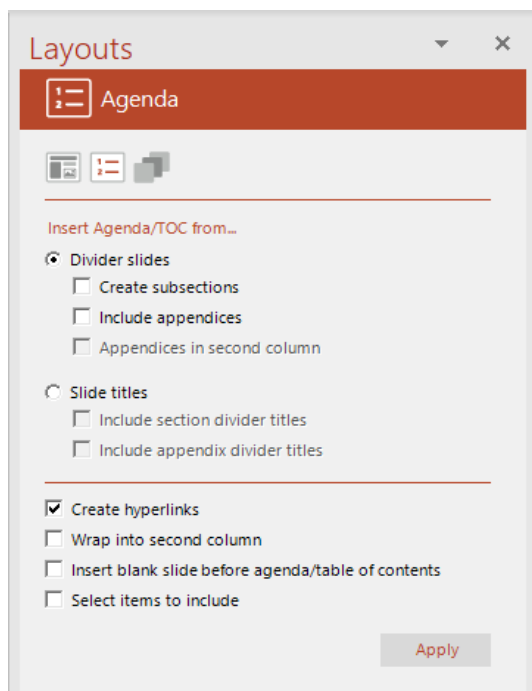
Adding an Agenda/Table of Contents

The Agenda/Table of Contents (TOC) slide appears after the cover slide and lists the main topics in the presentation. It can display either the titles on the section and appendix divider slides and/or the slide titles. Subsection titles are optional and can be added to the section and appendix divider slides and included in the agenda/TOC. Hyperlinks can be included to help navigate through the presentation.

Update the agenda by selecting *Update, Agenda/TOC* in the **Linking** group on the **Create** ribbon

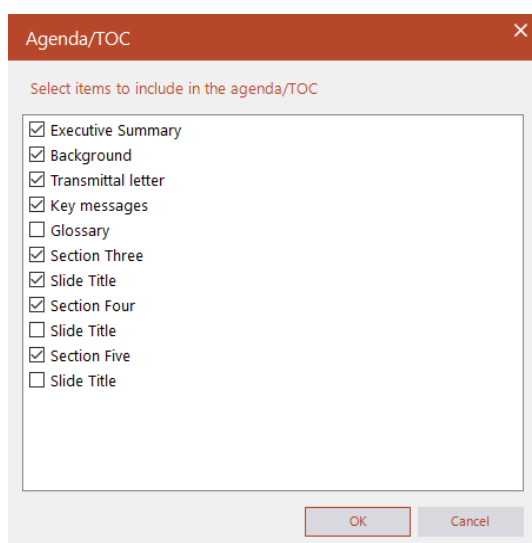
To insert an agenda/TOC, select **TOC/Agenda** in the ribbon or side bar.





The **Layouts** task pane opens at the **Agenda** panel.

- Check *Create subsections* to include subsections.
- Check *Include appendices* to include appendices.
- Check *Appendices in second column* to list the appendices next to the sections rather than beneath.
- Check *Slide titles* to only list the slide titles in your presentation (if there are no section/approx divider).
- To include slide titles **and** section and appendix divider titles, check the options below *Slide titles*.
- Check *Create hyperlinks* to include hyperlinks.
- Check *Wrap into second column* if you would like to keep the agenda on one slide, if possible. This will usually apply a smaller font size to the agenda to allow it to fit on to one page. If this is left unchecked the agenda will wrap on to two slides if necessary.
- Check the *Insert blank slide before agenda/table of contents* box if you are printing double-sided and want a blank slide before the Agenda/TOC slide.
- Check *Select items to include* to select only certain items in the agenda.



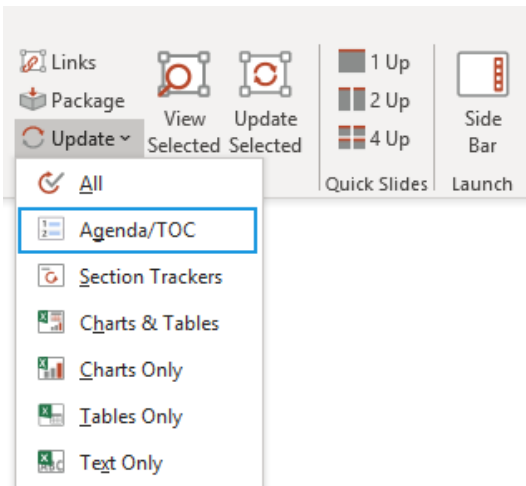
This will open a dialog which will list all the items based on your selection in the **Agenda** panel.

- Select those items you wish to include in the agenda. Click **OK**.

If you need to edit any details on the agenda/TOC, make the changes on the divider slides and then select **Update, Agenda/TOC** in the **Linking** group on the **Create** ribbon.

Updating the Agenda

Agendas can be updated separately or at the same time as all the linked objects in a presentation.



Select **Update, Agenda/TOC** in the **Linking** group on the **Create** ribbon.

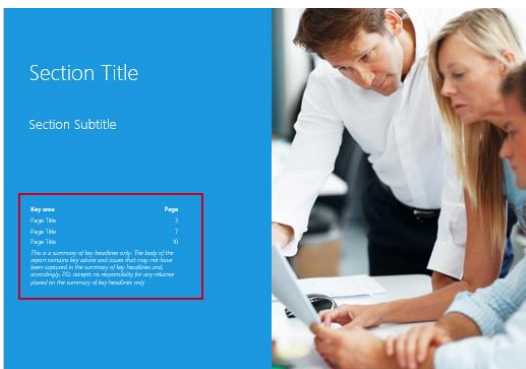
The existing Agenda/TOC slide(s) will be deleted and replaced with a new one.

Notes

Updating the agenda/TOC will also update the section trackers in the presentation.

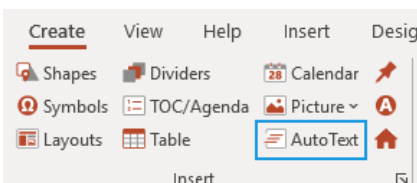
Updating **All** will update the agenda/TOC, section trackers and mini TOCs (if present), and all linked tables and charts within your presentation.

Section Mini TOC

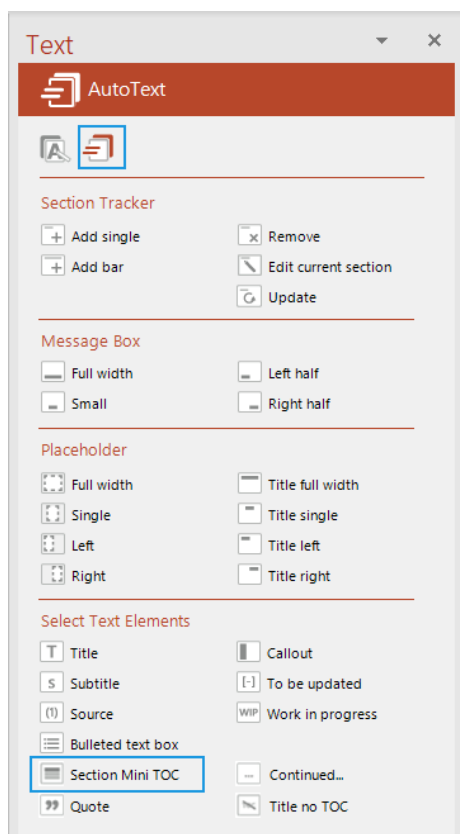


This will add a mini TOC (Table of Contents) to a section divider. This TOC will list all the slide titles that are in the following section.

This function is optional and will be available in the **Autotext** panel of the **Text** task pane if your organisation has requested it.



Select **AutoText** on the **Create** ribbon.



The **Text** task pane opens at the **AutoText** panel, showing all available AutoText entries.

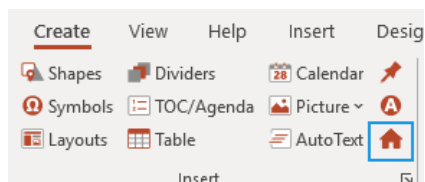
Go to the section divider where you wish to insert the Section Mini TOC.

Select **Section Mini TOC** to insert it on to the slide.

Update All will update the agenda/TOC, section trackers and mini TOCs

Adding a Home Link

This function inserts a home link icon with a hyperlink to the first Agenda/TOC slide on every slide in the presentation. The hyperlink will work in PDF and Slide Show view.



Select **Home Link** on the **Create** ribbon.

Notes

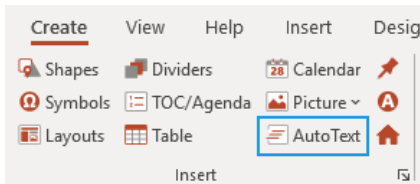
The Home Link will only be able to be inserted if your document has a TOC/Agenda.

The Home Link hyperlink and the hyperlinks in the agenda/TOC will be visible in Slide Show view in PowerPoint. They will also be visible when the document is saved as a pdf.

After inserting slides, you will need to select **Insert Home Link** again to display the home link icon on the new slides.

Adding Section Trackers

A section tracker displays the section or appendix title in the header of the slide within the current section (single) or all sections within a document with hyperlinks (bar).

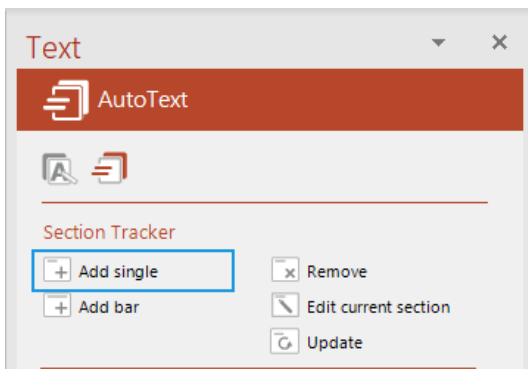


Select **AutoText** on the **Create** ribbon.

The **Text** task pane opens at the **AutoText** panel.

Single Section Tracker

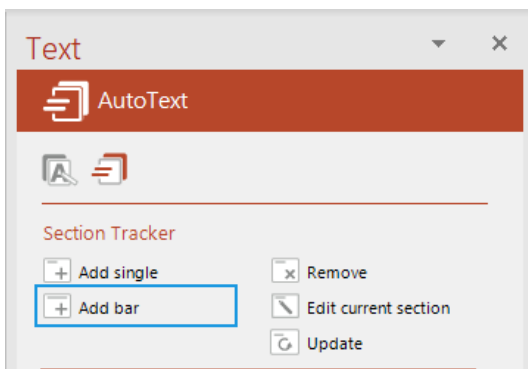
A single section tracker displays the current section title on all the slides in the section.



Select **Add single**.

Section Tracker Bar

A section tracker bar displays all the section and appendix titles on every slide and highlights the active section/appendix. The section tracker bar is hyperlinked for easy navigation through the presentation.



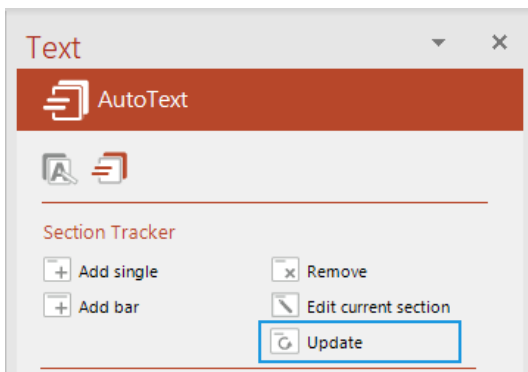
Select **Add bar**.

If any of the titles are too long for the section tracker bar, use the **Edit current section** function to reduce the title in the bar only, not on the Section or Appendix Divider slide.

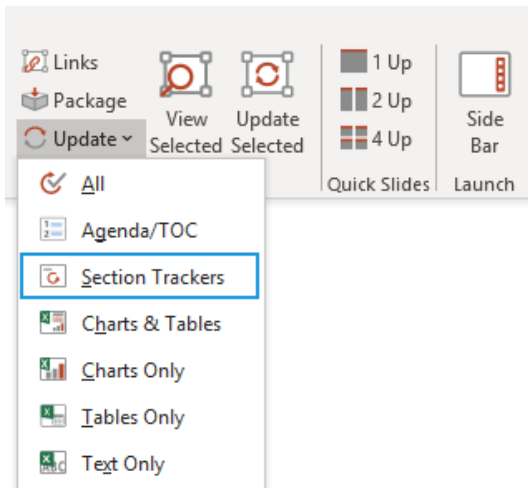
Updating Section Trackers

You will need to update section trackers after inserting slides or dividers. This can be done at the same time as updating the Agenda (see Updating the Agenda on page 31) or separately.

To update the section trackers only:



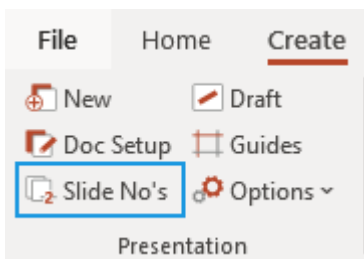
Select **Update** on the **Text** task pane.
OR



Select **Update**, **Section Trackers** on the **Create** ribbon.

Slide Numbering

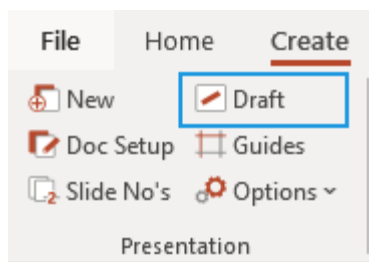
This function displays or hides the slide numbers on each slide of the presentation - can also be used to "refresh" the slide numbering if there are any numbering issues after e.g. copying slides in from another presentation.



Select **Slide No's** on the **Create** ribbon.

Displaying the Draft Stamp

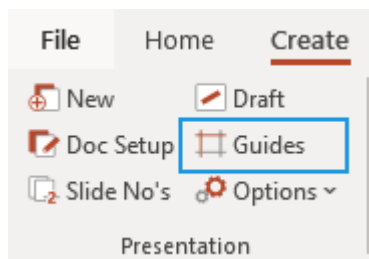
This function displays or hides the word DRAFT (or equivalent) and any associated draft text e.g. on the Title Slide. The location of the Draft text depends on your customisation.



