



Create™ 8.0 for Excel

Instruction Manual

July 2011

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1. Welcome to Create™ 8.0 for Excel

Our easy-to-use customised 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.

The Excel software assists with creating, formatting and sizing Excel charts, transferring Excel table data and charts to your Word or PowerPoint presentation and formatting Excel worksheets. By using the software, 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.

Version Number

On the **Create™ 8.0** tab there is an **About** option which tells you which version of the software you have installed on your PC. The software in Excel, PowerPoint and Word (if your version includes Word) will be running the same version number.



2. Navigating Create™ 8.0

The **Create™ 8.0** tab provides access to all available functions in Create™ 8.0 and should be visible in Excel, alongside the standard Excel tabs.

In the Office 2010 or 2007 version, ribbons replace menus and toolbars, and our Create™ 8.0 tab is even easier to use because all the features are in one place and grouped by common tasks.

The Create™ 8.0 Tab

The **Create™ 8.0** tab is divided into six logical groups. Brief descriptions of the groups are given below.



The Format Worksheet Group

The **Format Worksheet** group contains options to format data in your worksheet



Copy Subset of Data

Copies a selection of data from Excel that can be pasted into a table in Word or PowerPoint

Multiply By

Multiplies values in the selected cells by 10, 100 or 1,000

Divide By

Divides values in the selected cells by 10, 100 or 1,000

Colour Palette

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

Insert Footnote

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

Format Table

Formats whole tables, rows and columns or cells within tables in your worksheet

The Send Table To Group

The **Send Table To** group enables you to export data from Excel to Word or PowerPoint, chose the output format (e.g. fully formatted or unformatted) and have the table data linking back to the Excel source data



PowerPoint

Exports a range of Excel data as a table into a placeholder in PowerPoint, formatting and linking the table back to the Excel source

Word

Exports a range of Excel data as a table into an exhibit in Word, formatting and linking the table back to the Excel source

The Format Chart Group

The **Format Chart** group enables you to format charts in your company's style for Word, Excel or PowerPoint



For Excel

Formats a selected chart on your worksheet to your company's house style for Excel

For PowerPoint

Formats a selected chart on your worksheet to your company's house style for a PowerPoint presentation

For Word

Formats a selected chart on your worksheet to your company's house style for a Word document

The Send Chart To Group

The **Send Chart To** group enables you to export a chart from Excel into Word or PowerPoint, with different formatting options (e.g. fully formatted or resized only) and linking back to the Excel data source.



PowerPoint

Exports a selected Excel chart into a placeholder in PowerPoint, formatting, resizing and linking the chart back to the Excel data source

Word

Exports a selected Excel chart into an exhibit in Word, formatting, resizing and linking the chart back to the Excel data source

The Charting Tools Group

The **Charting Tools** group gives the user various tools to assist with chart creation and formatting, including a selection of custom chart types



Custom Chart

Assists the user in quickly creating complex, non-standard charts in their company's style

Pie Chart Labels

Adds labels to a pie chart as unattached text boxes that can be fully edited

Average

Calculates and inserts an average line or area onto a chart

Axis Splitter

Inserts a graphic to display a broken axis on a chart

Add Data Labels

Adds Excel data labels to a selected series on a chart

Remove Data Labels

Removes Excel data labels from a selected chart

Switch Axis

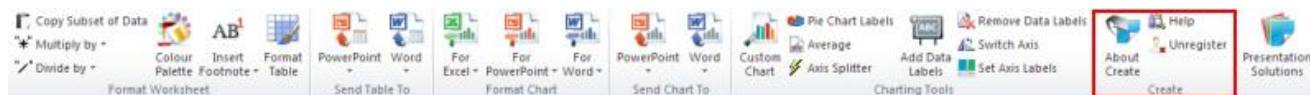
Swaps the primary and secondary axes of a chart that has two Y-axes

Set Axis Labels

Allows the user to change the number of categories on the X-axis

The Create™ Group

The **Create™** group gives access to the built-in help menu, the software version number and the user's global settings.



