



Create Documentation V10

Word 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.

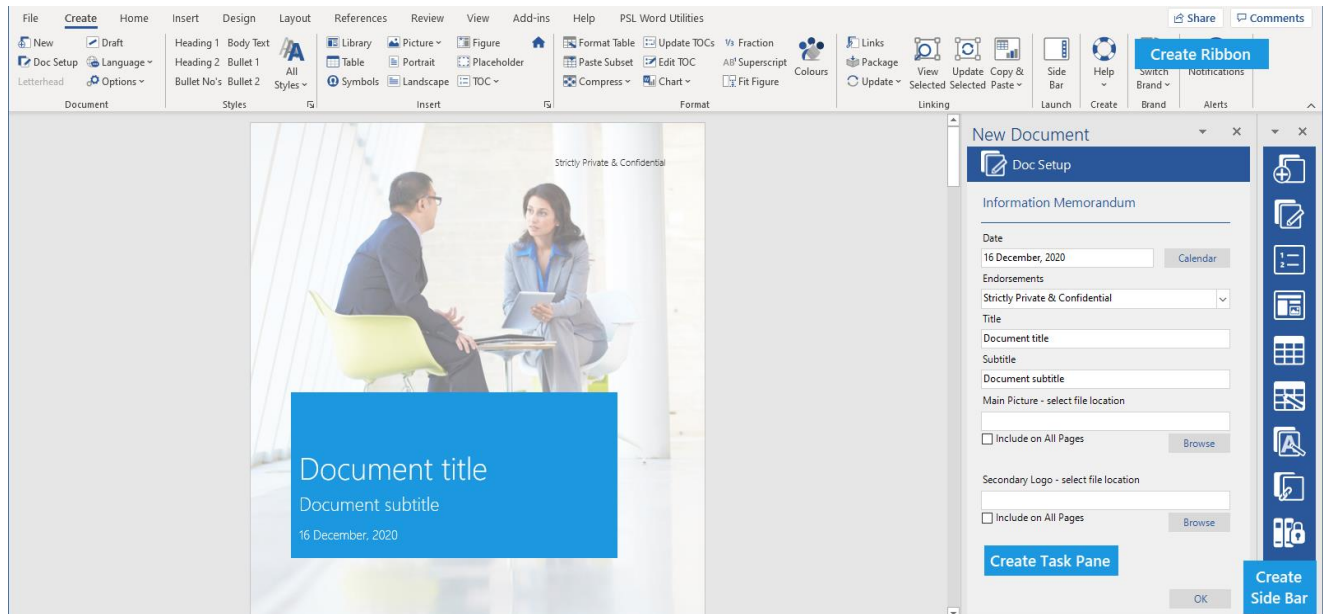
In addition to the software available in Word and PowerPoint, there are tools in Excel to assist with creating, formatting and sizing Excel charts and table data and copying to Word or PowerPoint. Charts and tables can be linked back to source data worksheets in Excel and you will be able to view, update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

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

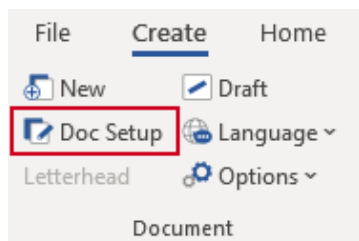
- authoring
 - designated authors can manage and upload new assets for access by users or groups of users
 - office addresses, registered company text and copyright dates can be added, deleted or edited by authors
- asset synchronisation
 - new versions of assets can be made available immediately to other users or on a fixed date in the future
- updateable content
 - users can insert updateable slides, shapes and images into PowerPoint documents
 - when a document containing updateable content is opened, Create checks if a new version of any updateable assets is available. The user can then select which, if any, content to update.
- quicker installation and updating
 - the new version of Create takes seconds to install or update
- new 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 Word

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



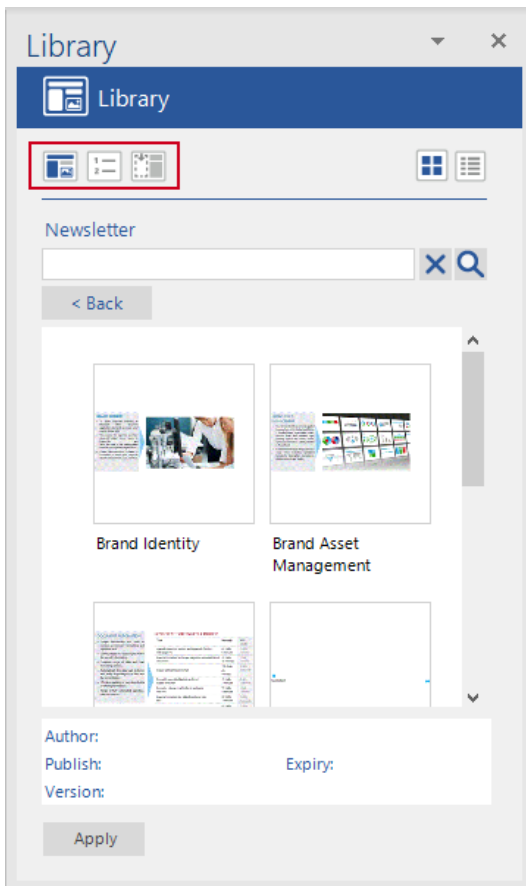
For functions which can be accessed from the **Ribbon** and the **Side Bar**, we'll show you how to access from both locations, for example,



Doc Setup on the ribbon

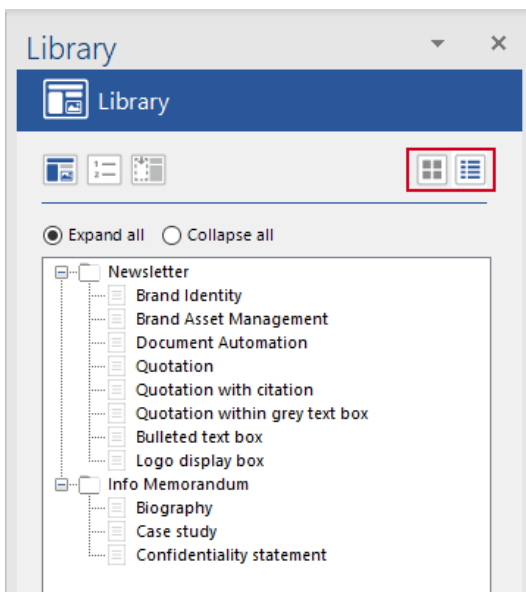


Doc Setup on the side bar



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.



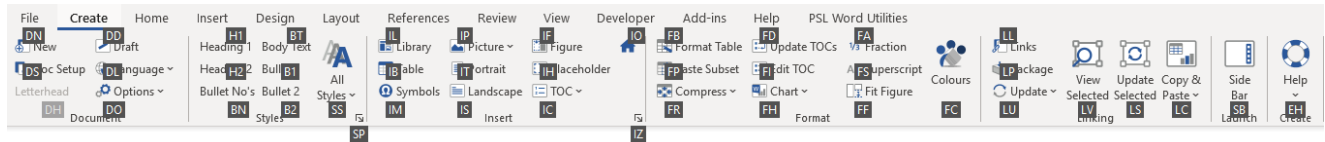
You can change views in some task panes by clicking the [list](#) or [thumbnail](#) icons on the top right.

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+CTB).

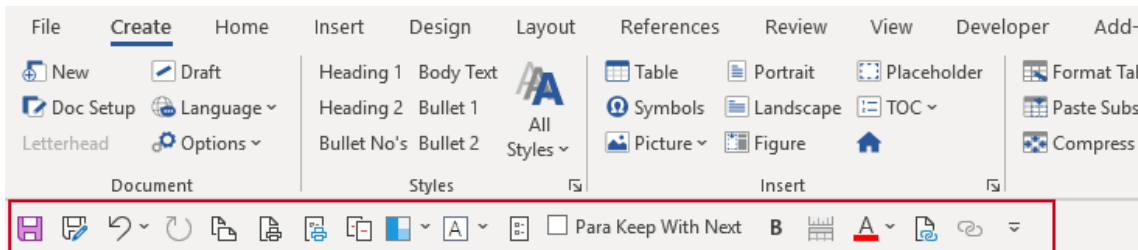


ALT C +	DN	New	ALT C +	FB	Format Table
	DS	Doc Setup		FP	Paste Subset
	DH	Letterhead		FR	Compress
	DD	Draft		O	Compress Column
	DL	Language		M	Compress Row
	DO	Options		FD	Update TOCs
	P	PDF		FI	Edit TOC
	C	To the Current Location		FH	Chart
	D	To a Different Location		A	Chart Theme A
	F	Filename On/Off		B	Chart Theme B
	C	Cover Graphics On/Off		C	Chart Theme C
	H1	Heading 1		FA	Fraction
	H2	Heading 2		FS	Superscript
	BN	Bullet Numbers		FF	Fit Exhibit
	BT	Body Text		FC	Colours
	B1	Bullet 1		LL	View Links
	B2	Bullet 2		LP	Package
	SS	All Styles		LU	Update
	SP	Show Styles		A	All
	IL	Library		B	Table of Contents
	IB	Insert Table		H	Charts & Tables
	IM	Symbols		C	Charts Only
	IP	Picture		T	Tables Only
	F	From File		X	Text Only
	C	From Clipboard		LV	View Selected
	IT	Portrait Page		LS	Update Selected
	IS	Landscape Page		LC	Copy & Paste
	IF	Figure		T	Copy Linked Table
	IH	Placeholder		B	Paste Linked Table
	IC	TOC		C	Copy Linked Chart
	C	Insert Table of Contents		H	Paste Linked Chart
	X	Insert Table of Exhibits		S	Copy Linked Selection
	F	Figures		E	Paste Linked Selection
	T	Tables		EH	Help
	E	Equations		H	Help
	A	Insert Table of Appendices		C	Check for Updates
	IO	Home Link		E	Send Error Log
	IZ	Show Symbols		S	User Settings
				M	Make V10 Compatible
				O	About Create

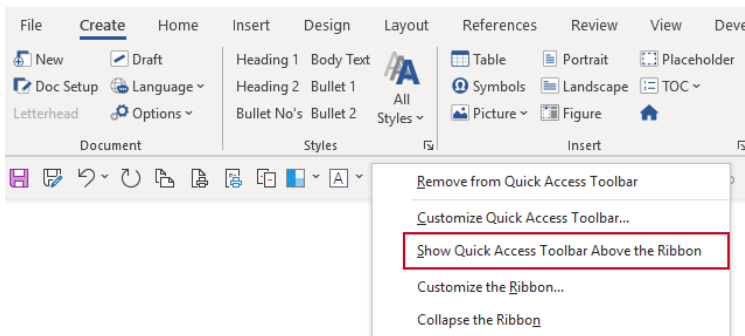
Quick Access Toolbar

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

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



Display the QAT Below/Above the Ribbon

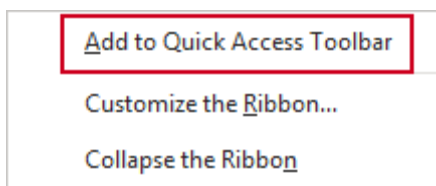


Right-click the Quick Access Toolbar (QAT).

Select **Show Below/Above the Ribbon**

Adding a Command that is on the Ribbon

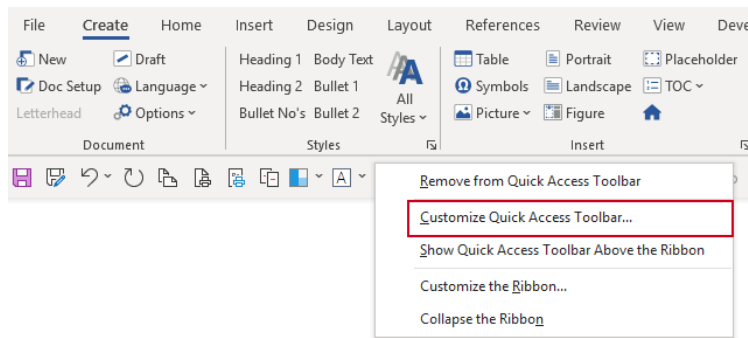
On the ribbon, click the appropriate ribbon or group to display the command that you want to add to the Quick Access Toolbar.



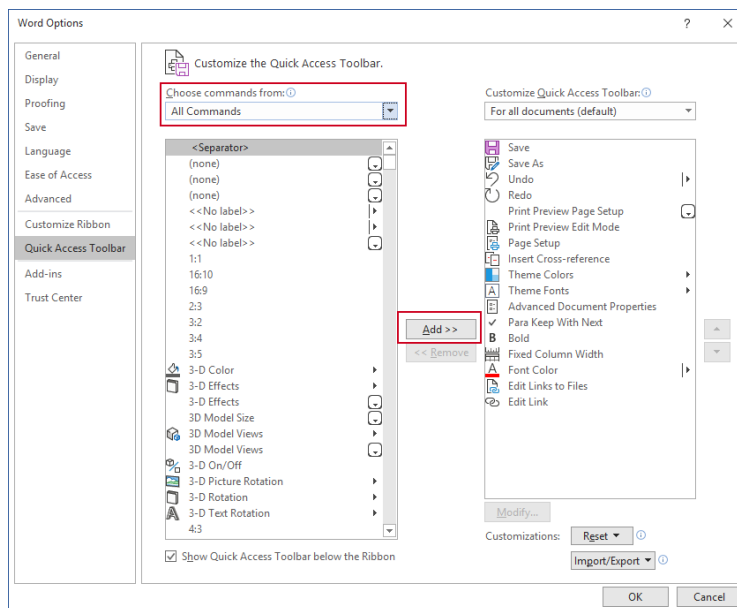
Right-click the command, and then click **Add to Quick Access Toolbar** on the shortcut menu

Adding a Command that is not on the Ribbon

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



Right-click on the Quick Access Toolbar and select **Customize Quick Access Toolbar**.

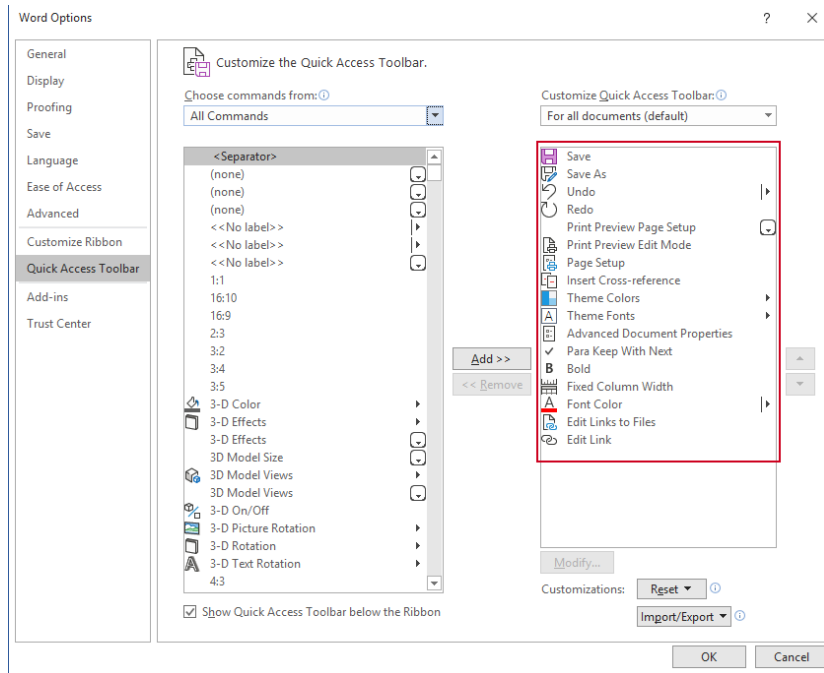


The Word Options dialog will open. Make sure **All Commands** is displayed under *Choose commands from:*

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 Word

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

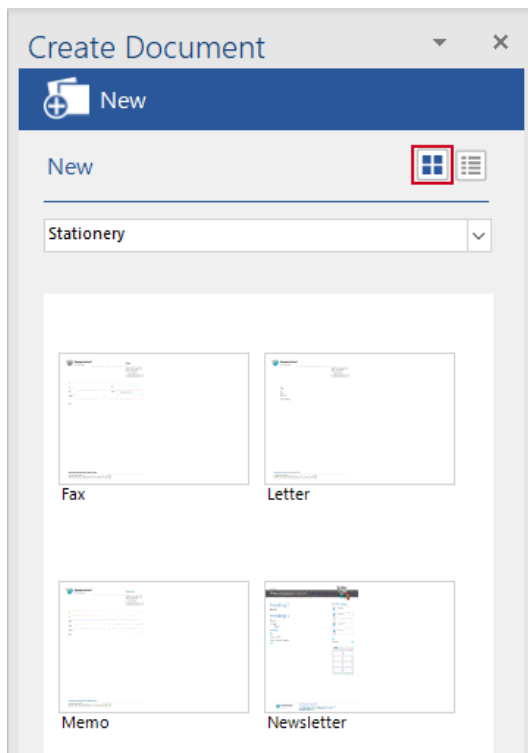
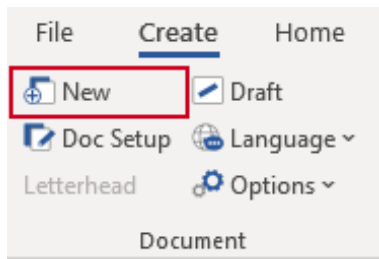
The high contrast setting is an accessibility feature built into Windows that assists people with vision impairment. The Create interface has been designed so that it can be used in high contrast mode.

Getting Started

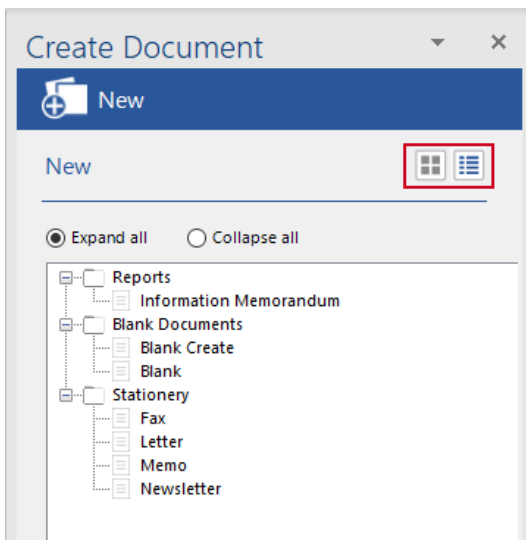
Your organisation's Word templates are accessible from the **New** task pane. These templates are built into the Create software by Presentation Solutions and not uploaded by authors.