Select **Draft** on the **Create** ribbon.

Guides

This function displays or hides native PowerPoint drawing guides. These guides (dashed lines) are non-printing and help you arrange things consistently across a set of slides. The guides are generally set to the body text placeholder positions in the templates.



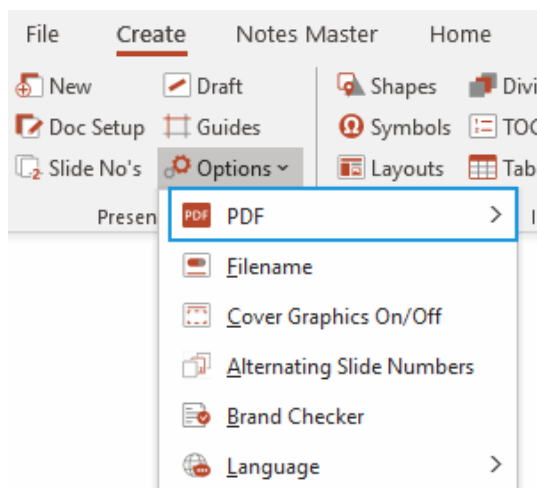
Select **Guides** on the **Create** ribbon.

Notes

PowerPoint drawing guides are horizontal and vertical lines that help you visually align and position pictures, shapes, and other objects on your slides. Use drawing guides in Normal view when you build your presentation. They're not visible during a slide show and do not print. You can display or hide drawing guides, and you can add or delete guides as well. When the guides are turned on, by default, PowerPoint displays one horizontal and one vertical guide that intersect at the centre of the slide. To add additional guides, hold CTRL, click an existing guide, and then drag it to a new location. To delete a guide, click and drag it off the slide.

Saving as a PDF

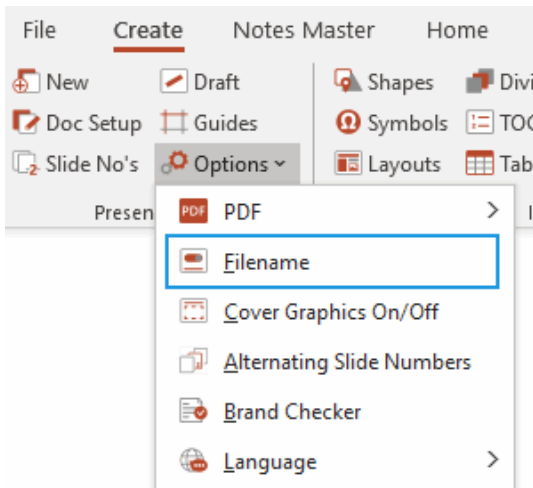
Saves your current presentation as a PDF either to the current file location or to a new location with a different name. Both options will prompt you to save the PowerPoint file, and then create a PDF with non-printing information and properties removed.



Select **Options**, **PDF** on the **Create** ribbon.

Displaying the Filename

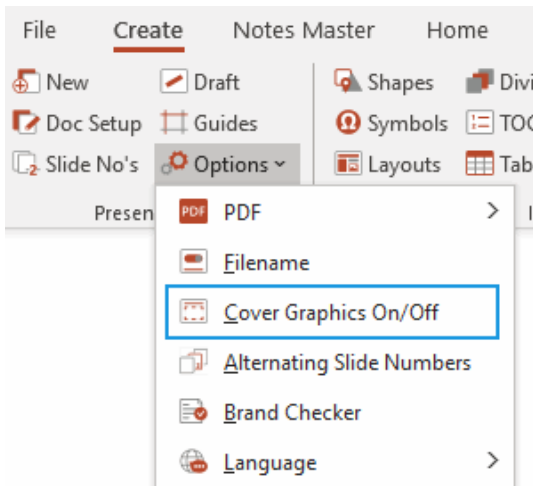
This function displays or hides the filename and location on each slide of the presentation.



Select **Filename** on the **Create** ribbon.

Hiding Cover Graphics

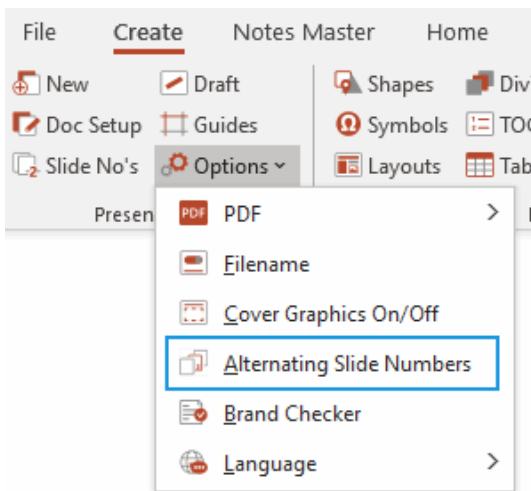
This function displays or hides cover graphics on the title slide of the presentation (the availability of this function depends on your customisation) – useful if you are planning to print on to pre-printed covers.



Select **Cover Graphics On/Off** on the **Create** ribbon.

Alternating Slide Numbers

This function displays consecutive slide numbers on alternate slides of the presentation – useful for double-sided printing.

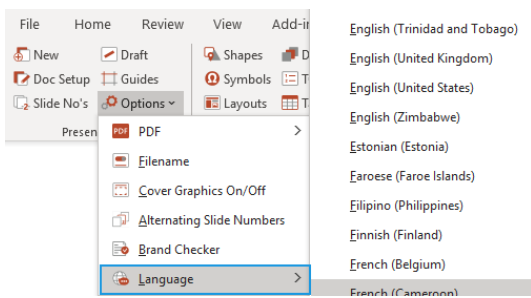


Select **Alternating Slide Numbers** on the **Create** ribbon.

To revert to slide numbers on every slide, select **Slide No's** on the **Create** ribbon.

Language

Applies the selected proofing language to all shapes and objects in the PowerPoint presentation. This will only affect the current document. Your computer's spelling language will be visible at the top of the options.



Select **Options, Language** on the **Create** ribbon.

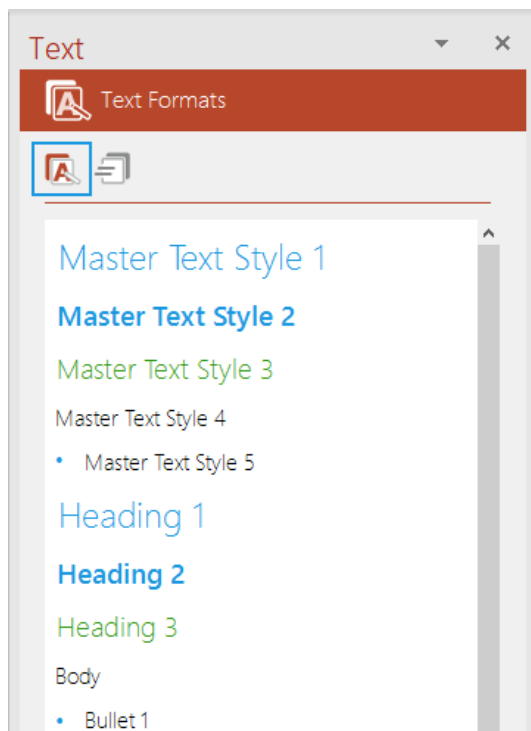
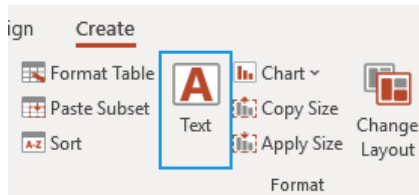
Formatting Tools

Use the tools in the **Format** group on the **Create** ribbon, rather than native PowerPoint to apply formatting to text and other content in the presentation.

Applying Text Formats

Format text using the **Text** task pane. This contains paragraph styles relevant to the template in which you are working.

Select **Text** in the ribbon or side bar to view the available text formats.



The **Text** task pane opens at the **Text Formats** panel, showing all available text formats for the current presentation.

Select a paragraph or multiple paragraphs and then the required text format.

Items marked as *Master Text Style* will reflect the styles set up in your document and you will be able to promote-demote through levels when these styles are applied.

All other styles are manually formatted so you won't be able to promote and demote bullet levels when these are used.

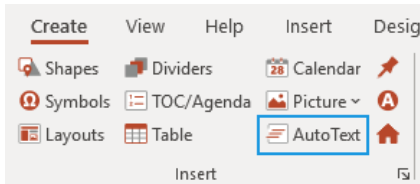
Notes

This function only applies formats to text or paragraphs. It doesn't insert placeholders e.g. if you wish to insert a Slide Title use the **AutoText** function.

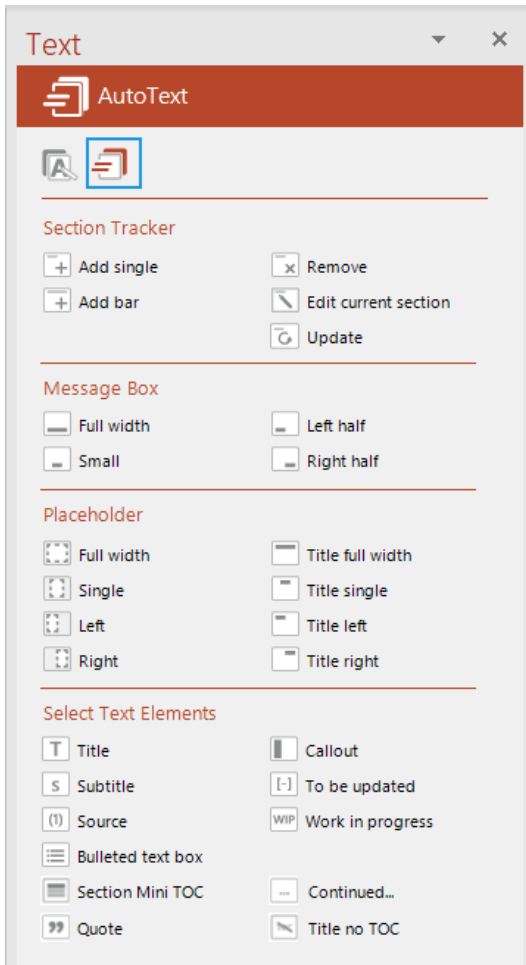
The text formats available will depend on your customisation and the template in which you are working.

AutoText

Insert frequently used text elements such as placeholders, subtitles, a bulleted text box or source and objects from the **AutoText** panel on the **Text** task pane.



Select **AutoText** on the **Create** ribbon.



The **Text** task pane opens at the **AutoText** panel, showing all available AutoText entries.

Select any entry to insert it on to your slide.

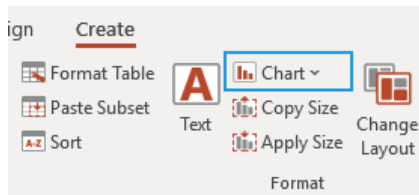
Notes

The *Placeholder* AutoText entries will insert a placeholder in the chosen position on the slide, ready for content to be added. If an entire slide containing placeholders is required, use the **Layouts** function.

For more information on section trackers see **Adding Section Trackers**.

Formatting Microsoft Charts

This function formats embedded Microsoft Charts using one of your organisation's custom themes, directly in PowerPoint.



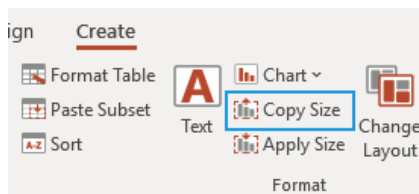
Select **Chart** and select one of the customised chart themes.

Notes

Whilst this will format both PowerPoint charts and charts that were created in Excel, we recommend Excel charts be formatted at source in Excel, as any formatting applied to the chart in PowerPoint will be overwritten when the links are updated.

Copy and Apply Size

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.

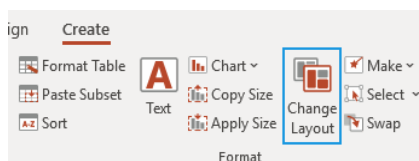


Select the chart and select **Copy Size**.

Select the chart whose dimensions you wish to resize and select **Apply Size**.

Changing a Layout

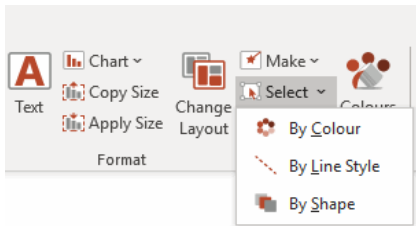
You can change the layout of some slides by selecting **Change Layout** from the ribbon and choosing a new layout from the available list. Any content within the placeholders will be resized and copied into new placeholders on the new layout.



Select **Change Layout**.

Selecting Objects

The *Select* function picks up multiple objects on a slide that have similar attributes. This is handy for simultaneous updating of fill or line colour, shape or other formatting. The *Select* function can only pick up shapes that are not grouped.

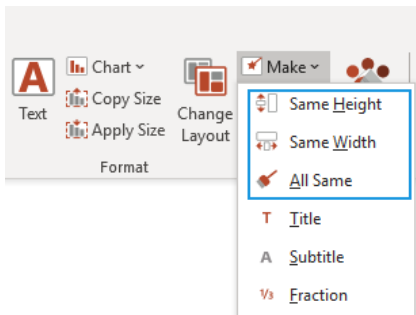


From the *Select* dropdown, choose *By Colour*, *By Line Style*, or *By Shape*.

All the objects with the same selected attributes will be selected, ready to recolour, resize, etc.

Making Objects the Same

This function contains options for applying selected attributes or effects to a shape or shapes.



Select the object which is already of the required height, then select the other objects whose attributes you wish to adjust. Or use the *Select* tool.

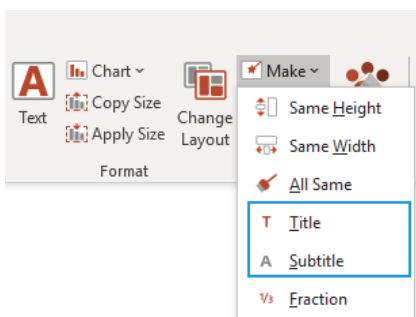
Select *Make* and from the dropdown select *Same Height*, *Same Width* or *All Same* (which will also apply the same formatting such as border and fill).