About Create™

Lists the version of the software you have installed on your PC. The software in Excel, PowerPoint and Word (if your version includes Word) will be running the same version number

Help

A built in help menu with information and guidance on how to use Create™ 8.0

Unregister

Allows the user to unregister Create™ 8.0

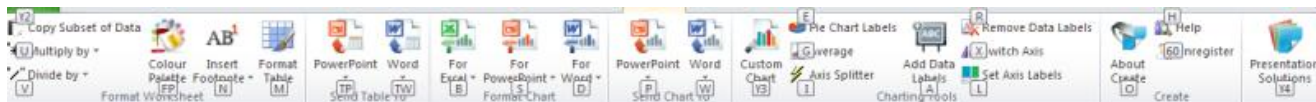
Switch Brand

Allows the user to switch brands (available only for clients with multiple brand version of the Create™ 8.0 software)

3. Shortcut Keys

In all versions of Create™ 8.0 , we employ native menu keyboard shortcuts. When you select **ALT** on your keyboard, letters in the tab names indicate the keyboard access to that tab's functions.

For example, **ALT+C** opens the **Create™ 8.0** tab. Letters in command names then show the keyboard access to that command. To access a feature in the **Create™ 8.0** tab, you would select **Alt+C** and the indicated letter. For example, to insert a Custom Chart you would select **ALT+CC**. See below for a full list of shortcut keys.

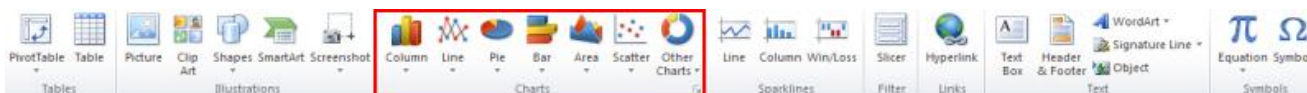


ALT C +	Y2	Copy Subset of Data
	U	Multiply by
	V	Divide by
	FP	Colour Palette
	N	Insert Footnote
	M	Format Table
	TP	Send T able to P owerPoint
	TW	Send T able to W ord
	B	Format Chart for Excel
	S	Format Chart for PowerPoint
	D	Format Chart for Word
	P	Send Chart to P owerPoint
	W	Send Chart to W ord
	Y3	Custom Chart
	E	Pie Chart Labels
	G	Average
	I	Axis Splitter
	A	A dd Data Labels
	R	R emove Data Labels
	X	Switch A xis
	L	Set Axis L abels
	O	O utline Create™
	H	H elp
	60	Unregister
	Y4	Presentation Solutions

4. Creating a Standard Chart

To create standard charts, use the Excel Chart wizard.

1. On the worksheet select the data to be plotted
2. Click on the native Excel **Insert** tab

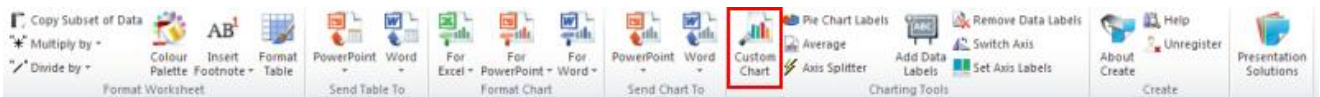


3. From the **Charts** selection, select the required chart type and then the sub-type. A chart will be inserted on the worksheet – this is a standard Excel chart and can now be formatted to the correct corporate style
4. To format your chart, go to the **Format Chart** group on the **Create™ 8.0** tab and select **For Excel, For Word** or **For PowerPoint**



5. Creating a Custom Chart

There are some chart types that are not available in the native Excel Chart wizard, or that are very complicated and time consuming to create natively. To help produce these charts quickly and easily in your company's style, there is a **Custom Chart** function on the **Create™ 8.0** tab.