Starting a New Document

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



The **New Document** task pane launches, showing all available templates. Select a template category from the dropdown list and then 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.

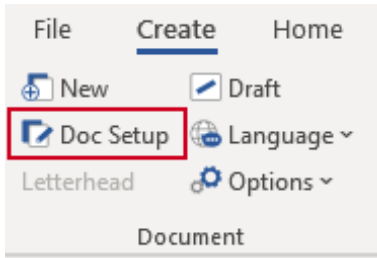
Select the required template and click [OK](#).

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.

Complete the fields – these will differ between templates – then click [OK](#) to launch your presentation.

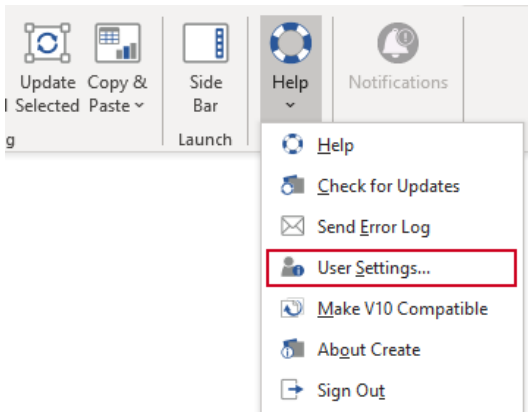
Editing the Doc Setup

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

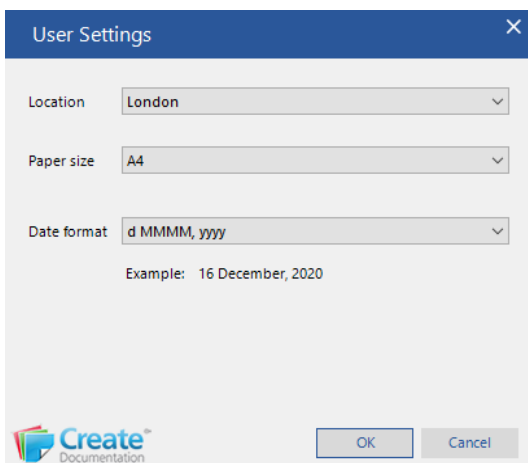


Changing the User Settings

Before using Create for the first time, set your default *User Settings*. Once you have selected your preferred defaults, all new Word documents 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

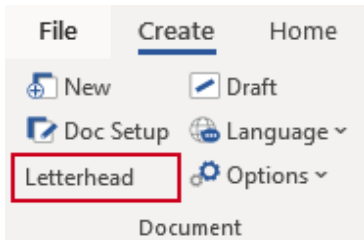
Please note that these are example fields, and that your product may not have some of these and may include others not listed here.

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 document will update to contain the new settings.

Displaying the Letterhead

The letterhead appears by default in a letter template only – this might include your organisation’s logo and address. This can be hidden as necessary (for example, when printing on letter headed paper).



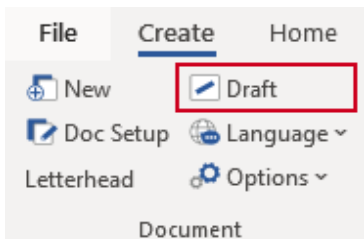
Select [Letterhead](#) on the **Create** ribbon.

Notes

This function will “hide” the information contained in the letterhead so check its visibility by going to Print Preview in Word.

Displaying the Draft Stamp

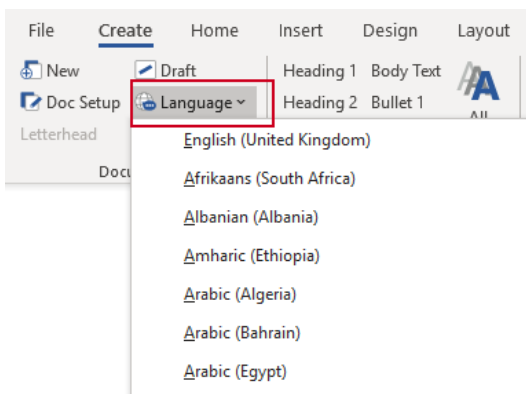
This function displays or hides the word DRAFT (or equivalent) and any associated draft text throughout the document. The location of the Draft text depends on your customisation.



Select [Draft](#) on the **Create** ribbon.

Setting the Proofing Language

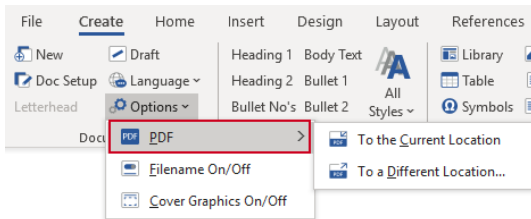
Applies the selected proofing language to the Word document. This will only affect the current document. Your computer’s spelling language will be visible at the top of the options.



Select [Language](#) on the **Create** ribbon.

Saving as a PDF

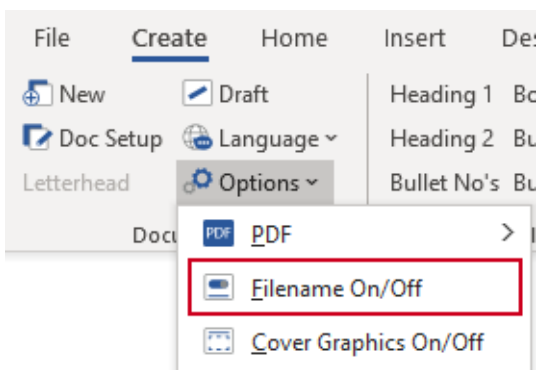
Saves your current document as a PDF either to the current file location or to a new location with a different name. Both options will prompt you to save the Word file, and then create a PDF with non-printing information and properties removed.



Select [Options](#), [PDF](#) on the **Create** ribbon.

Displaying the Filename

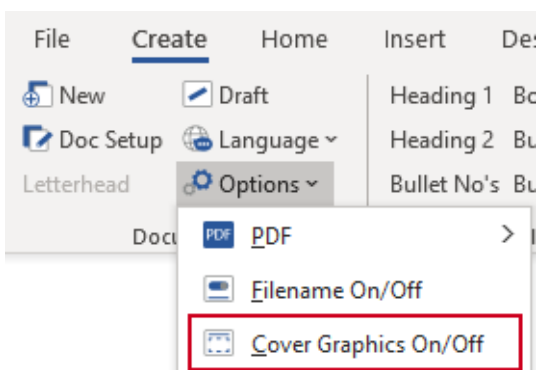
This function displays or hides the file name and location on every page of the document.



Select [Options](#), [Filename On/Off](#) on the **Create** ribbon.

Hiding Cover Graphics

This function displays or hides cover graphics on the cover page of your document (the availability of this function depends on your customisation and may not be applicable to all templates) – useful if you are planning to print on to pre-printed covers.

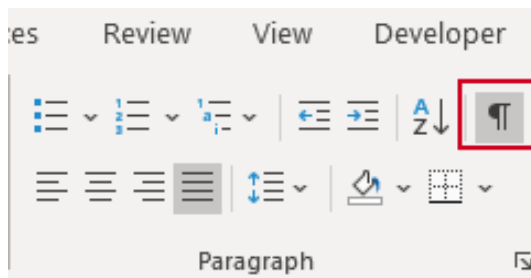


Select [Cover Graphics On/Off](#) on the **Create** ribbon.

Formatting your Document

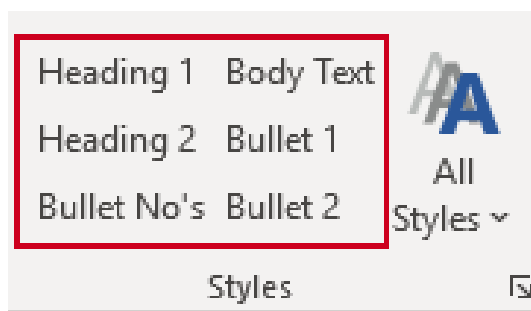
The [Styles](#) group gives access to the styles that make up each template. Using the buttons will enable you to format your document quickly and easily in the corporate style.

All the text styles for the document are available in the [Styles](#) group on the **Create** ribbon or the [Text Formats](#) task pane. These will help you format your document efficiently. The six main style buttons will be available in all documents. However, the [All Styles](#) list will change according to the template you are using.

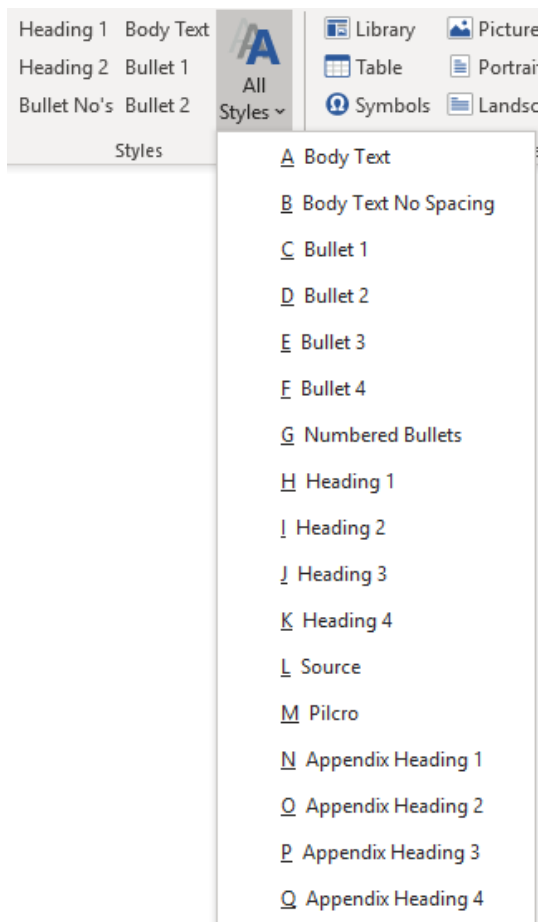


To make text styling easier and to view section breaks, you can display paragraph marks. To enable this, select *Show/Hide Paragraphs Marks* on the native Word **Home** ribbon.

Using Styles

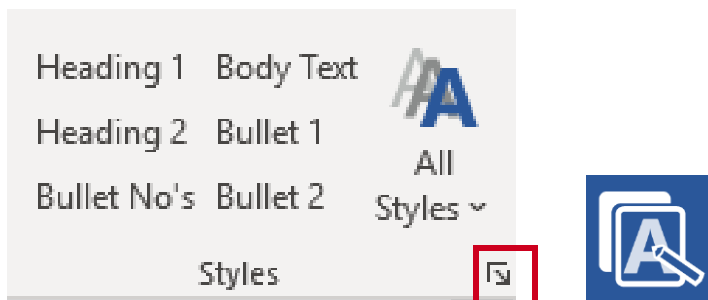


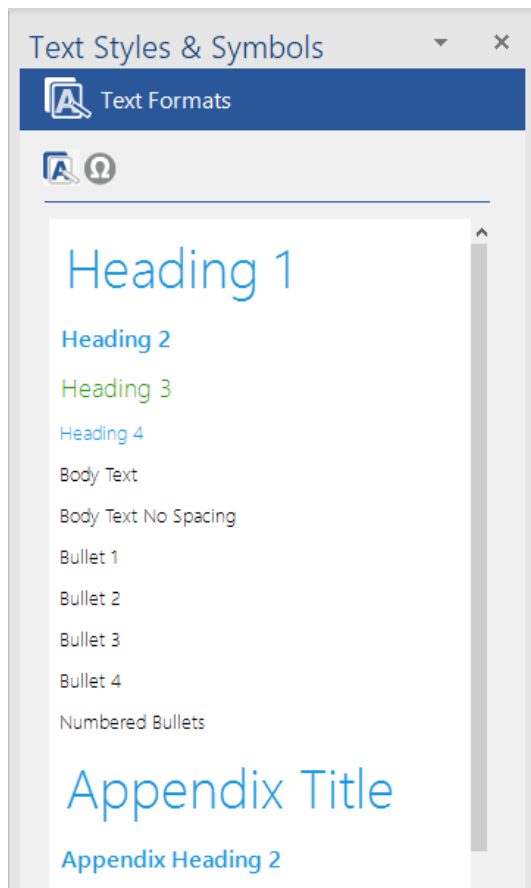
To format your document, click in the paragraph of text and select the required style from the [Styles](#) group. The six main styles are available here.



Select [All Styles](#) to access a dropdown menu which lists all the styles that make up the document. This will change depending on which template you are using.

If you are using the list of [All Styles](#) regularly, select the task pane launcher from the [Styles](#) group or the [Text](#) button on the side bar .





The **Text Styles & Symbols** task pane will open at the Text Formats panel showing all available Word style for the current document.

Select a paragraph or multiple paragraphs and then the required style.

Notes

When you enter a hard return at the end of the paragraph, the next logical style will be applied automatically, e.g. after a page heading (Heading 1) style the next style default style is subheading (Heading 2) text, followed by body text.

Remember to use the heading styles and the bullet levels in order, as you would an outline. For example, you should not have a bullet level 2 if there is no bullet level 1 above it.

Always use the Bullet styles from the **Create** ribbon or the **Styles** task pane rather than the **Bullets** button on the native Word Home tab as these have been set up as multilevel lists in accordance with your corporate design. You can also use *Decrease Indent* and *Increase Indent* buttons on the native Word Home tab to promote and demote through the bullet levels.

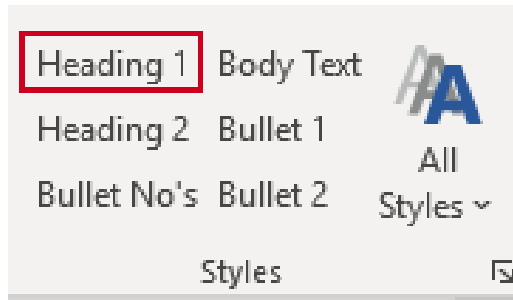
Text can be copied and pasted in from another source and then restyled (always use *Edit, Paste Special, Unformatted Text* if copying in from another document source), or can be typed directly into the new document.

Sections and Appendices

If your selected document type contains sections, the first section is usually present when you start a new document. Depending on the document design there are different ways that additional sections should be created. If the design includes section cover pages, the sections will be stored in the Library (see **Inserting Library Content**). If the design does not include section cover pages, the section title will be created by applying either the style *Heading 1* or *Section Title*. Section Titles and Headings levels 1-4 can be included in your Table of Contents (see **Editing the TOC**).

Inserting a New Section

If your selected document type contains sections with no section cover pages, use the *Heading 1* style to insert a new section.



Click on a blank paragraph mark.

Select *Heading 1*. A new page will be inserted and the correct style will be applied.

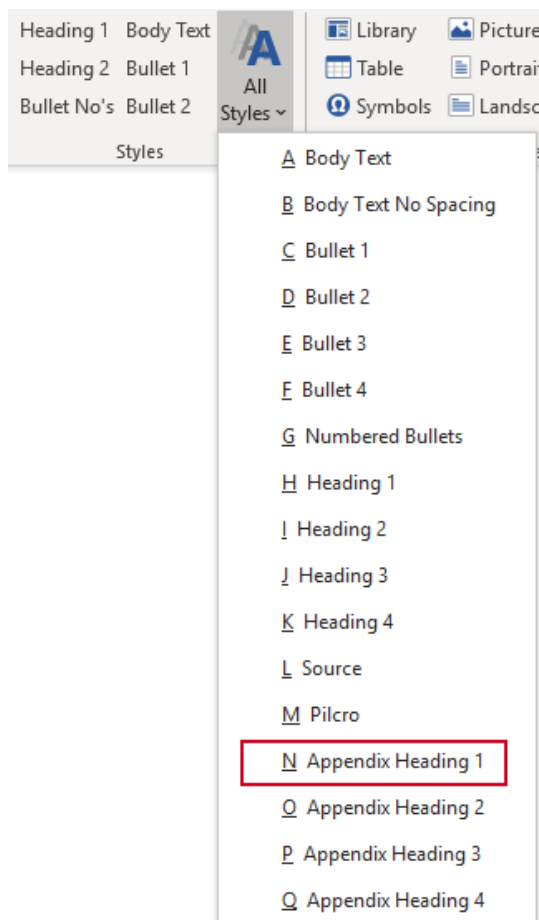
Notes

Not all customisations will use *Heading 1* as the Section Title. In some templates, *Heading 1* is a Page Heading, in which case it will include a "page break before".

Use the headings in order, e.g. first a *Heading 1*, then *Heading 2*, then *Heading 3*, etc.

Inserting a New Appendix

If your selected document type contains sections and appendices with no cover pages, use the *Appendix Title* or *Appendix Heading 1* style to insert a new appendix.



Click on a blank paragraph mark.

Select *Appendix Title* or *Appendix Heading 1*. A new page will be inserted, and the correct style will be applied.

Notes

Use the headings in order, e.g. first an *Appendix Title*, then *Appendix Heading 2*, then *Appendix Heading 3*, etc. All *Appendix Titles* can be picked up in the Table of Appendices.

The heading styles in sections and appendices may have the same appearance but they are named differently in order that they can be listed separately in the Tables of Contents and Appendices.

Inserting other Elements

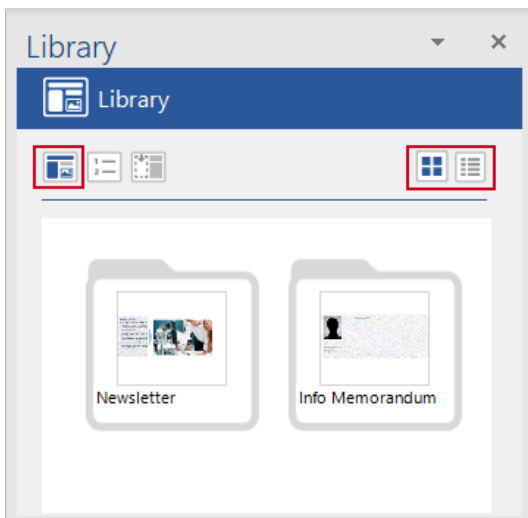
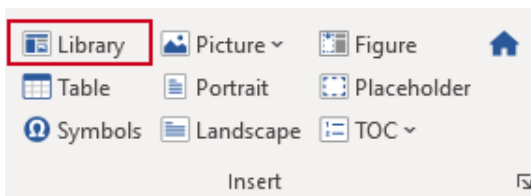
The *Insert* group contains a number of preformatted objects or different page setups that you can choose to insert into your document.