Notes

All objects must be ungrouped for this function to perform correctly

Making Text a Slide Title or Subtitle

This function will cut and paste selected text into a formatted title or subtitle placeholder.

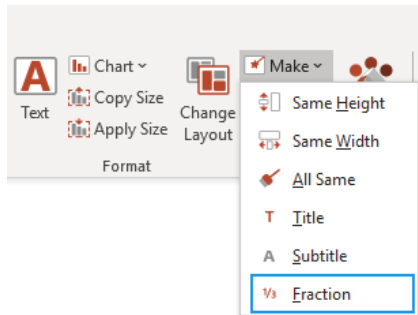


Select the text you wish to cut and paste.

Select *Make* and from the dropdown select *Title* or *Subtitle*.

Fractions

In Microsoft Office, only $\frac{1}{4}$, $\frac{1}{2}$ and $\frac{3}{4}$ can be inserted via the symbol tool (or by typing the figures and having AutoText automatically reformat them for you). The **Fraction** function enables you to format other fractions within the text of your presentation quickly.

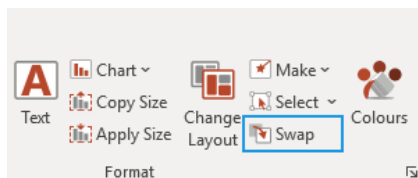


Type in the figures as text with a "/" to indicate the fraction, e.g. 7/8. Select the text.

Select **Make** on the Create ribbon and from the dropdown select **Fraction**.

Swapping Shapes

Swap the location of two selected shapes or objects (e.g. a table, chart, picture, text) on the current slide.

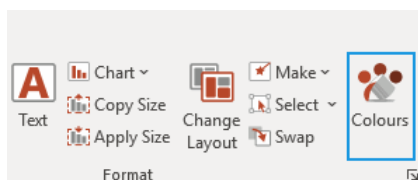


Select the two items to be swapped.

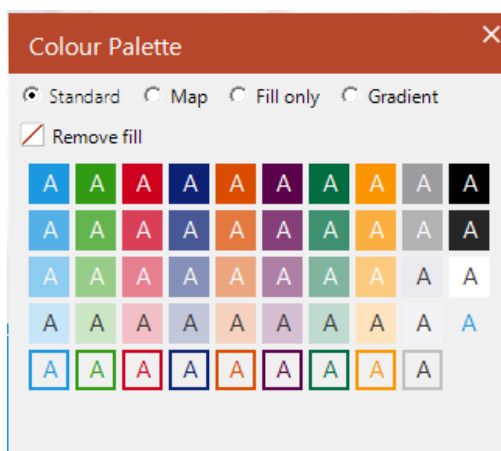
Select **Swap**.

Colour Palette

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



Select **Colours**.



Use the **Standard** colour palette to apply a fill and font colour to a shape and text.

Use the **Map** colour palette to apply a fill and font colour to a map – this will also apply a white (or differentiating) border.

You can "drag" 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.

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.

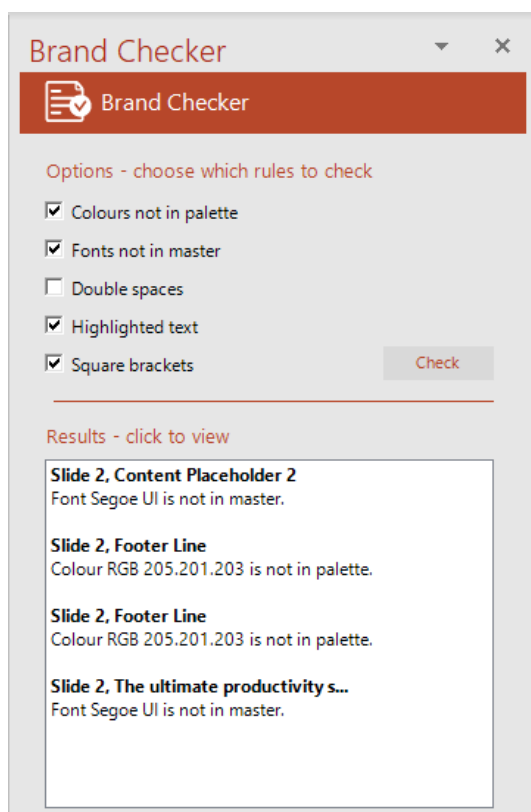
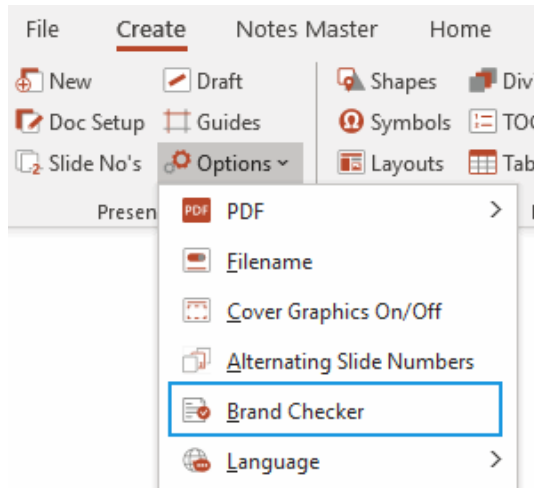
The palette window is also shown in the task bar.

Check **Shapes** for preformatted diagrams that might assist in the creation of your object/drawing.

Brand Checker

Brand checker checks a presentation for branding elements, such as fonts and colours and summarises deviations in a task pane.

Select **Brand Checker** on the side bar or from the **Options** dropdown in ribbon to run the brand checker.



The **Brand Checker** task pane will open. Select which rules you wish to be checked.

- **Colours not in palette** will check for any colours in the presentation that are not part of your colour palette.
- **Fonts not in master** will check for any fonts that are not in any of the slide masters in the template.
- **Double spaces** will check for any occurrences of double spaces within text.
- **Highlighted text** will check for any text that has been highlighted using the PPT highlighting tool.
- **Square brackets** will check for any square brackets [].

Select **Check**.

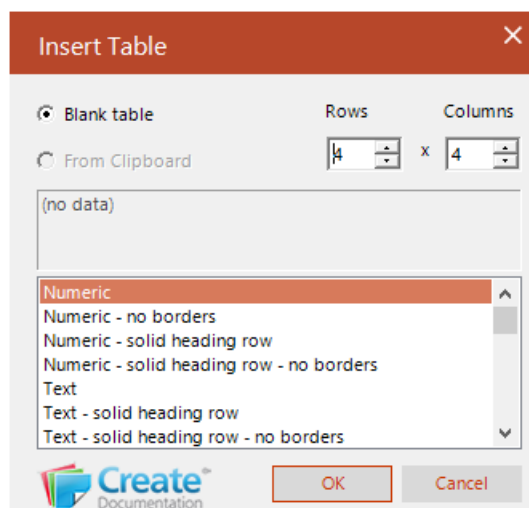
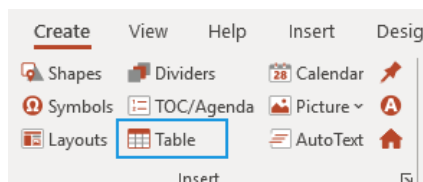
The results of the brand check will be listed below. Double-click on any item to go to that item in the presentation.

PowerPoint Tables

Use the Create table tools to insert and format tables in your organisation's branding, rather than native PowerPoint to ensure you are using the correct formatting.

Inserting Tables

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.



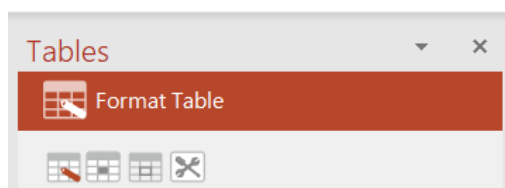
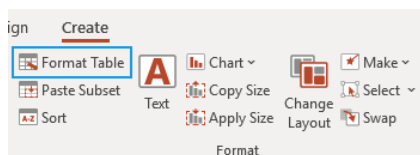
Choose the number of rows and columns you need for your table and then select a table format from the list.

Click **OK**.

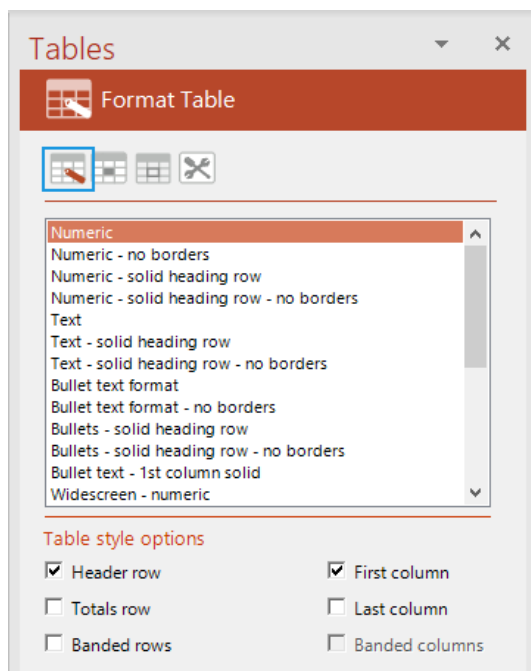
The table will be inserted in the placeholder.

Formatting Tables

Once a table is inserted you can apply a different table format or apply other specific formatting options. Select the table and select **Format Table** on the ribbon or **Format** on the side bar.



The **Tables** task pane opens at the **Format Table** panel. You can select an icon to view **Format Cells**, **Borders** or **Table Tools**.

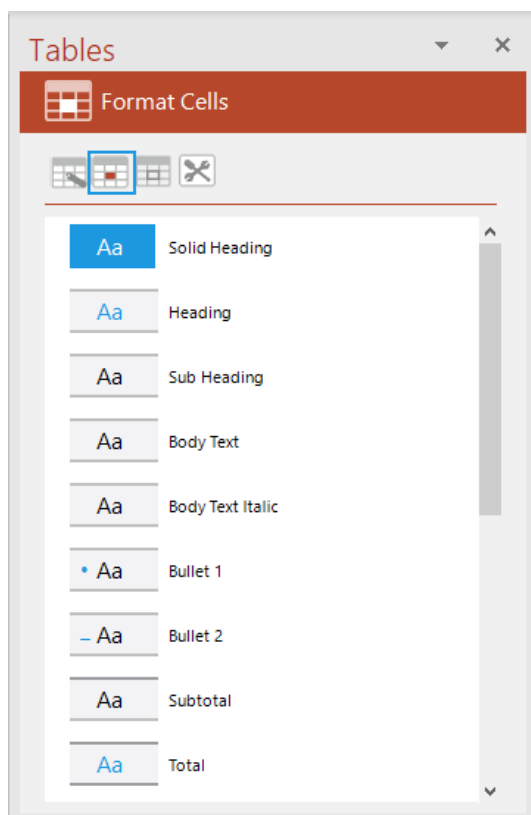


Select a base **Table Format** from the list to apply to the selected table.

Check any of the **Table Style Options** to apply special formatting to your table. To remove this formatting, uncheck the option.

Formatting Cells

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

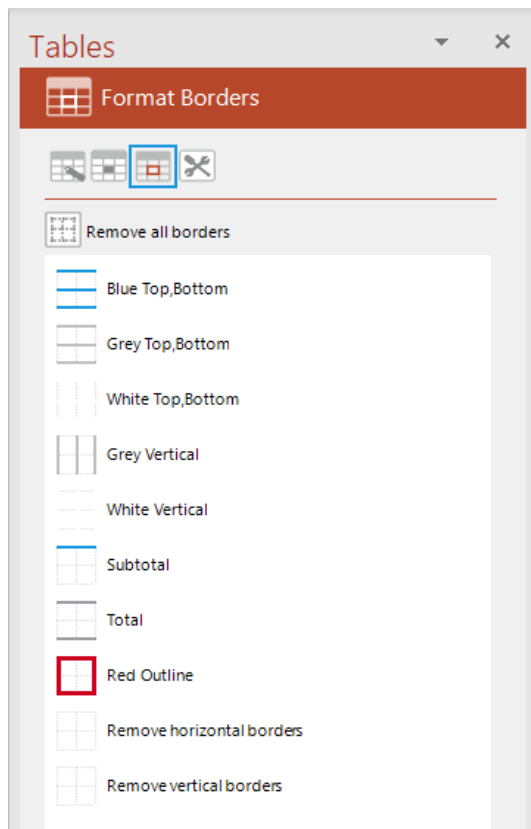


From the **Format Cells** panel click an option in the list to apply a cell format to the selected cells.

Note that applying a cell format will not change the font size or the alignment of a cell. It will apply the correct font type, colour and cell formatting such as fill and border.

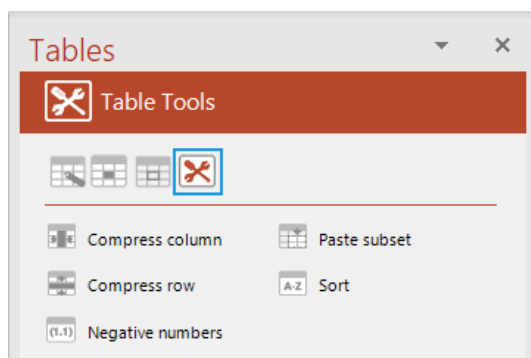
Formatting Borders

Borders will be applied accordingly when you apply a whole table format but to change these or to apply additional borders to the table use the *Format Borders* function rather than native PowerPoint. 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



Use one of the **Table Tools** to overwrite some of the current behaviours of selected cell/s.

Compress Column

Reduces the column width of the whole table or selected columns, when space is needed to accommodate more data, or your table no longer fits the available area.

If the table still does not fit the area, then consider reducing the font size of the whole table.

Compress Row

Reduces the top and bottom cell padding of the selected row/s or the whole table if more space is needed to accommodate more data or your table no longer fits the available area.

If the table still does not fit the area, then consider reducing the font size of the whole table.