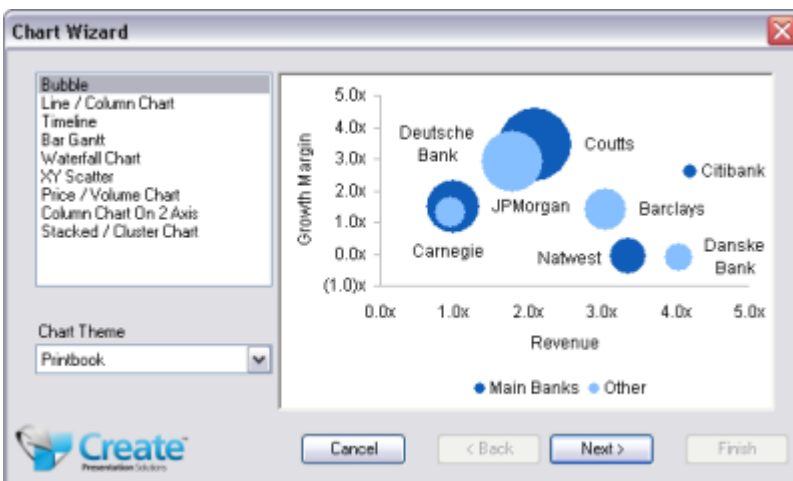
Bubble Charts

The **Custom Chart** wizard creates and formats a bubble chart. To add a second series see step 8.

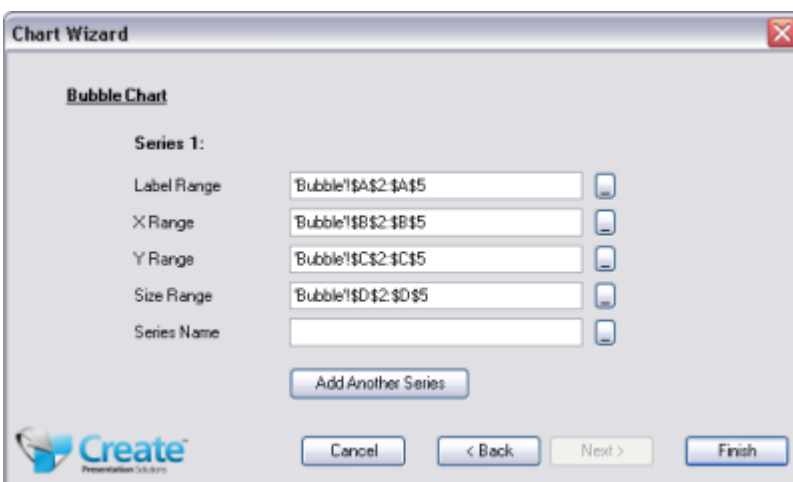
Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart – send them **Resized Only** or **As Is**

To create a Bubble Chart:

1. Select the bubble data range (Labels, X data, Y data and Z data), including titles
2. Click on the **Custom Chart** button in **Charting Tools** on the **Create™ 8.0** tab
3. In the Chart Type list, select **Bubble Chart**



4. Click **Next**



5. A dialogue will appear with all but one range selected. Go to the **Series Name** field and click on the button at the end to collapse the dialog
6. Select the cell containing your series name (you can also type this into the field manually if you prefer)
7. Click **OK**
8. To add a second series of data select **Add Another Series**
9. Click on the button at the end of the **Label Range** field. This will collapse the dialog
10. Select the labels from your worksheet. The cell references for this range will appear in the label field
11. Click **OK**
12. Repeat steps 9 – 11 for the X Range, the Y Range, the Size Range and the Series Name
13. Click **Finish** - the formatted chart will appear on the worksheet
14. **Save** the workbook
15. If copying to Word or PowerPoint, ensure you are clicked into a placeholder
16. In Excel from the **Send Chart To** group, select **PowerPoint** or **Word** and choose **Resized only** from the submenu. The chart will be inserted into the placeholder in your presentation in Word or PowerPoint

Note:

Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart – send them **Resized Only** or **As Is**