Inserting Library Content

The Library contains frequently used text, graphics or other content such as section and appendix dividers. These may be categorised by template name or type of content. If your customisation does not contain any library content, the option will not be displayed on the Create tab.

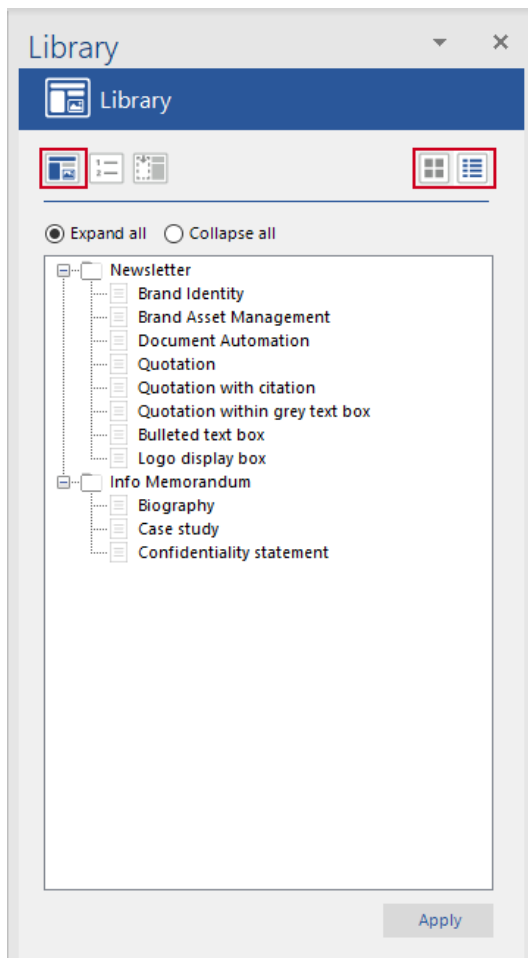
To insert content from the Library, go to the location where you want to insert the content. Insert a blank paragraph marker and apply the style *Body Text*. If you are inserting a new section, there is no need to insert section breaks as these are included as part of the library content.

Select *Library* on the ribbon or side bar.



The *Library* task pane will open. If there is different library content for different templates within your customisation, they will be in folders, usually named the same as the templates.

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



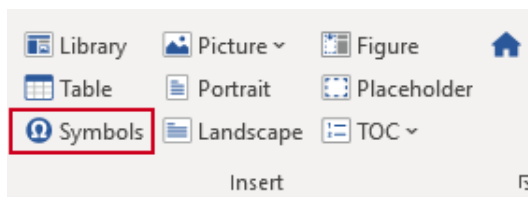
In *list* view, select *Expand all*, to see all templates, or click the + to expand a single category.

Select the required library content and click *Apply*.

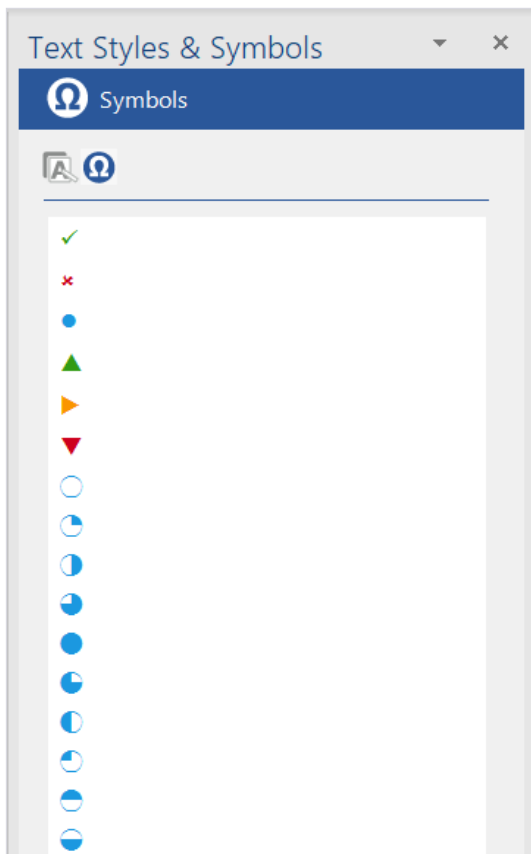
The selected library content will be inserted into your document.

Inserting Symbols

Contains a selection of preformatted symbols to insert into your document.



Select *Symbols* on the **Create** ribbon.



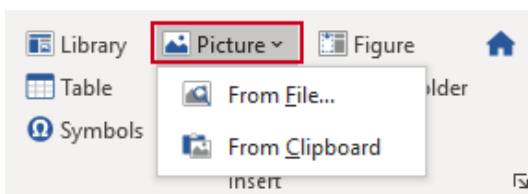
The **Symbols** task pane will open.

With your cursor in a placeholder or a table, select a symbol.

The selected symbol will be inserted at the point of your cursor.

Inserting Pictures

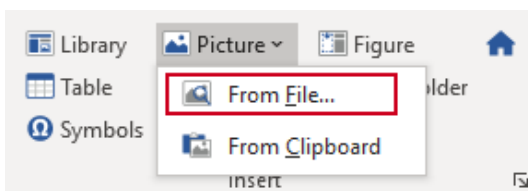
This function inserts an image from your clipboard or from a file. All pictures should be inserted into placeholders to ensure consistent sizing and positioning on the page and to enable listing in the TOC if required.



Select **Picture** on the **Create** ribbon.

Inserting a Picture from a File

Place your cursor inside a placeholder.



Select **Picture, From File** on the **Create** ribbon.

Browse to the location of the file you wish to insert.

Select **Open**.

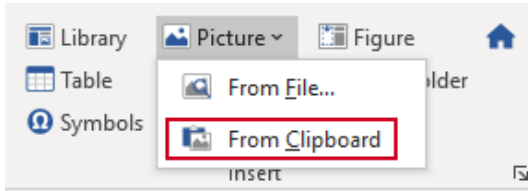
The picture will be inserted into the placeholder sized to fit proportionately.

Notes

This function will scale the height and width of the picture proportionally to the original image and will be positioned in the top left hand corner of the placeholder – it will not necessarily fill the placeholder. If you wish to rescale the picture select the picture, click on a resize handle and resize accordingly.

Inserting a Picture from the Clipboard

Copy (CTRL + C) the picture from its original location and place your cursor inside a placeholder.



Select [Picture, From Clipboard](#) on the **Create** ribbon.

Browse to the location of the file you wish to insert.

Select [Open](#).

The picture will be inserted into the placeholder sized to fit proportionately.

Notes

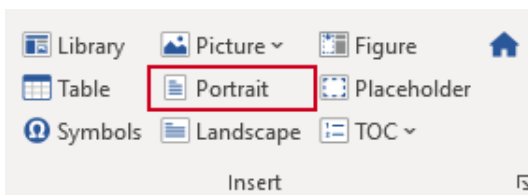
This function will scale the height and width of the picture proportionally to the original image and will be positioned in the top left hand corner of the exhibit – it will not necessarily fill the placeholder. If you wish to rescale the picture select the picture, click on a resize handle and resize accordingly.

Inserting PowerPoint Shapes and Diagrams

PowerPoint shapes and diagrams should be created, formatted and sized in PowerPoint and then copied to placeholders in Word. The [Picture, From Clipboard](#) function pastes the picture and scales it to fit the placeholder. The picture is not linked back to the source file so to edit the shape, go back to PowerPoint and copy again.

Inserting a Portrait Page

The standard page orientation for most Word documents is already portrait. In which case, you should use styles or page breaks to insert a new page. However, if your document is landscape and certain information would be better displayed in a portrait format, a preformatted portrait page can be inserted. Place your cursor where you wish the new portrait page to appear.

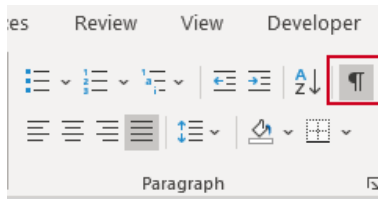


With your cursor on a blank paragraph marker, select [Portrait](#) on the **Create** ribbon.

A section break or a page break will be inserted (depending on the orientation of the previous page), followed by the new portrait page.

Notes

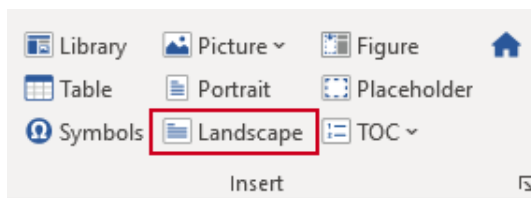
In order to make text styling easier and to view section breaks, you can choose to display paragraph marks. To enable this, select *Show/Hide Paragraph Marks* on the native Word Home tab.



Inserting a Landscape Page

The standard page orientation for most Word documents is portrait. However, if certain information would be better displayed in landscape format, a preformatted landscape page can be inserted within the document.

Place your cursor where you wish the new landscape page to appear.



With your cursor on a blank paragraph marker, select **Landscape** on the **Create** ribbon.

A section break will be inserted, followed by the landscape page, followed by another section break. All the text or graphics for the landscape page should be inserted between the two section breaks.

Deleting a Landscape Page

To delete a landscape page (that has been inserted via the *Landscape* function), select from the beginning of the first section break, up to and including the section break at the end of the landscape page and delete.

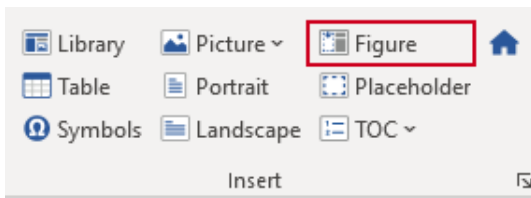
Inserting Figures

"Figures" help to manage the dimensions and position of all objects and ensure consistency throughout your Word documents. They also contain the linking information for charts and tables created and imported from Excel using Create.

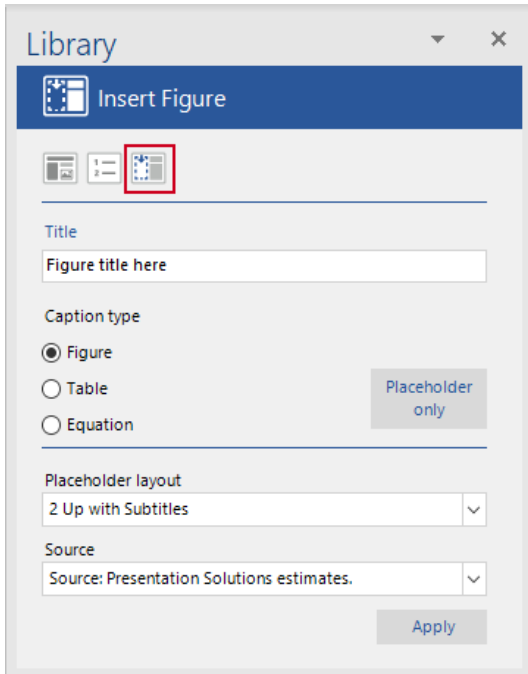
There are three types of figures available for insertion in your document: figures; tables; or equations. They can be used for items such as text, tables, charts, diagrams and pictures. However, you do not need to use different exhibit types – you can choose to insert all your tables, pictures and charts into the first type (figure).

All figures will have a sequential exhibit number (depending on the type selected), a title and optional source field. This numbering is only required if you want to cross reference the figure or have a list appear in the table of exhibit figures/tables/equations – if you do not require the numbering simply select the text and delete it.

There are various sized figures available and a further option to insert a placeholder only (with no title). Place on a blank paragraph marker where you wish to insert a figure.



Select **Figure** on the **Create** ribbon.



The **Library** task pane opens at the **Insert Figure** panel.

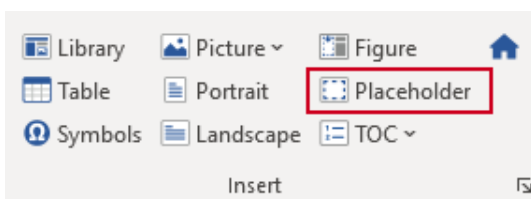
- Type in the title of the figure.
- Under *Caption type* select the figure type; Figure, Table or Equation. Each type will be numbered sequentially throughout the document and then they can be listed in their own tables of exhibits. If you do not require a caption number, you can delete it once the exhibit has been inserted in your document.
- Select the required placeholder layout. *1 Up* will insert one placeholder across the whole page. *2 Up* will insert two next to each other, *3 Up* will insert three next to each other. Or select *Placeholder Only* (which is a placeholder with no title).
- Type in the source (optional) or select from the dropdown menu.
- Click *Apply*.

The figure(s) will be inserted with a title and a number (automatically allocated) above the placeholder, unless you select *Placeholder Only*. If you do not require the numbering, select the text and delete it.

Inserting a Placeholder

This will insert a *placeholder* (i.e. and exhibit with no title or number) exhibit without having to go through the **Insert Figure** task pane.

Place your cursor on a blank paragraph marker where you wish to insert the placeholder.



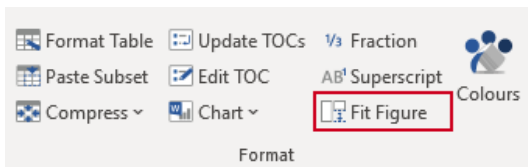
Select **Placeholder** on the **Create** ribbon.

The placeholder will be inserted.

Resizing Figures

All figure placeholders have a table cell with a set height to control the size of charts and pictures. Where tables are inserted that are smaller in height than the default size (e.g. 6cm) or where you wish the height of the placeholder to be intentionally smaller, you can use **Fit Figure** to change the row height from a set size to automatic.

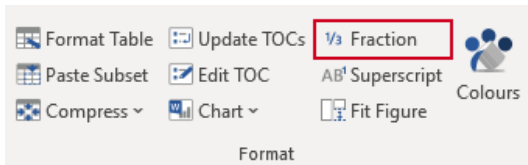
In the exhibit placeholder select the row/s of which you wish to turn off "exact row height".



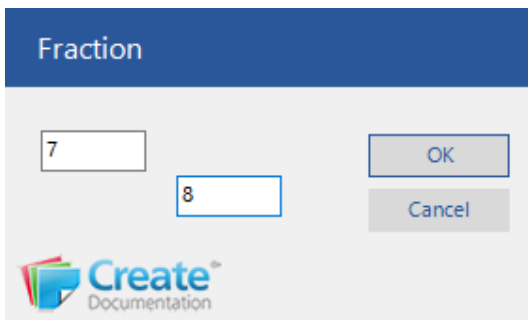
Select [Fit Figure](#) on the **Create** ribbon.

Inserting 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 insert other fractions within the text of your document quickly.



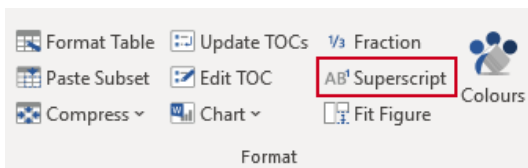
Select [Fraction](#) on the **Create** ribbon.



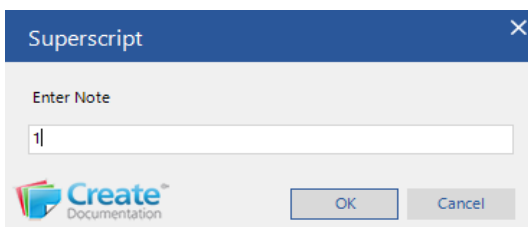
Type in the figures and click [OK](#).

Inserting Superscript Note Numbers

Superscript notes can be added to text or data in tables. These can be used to create your own footnotes or notes.



Select [Superscript](#) on the **Create** ribbon.



Type in the note number required.
Click [OK](#)

Notes

This will insert a superscript number only, not a reference to a footnote.

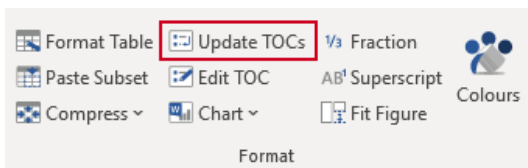
Tables of Contents

Create can automatically generate preformatted Tables of Contents, Appendices, Figures, Tables and Exhibits. The Table of Contents (TOC) and Table of Appendices (TOA) can be configured to include various levels of headings.

The templates built into Create will already have a Table of Contents included. This can be updated using Create.

Updating the TOCs

After inserting or deleting sections or appendices or making changes to headings that are included in the TOCs, select [Update TOCs](#) on the **Create** ribbon.



Notes

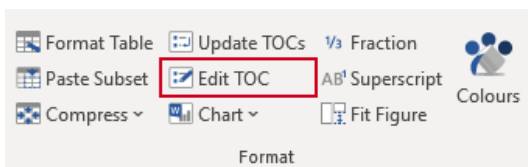
Do not type directly onto the TOC. If there are text errors in the TOC go to the corresponding heading in the document and make the changes, then [Update TOCs](#).

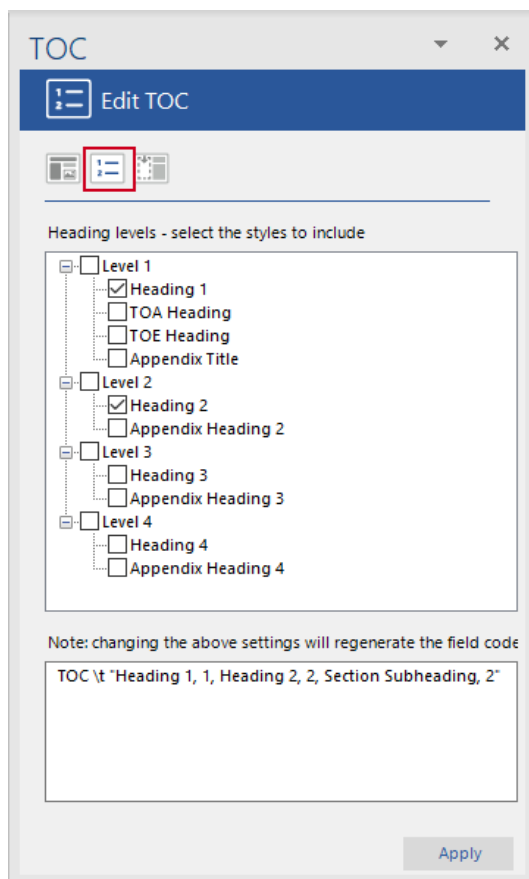
If a TOC is not required in your document, it can be deleted in the normal way without affecting the document (remember to delete the page heading as well as the TOC).

Editing the TOC

The Table of Contents can be configured to include various levels of headings. Place your cursor in the TOC you wish to customise.