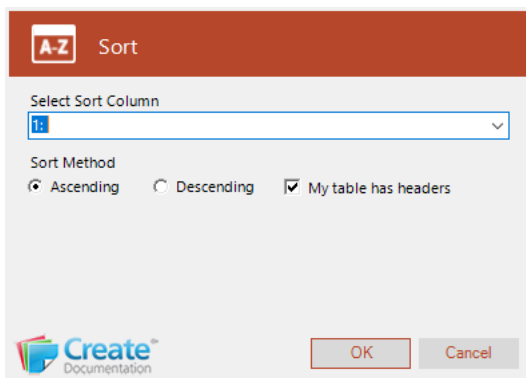
Negative Numbers

Formats selected numbers, when negative, to your organisation's preferred default, typically one of these options (29.9) -29.9 (29.9) -29.9.

However, if your table is linked to Excel, always make changes to source worksheet and use the Create *Update* function.

Sort

Sorts data alphabetically in a table or in multiple tables on a slide, based on a selected column.



Select the column on which the sort is to be based.

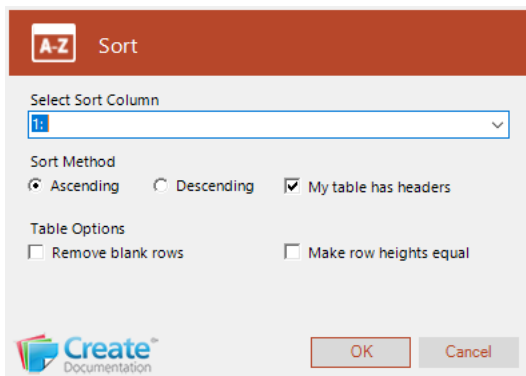
Choose *Ascending* or *Descending*.

Uncheck *My Table has headers* if you want to include the first row within the sort.

Click *OK* to sort the table.

Sort Multiple Tables

Sorts multiple tables on a slide (for example, a Glossary of Terms consisting of two separate tables) - use SHIFT + Select to select multiple tables. If the tables are on different slides, copy to one slide, *sort* and then move the table/s back to their original slide.



When you select multiple tables, you will see some additional options:

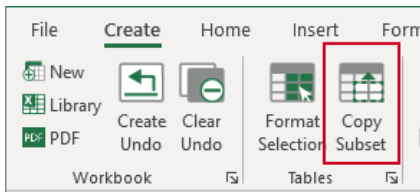
Check *Remove blank rows* to remove any blank rows in either table. Create will then evenly distribute the content across the tables.

Choose *Make row heights equal* if you want the row heights to be identical regardless of the content.

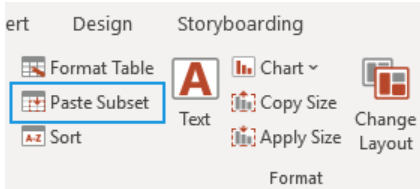
Paste Subset

This function is handy 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**.

Inserting Rows and Columns in a Table

Use native PowerPoint table tools to insert rows and columns in a table.

Inserting a Row

Place your cursor in the row next to the one where you wish to insert the new one. Go to the **Table Tools Layout** ribbon (which will appear automatically when you click into the table) and from the *Rows & Columns* group choose *Insert Above* or *Below* as required.

If you have changed the height of any rows, you may need to redistribute them evenly later. Select the rows you want to format and select the *Distribute Rows* button.

Inserting a Column

Place your cursor in the column next to the one where you wish to insert the new one. Go to the **Table Tools Layout** ribbon (which will appear automatically when you click into the table) and from the *Rows & Columns* group choose *Insert Left* or *Right* as required.

If you have inserted or deleted columns, you may wish to adjust the width of some or all of the columns. Select the columns you wish to format and select the *Distribute Columns* button.

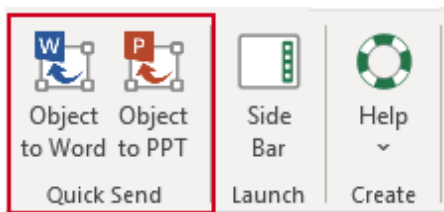
Linking Excel Data to PowerPoint

Using Create you can export table data and charts from Excel to PowerPoint with a link to the Excel source data. Charts and tables can then be updated in PowerPoint using Create.

If your cursor is in a placeholder in PowerPoint when copying from Excel the chart or table will be sized and positioned correctly on the slide.

Quick Send

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



Make sure you have a placeholder selected in PowerPoint.

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

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

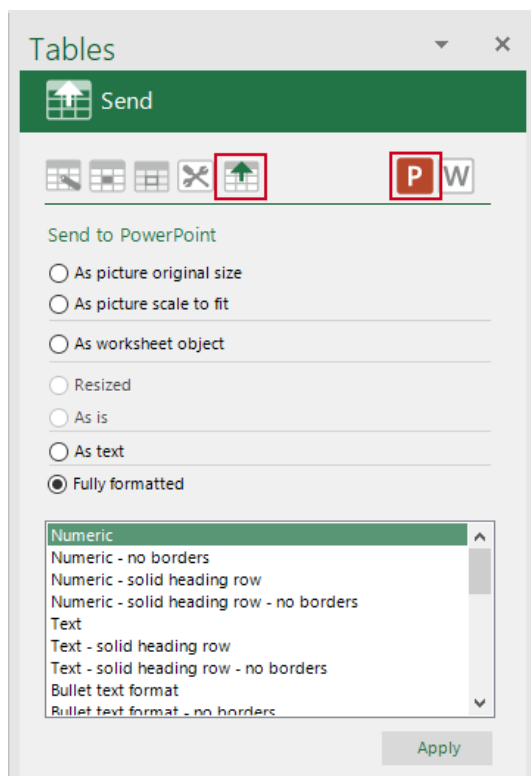
Other Methods of Copying Tables from Excel

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

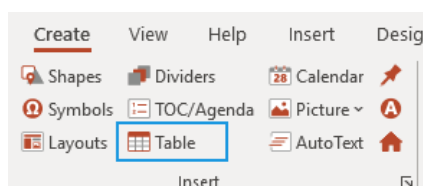
For further details on Excel tables see the **Excel Create User Guide** or the online Help in Excel.

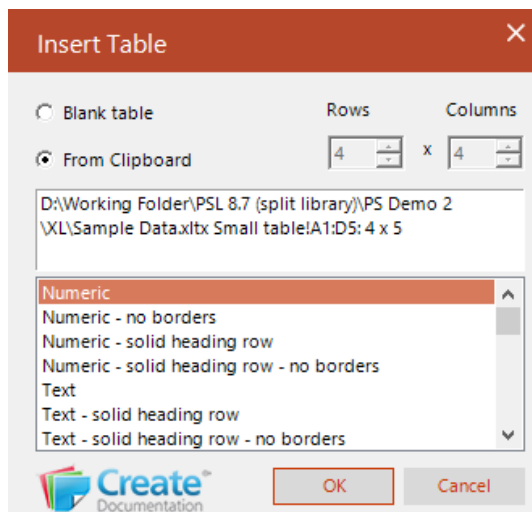
Copying Table Data from the Clipboard to PowerPoint

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

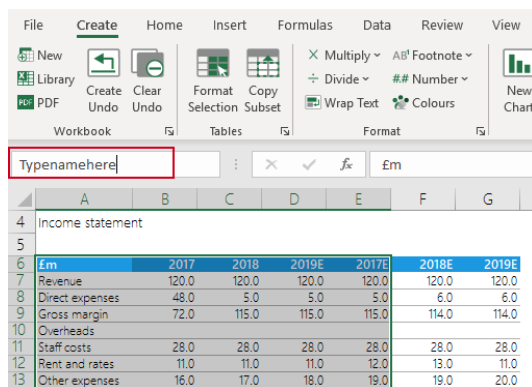
If the data changes in Excel, you can update the linked data via the *Update Selected* button on the **Create** ribbon in your PowerPoint presentation.

Named Ranges in Excel

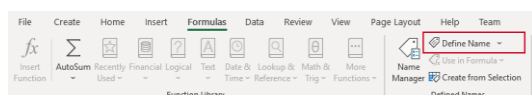
If a range of table data in the Excel workbook has been named, when exporting the data from Excel to Word or PowerPoint the range's name rather than the cell reference is used in the **Link** dialogue box in Word or PowerPoint. This makes the updating of tables more efficient because, regardless of the 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

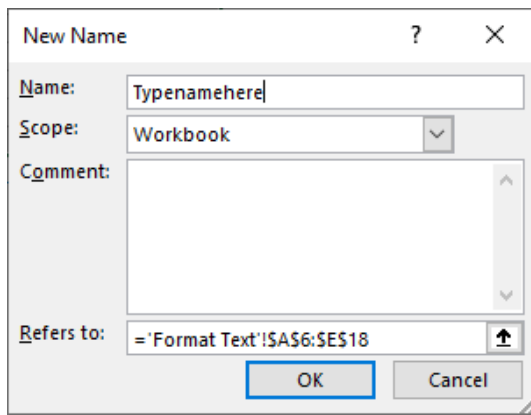
Select the cell range that you want to name.



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



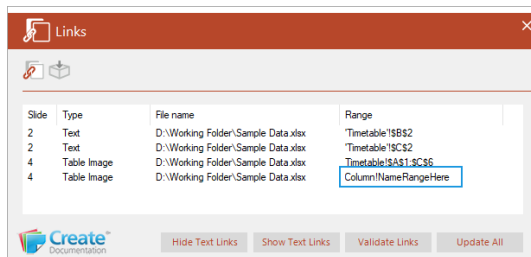
Alternatively, select the cell range that you want to name and on the **Formulas** tab, click **Define Name** in the **Defined Names** group.



The 'New Name' dialog box is shown. It has a title bar with a question mark and a close button. The 'Name' field contains 'Typenamehere'. The 'Scope' dropdown is set to 'Workbook'. The 'Comment' field is empty. The 'Refers to' field contains the formula '=Format Text!\$A\$6:\$E\$18'. There are 'OK' and 'Cancel' buttons at the bottom.

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



The 'Links' task pane is shown. It contains a table with the following data:

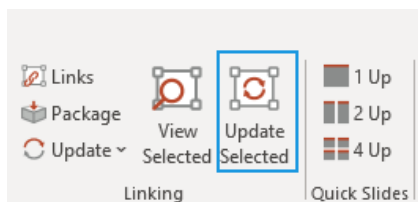
Slide	Type	File name	Range
2	Text	D:\Working Folder\Sample Data.xlsx	'Timetable'!\$B\$2
2	Text	D:\Working Folder\Sample Data.xlsx	'Timetable'!\$C\$2
4	Table Image	D:\Working Folder\Sample Data.xlsx	'Timetable'!\$A\$1:\$C\$6
4	Table Image	D:\Working Folder\Sample Data.xlsx	Column!NameRangeHere

At the bottom of the pane are buttons: 'Hide Text Links', 'Show Text Links', 'Validate Links', and 'Update All'.

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.



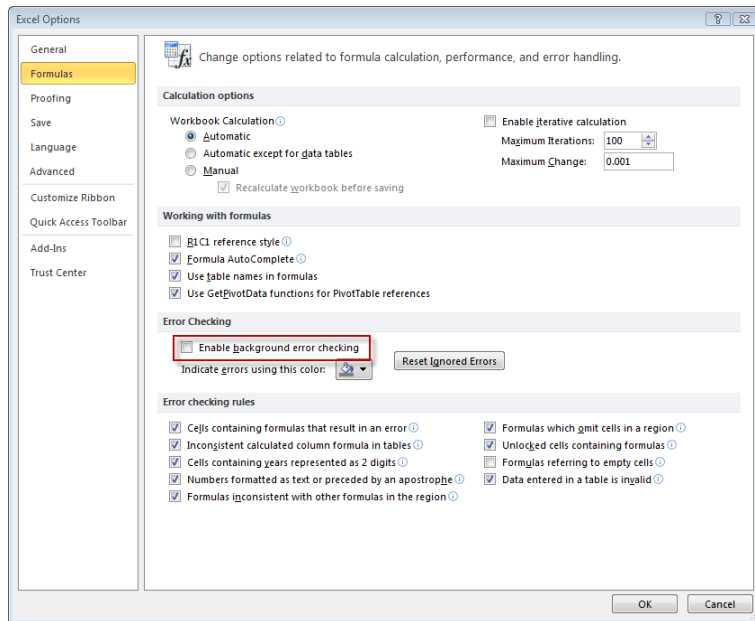
The 'Create' ribbon is shown, specifically the 'Linking' group. It contains buttons for 'Links', 'Package', and 'Update'. The 'Update' button has a dropdown menu. The 'Update Selected' button is highlighted with a blue box. To the right of the buttons are 'Quick Slides' options: '1 Up', '2 Up', and '4 Up'.

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).

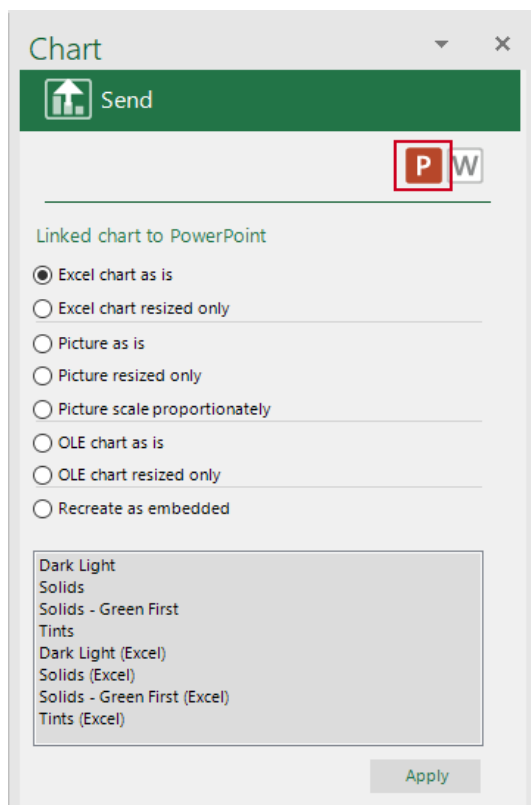
Other Methods of Copying Charts from Excel

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**

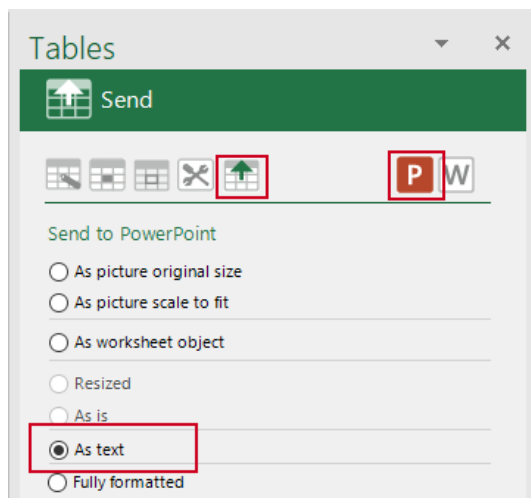
The chart will be copied to the placeholder in PowerPoint using the method selected.

