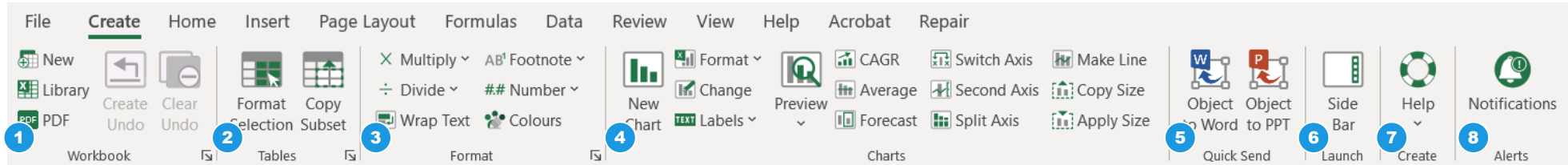


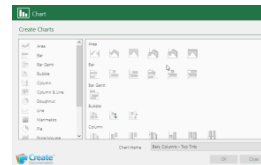
Overview of Create for Excel



1 The **Workbook** group contains any regularly used Excel workbooks, worksheets, templates or models, and options to save your Excel workbook as a PDF. The Create Undo function is located here.

2 The **Tables** group enables you to format whole tables, rows and columns or cells within tables in your worksheet and export those tables from Excel to Word or PowerPoint, choose the output format (e.g. fully formatted or unformatted) and have the table data linking back to the Excel.

3 The **Format** group contains some useful functions to assist with formatting data in your worksheet.



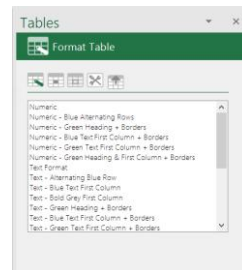
4 The **Charts** group contains options to create standard and custom charts, format existing charts to your organisation's style (by applying a "theme"), and send charts to Word or PowerPoint with a link back to the original source data. Other features include adding average lines, forecasts periods, axis splits, secondary axes and labels.

5 The **Quick Send** group enables you to send tables and charts to a selected placeholder in PowerPoint or Word

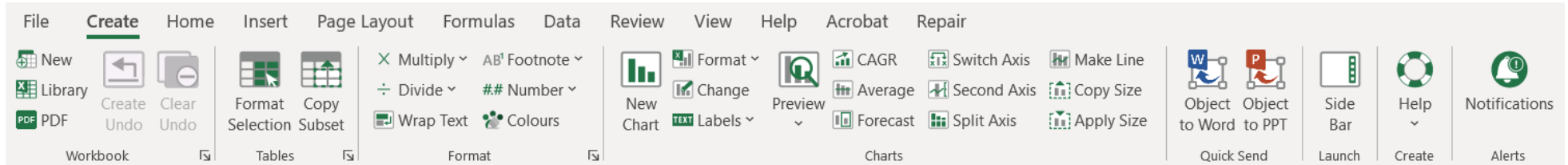
6 The **Launch** group launches the Create Documentation Side Bar, enabling you to quickly access template, library, chart and formatting panes for easy document formatting

7 The **Help** pane contains a searchable help resource, preferences and user settings. You can also check the Help button for any updates to Create.

8 The **Notifications** pane will alert you to any important messages or alerts concerning any template updates



Create Excel Functions



Workbook

New opens the New Workbook side panel

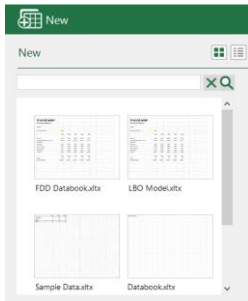
Library

Inserts a worksheet from a selection of formatted worksheets that can be inserted.

PDF Creates a PDF of an Excel file and removes metadata.*

Create Undo a previous Create action such as format table or chart.

Clear Undo will clear the Create Undo list.

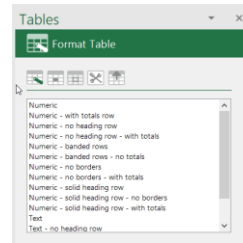


Tables

Format Selection

Formats whole tables, rows, columns or selected cells.

Copy Subset Copies a selection of data in Excel that can be pasted into an existing table in Word or PowerPoint (unlinked) retaining formatting.



Format

Multiply values by -1, 10, 100 or 1,000.

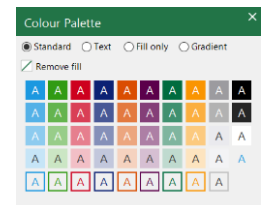
Divide values by 10, 100 or 1,000.

Wrap Text in a cell or a selection of cells on the worksheet.

Footnote Adds a superscript number (1, 2 or 3) to text in a cell (footnotes). Applies to the corresponding chart, if there is one.