Select [Edit TOC](#) on the **Create** ribbon or side bar.





The **TOC** task pane will open at the **Edit TOC** panel.

- Up to four levels of heading can be included in the TOC. Each level is based on the Heading styles 1-4 within the document.
- Check the boxes to the left of the headings you wish to include in the TOC.
- Appendices can also be listed as part of the TOC or they can be listed in their own Table of Appendices.
- The field codes in the TOC are also displayed in the TOC dialog and can be edited by users if further customisation is required.

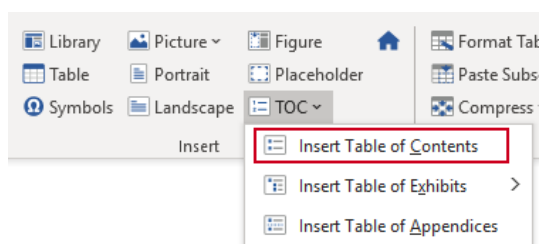
Click **Apply**

The TOC will be updated with the requested information.

Inserting a Table of Contents

If the document type selected has a Table of Contents, a default version will be included in the new document. There is also a function to insert a new one.

Delete any existing TOC and page heading (the function will insert a new page heading). Place your cursor where you want the new TOC to appear



Select **TOC**, **Insert Table of Contents** on the **Create** ribbon.

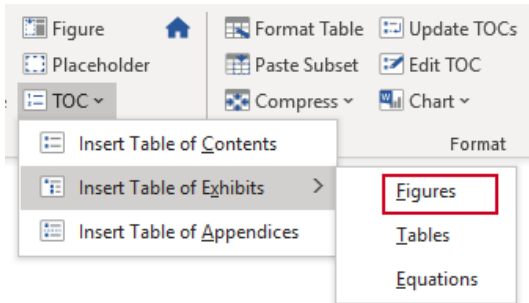
A new TOC will be inserted on the correct page in your document. To edit the Table of Contents to include different headings see **Editing the TOC**.

Tables of Exhibits

There are three types of Tables of Exhibits available: the Table of Figures lists all the numbered figure exhibits in the document along with their title; the Table of Tables lists all the numbered table exhibits in the document along with their title; and the Table of Equations lists all the numbered equation exhibits in the document along with their title. Each Table of Exhibits will appear on a separate page. One of each is included when a new document is started, if this is the document's default style.

Inserting a Tables of Figures

This will list any exhibits/figures that have been inserted as figures from the **Figure** task pane. Delete any existing Table of Figures and page heading (the function will insert a new page heading). Place your cursor on a blank paragraph marker, where you want the new Table of Figures to appear (usually after the Table of Appendices).

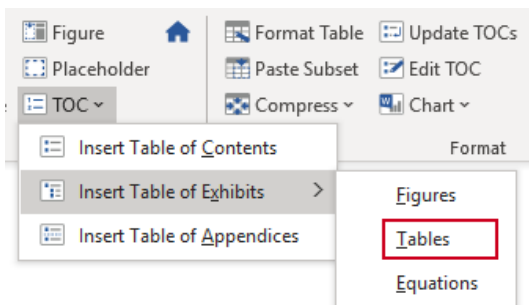


Select **TOC**, **Insert Table of Exhibits**, **Figures** on the **Create** ribbon.

A new Table of Figures page will be inserted in your document and any figure exhibits in the document will be listed, once you have updated the TOCs.

Inserting a Table of Tables

This will list any exhibits/figures that have been inserted as tables from the **Figure** task pane. Delete any existing Table of Tables and page heading (the function will insert a new page heading). Place your cursor on a blank paragraph marker, where you want the new Table of Tables to appear (usually after the Table of Appendices).



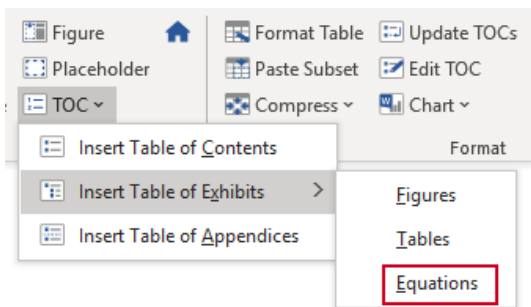
Select **TOC**, **Insert Table of Exhibits**, **Tables** on the **Create** ribbon.

A new Table of Tables page will be inserted in your document and any table exhibits in the document will be listed, once you have updated the TOCs.

Inserting a Table of Equations

This will list any exhibits/figures that have been inserted as equations from the **Figure** task pane. Delete any existing Table of Equations and page heading (the function will insert a new page heading). Place

your cursor on a blank paragraph marker, where you want the new Table of Equations to appear (usually after the Table of Appendices).

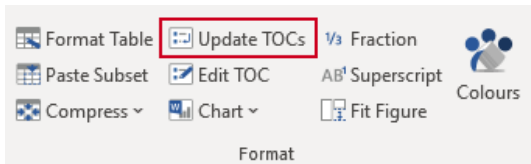


Select [TOC](#), [Insert Table of Exhibits](#), [Equations](#) on the **Create** ribbon.

A new Table of Equations page will be inserted in your document and any equations exhibits in the document will be listed, once you have updated the TOCs.

Updating a Table of Exhibits

After inserting or deleting sections or appendices or making changes to headings that are included in the TOCs, select [Update TOCs](#).



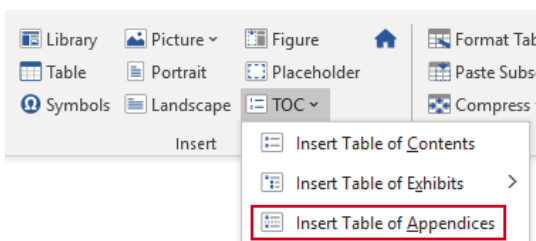
Notes

Do not type directly onto the Tables of Exhibits. If there are errors in the TOE, go to the corresponding exhibit heading in the document and make the alterations, then [Update TOCs](#).

Inserting a Table of Appendices

The Table of Appendices (TOA) lists all the Appendix Titles within the document, and further levels of Appendix Headings, if selected. If the document type selected has a TOA, a default version will be included within the new document on creation. However, this is configurable and can be changed at any time to suit your requirements.

Delete any existing Table of Appendices and page heading (the function will insert a new page heading). Place your cursor where you want the new Table of Appendices to appear.



Select [TOC](#), [Insert Table of Appendices](#) on the **Create** ribbon.

A new TOA will be inserted on the correct page in your document.

Notes

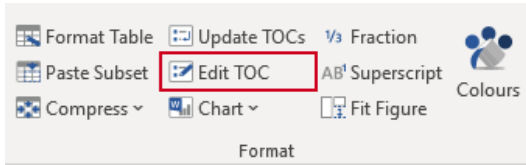
You should also use this option if you need to reinsert the standard TOA after deletion.

If a TOA is not required in your document, it can be deleted in the normal way without affecting the document (remember to delete the page heading as well as the TOA).

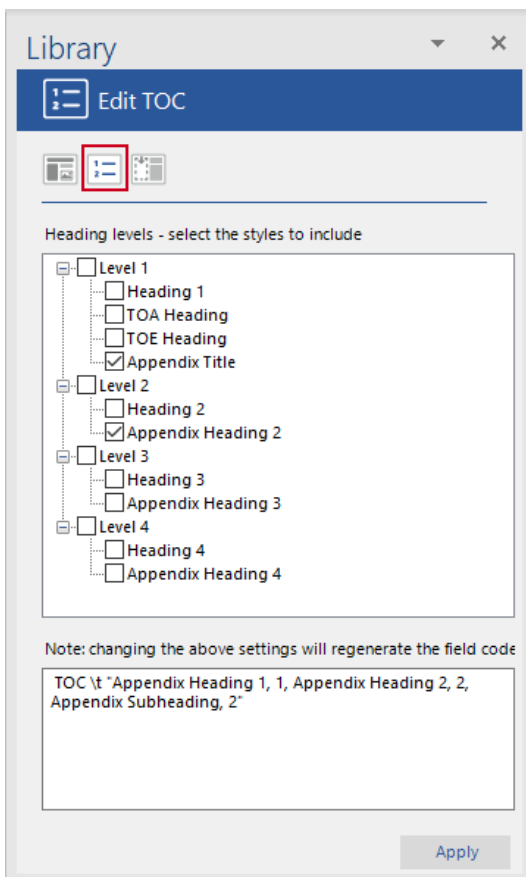
Do not type directly onto the TOA. If there are errors in the TOA go to the corresponding heading in the document and make the changes, then [Update TOCs](#).

Editing the TOA

The Table of Appendices can be configured to include various levels of headings. Place your cursor in the TOA you wish to customise.



Select [Edit TOC](#) on the **Create** ribbon.



The [TOC](#) task pane will open.

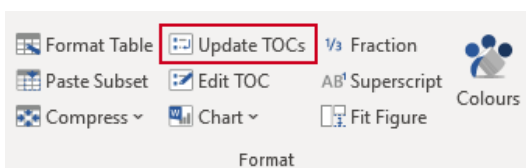
- Up to four levels of Appendix heading can be included in the TOC. Each level is based on the Appendix Heading styles 1-4 within the document.
- Check the boxes to the left of the headings you wish to include in the TOA.
- The field codes in the TOC are also displayed in the TOC dialog and can be edited by users if further customisation is required.

Click [Apply](#)

The TOC will be updated with the requested information.

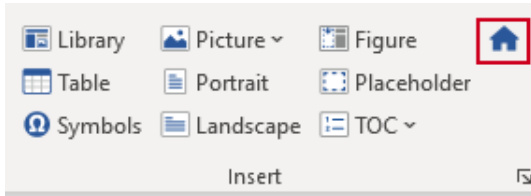
Updating the TOA

After inserting or deleting sections or appendices or making changes to headings that are included in the TOCs, select [Update TOCs](#).



Inserting a Hyperlink to the Table of Contents

This option displays or hides a home link icon on every page in the document. This home link icon contains a hyperlink to the Table of Contents. When your document is saved as a PDF, you will be able to click on the icon and you will be taken to the Table of Contents page (the availability of this function depends on the template and your customisation).



Select [Home Link](#) on the **Create** ribbon.

A home link icon will be inserted, usually in the header, on every page in the presentation after the Table of Contents page.

To hide the home link icon select [Home Link](#) again.

This function will only work when the document is saved as a PDF.

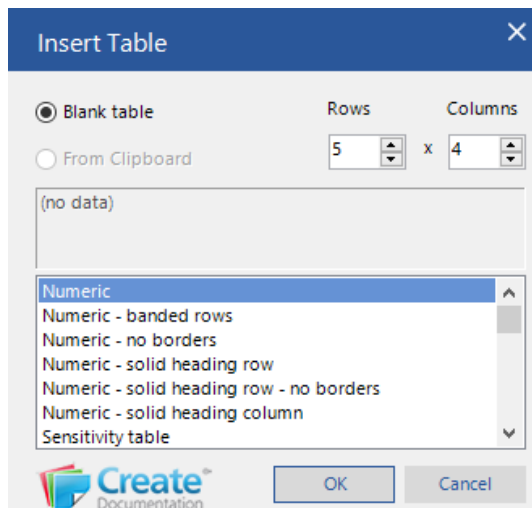
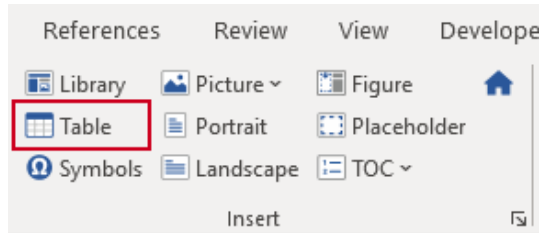
Word Tables

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

Inserting Tables

Place your cursor inside a placeholder. See [Inserting Figures](#).

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](#).

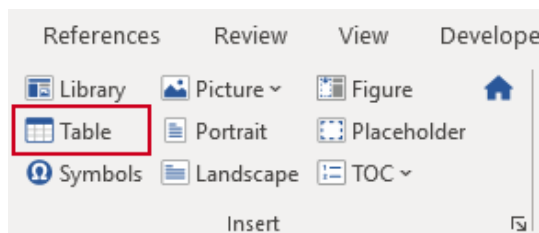
The table will be inserted in the placeholder.

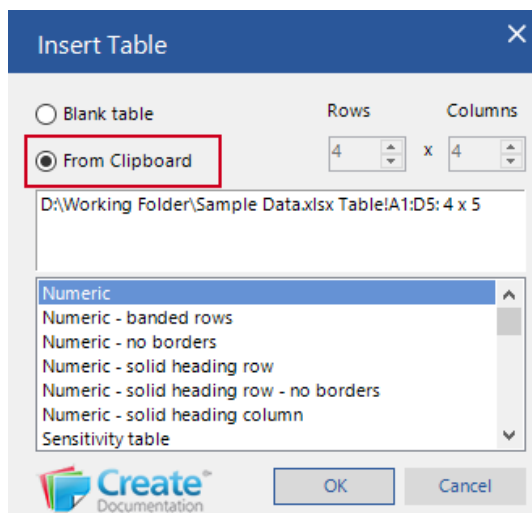
Inserting Table Data from the Clipboard

You can create a table in Word with Excel data from the clipboard. Create will create a link to the source data in Excel, so that if it changes, it can be updated from Word.

In Word, place your cursor inside a placeholder. See [Inserting Figures](#).

In Excel, select the data range and Copy (CTRL+C) to copy it to your clipboard. In Word, select [Table](#) on the ribbon or the [Insert](#) table icon on the side bar.



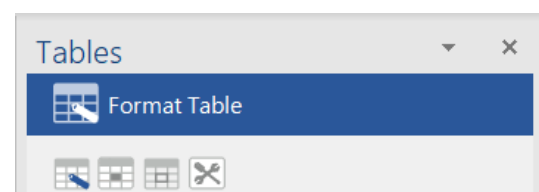
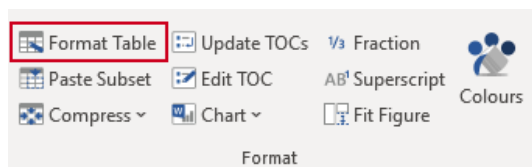


The dialog will highlight *From Clipboard* and the cell range and worksheet name.

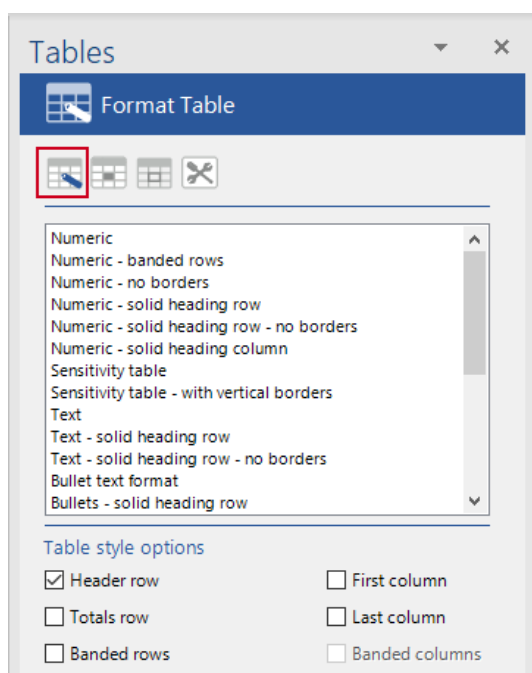
Select a table format, click *OK* and the table data will be inserted, formatted and linked back to the Excel source.

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**.

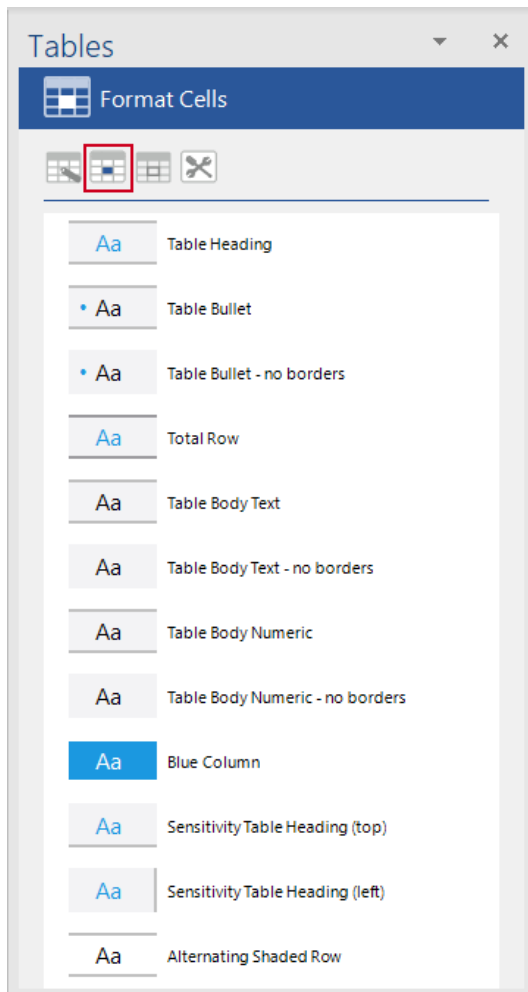


Select a base *Table Format* from the list to apply to the selected table.

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.

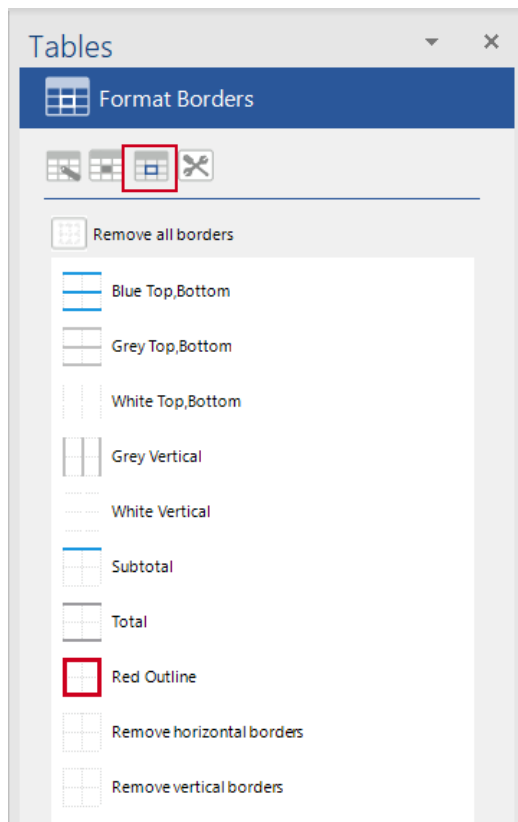


From the **Format Cells** panel click an option in the list to apply a cell format to the selected cells.