For further details on charts in Excel see the **Excel Create User Guide**.

Linking One Cell's Content from Excel

You can copy one cell's content from Excel to PowerPoint 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

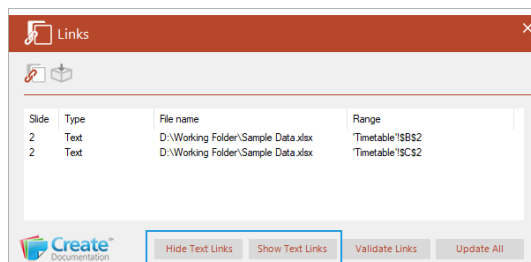
changes in the Excel source file and can be displayed as plain or hyperlinked text - managed in the *Links* dialog.



In PowerPoint 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.

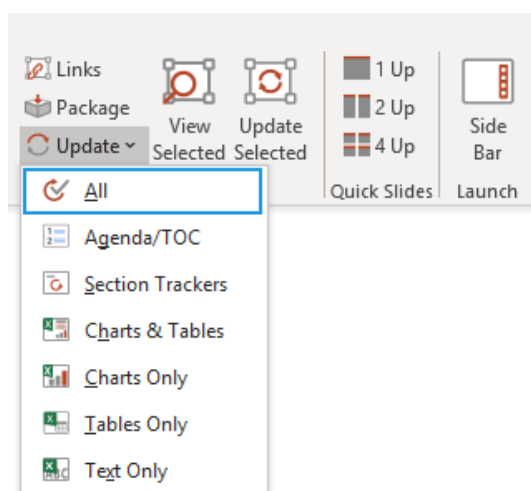
The text will be inserted as a hyperlink in PowerPoint. This can be updated using Create. See **Updating Linked Objects**.



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

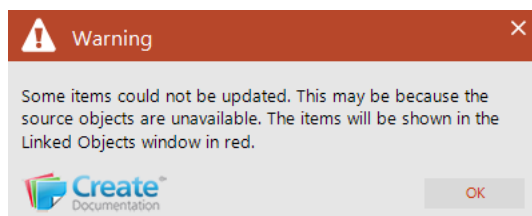
Updating Linked Objects

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 automatically in PowerPoint. Make sure you save the Excel file before updating. Linked objects can be updated individually or by object type (i.e. charts, tables or text). You can also select **Update, All** which will update the agendas/TOCs and section trackers as well as any linked objects.



To update only linked charts, tables or text in a presentation select **Charts Only**, **Tables Only** or **Text Only** from the **Update** dropdown.

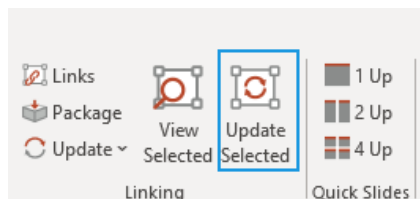
If any links cannot be found the following message is displayed



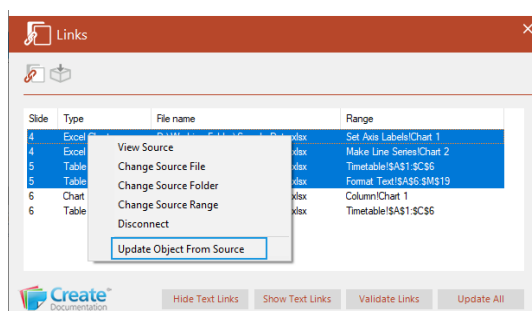
Use the **Change Source File** option in the **Links** dialog to correct any missing links. See **Changing the Excel Source File**.

Updating a Single Object

You can update individual objects - this will save time especially if you have numerous linked objects in your presentation.



Select the object to be updated and select **Update Selected**.

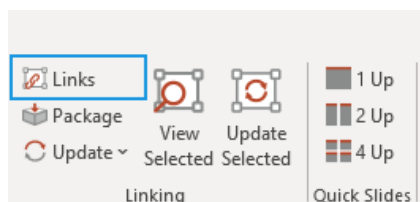


OR

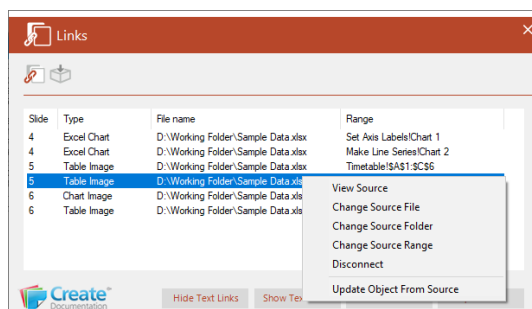
Right-click on the object (or select multiple objects by holding the SHIFT key down) in the **Links** dialog and select **Update Object From Source**.

Managing Linked Objects

Table data or charts that have been imported from Excel become linked objects in your presentation. The **Linking** group contains options for viewing and updating those links, copying and pasting linked objects between presentations and packaging up your presentation along with all the links. There is no limit to the number of linked objects or the number of related Excel files.



Select **Links** to view a list of the linked objects in your presentation.

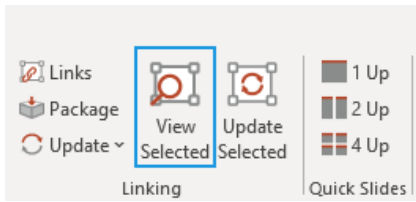


The dialog lists all the linked objects in the presentation. As you click on any linked object in your presentation, that object will be highlighted in the dialog box making it easier to identify.

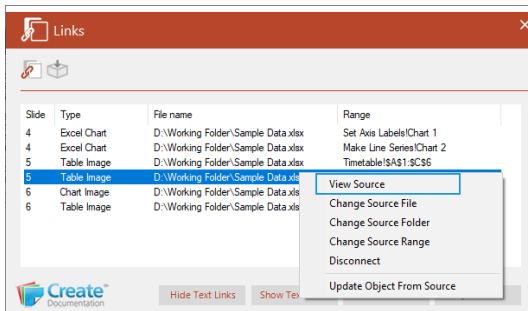
You can select an object or multiple objects and right-click to view (open), change, update or disconnect from the source data.

Viewing Excel Source Files

This function will open the source file and navigate to the source table data or chart in Excel. Make sure the source file isn't already open – if it is, then a *Read Only* copy will be opened.



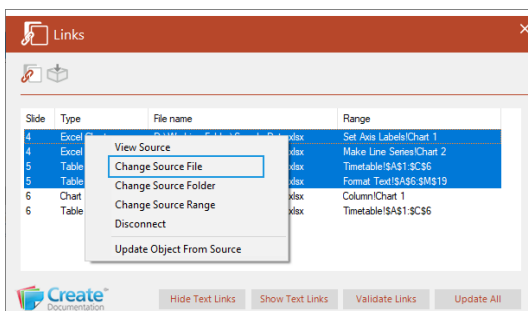
Select the object whose Excel source data you wish to view and select *View Selected*.



OR, right-click on the object in the *Links* dialog and select *View Source*.

Changing the Excel Source File

You may wish to link the object to a different file. Note though, that the range of data and the worksheet ribbon must have the same name as the original data, for this function to perform correctly.

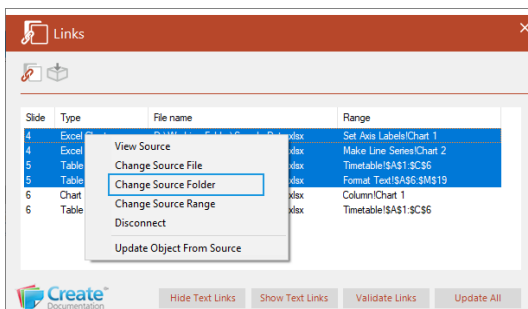


Right-click on the object (or select multiple objects by holding the SHIFT key down) in the *Links* dialog and select *Change Source File*.

Navigate to the new file location, select the file and click **Open**.

Changing the Excel Source Folder

You may wish to link the object to a different folder. Note though that the file, the data range and the worksheet ribbon must have the same name as the original data, for this function to perform correctly.

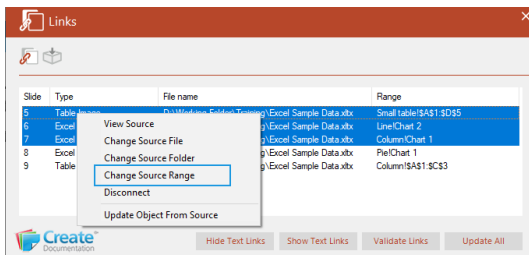


Right-click on the object (or select multiple objects by holding the SHIFT key down) in the *Links* dialog and select *Change Source Folder*.

Navigate to the new folder location and select the file and click **OK**.

Changing the Excel Source Range

You may wish to link the object to a different data range. Note though that the data range must be in the same file and folder as the original data copied over, for this function to perform correctly.

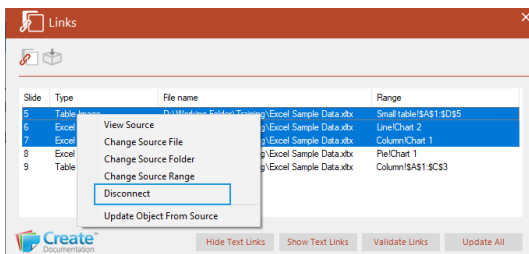


Right-click on the object (or select multiple objects by holding the SHIFT key down) in the *Links* dialog and select *Change Source Range*.

Type in the new data range or select **Show** to show the existing data range and then select the new data range click **OK**.

Disconnecting Linked Objects

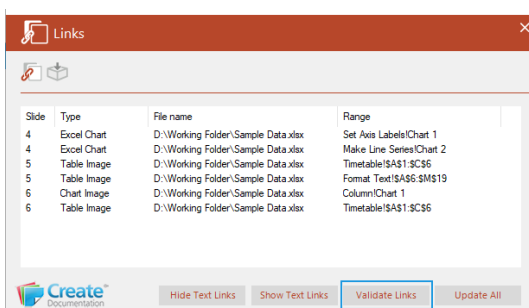
You can break the link or disconnect linked objects at any time. The chart or table will remain in the presentation, but it will no longer be linked to the original Excel source data.



Right-click on the object (or select multiple objects by holding the SHIFT key down) in the *Links* dialog and select *Disconnect*.

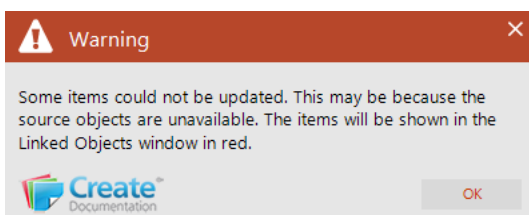
Validating Links

This function will check all the linked objects in your presentation to make sure they are still valid. If any of the links are missing, they will be highlighted in the *Links* dialog.



Right-click on the object (or select multiple objects by holding the SHIFT key down) in the *Links* dialog and select *Validate Links*.

If any links cannot be found the following message is displayed.



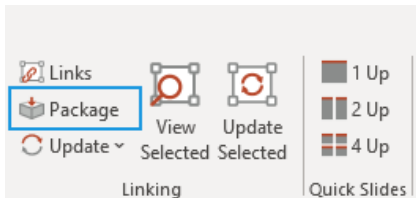
You can continue to update all the remaining links but those that are missing will not be updated.

Use the *Change Source File* or *Change Source Range* options in the *Links* dialog to correct any missing links.

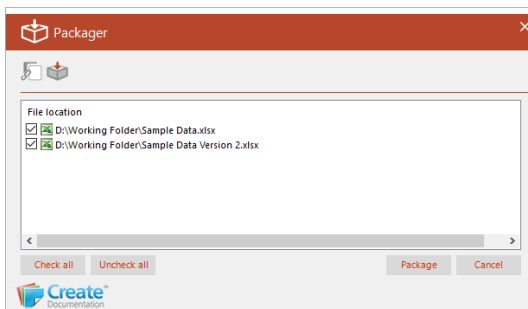
Packaging Linked Files

This option takes a copy of the presentation and all the linked Excel data files. It puts the files in a custom zipped file which you can only open, edit and update with Create. This can then be sent to a colleague or re-filed in the user's own system. The recipient (or user) can then unpackage the files and the links to the source data will be updated automatically to the new file location.

Make sure all the files are saved and the Excel files are closed.



Select *Package* from the ribbon or from the *Links* dialog.



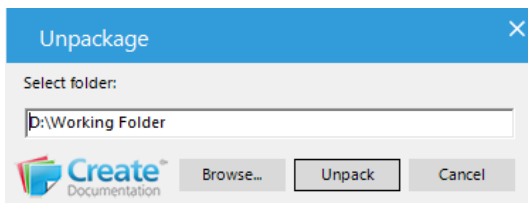
The *Packager* dialog will open with a list of all the associated Excel files.

Check the files you wish to package with your document. Select *Package*.

Name and save the packaged (ending psl-pkg) file to the required location.

Unpackaging Linked Files

Unpack the PowerPoint and associated Excel files to a new location by double-clicking on the psl-pkg file.



The *Unpackage* dialog will open.