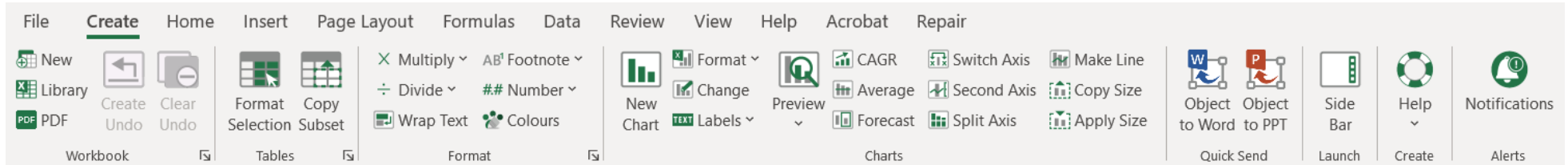
Number Applies a number format from a handy selection to the selected cell or cells.

Colours Displays the current colour palette which can be used for recolouring worksheets or charts.



* If you plan to share a PDF or publish it to the web, there may be hidden data or personal information that might be stored in the presentation which you might not want to share publicly. Create PDF will remove before all metadata in the PDF.

Create Excel Functions



Charts

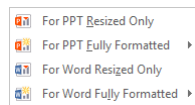
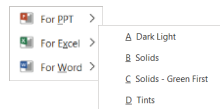
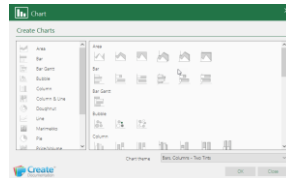
New Chart Creates a new chart with a custom theme applied.

Format Formats a selected chart by applying a custom theme for PowerPoint, Word or Excel.

Change Changes the type of the selected chart and applies a theme.

Labels Displays a list of chart label options.

Preview Resizes or reformats the selected chart, without sending to PowerPoint or Word.



CAGR Calculates and adds a CAGR arrow or line to a column chart.

Average Calculates and inserts an average line or area into a chart.

Forecast Adds a shaded region behind a chart to represent forecast data.

Switch Axis Swaps the primary and secondary axes of a chart that has two Y-axes.

Split Axis Inserts a graphic to display a split axis on a chart and updates the axis labels.

Second Axis Adds a 2nd value axis to a chart and moves the first or selected series to that axis.

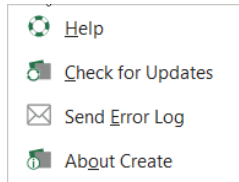
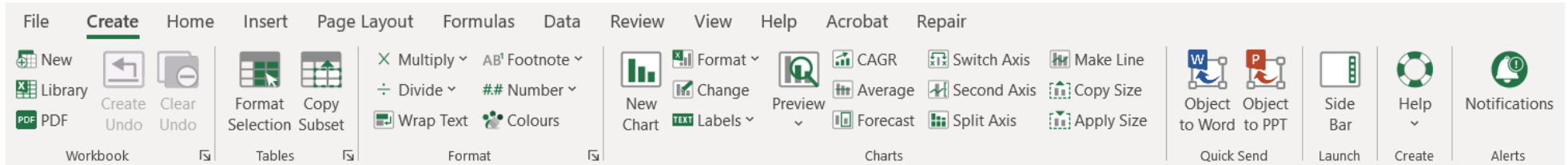
Make Line Changes the selected series on a chart to a line.

Copy Size/Apply Size Copies the size of the plot area and shape so that it can be applied to another chart.

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

Create Excel Functions



Create

Help

[Create Help](#) An online help is available in each programme in Create (you do not need the internet to view the Help).

Check for Updates

Download updates to Create.

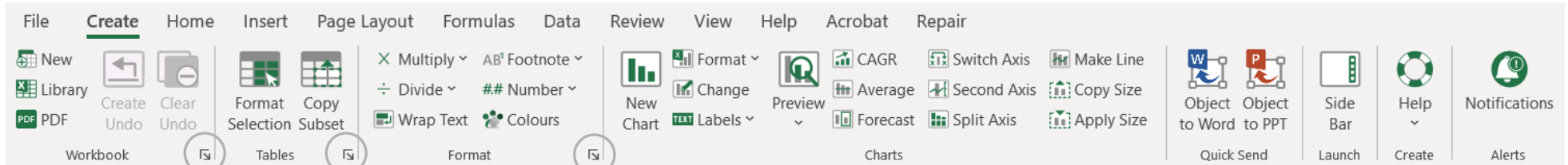
[Send Error Log](#) Sending us the Create error log if you have experienced problems using Create will allow us to investigate the issue.

[About Create](#) Tells you which version of the software is installed.