Note that applying a cell format will not change the font size of a cell.

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 Word. The line weights and colours will be in line with your organisation's branding.

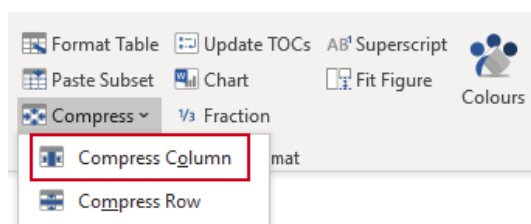


From the **Format Borders** panel click an option in the list to apply a border format to the selected cells or use the [Remove all borders](#) button to clear all borders.

Compressing Columns

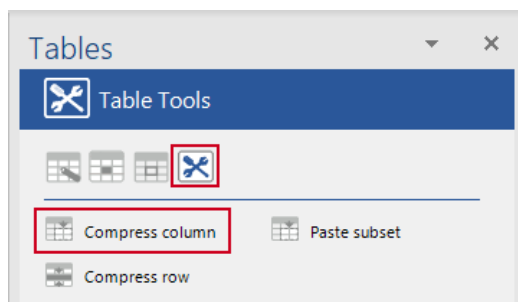
This reduces the column width of the whole table or selected columns, when space is needed to accommodate more data, or your table no longer fits the available area.

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



With your cursor in the column/s, select *Compress Column* from the [Compress](#) dropdown

OR

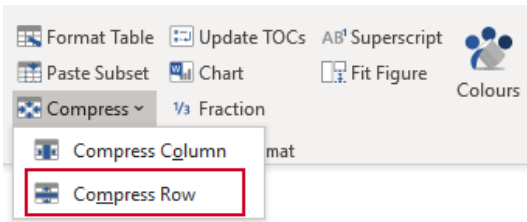


from the **Table Tools** panel select [Compress column](#).

Compressing Rows

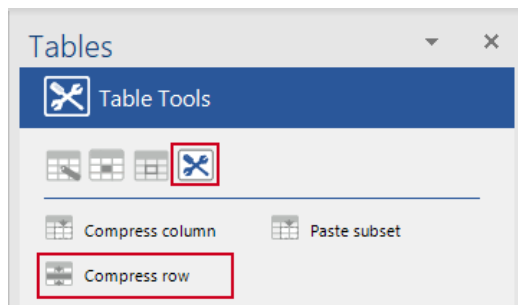
This reduces the cell padding of the selected row/s or the whole table if more space is needed to accommodate more data or your table no longer fits the available area.

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



With your cursor in the column/s, select *Compress Row* from the *Compress* dropdown

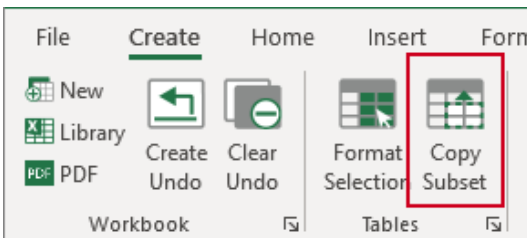
OR



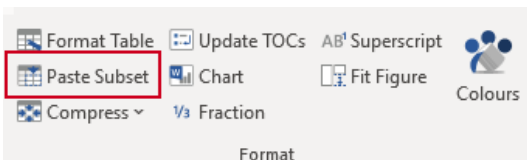
from the **Table Tools** panel select *Compress row*.

Pasting a Subset of Data

This function is useful if a table has been typed and formatted in Word (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 whilst retaining the PowerPoint formatting.

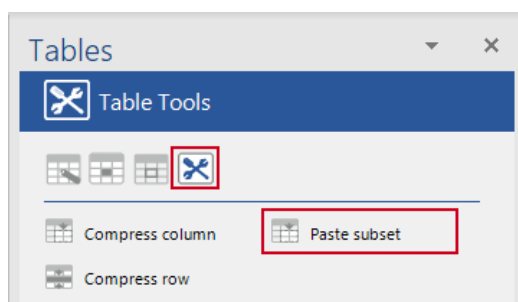


In Excel, select the new range of data and choose *Copy Subset*.



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

OR



from the **Table Tools** panel select *Paste subset*.

Inserting Rows and Columns in a Table

Use native Word 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 **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 **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.

Formatting Tools

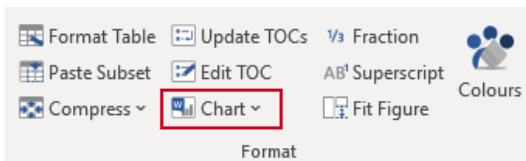
Use the tools in the **Format** group on the **Create** ribbon, rather than native Word to in edit the TOCs, format tables and Microsoft Charts and to add preformatted text such as fractions and superscript notes.

Formatting Tables

To format tables in your Word document see **Formatting Tables**.

Formatting Microsoft Charts

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



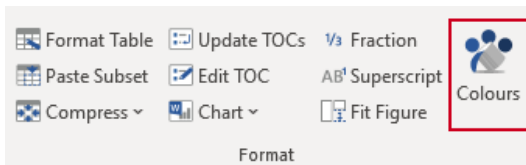
Select **Chart** and select one of the customised chart themes.

Notes

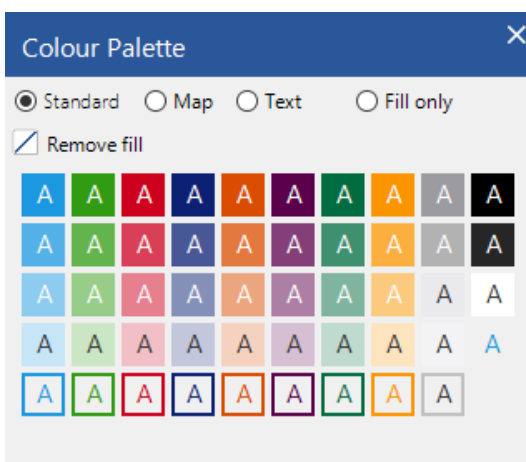
Whilst this will format both Microsoft charts and charts that were created in Excel, we recommend Excel charts be formatted at source in Excel, as any formatting applied to the chart in Word will be overwritten when the links are updated.

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 or a shape – 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 Word colour palette in PowerPoint 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** in PowerPoint for preformatted diagrams that might assist in the creation of your object/drawing.

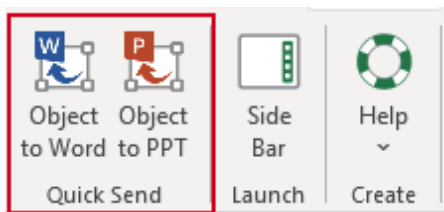
Linking Excel Data to Word

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

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

Quick Send

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



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

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

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

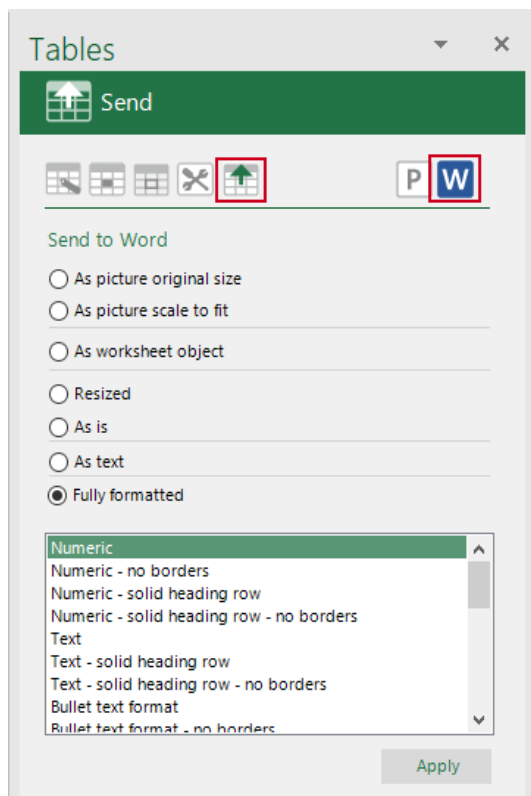
Other Methods of Copying Tables from Excel

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

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



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



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

Choose Word and then select your preferred method of copying

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

Notes

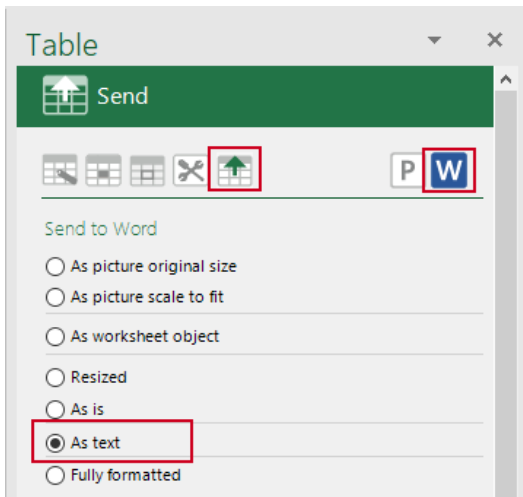
If the data changes in Excel, you can update the linked data via the **Update** button on the **Create** ribbon in your Word document.

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

Linking One Cell's Content from Excel

You can copy one cell's content from Excel to PowerPoint or Word as linked text – useful if you need to include figures, that may change at a later date, in a paragraph of text. This linked text can be updated if

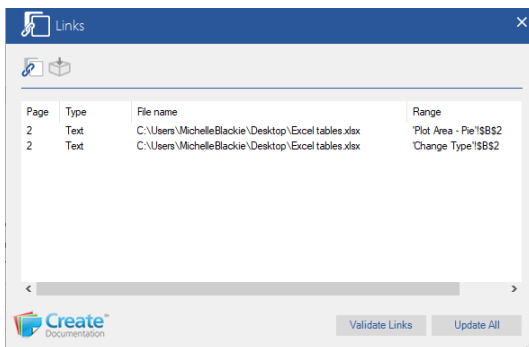
it changes in the Excel source file. In Word, the text contains a hyperlink but is not reformatted with the *hyperlink* style – it will retain its existing style.



In Word, position your cursor where the Excel cell text is to be inserted – either in text or in a table cell.

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

The text will be inserted in Word with a hyperlink. To view hyperlinks in your Word document, select ALT + F9 (function key).



Linked text becomes a linked object and will be listed with linked charts and tables in the **Links** dialog. It can be updated using Create.

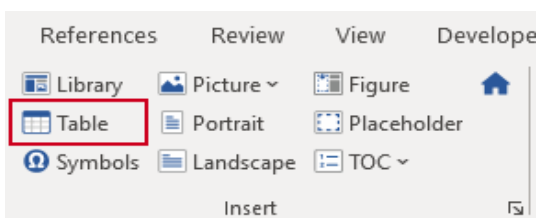
See **Updating Linked Objects**

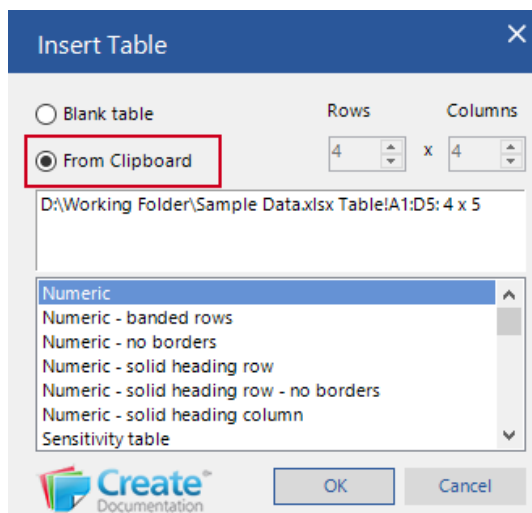
Copying Table Data from the Clipboard to Word

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

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

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





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

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

Notes

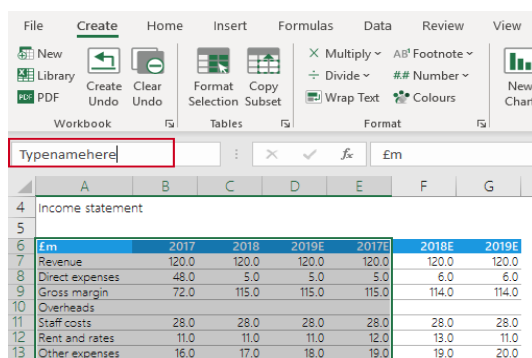
If the data changes in Excel, you can update the linked data via the *Update Selected* button on the **Create** ribbon in Word.

Named Ranges in Excel

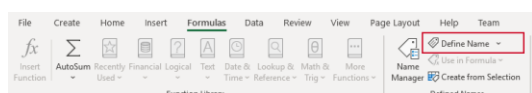
If a range of table data in the Excel workbook has been named, when exporting the data from Excel to Word or PowerPoint the range's name rather than the cell reference is used in the **Links** dialogue box in Word or PowerPoint. This makes the updating of tables more efficient because, regardless of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

Naming a Range in Excel

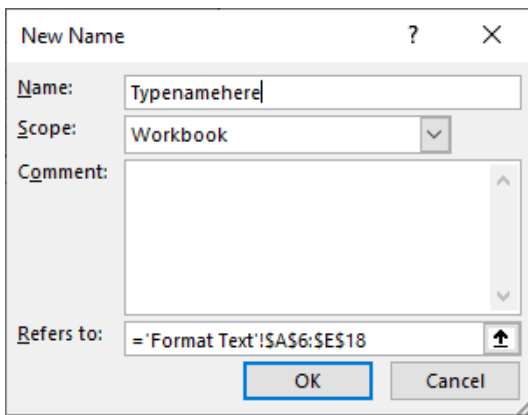
Select the cell range that you want to name.



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



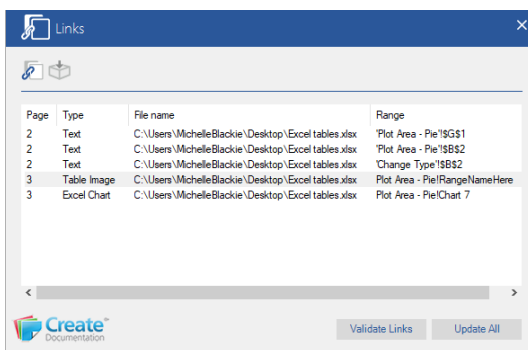
Alternatively, select the cell range that you want to name and on the **Formulas** tab, click **Define Name** in the **Defined Names** group.



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**.

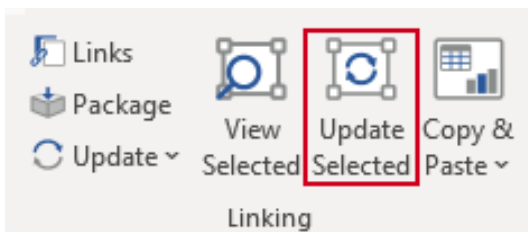
Updating Named Range Data in Word or PowerPoint



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

To update a named range in Word or PowerPoint:

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

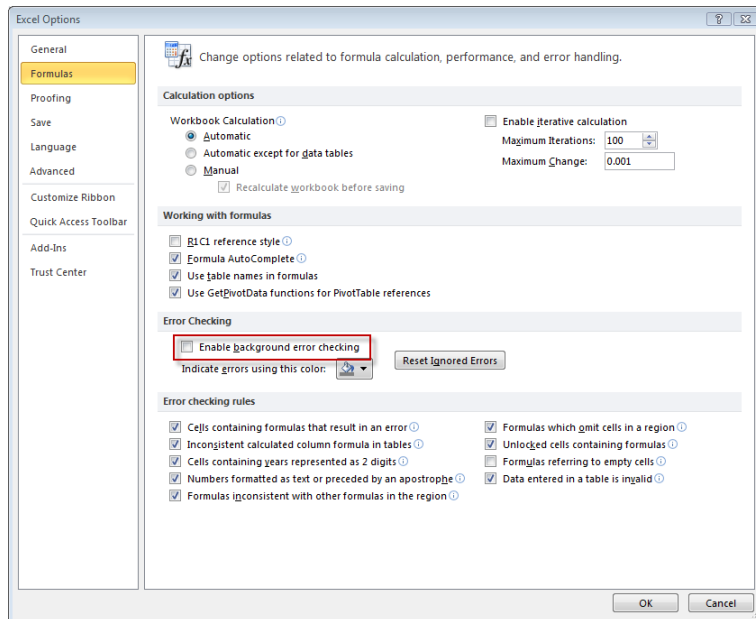


From the [Linking](#) group on the **Create** ribbon in Word or PowerPoint tab click on [Update Selected](#).

Hiding Excel Error Indicators

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

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



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

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

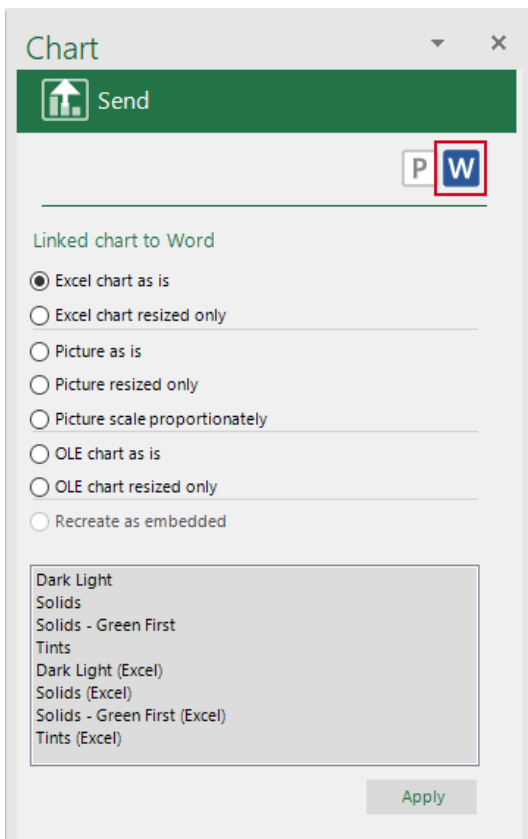
Other Methods of Copying Charts from Excel

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

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



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



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

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

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

Additionally

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

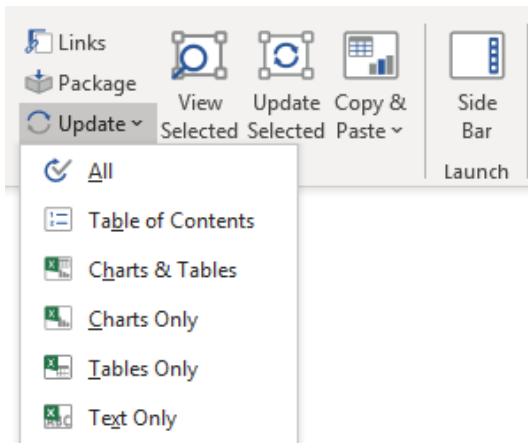
The chart will be copied to the placeholder in Word using the method selected.