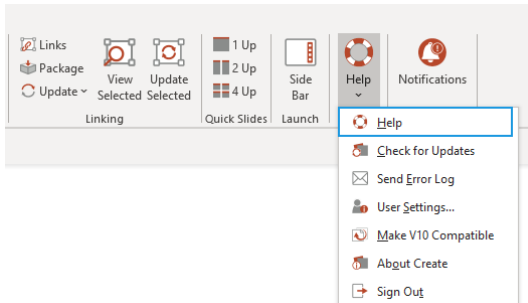
Select the folder in which you wish to save the PowerPoint file and the linked files. Select *Unpack*.

The PowerPoint file and selected Excel files will be saved to the new location and any linked objects relinked to the Excel file in the new location.

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**

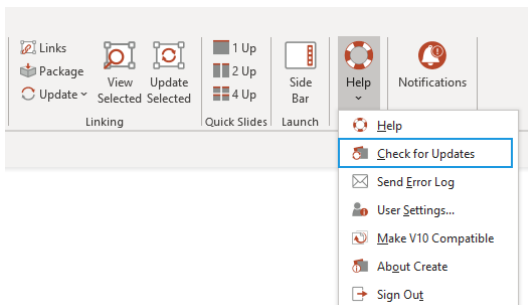
On the contents pane, main topic headings are listed on the left of the window. A tick next to a topic indicates that further subtopics are available under the selected topic. A plus sign indicates that selecting the topic will display the topic text and no further subtopics.

Under "related topics", blue text indicates that the topic has not been accessed previously; purple indicates that it has been accessed.

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**.

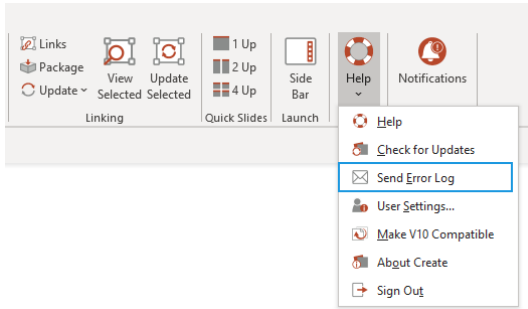
From the dropdown menu select **Check for Updates**

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:



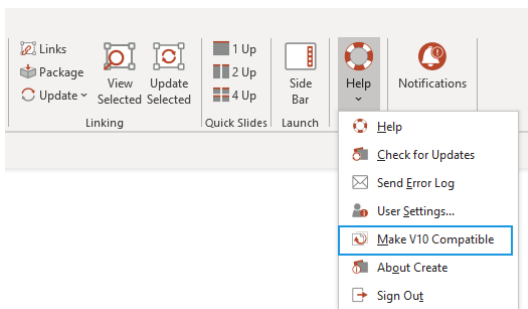
On the **Create** ribbon select **Help**.

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.

Make V10 Compatible

Use this option on presentations that have been created in previous versions of Create. It will ensure that all required tables styles are added to the template and so make formatting more efficient.



Open the presentation that was created in a previous version of Create.

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

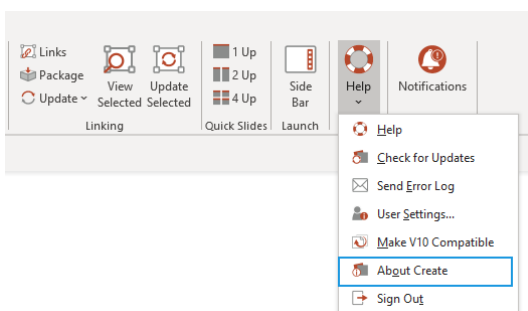
From the dropdown menu select **Make V10 Compatible**.

Notes

This will update the presentation to V10. If you intend to work on the presentation again in a previous version, make a copy first.

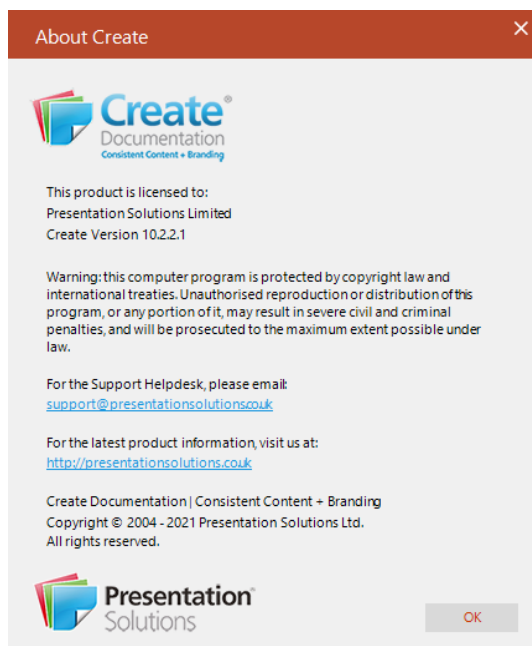
About Create

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.

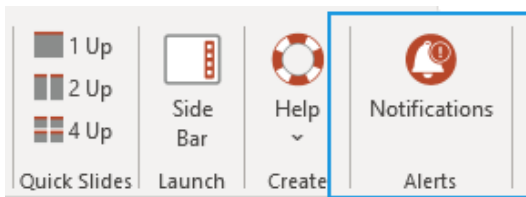
[Create V10 Documentation](#)

Notifications

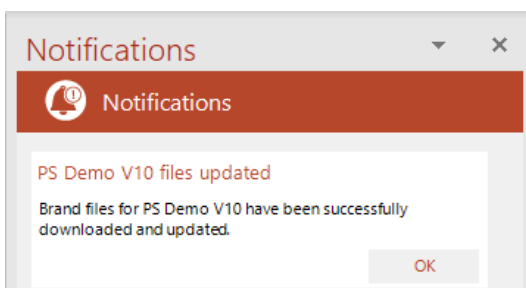
Assets are uploaded by designated authors within your organisation and can be marked as *updateable*. The *Notifications* button will be enabled if:

- 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.



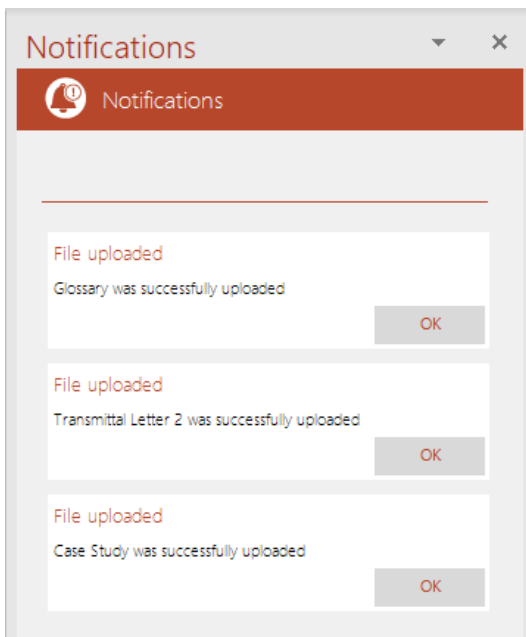
Click on *Notifications* in the ribbon.



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.



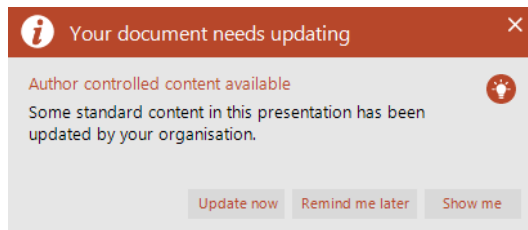
The files will be uploaded and you can close the task pane.

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

Notes

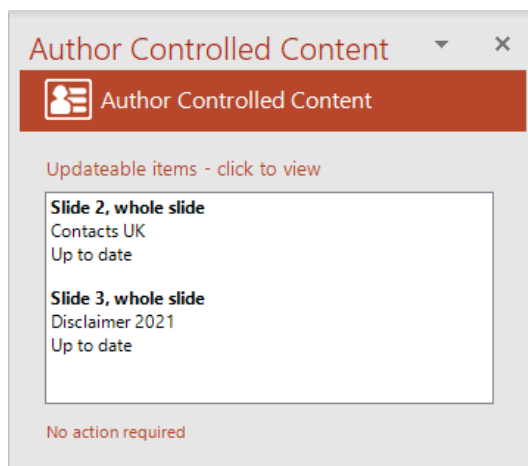
If you do not select it, the *Notifications* button will remain enabled and any updated assets in your presentation will not be updated.

Author Controlled Content



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

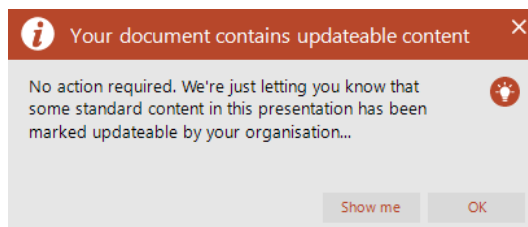
Click *Update* to update the assets in your presentation or *Remind me later* to close the message without updating the content – the message will reappear until you update. Click *Show me* to open the **Author Controlled Content** pane.



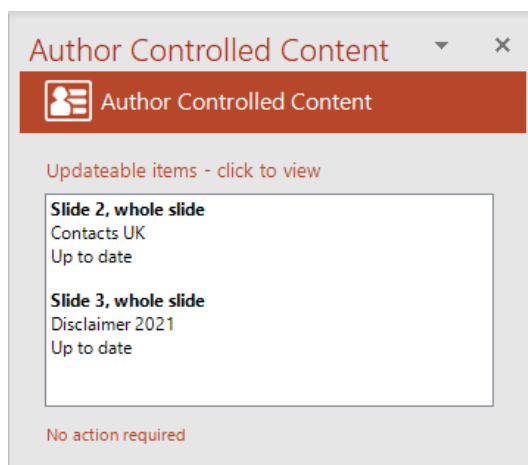
The **Author Controlled Content** pane will open listing the assets that have been updated.

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

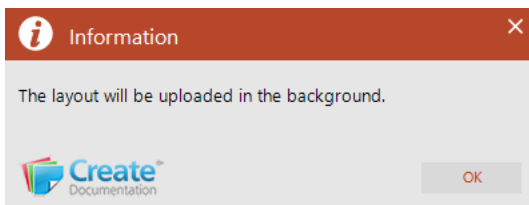
OK

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

Complete the details of the new layout:

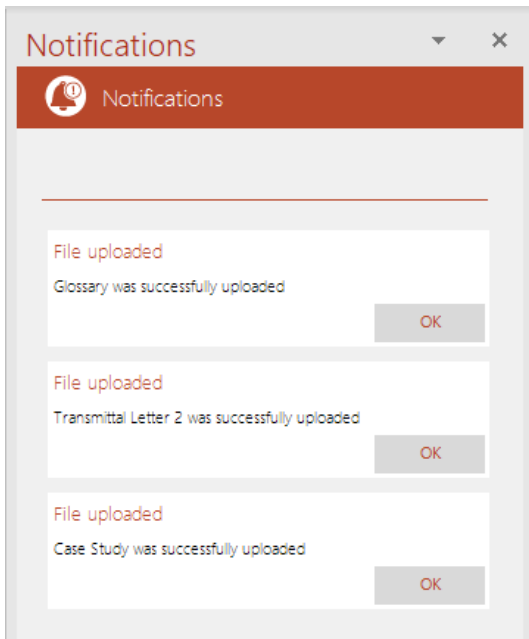
- **Name:** The name that you choose will appear underneath the layout thumbnail in the **Layouts** task pane once the layout is uploaded.
- **Publish date:** Defaults to the current day, month and year. To choose a future date, click on the calendar button and select the date. The recorded publish date 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 64.

Uploading Images

Select the image you wish to upload.



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.

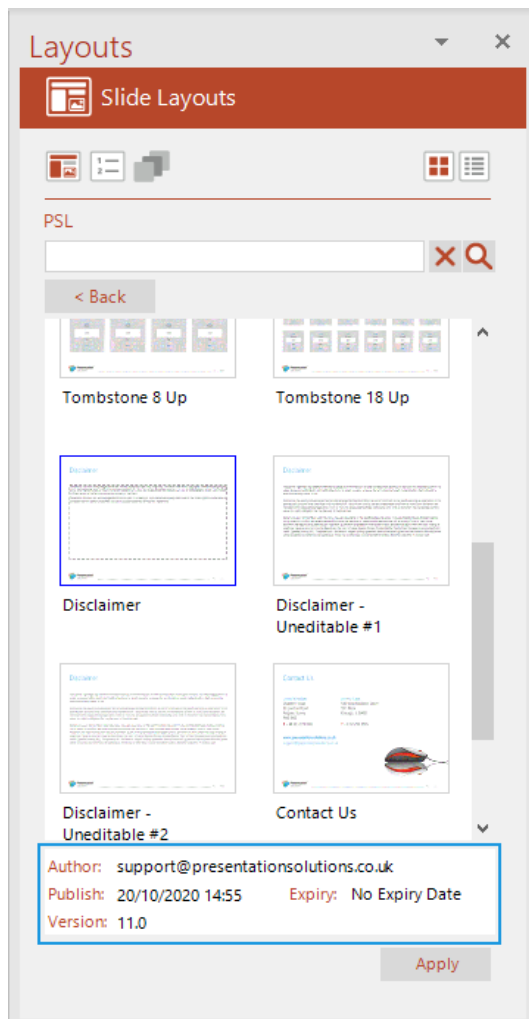
The **Author** task pane will open at the **Upload Assets** panel.