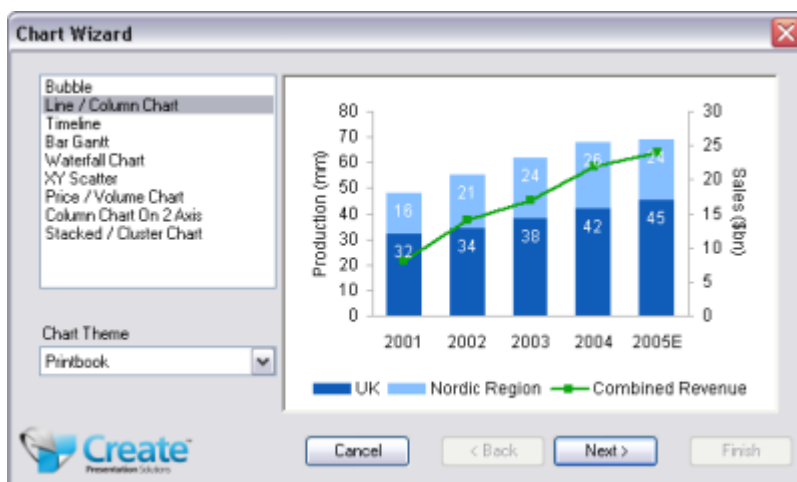
Line / Column Charts

The **Custom Chart** wizard creates and formats this chart.

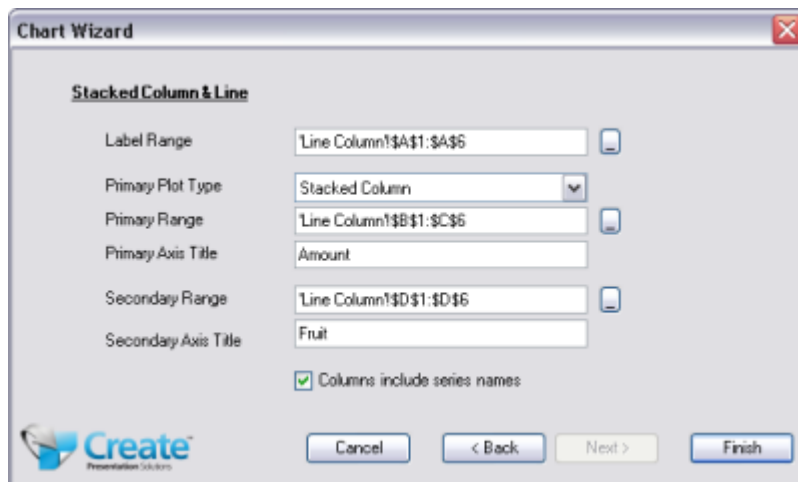
Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart.

To create a Line / Column Chart:

1. Click on the **Custom Chart** button
2. In the Chart Type list, select **Line / Column**



3. Click **Next**



4. Click on the button next to the **Label Range** field. This will collapse the dialog and take you to your worksheet. Select the labels from your worksheet. You can select the empty cell above the labels if you wish. The cell references for this range will appear in the Label Range field.
5. Click **OK**
6. From the **Primary Plot Type** choose a subtype from the drop down list
7. Click on the button next to the **Primary Range** field. This will collapse the dialog
8. Select the data range that is to go on the primary Y-axis. The cell references for this data series will appear in the Primary Range field. Click **OK**.
9. Click into the **Primary Axis Title** field and type in a title
10. Click on the button next to the **Secondary Range** field. This will collapse the dialog
11. Select the data range that is to go on the secondary Y-axis. The cell references for this data series will appear in the Secondary Range field. Click **OK**.
12. Click into the **Secondary Axis Title** field and type in a title
13. Check the option **Columns include series names**, if required
14. Click **Finish**. The formatted chart will appear on the worksheet
15. **Save** the workbook
16. If copying to Word or PowerPoint, ensure you are clicked into a placeholder
17. In Excel from the **Send Chart To** group, select **PowerPoint** or **Word** and choose **Resized only** from the submenu. The chart will be inserted into the placeholder in your presentation in Word or PowerPoint

Note:

Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart.