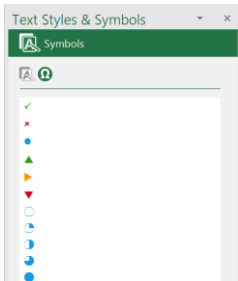
Alerts

[Notifications](#) is enabled when content and new assets have been updated in Create

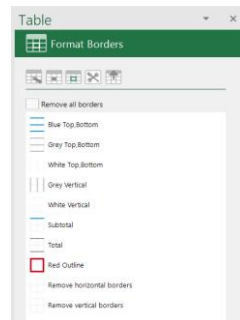
Create Excel Task Panes



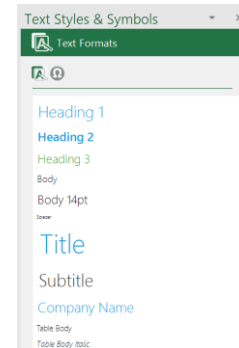
Symbols task pane can be used to insert custom, preformatted shapes into the selected cell or cells on your worksheet.



Tables task pane can be used to apply (or remove) table borders to selected cells, apply table formats to whole tables or cells as well as provide a full menu of sending options for linking into PowerPoint and Word.



Text Formats task pane can be used to apply formatting to selected cells.

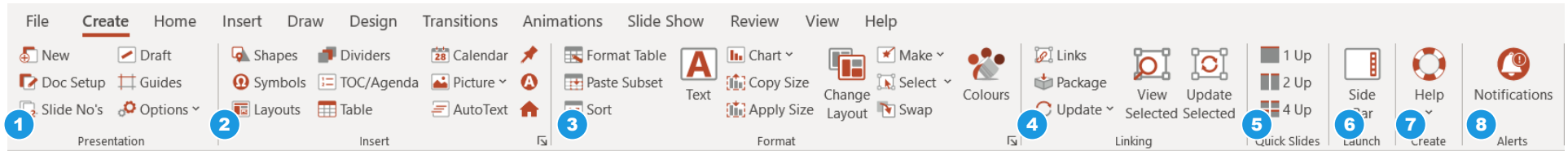


Side Bar contains single-button shortcuts to:

- New templates
- Excel library
- Charts
- Table formats
- Text formats
- Linking for tables and charts

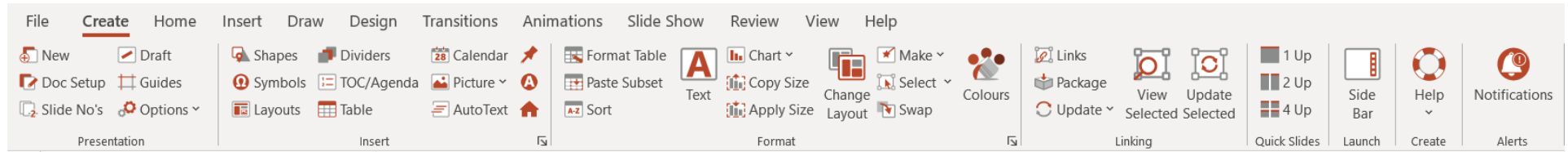


Overview of Create for PowerPoint



- 1 The **Presentation** group contains the options to start a new presentation and to make certain changes to the look of your presentation.
- 2 The **Insert** group contains a number of preformatted slide types, slides or objects that you can choose to insert into your presentation.
- 3 The **Format** group contains options to change the layout of a slide, select multiple objects for formatting, display the colour palette and apply text formats.
- 4 Table data or charts that have been imported from Excel with **Create** become linked objects in your presentation. The **Linking** group contains options for viewing and updating those links, as well as packaging up your document along with all the linked source data files.
- 5 The **Quick Slides** group provides quick access to the most frequently used slide layouts. The options available in this group are customised for each organisation.
- 6 The **Launch** group launches the Create Documentation Side Bar, enabling you to quickly access template, library, shapes, images and linking buttons for easy document formatting
- 7 The **Help** pane contains a searchable help resource, preferences and user settings. You can also check the Help button for any updates to Create.
- 8 The **Notifications** pane will alert you to any important messages or alerts concerning any template updates

Create PowerPoint Functions



Presentation

New Contains a list of presentation masters.

Doc Setup Opens the dialog associated with the current presentation.

Slide Numbers On/Off Toggle slide numbers

Draft Toggles the draft throughout the document

Guides Display or hide the native PowerPoint drawing guides.