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

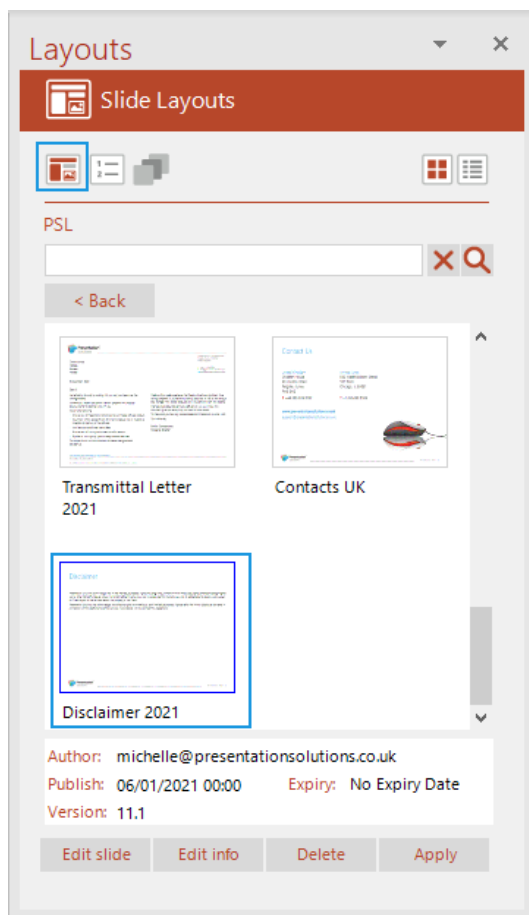
Existing assets are edited using the pane from which they are inserted (i.e. the **Layouts** or **Shapes** task panes). Only assets which have been uploaded by a client author can be edited. Assets built into Create by Presentation Solutions cannot be edited by authors.



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**.

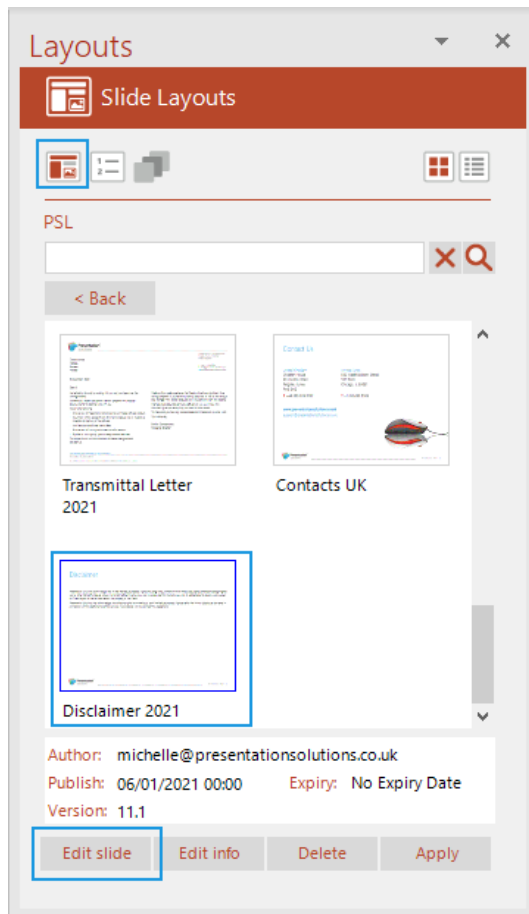
Authors will see all assets, including those that are not yet published.

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.

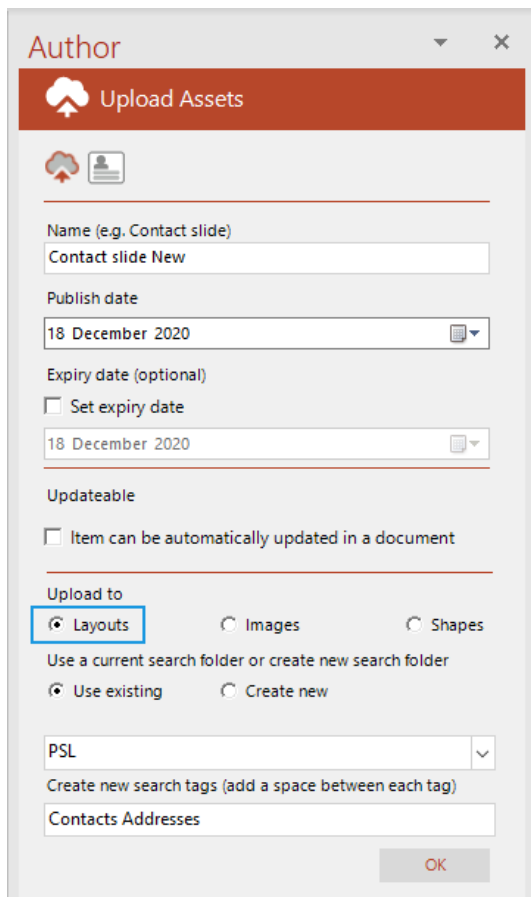
If you are an author and you wish to **replace** an existing author-generated slide:



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 several input fields and checkboxes for configuring an upload. The 'Name' field is filled with 'Contact slide New'. The 'Publish date' is set to '18 December 2020'. The 'Expiry date (optional)' section has a checkbox for 'Set expiry date' which is unchecked, with the date field also showing '18 December 2020'. Under the 'Updateable' section, the checkbox 'Item can be automatically updated in a document' is unchecked. The 'Upload to' section has three radio buttons: 'Layouts' (selected and highlighted with a blue box), 'Images', and 'Shapes'. Below this, there are two options for search folders: 'Use existing' (selected) and 'Create new'. A dropdown menu shows 'PSL'. A text field for 'Create new search tags' contains 'Contacts Addresses'. An '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

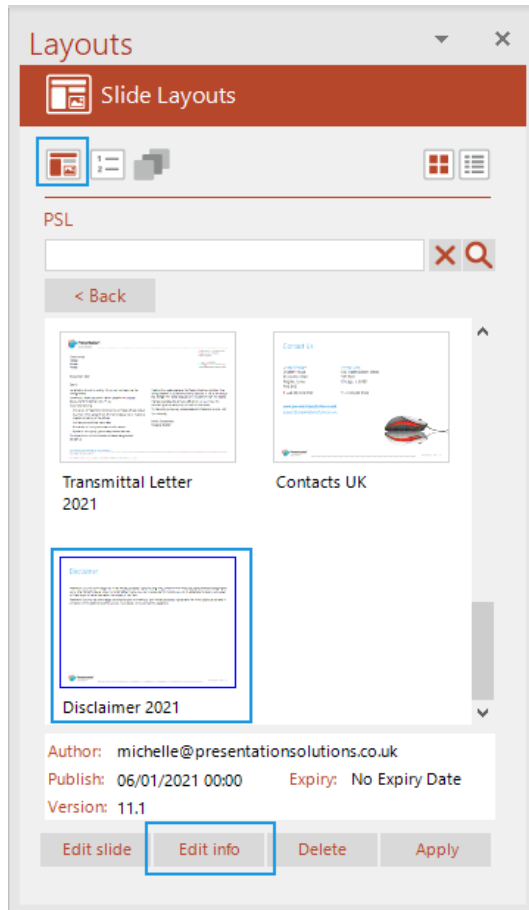
OK

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

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**.

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

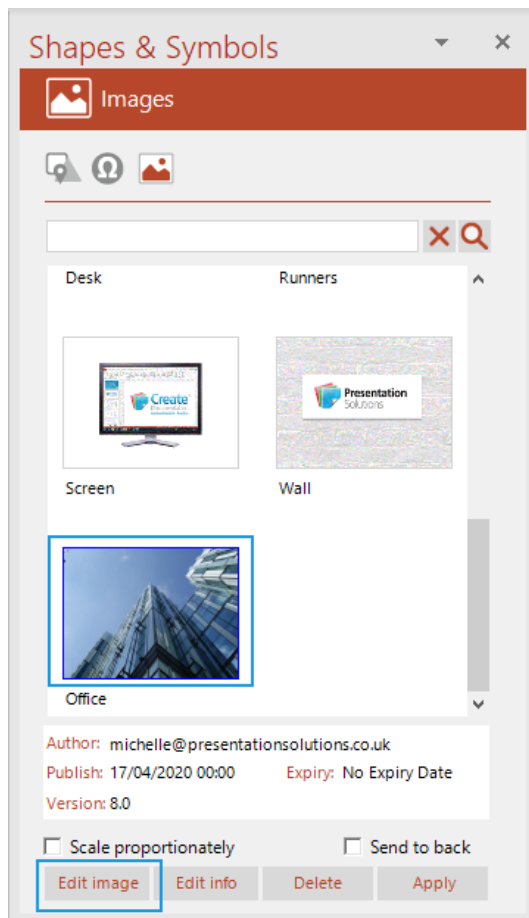
OK

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:

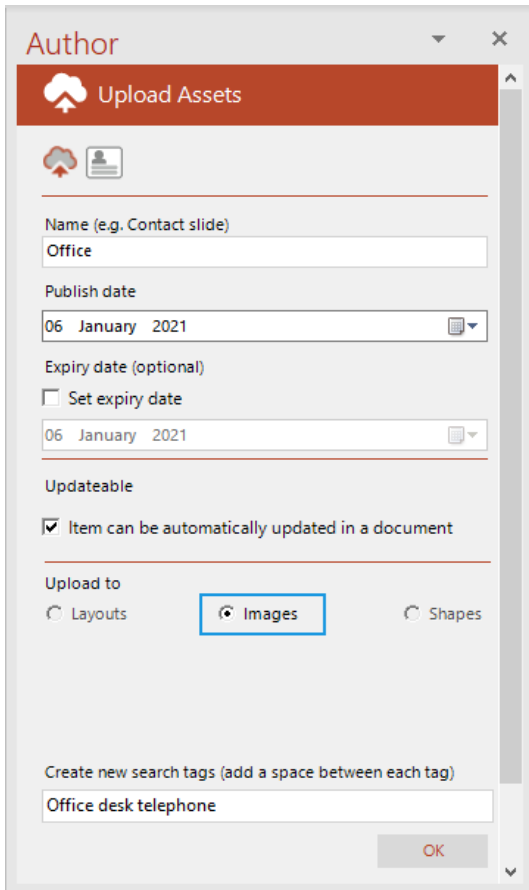


Select the new version of the image in your presentation.

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.



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

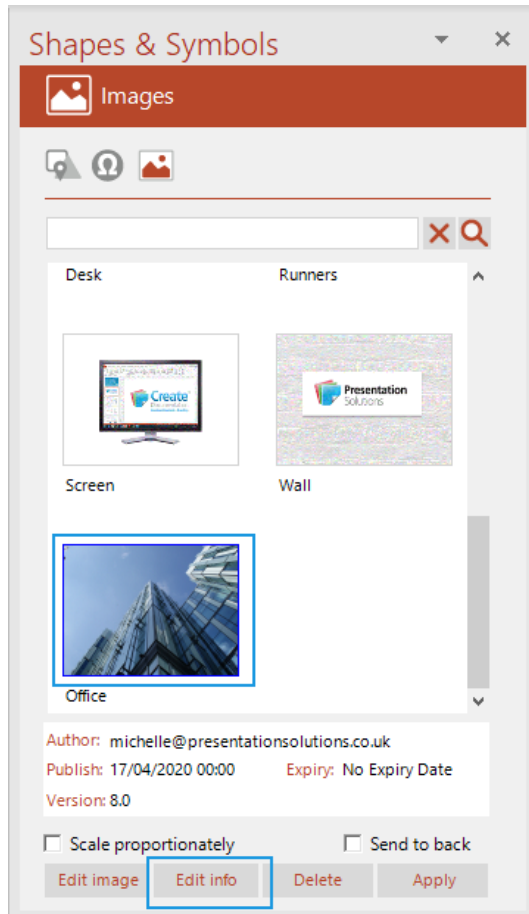
Create new search tags (add a space between each tag)
Office desk telephone

OK

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

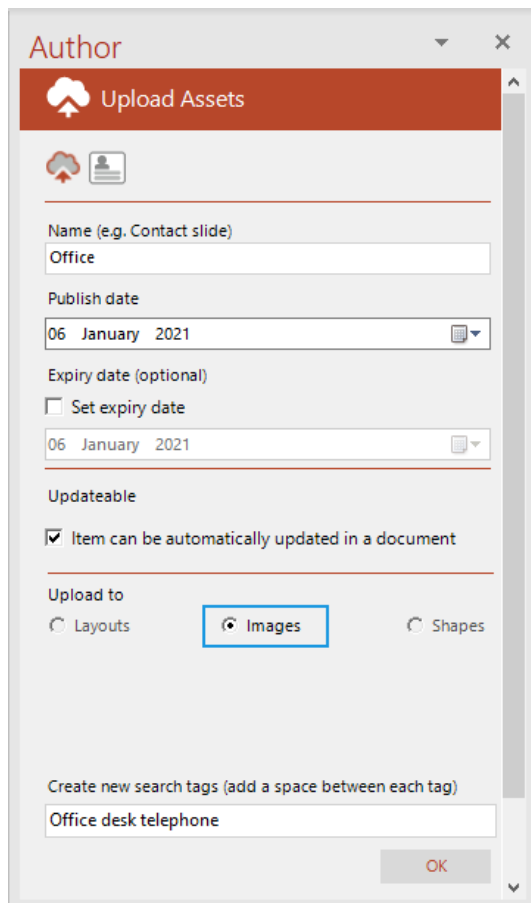
Make any required changes to the information and click **OK**.