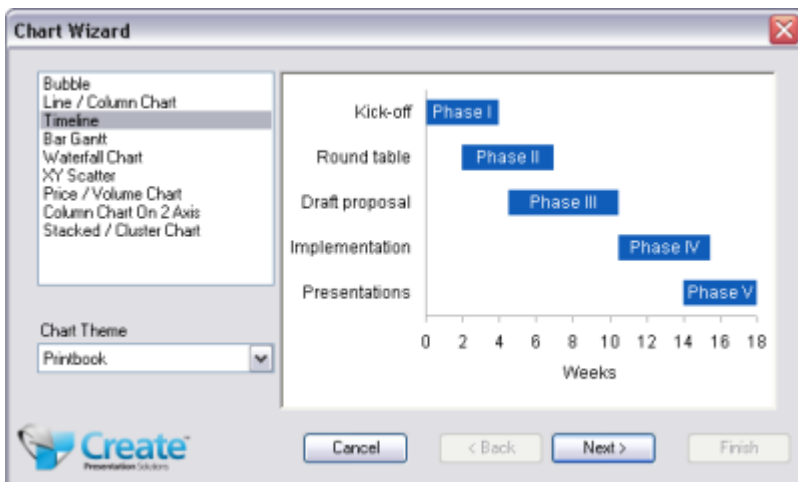
Timeline Charts

The **Custom Chart** wizard creates and formats this chart.

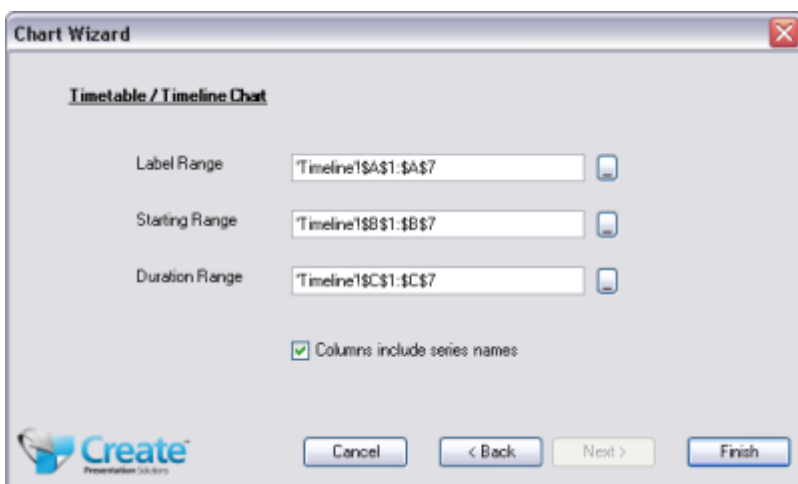
Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart

To create a Timeline Chart

1. Select the Timeline chart data
2. Click on the **Custom Chart** button
3. In the Chart Type list, select **Timeline**



4. Click **Next**



5. Check the option **Columns include series names**
6. Click **Finish**. The formatted chart will appear on the worksheet
7. **Save** the workbook
8. If copying to Word or PowerPoint, ensure you are clicked into a placeholder
9. In Excel from the **Send Chart To** group, select **PowerPoint** or **Word** and choose **Resized only** from the submenu. The chart will be inserted into the placeholder in your presentation in Word or PowerPoint