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

Updating Linked Objects

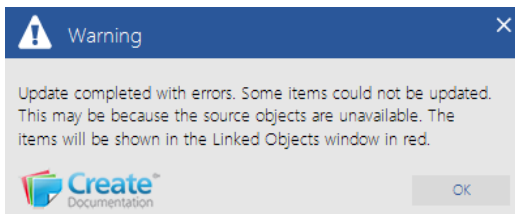
Once table data, charts and text have been copied from Excel they become *linked objects* in your Word document. When the data changes in Excel use the **Update** function to update the data automatically in Word. Make sure you save the Excel file before updating. Linked objects can be updated individually or

by object type (i.e. charts or tables). You can also select **Update, All** which will update any Tables of Contents in the document and all 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.

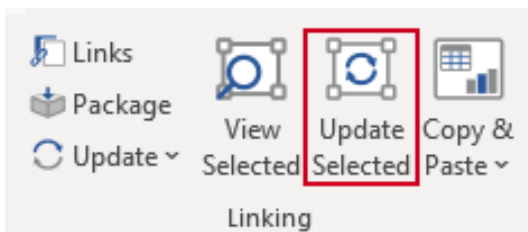
If any links cannot be found the following message is displayed



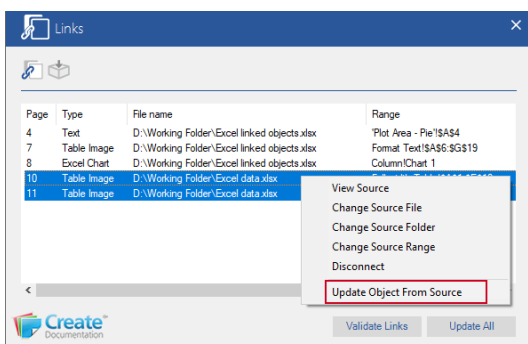
Use the **Change Source File** option in the **Links** dialog to correct any missing links. See **Changing the Excel Source File**

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**.



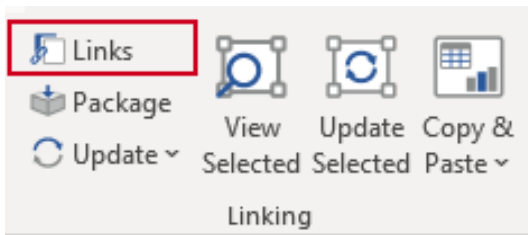
OR

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**.

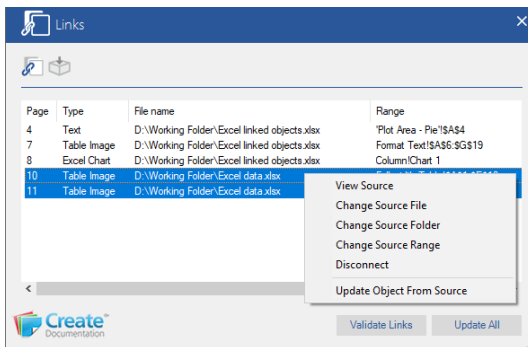
Managing Linked Objects

Table data or charts that have been imported from Excel become linked objects in your document. The **Linking** group contains options for viewing and updating those links, copying and pasting linked objects

between documents and packaging up your document 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 document.



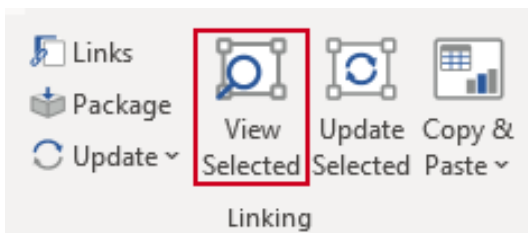
The dialog lists all the linked objects in the document.

As you click on any linked object in your document, that object will be highlighted in the dialog box making it easier to identify.

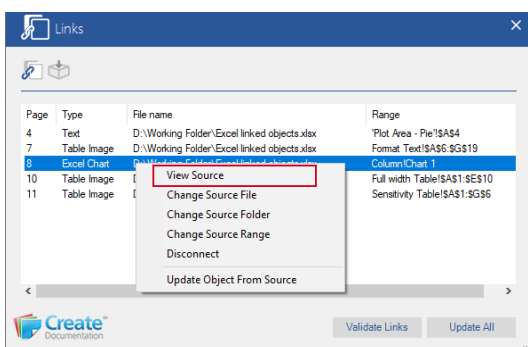
You can select an object or multiple objects and right-click to view (open), change, update or disconnect from the source data.

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.



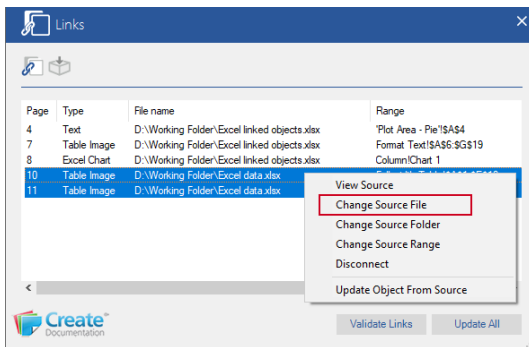
Select the object whose Excel source data you wish to view and select [View Selected](#).



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.

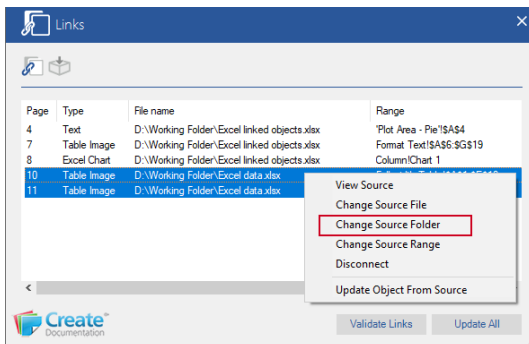


Right-click on the object (or select multiple objects by holding the SHIFT key down) in the [Links](#) dialog and select *Change Source File*.

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.

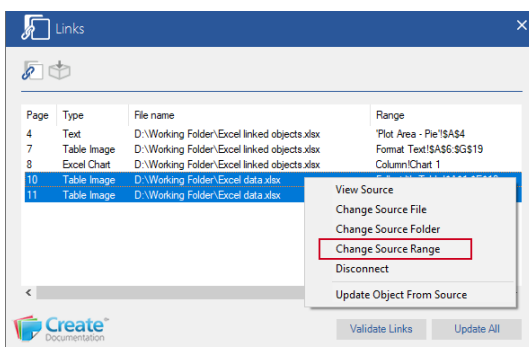


Right-click on the object (or select multiple objects by holding the SHIFT key down) in the [Links](#) dialog and select *Change Source Folder*.

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.

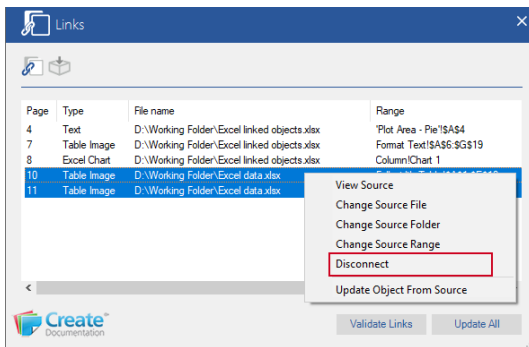


Right-click on the object (or select multiple objects by holding the SHIFT key down) in the [Links](#) dialog and select *Change Source Range*.

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

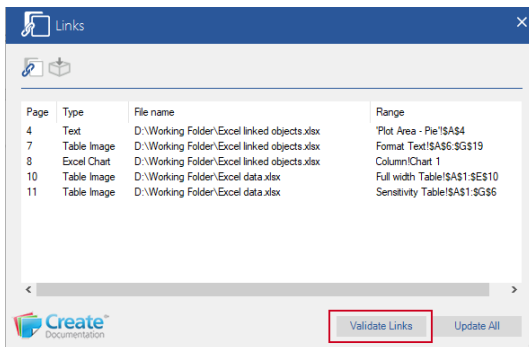
You can break the link or disconnect linked objects at any time. The chart or table will remain in the presentation, but it will no longer be linked to the original Excel source data.



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

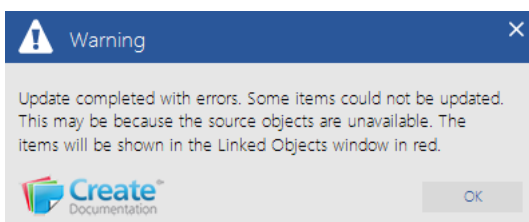
Validating Links

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.

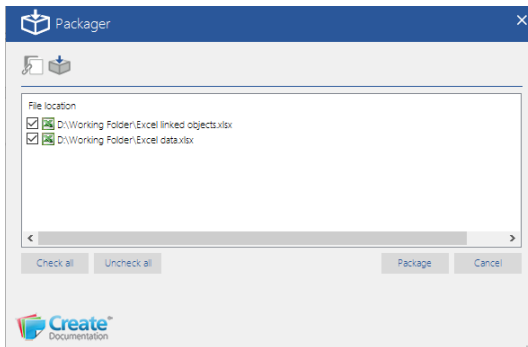
Packaging Linked Files

This option takes a copy of the Word file 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.



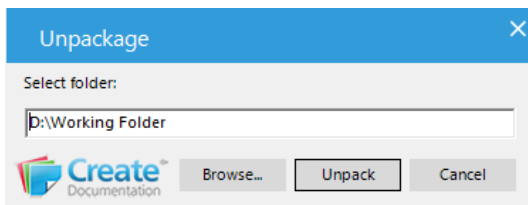
The *Packager* dialog will open with a list of all the associated Excel files.

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



The *Unpackage* dialog will open.

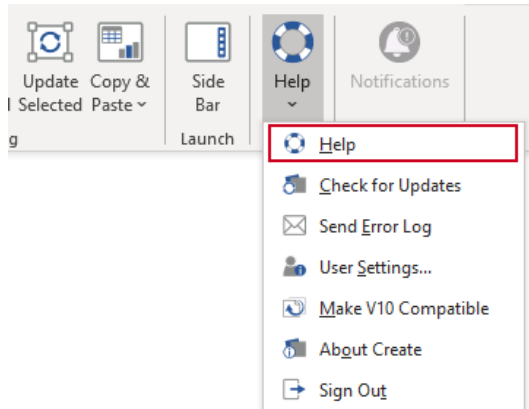
Select the folder in which you wish to save the PowerPoint file and the linked files. Select *Unpack*.

The Word 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*

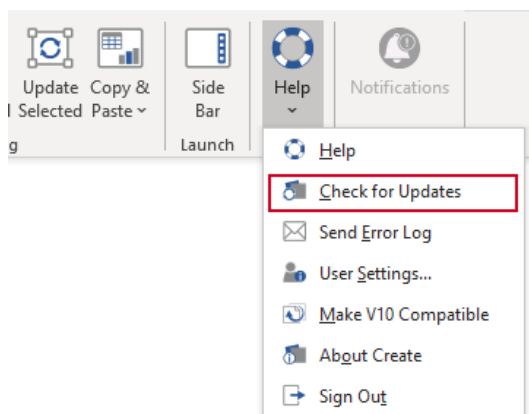
On the contents pane, main topic headings are listed on the left of the window. A tick next to a topic indicates that further subtopics are available under the selected topic. A plus sign indicates that selecting the topic will display the topic text and no further subtopics.

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*.

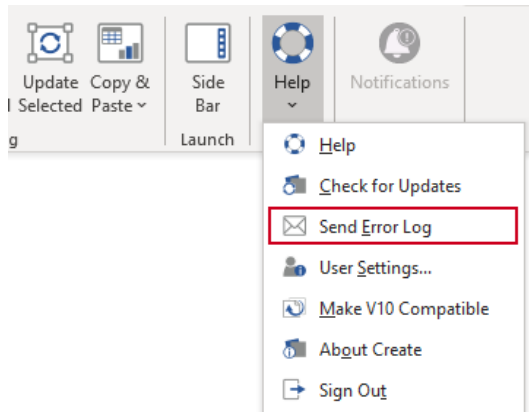
From the dropdown menu select *Check for Updates*

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:



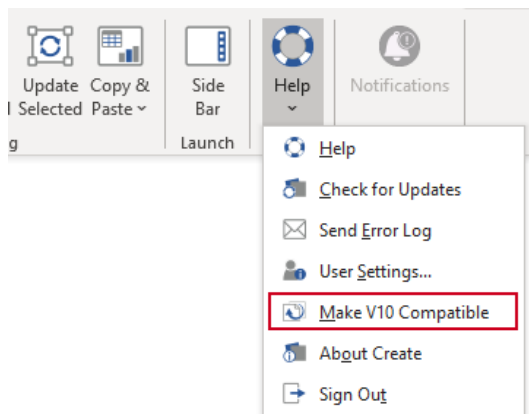
On the **Create** ribbon select [Help](#).

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 documents 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 document that was created in a previous version of Create.

On the **Create** ribbon select [Help](#).

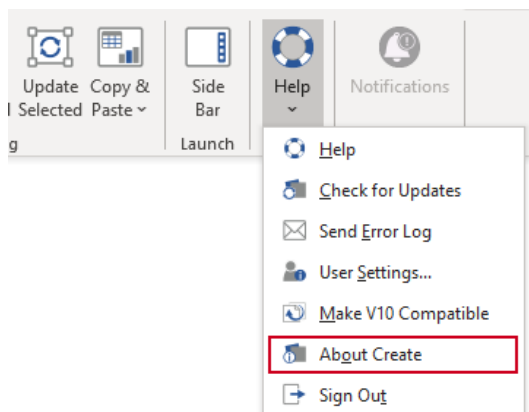
From the dropdown menu select [Make V10 Compatible](#).

Notes

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

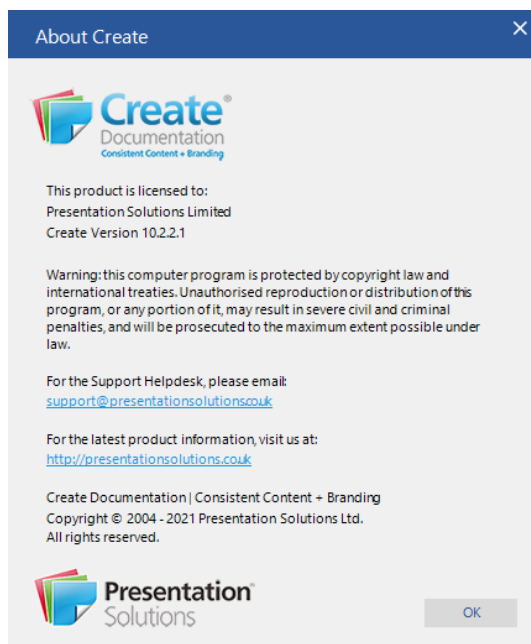
About Create

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.

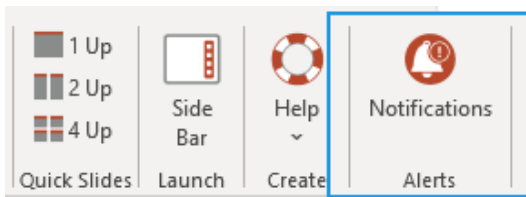
Create V10 Documentation

Notifications

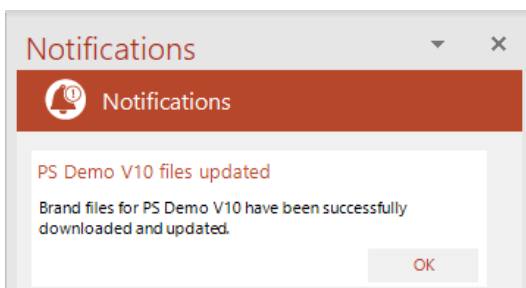
Assets are uploaded by designated authors within your organisation and can be marked as *updateable*. The *Notifications* button will be enabled if:

- 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.



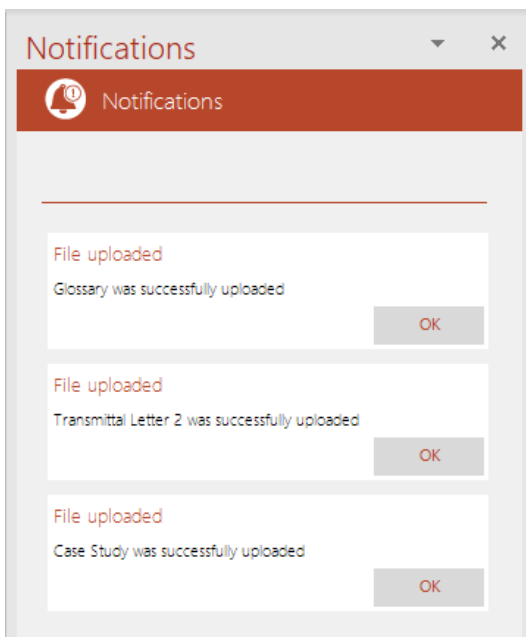
Click on **Notifications** in the ribbon.



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.



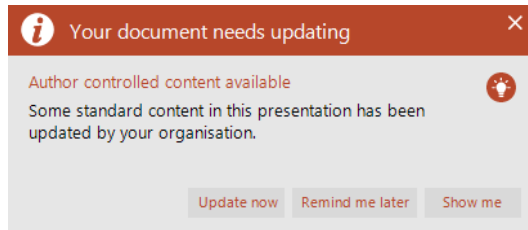
The files will be uploaded and you can close the task pane.

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

Notes

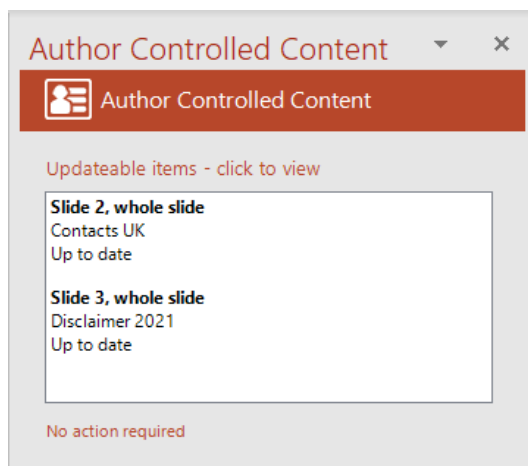
If you do not select it, the **Notifications** button will remain enabled and any updated assets in your presentation will not be updated.