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 the following fields and options:

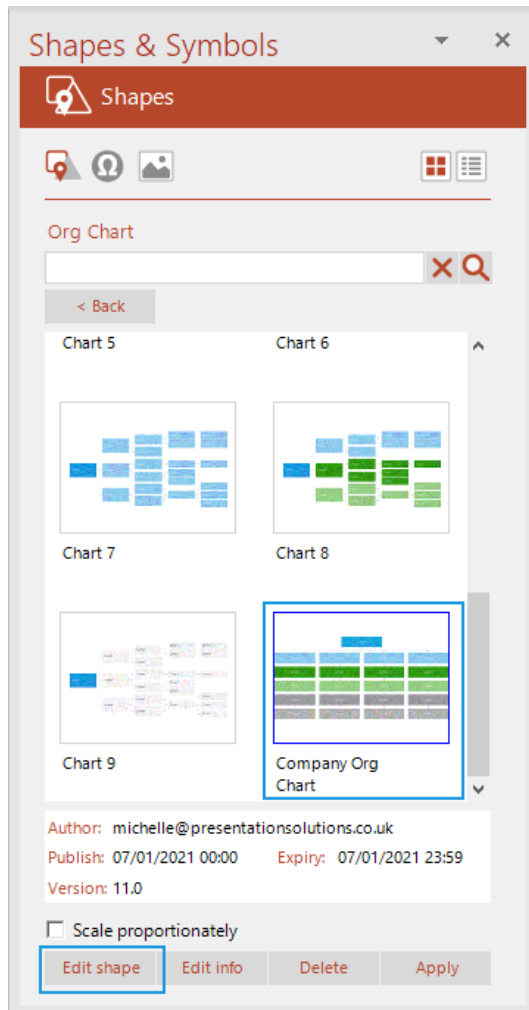
- Name (e.g. Contact slide):** A text box containing 'Office'.
- Publish date:** A date picker showing '06 January 2021'.
- Expiry date (optional):** A checkbox labeled 'Set expiry date' is unchecked, followed by a date picker showing '06 January 2021'.
- Updateable:** A checkbox labeled 'Item can be automatically updated in a document' is checked.
- Upload to:** Three radio buttons: 'Layouts' (unchecked), 'Images' (checked and highlighted with a blue box), and 'Shapes' (unchecked).
- Create new search tags (add a space between each tag):** A text box containing 'Office desk telephone'.
- OK button:** A grey button with the text 'OK' in red.

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

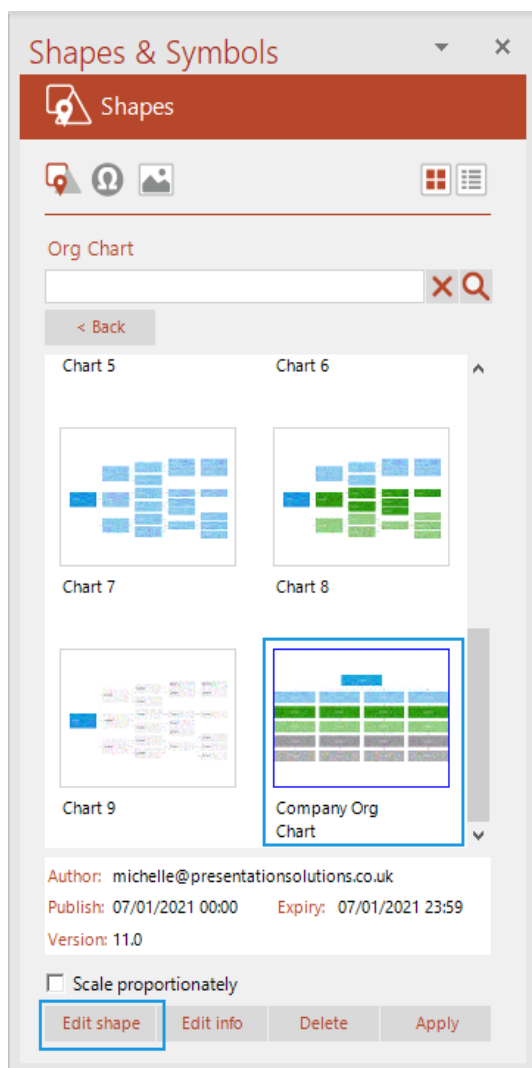
If you are an author and you wish to **replace** an existing author-generated shape:



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

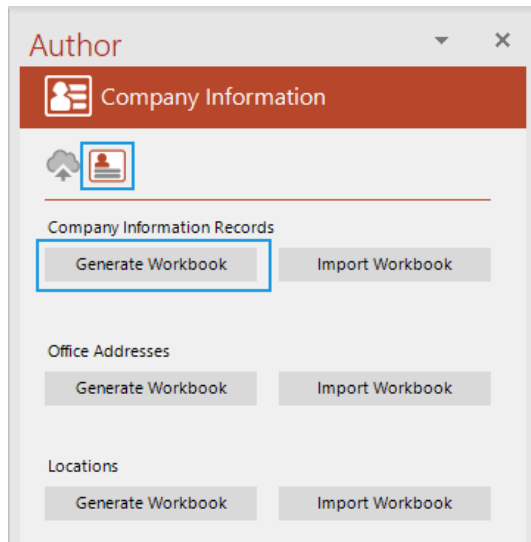
Company information records can contain a range of fields such as registered company text and copyright dates. The fields included will vary according to your company's customisation of Create.

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.

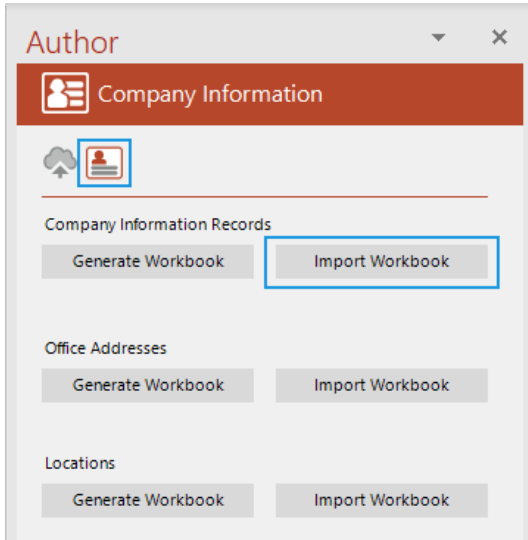
Blank or unrecognised values in ID (PLEASE LEAVE!!) will be treated as new Company Information Records.

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

Importing the Company Information Workbook



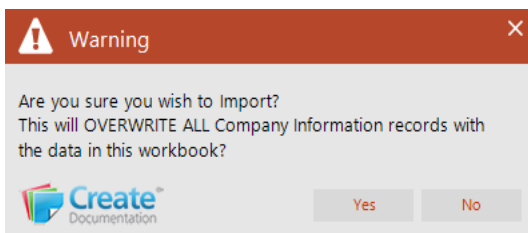
Select **Author** on the side bar.



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

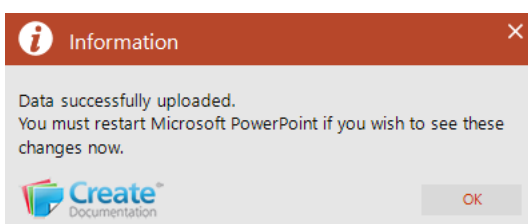
Select **Import Workbook** below **Company Information Records**.

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

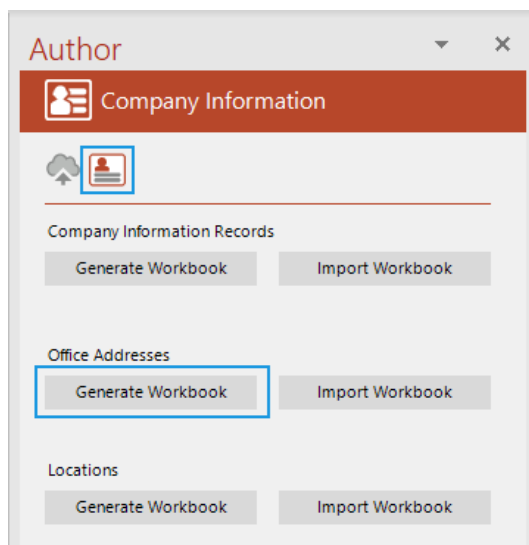
Office addresses can contain a range of fields including telephone numbers and web addresses. The fields included will vary according to your company's customisation of Create.

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.

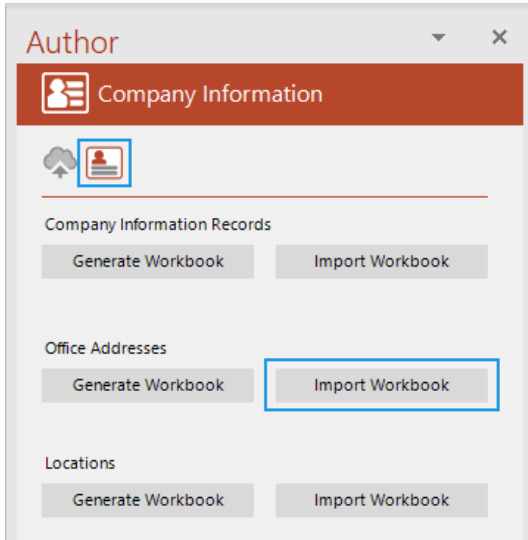
Blank or unrecognised values in ID (PLEASE LEAVE!!) will be treated as new Office Addresses.

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

Importing the Office Addresses Workbook



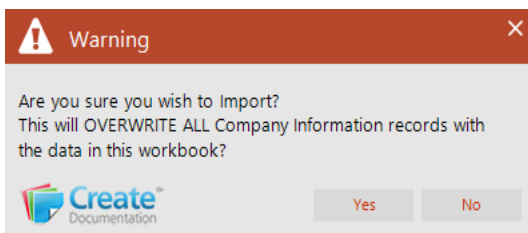
Select **Author** on the side bar.



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

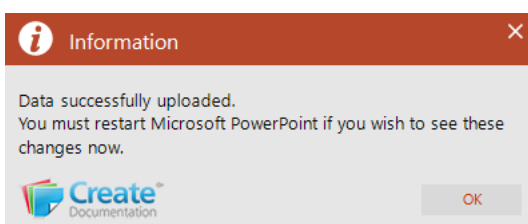
Select **Import Workbook** below **Office Addresses**.

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.

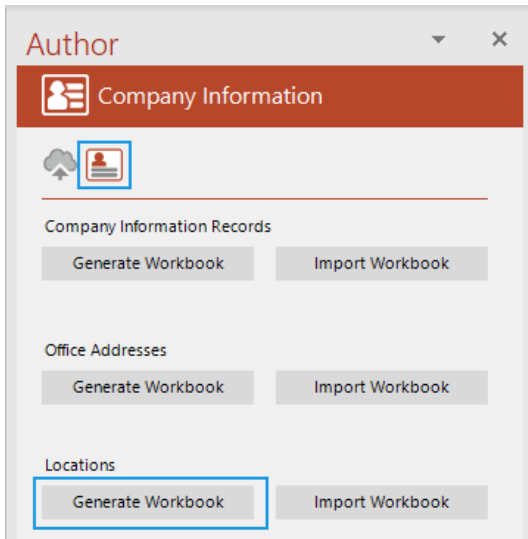
An end user picks the location appropriate to them from **User Settings**.

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).

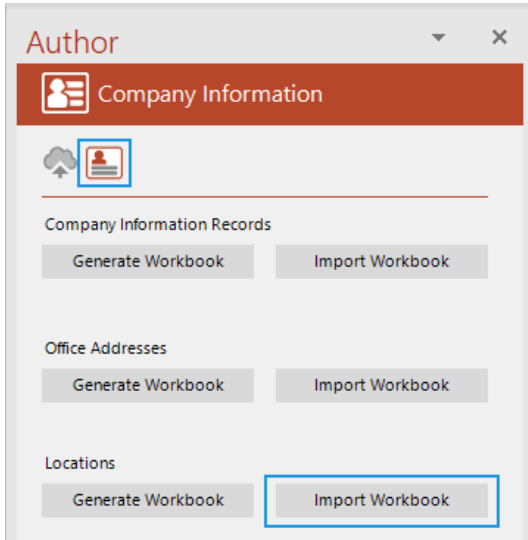
Blank or unrecognised values in ID (PLEASE LEAVE!!) will be treated as new Locations

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

Importing the Locations Workbook



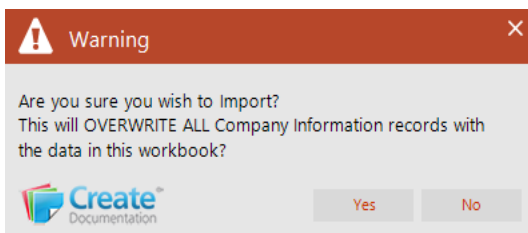
Select **Author** on the side bar.



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

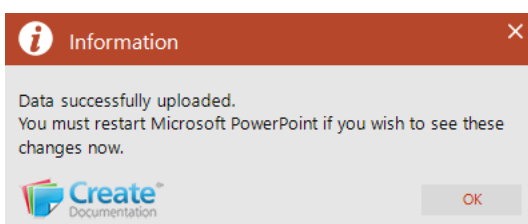
Select **Import Workbook** below **Locations**.

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

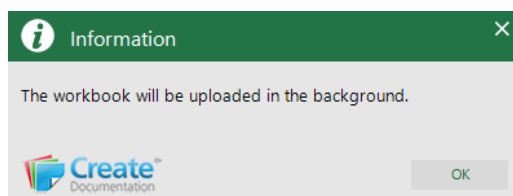
Use active Browse OK

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

Complete the details of the new layout:

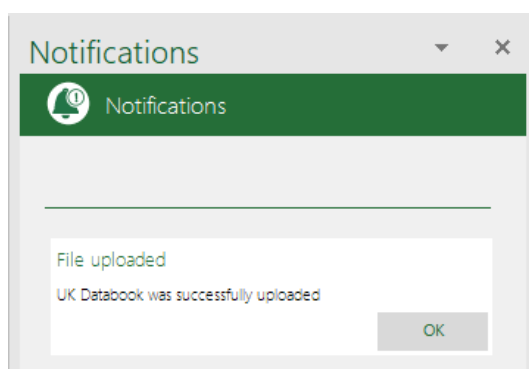
- **Name:** The name that you enter will appear underneath the layout thumbnail in the **Workbook** task pane once the layout is uploaded.
- **Publish date:** Defaults to the current day, month and year. To choose a future date, click on the calendar button and select the date. The recorded publish date 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 64.



United Kingdom

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Reigate
Surrey RH2 9HZ

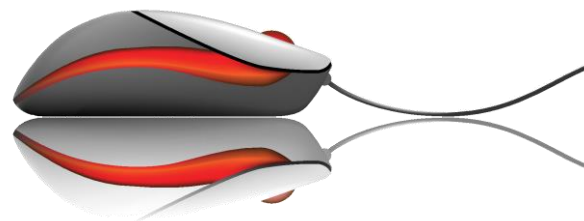
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