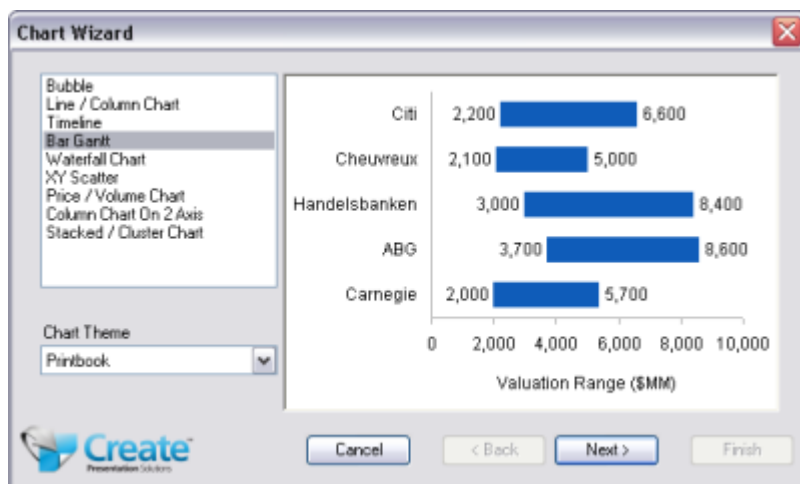
Bar Gantt Charts

The **Custom Chart** wizard creates and formats this chart.

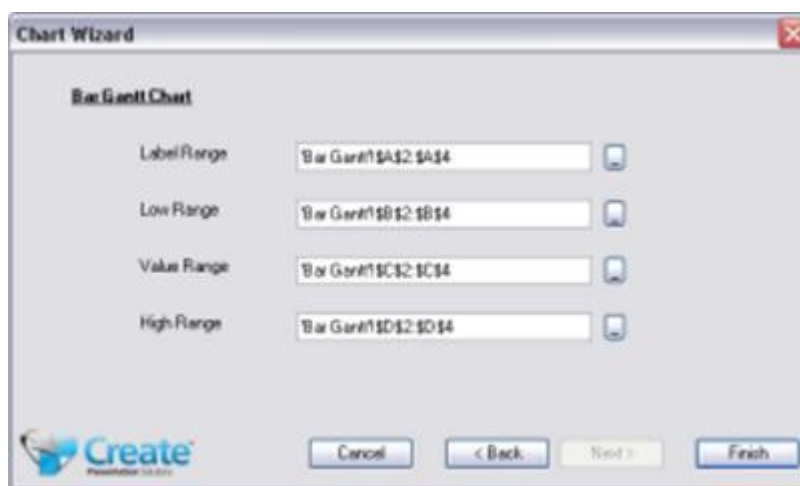
Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart

To create a Bar Gantt Chart

1. Select the Bar Gantt data range – do NOT include header rows
2. Click on the **Custom Chart** button
3. In the Chart Type list, select **Bar Gantt**



4. Click **Next**. A dialogue will appear with the fields populated



5. Click **Finish**. The formatted chart will appear on the worksheet
6. **Save** the workbook
7. If copying to Word or PowerPoint, ensure that you are clicked into a placeholder
8. In Excel from the **Send Chart To** group, select **PowerPoint** or **Word** and choose **Resized only** from the submenu. The chart will be inserted into the placeholder in your presentation in Word or PowerPoint

Note:

Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart.

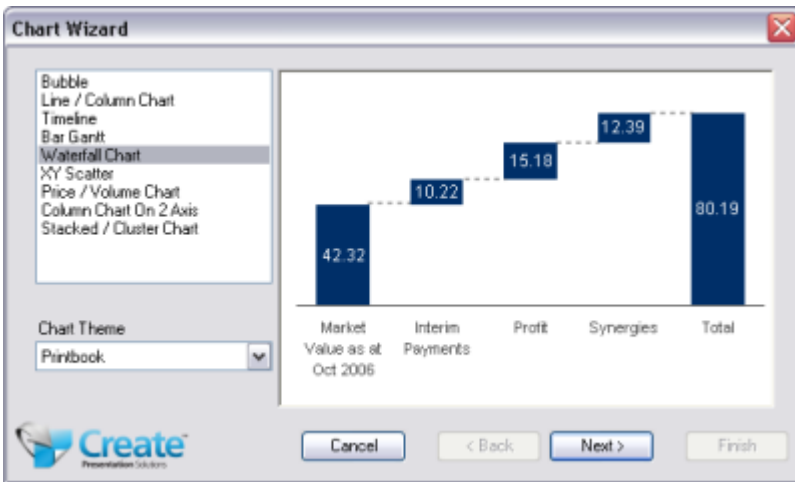
Waterfall Charts

To create your chart, ensure your chart data contains a low range and a value range. The **Custom Chart** wizard creates and formats this chart.