Options Contains a list of document options

- **PDF** Create a PDF of a PowerPoint presentation and removes all metadata.*
- **Filename** Toggle file path
- **Cover Graphics** On/Off
- **Alternating Slide Numbers** Display slide numbers on alternate slides
- **Brand Checker** runs a quick check to highlight any off-brand elements in your presentation
- **Language** Apply a spelling language to all shapes and objects in the PPT presentation

Insert

Shapes contains your custom library pages, shapes and images

Symbols contains custom checks, crosses and blobs that can be used within text or tables

Layouts contains blank and populated layouts customized for your presentation

Dividers Insert Section or Appendix Dividers into your document as well as refresh your section tracker

Agenda/TOC Insert an automated Agenda based on Dividers, Slide Titles or items of your choosing

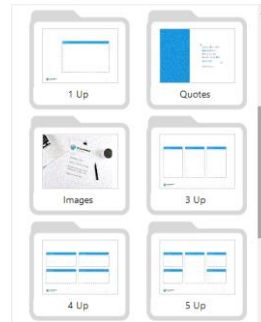


Table Inserts a pre-formatted table of your choosing into a placeholder

Calendar Insert a slide containing 4 populated months.

Picture

- **From File** Insert a picture from an image file
- **From Clipboard** Insert a picture from a copied image on the clipboard
- **From Image** Insert a picture from your custom image library

AutoText Add common slide text elements such as Subtitles, Source and Placeholders as well as Section Trackers.

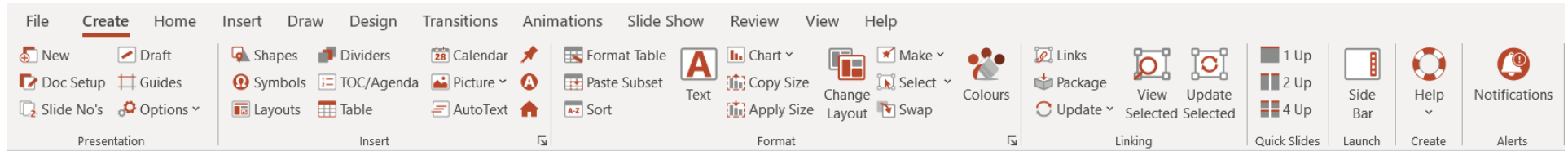
Insert Map Point Insert pre-defined markers for use on maps.

Select Map Point Change the default map marker shape and colour.

Insert Home Hyperlink Insert a hyperlink on every slide which will link to the TOC/Agenda.



Create PowerPoint Functions



Format

Format Table Apply brand formatting to a full table, cells or borders

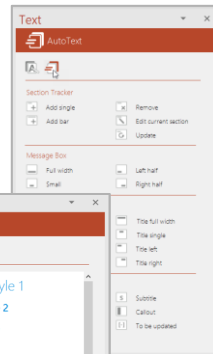
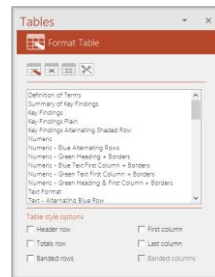
Paste Subset Paste a selection of data from Excel into an existing table in (unlinked) retaining formatting of the table in PowerPoint

Sort Arrange data in a table or multiple tables numerically or alphabetically

Text View all of your branded text formats and access your AutoText options from the Text pane

Chart Apply a Create customised theme to the selected Microsoft Chart from a selection of Create customised themes.

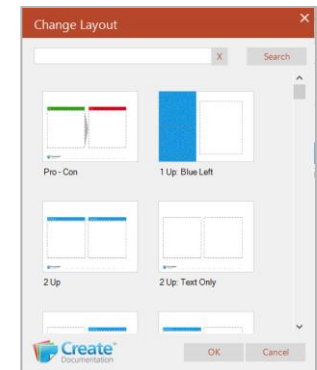
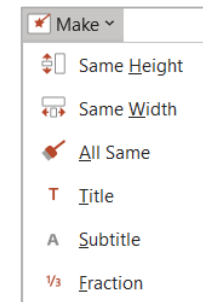
Copy Size / Apply Size Pick up and apply the preferred sizing copied from one element to another



Change Layout Change an existing layout to a new style from the selection.

Make Apply a selected effect to the shape or shapes

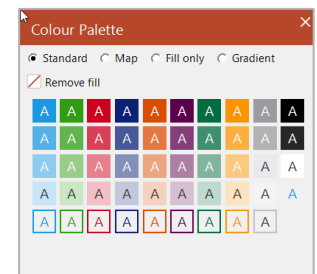
- Same Height
- Same Width
- All Same
- Title
- Subtitle
- Fraction



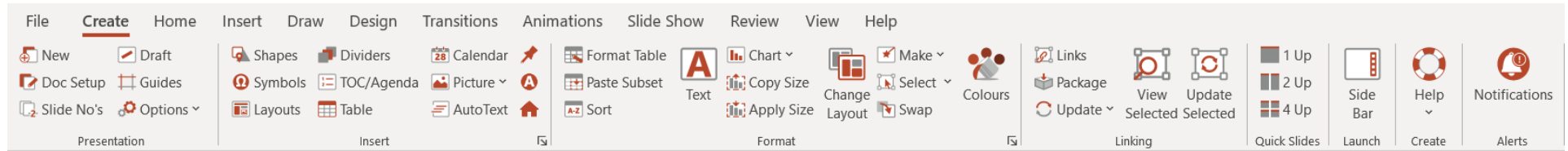
Select Select all objects of the same shape, colour or line style on the current slide.