Author Controlled Content



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

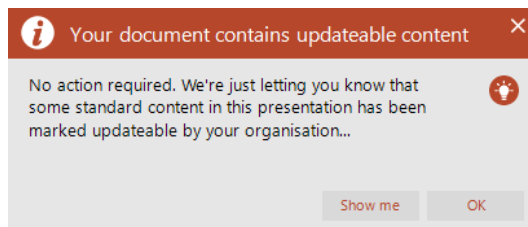
Click *Update* to update the assets in your presentation or *Remind me later* to close the message without updating the content – the message will reappear until you update. Click *Show me* to open the **Author Controlled Content** pane.



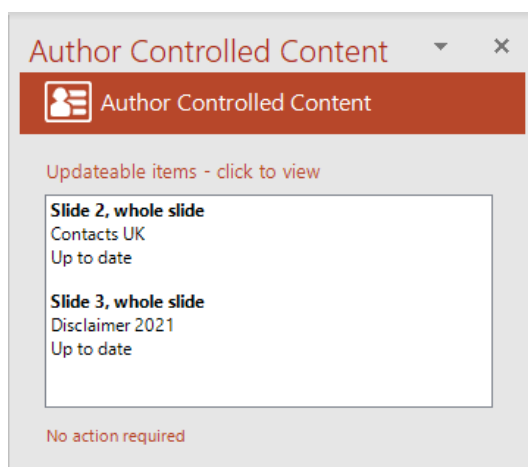
The **Author Controlled Content** pane will open listing the assets that have been updated.

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

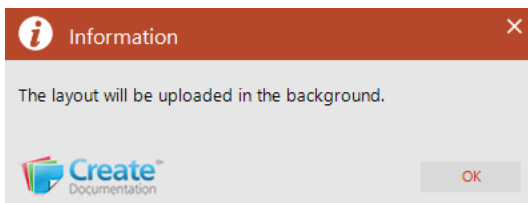
OK

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

Complete the details of the new layout:

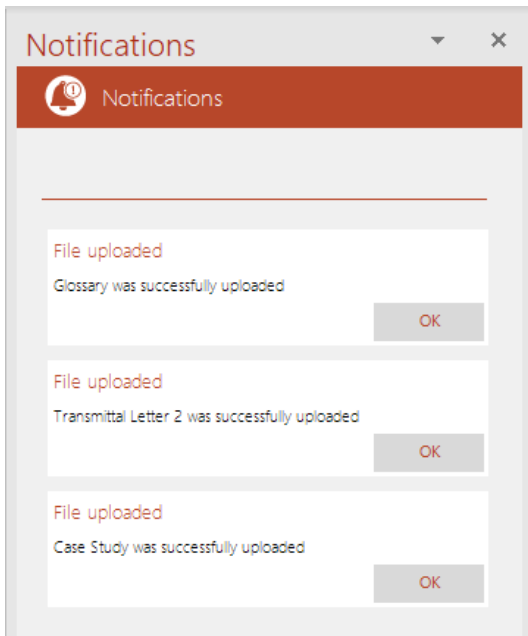
- **Name:** The name that you choose will appear underneath the layout thumbnail in the **Layouts** task pane once the layout is uploaded.
- **Publish date:** Defaults to the current day, month and year. To choose a future date, click on the calendar button and select the date. The recorded publish date 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 60.

Uploading Images

Select the image you wish to upload.



Author

Upload Assets

Name (e.g. Contact slide)
Office

Publish date
06 January 2021

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

Updateable
☒ Item can be automatically updated in a document

Upload to
☐ Layouts ☒ Images ☐ Shapes

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

OK

Select **Author** on the side bar.

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

Complete the details of the new image:

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

Uploading Shapes

Select the shape you wish to upload.



Author

Upload Assets

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

Publish date
07 January 2021

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

Updateable
☒ Item can be automatically updated in a document

Upload to
☐ Layouts ☐ Images ☒ Shapes

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

Org Chart

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

OK

Select **Author** on the side bar.

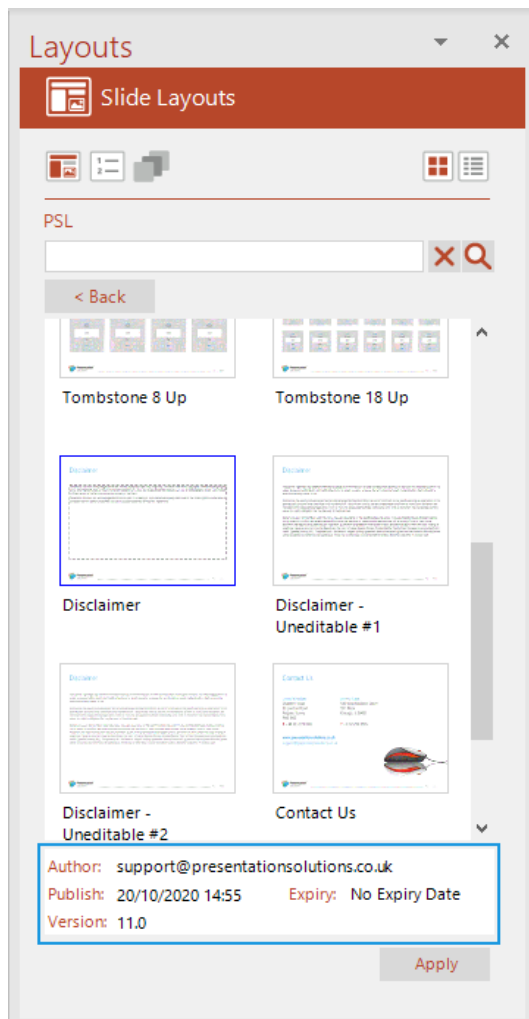
The **Author** task pane will open at the **Upload Assets** panel.

Complete the details of the new shape:

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

Editing Assets

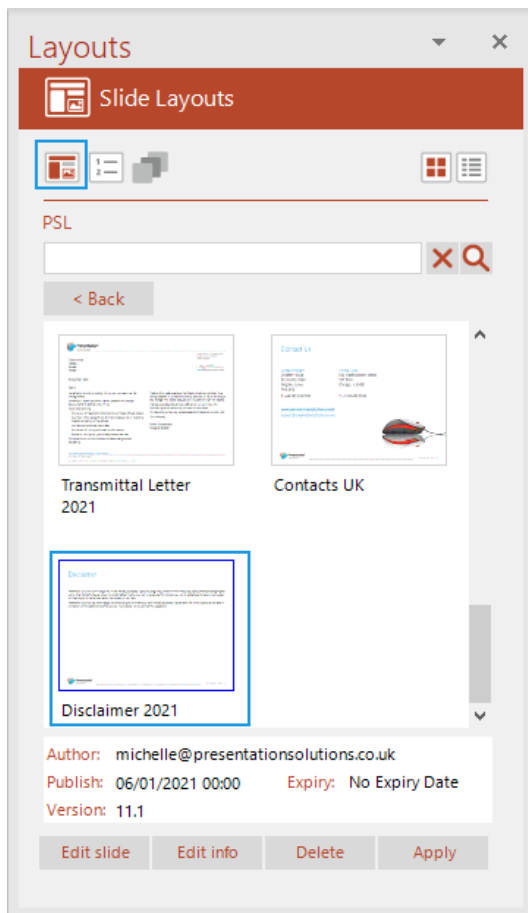
Existing assets are edited using the pane from which they are inserted (i.e. the **Layouts** or **Shapes** task panes). Only assets which have been uploaded by a client author can be edited. Assets built into Create by Presentation Solutions cannot be edited by authors.



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

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

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



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

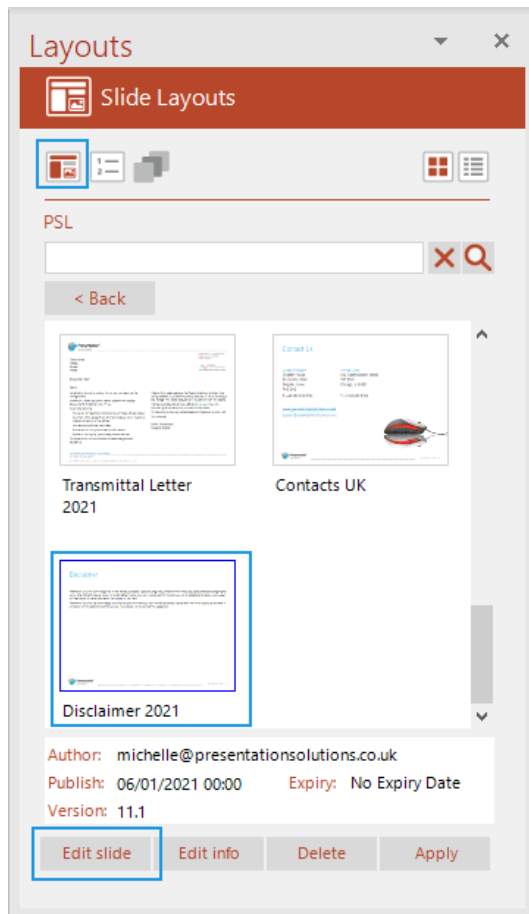
Authors will see all assets, including those that are not yet published.

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

Editing Layouts

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

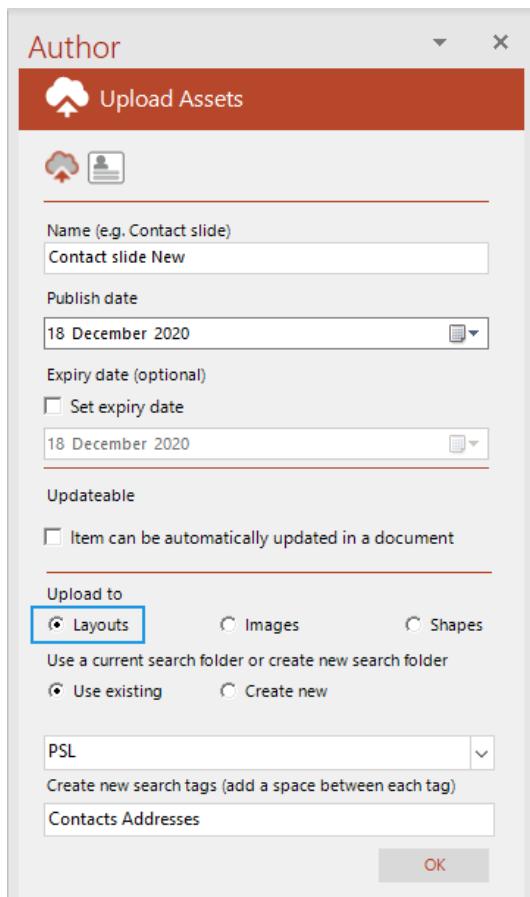
If you are an author and you wish to **replace** an existing author-generated slide:



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

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

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



The screenshot shows the 'Author' task pane with the 'Upload Assets' sub-pane active. It contains 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' section has a checkbox for 'Set expiry date' which is unchecked, with the date '18 December 2020' shown below it. The 'Updateable' section has a checkbox for 'Item can be automatically updated in a document' which is unchecked. The 'Upload to' section has three radio buttons: 'Layouts' (selected), 'Images', and 'Shapes'. Below this, there are two more radio buttons: 'Use existing' (selected) and 'Create new'. A search folder dropdown is set to 'PSL'. At the bottom, there is a text field for 'Create new search tags' containing 'Contacts Addresses' and an 'OK' button.

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

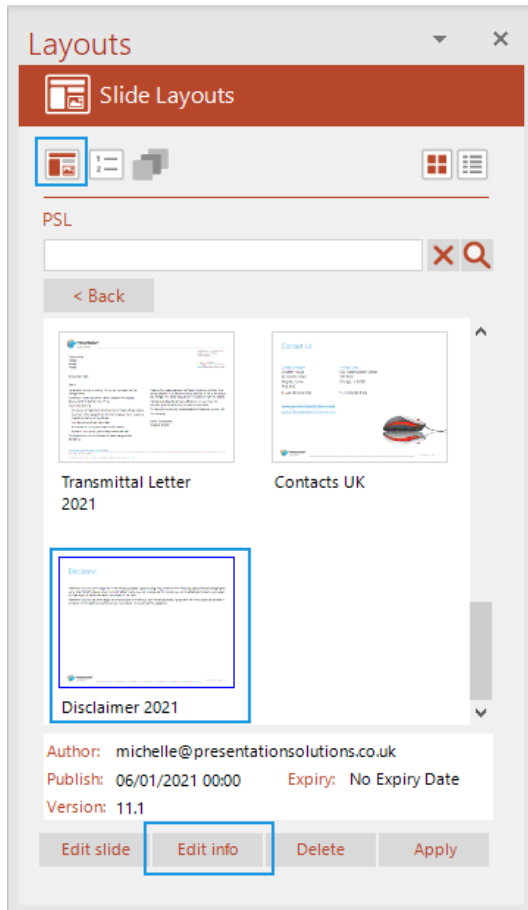
OK

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**.

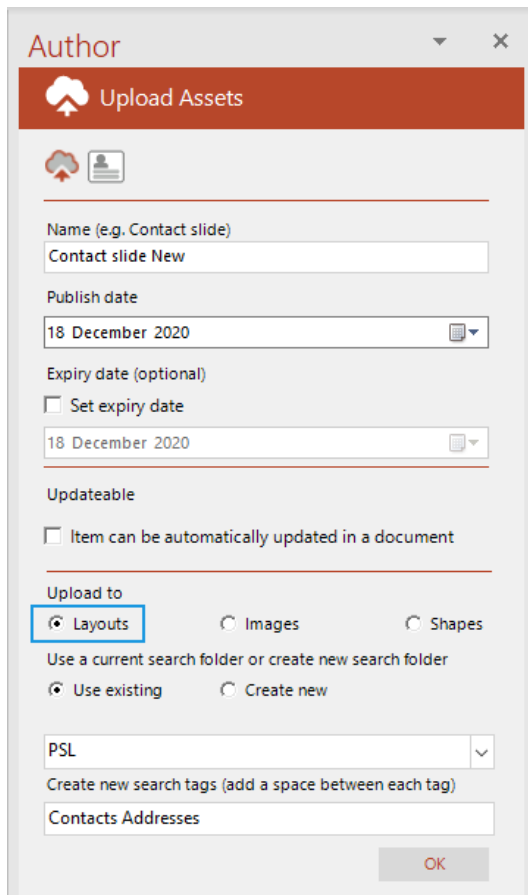
The new slide that you had selected in your presentation will replace the one that had previously been uploaded.

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*.



The screenshot shows the 'Author' task pane with the 'Upload Assets' sub-pane active. The 'Name' field contains 'Contact slide New'. The 'Publish date' and 'Expiry date (optional)' are both set to '18 December 2020'. The 'Updateable' checkbox is unchecked. Under 'Upload to', 'Layouts' is selected. The 'Use existing' checkbox is selected. The search folder is 'PSL'. The search tags are 'Contacts Addresses'. The 'OK' button is at the bottom right.

Author

Upload Assets

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

Publish date
18 December 2020

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

Updateable
☐ Item can be automatically updated in a document

Upload to
☒ Layouts ☐ Images ☐ Shapes

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

PSL

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

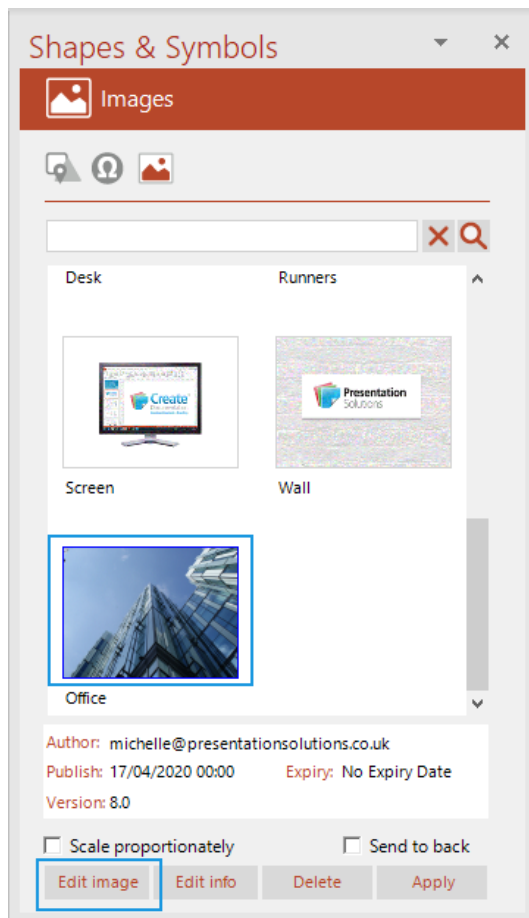
OK

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

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

Editing Images

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



Select the new version of the image in your presentation.