Swap Shapes Swap the locations of two selected shapes on the same slide.

Colours Display the colour palette for use in standard and map formatting.



Create PowerPoint Functions



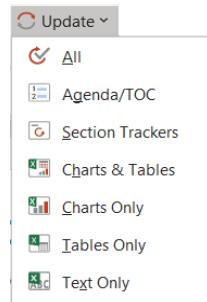
Linking

Links Display all linked objects such as charts, tables and graphics.

Package Compress and save the PowerPoint presentation and all the linked source files as one file.

Update Global update of Create linked charts and tables using one of these options

- **All** Update the Agenda/TOC and all charts and tables linked with Create
- **Agenda/TOC** Update all charts and tables
- **Charts and Tables** Update all charts and tables
- **Charts Only** Update all charts
- **Tables Only** Update all tables
- **Text only** Update all text linked from Excel



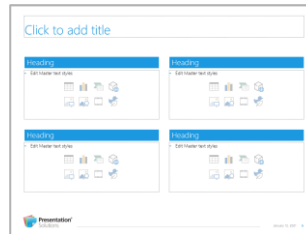
View Selected View the selected linked object in its source Excel worksheet

Updated Selected Update the selected linked object from its source Excel worksheet

Quick Slides

1 Up, 2 Up, 4 Up

Quick access to the most frequently used slide layouts. The options you see may vary depending on your presentation



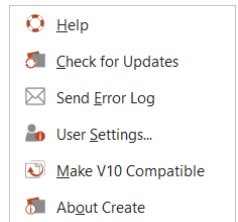
Create

Help

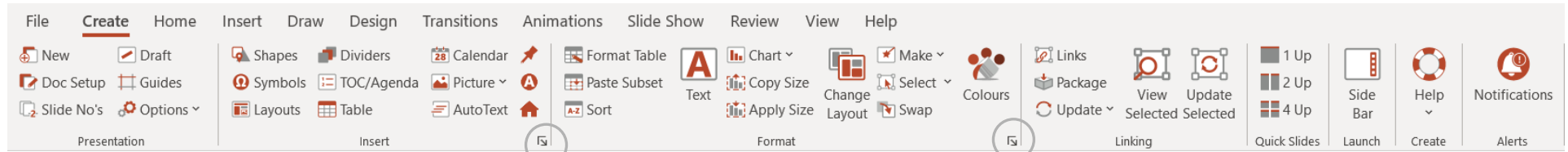
- **Help** An online help is available in each programme in Create (you do not need the internet to view the Help)
- **Check for Updates** Download updates to Create
- **Send Error Log** Sending us the Create error log if you have experienced problems using Create will allow us to investigate the issue.
- **User Settings** Change user settings such as location, paper size, layout and date format.
- **Make V10 Compatible** Update an earlier V8 Create PowerPoint to work with V10
- **About Create** Tells you which version of the software is installed

Alerts

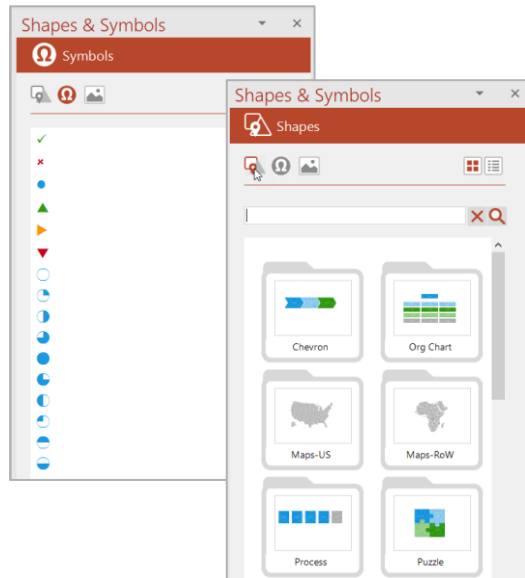
Notifications is enabled when content and new assets have been updated in Create



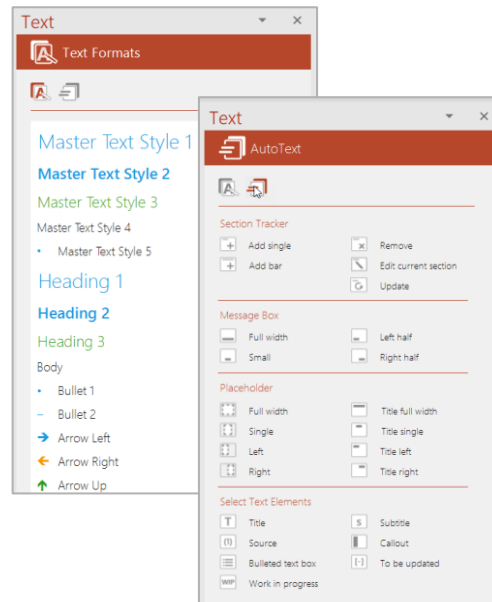
Create PowerPoint Task Panes



Insert Symbols task pane can be used to insert preformatted shapes into the selected table cell or text in your presentation.



Format Formats task pane can be used to apply formatting to selected text and add AutoText to your presentation

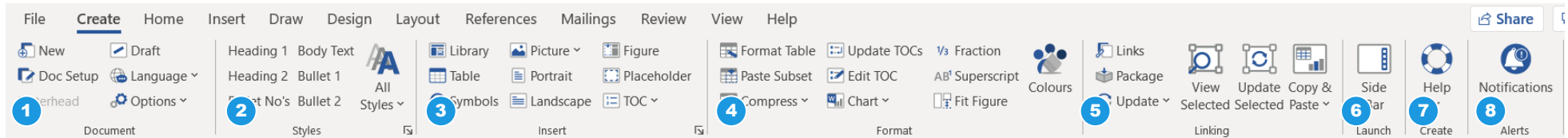


Side Bar contains single-button shortcuts to:

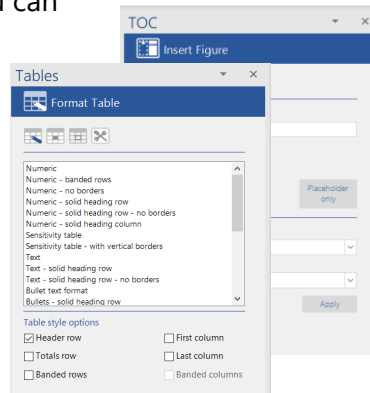
- New templates
- Doc Setup
- Agenda
- Layouts
- Table insert/format
- Text formats
- Shapes/Images
- Linking for tables and charts
- Brand checker



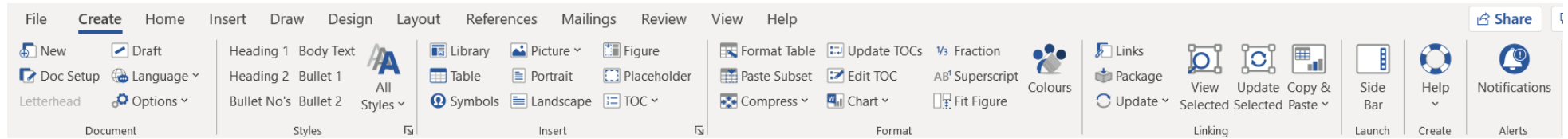
Overview of Create for Word



- 1 The **Document** group contains options to start a new document, to make certain changes such as header and footer information and to save the document as a PDF.
- 2 The **Styles** group gives access to the styles that make up each document master. Using the buttons will enable you to format your document quickly and easily in the corporate style.
- 3 The **Insert** group contains a number of preformatted objects or different page setups that you can choose to insert into your document.
- 4 The **Format** group contains options to insert and format Tables, Tables of Contents (TOCs), to insert preformatted text such as fractions and to format Microsoft charts.
- 5 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, as well as copying linked objects between documents. There is also an option to package up your document along with all the linked source data files.
- 6 The **Launch** group launches the Create Documentation Side Bar, enabling you to quickly access template, library, table and linking buttons for easy document formatting
- 7 The **Create** group contains options to: access the help menu; check for software updates; send an error log to Presentation Solutions; change your user settings; and check the current version of the Create software.
- 8 The **Notifications** pane will alert you to any important messages or alerts concerning any template updates



Create Word Functions



Document

New Start a new Create document based on the document master selected from the available list.

Doc Setup Make changes to document information such as titles, headers, footers and logos.

Letterhead Display or hide the letterhead information within a letter document to enable printing on pre-printed stationery.

Draft Toggle draft stamps on/off.

Language Apply a proofing language to the entire document

Options contains a list of document options

- **PDF** Create a PDF of a Word document and removes all metadata.*
- **Filename On/Off** Toggle file path
- **Cover Graphics On/Off** Toggle cover image/s. This feature may not be available in every brand or template.

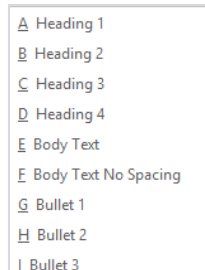


Styles

The **Styles** group gives access to the styles that make up each document master. Using the buttons will enable you to format your document quickly and easily in the corporate style.