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

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

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

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

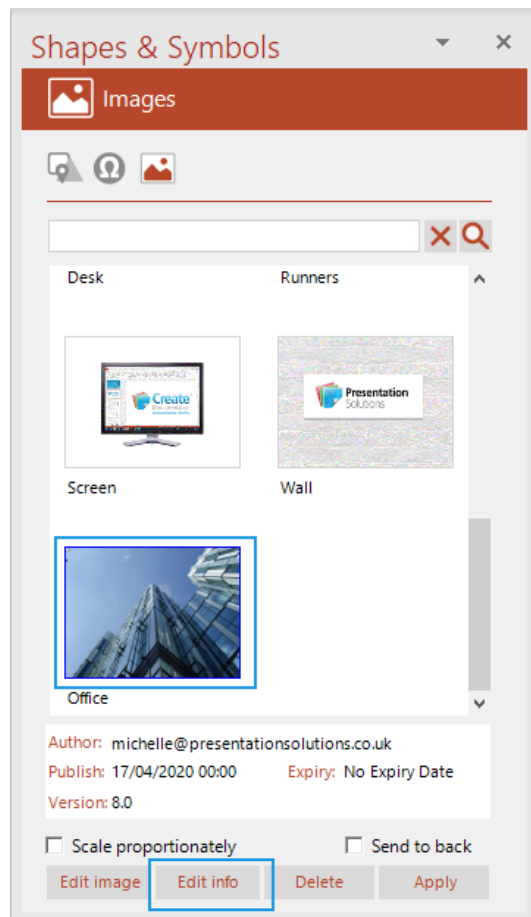
Create new search tags (add a space between each tag)
Office desk telephone

OK

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

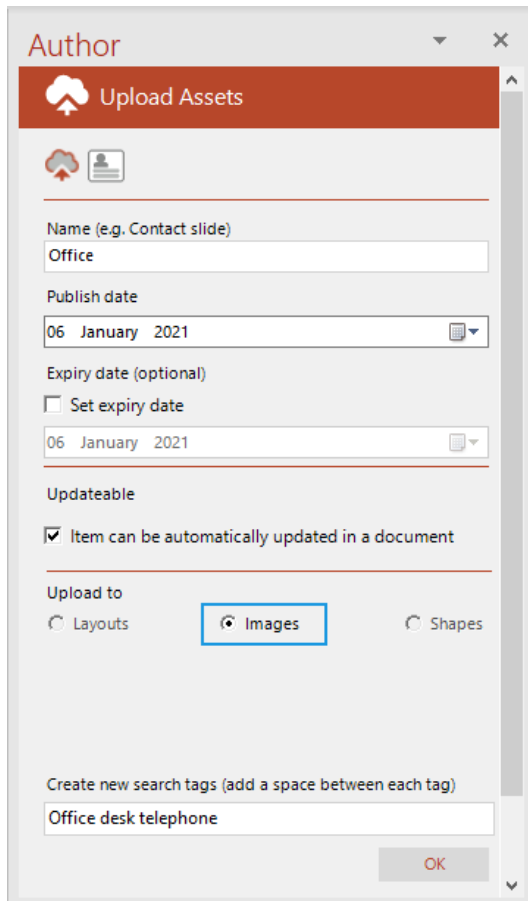
Make any required changes to the information and click **OK**.

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 several input fields and checkboxes for asset metadata. The 'Name' field is filled with 'Office'. The 'Publish date' is set to '06 January 2021'. The 'Expiry date (optional)' is also set to '06 January 2021', with the checkbox 'Set expiry date' checked. Under the 'Updateable' section, the checkbox 'Item can be automatically updated in a document' is checked. In the 'Upload to' section, the 'Images' radio button is selected and highlighted with a blue box, while 'Layouts' and 'Shapes' are unselected. At the bottom, there is a 'Create new search tags' field containing 'Office desk telephone' and an 'OK' button.

Author

Upload Assets

Name (e.g. Contact slide)
Office

Publish date
06 January 2021

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

Updateable
☒ Item can be automatically updated in a document

Upload to
☐ Layouts ☒ Images ☐ Shapes

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

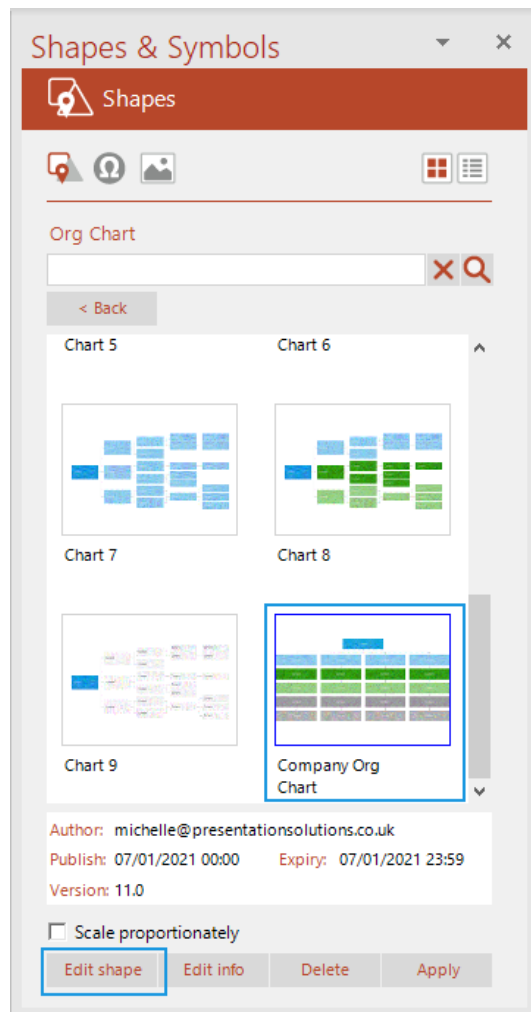
OK

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

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

Editing Shapes

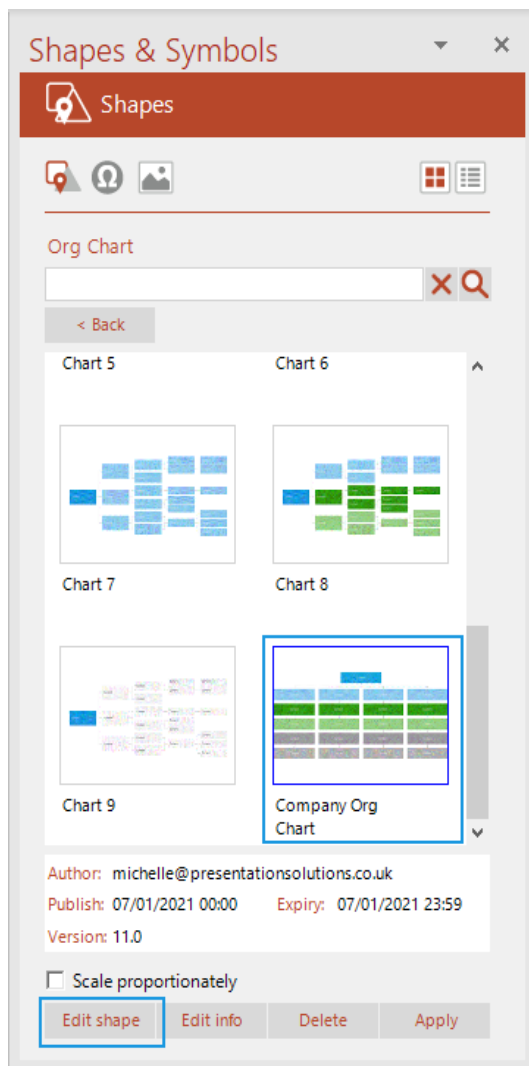
If you are an author and you wish to **replace** an existing author-generated shape:



Select the new version of the shape in your presentation.

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

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



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

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

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

Managing Company Information

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

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

Company Information Records

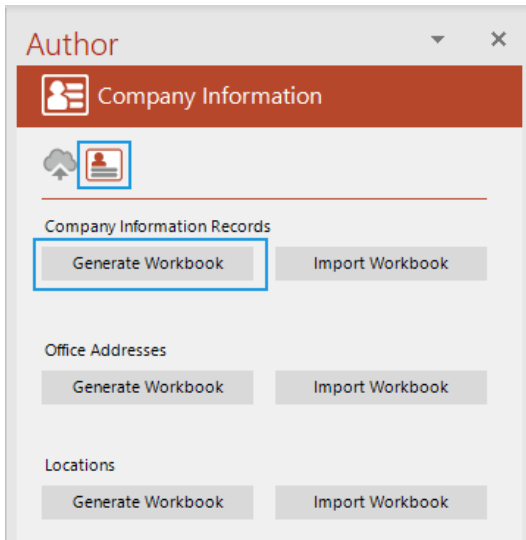
Company information records can contain a range of fields such as registered company text and copyright dates. The fields included will vary according to your company's customisation of Create.

Generating the Company Information Workbook

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



Select **Author** on the side bar.



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

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

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

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

Editing the Company Information Workbook

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

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

Save the workbook.

Notes

Set up the Company Information Records as desired.

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

Only data in the 1st sheet will be imported.

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

Rows with incorrect data will cause the import to fail.

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

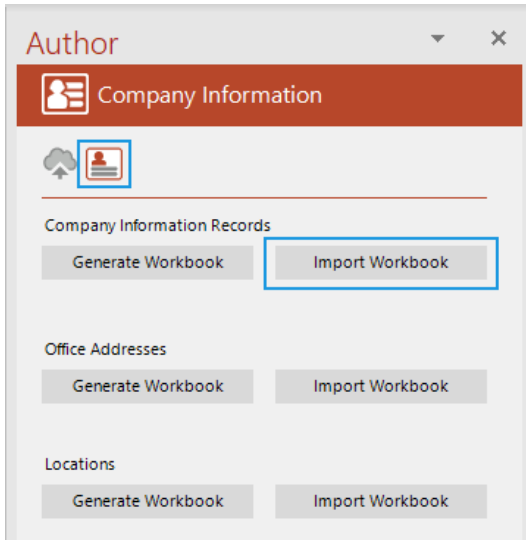
Blank or unrecognised values in ID (PLEASE LEAVE!!) will be treated as new Company Information Records.

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

Importing the Company Information Workbook



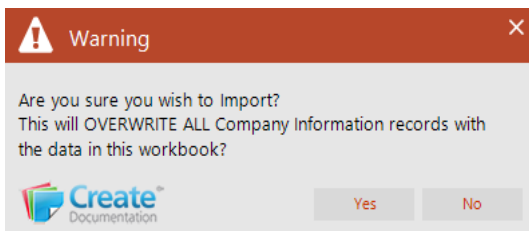
Select **Author** on the side bar.



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

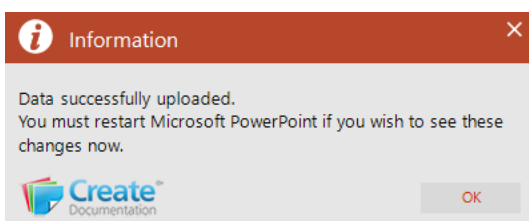
Select **Import Workbook** below **Company Information Records**.

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



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

Click **Yes** to confirm.



Once the update is complete this dialog will open.

Click **OK**.

Office Addresses

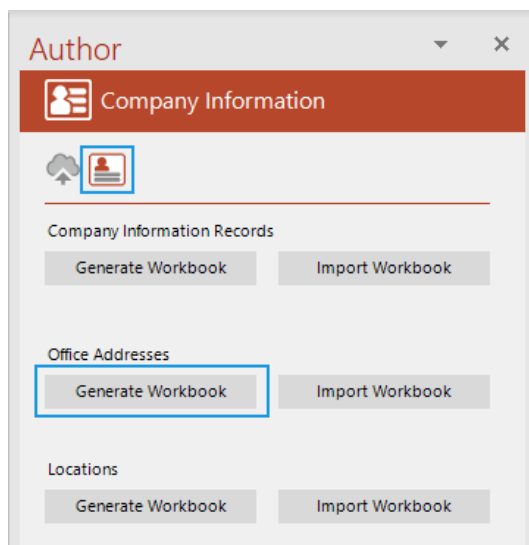
Office addresses can contain a range of fields including telephone numbers and web addresses. The fields included will vary according to your company's customisation of Create.

Generating the Office Addresses Workbook

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



Select **Author** on the side bar.



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

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

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

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

Editing the Office Addresses Workbook

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

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

Save the workbook.

Notes

Set up the Office Addresses as desired.

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

Only data in the 1st sheet will be imported.

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

Rows with incorrect data will cause the import to fail.

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

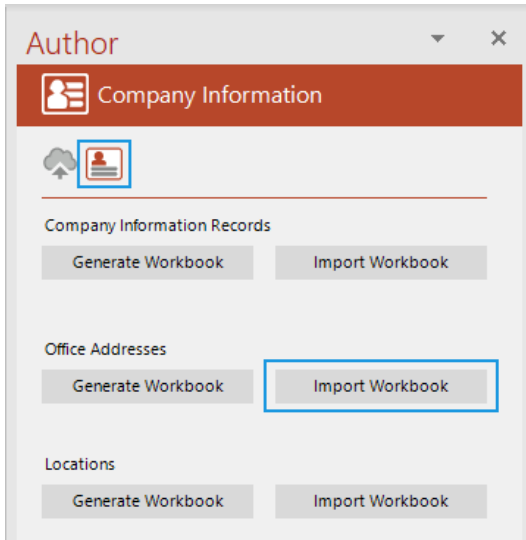
Blank or unrecognised values in ID (PLEASE LEAVE!!) will be treated as new Office Addresses.

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

Importing the Office Addresses Workbook



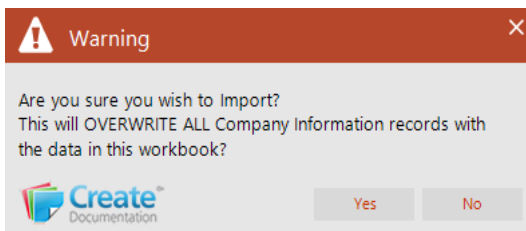
Select **Author** on the side bar.



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

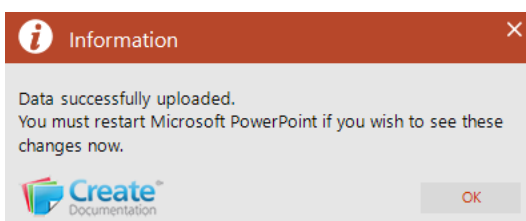
Select **Import Workbook** below **Office Addresses**.

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



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

Click **Yes** to confirm.



Once the update is complete this dialog will open.

Click **OK**.

Locations

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

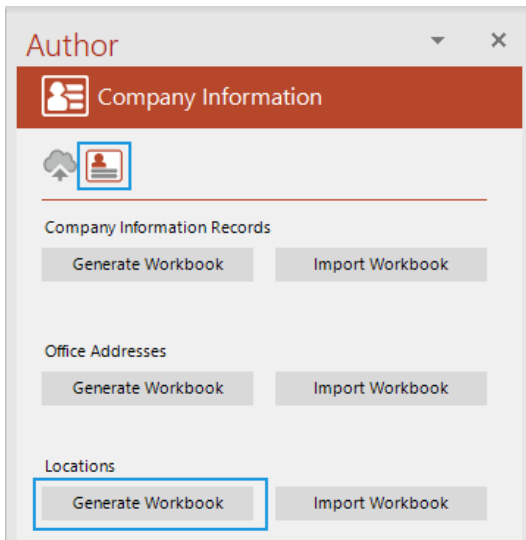
An end user picks the location appropriate to them from **User Settings**.

Generating the Locations Workbook

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



Select **Author** on the side bar.



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

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

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

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

Editing the Locations Workbook

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

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

Save the workbook.

Notes

Set up the Locations as desired.

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

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

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

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

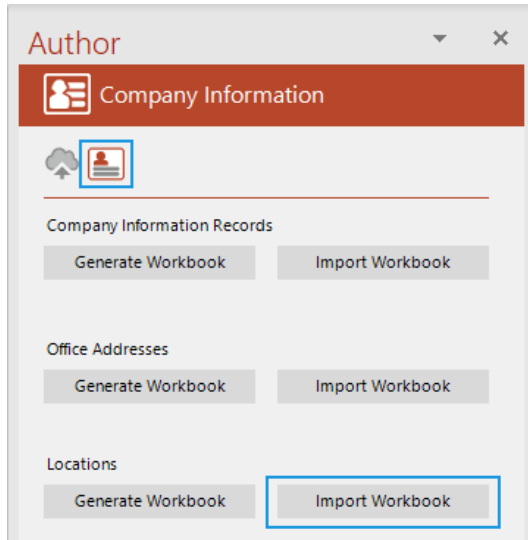
Blank or unrecognised values in ID (PLEASE LEAVE!!) will be treated as new Locations

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

Importing the Locations Workbook



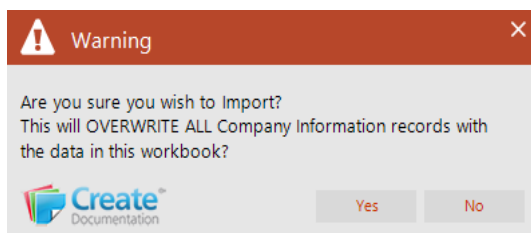
Select **Author** on the side bar.



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

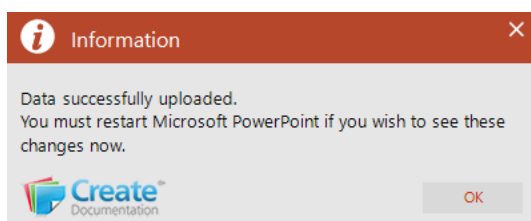
Select **Import Workbook** below **Locations**.

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



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

Click Yes to confirm.



Once the update is complete this dialog will open.

Click OK.

Uploading Workbooks in Excel

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



Select **Author** on the side bar.

Author

Upload Assets

Name
UK Databook

Publish date
07 January 2021

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

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

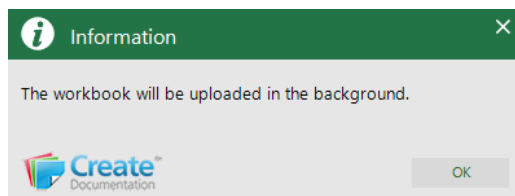
Use active Browse OK

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

Complete the details of the new layout:

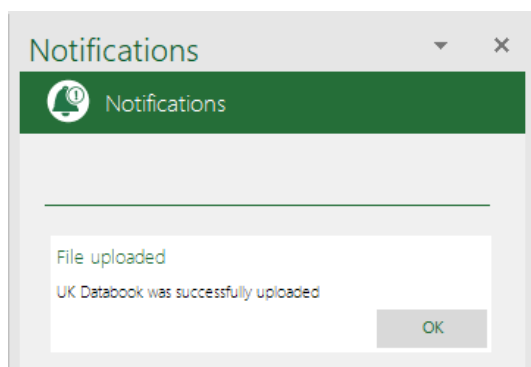
- **Name:** The name that you enter will appear underneath the layout thumbnail in the **Workbook** task pane once the layout is uploaded.
- **Publish date:** Defaults to the current day, month and year. To choose a future date, click on the calendar button and select the date. The recorded publish date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

Click **OK**.



A message confirming that the workbook will be uploaded appears.

Click **OK**.



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

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

Users will receive their own notifications informing them of any updates to updateable assets. See Notifications on page 60.



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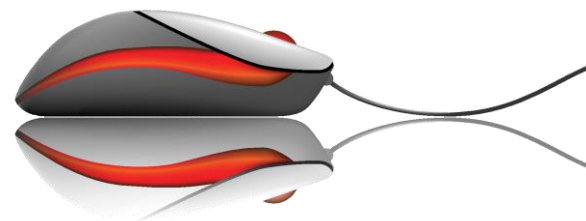
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