- **Heading 1** Apply Heading 1 style to selected text
- **Heading 2** Apply Heading 2 style to selected text
- **Bullet No's** Apply Numbered Bullets style to selected text
- **Body Text** Apply Body Text style to selected text
- **Bullet 1** Apply Bullet 1 style to selected text
- **Bullet 2** Apply Bullet 2 style to selected text

All Styles Apply a style from the full list available for the current document.



Insert

Library Insert text, images or other content from a custom-built library.

Table Inserts a pre-formatted table of your choosing into a placeholder

Symbols contains custom checks, crosses and blobs that can be used within text or tables

Picture

- **From File** Insert a picture from an image file
- **From Clipboard** Insert a picture from a file or from a copied image on the clipboard

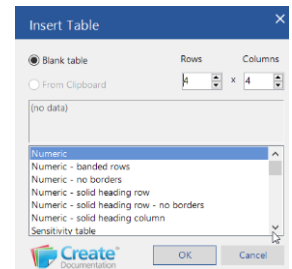
Portrait Page Insert a portrait page.

Landscape Page Insert a landscape page.

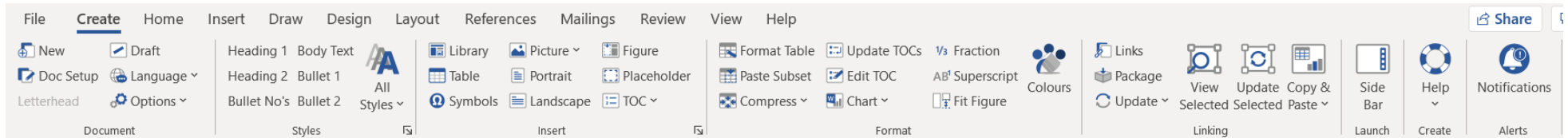
Figure Insert an exhibit, table or equation placeholder.

Placeholder Insert a Placeholder Only exhibit.

TOC Insert a Table of Contents, Appendices or Exhibits



Create Word Functions



Format

Format Table Options to format whole tables, rows, columns or selected cells

- **Whole Table** Format the whole table
- **Selected Cells** Format selected cells
- **Selected Rows** Format selected rows
- **Compress Rows/Columns** Compress the height/width of a selected rows or columns

Paste Subset Paste a selection of data from Excel into an existing table in (unlinked) retaining formatting of the table in Word.

Compress reduces extra spacing in either a row or column to better fit content

Update/Edit TOC Insert a Table of Contents, Appendices or Exhibits

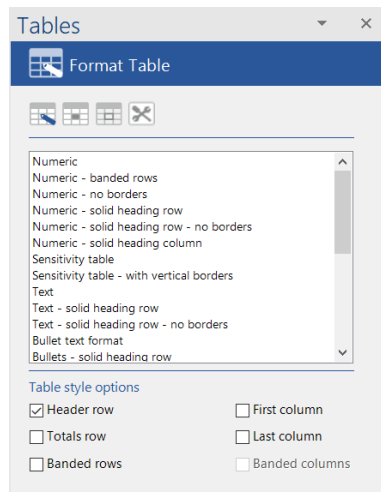


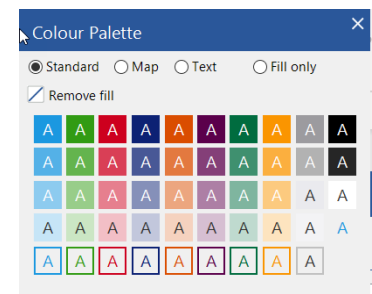
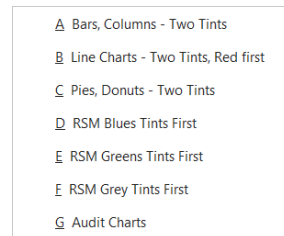
Chart Apply a Create customised theme to the selected Microsoft Chart from a selection of Create customised themes.

Fraction Insert a formatted fraction.

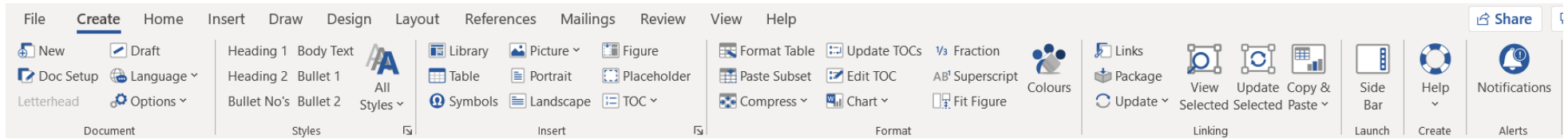
Superscript Insert a superscript character directly after selected text. These can be used to create your own footnotes or notes.

Fit Figure Reduce the height of an exhibit to fit its content.

Colours Quickly access your branded colour palette to apply to shapes, maps, text and fills.



Create Word Functions



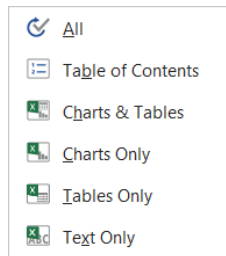
Linking

Links Display all linked objects such as charts, tables and graphics.

Package Compress and save the Word document and all the linked source files as one file.

Update Global update of Create linked charts and tables using one of these options

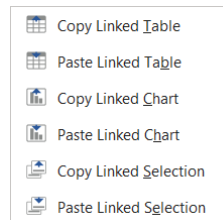
- **All** Update the TOC and all charts and tables linked with Create
- **Table of Contents** Update the TOC only
- **Charts and Tables** Update all charts and tables
- **Charts Only** Update all charts only
- **Tables Only** Update all tables only
- **Text Only** Update all text linked from Excel



View Selected View the selected linked object in its source Excel worksheet.

Updated Selected Update the selected linked object from its source Excel worksheet.

Copy & Paste Copy and paste linked charts and tables or a selection between documents, and ensures active links remain with the chart or table.



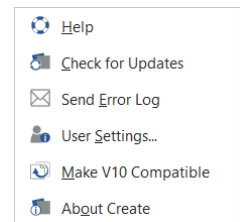
Create

Help

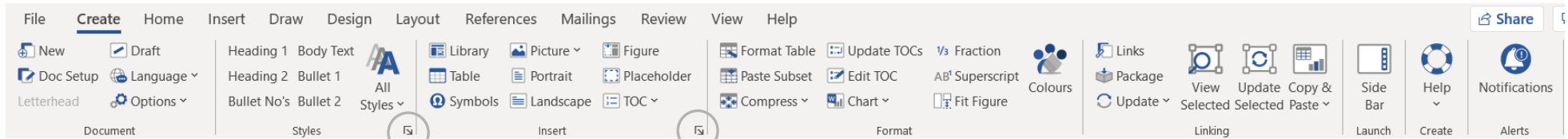
- **Help** An online help is available in each programme in Create (you do not need the internet to view the Help)
- **Check for Updates** Download updates to Create
- **Send Error Log** Sending us the Create error log if you have experienced problems using Create will allow us to investigate the issue.
- **User Settings** Change user settings such as location, paper size, layout and date format.
- **Make V10 Compatible** Update an earlier V8 Create PowerPoint to work with V10
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Alerts

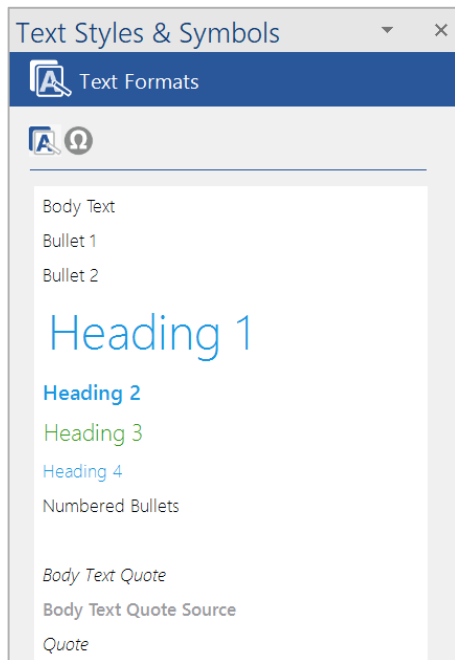
Notifications is enabled when content and new assets have been updated in Create



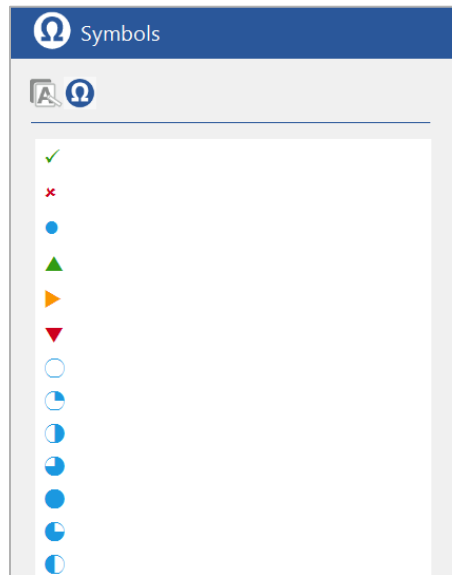
Create Word Task Panes



The **Styles** task pane can be used to apply formatting to selected text.



Insert Symbols task pane can be used to can insert preformatted shapes into the selected cell or text.



Side Bar contains single-button shortcuts to:

- New templates
- Doc Setup
- TOC
- Library
- Table insert/format
- Text formats
- Linking for tables and charts