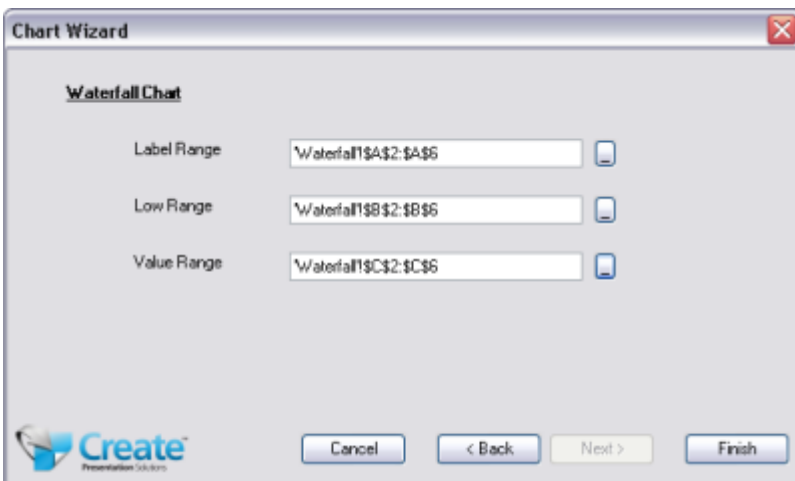
Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart.

To create a Waterfall Chart

1. Click on the **Custom Chart** button
2. In the Chart Type list, select **Waterfall Chart**



3. Click **Next**
4. Click on the button next to the **Label Range** field. This will collapse the dialog and take you to the worksheet. Select the labels from your worksheet. Only include the labels, do not select empty cells above the labels. The cell references for this range will appear in the Label Range field.
5. Click **OK**
6. Repeat 4 and 5 for the **Low Range** and **Value Range** fields. Do NOT include header rows in the selections



7. Click **Finish**
8. Depending on the text in the labels, you may need to reduce the font size for all of the text to display. Double-click on the x-axis. From the **Format Axis** dialog click on the **Font** tab and change the size until all your data is displayed.
9. Click **OK**. The formatted chart will appear on the worksheet
10. You may wish to draw dotted lines for the leader lines manually on the chart
11. **Save** the workbook
12. If copying to Word or PowerPoint, ensure that you are clicked into a placeholder
13. In Excel from the **Send Chart To** group, select **PowerPoint** or **Word** and choose **Resized only** from the submenu. The chart will be inserted into the placeholder in your presentation in Word or PowerPoint

Note:

Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart.

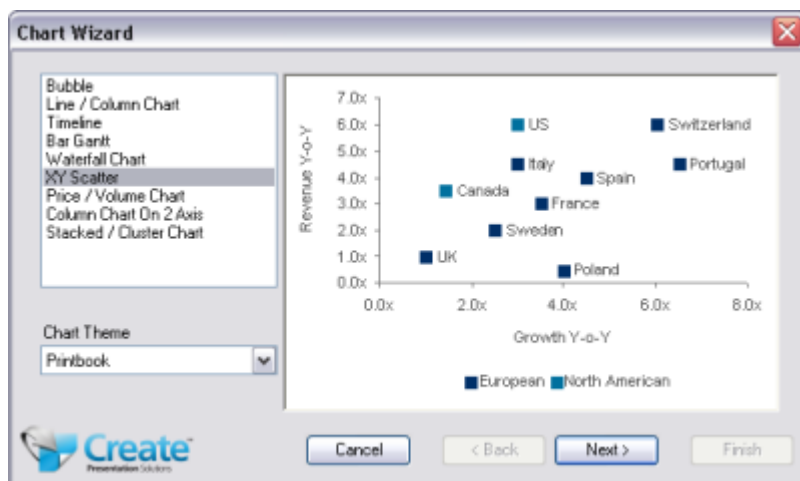
XY Scatter Charts

The **Custom Chart** wizard creates and formats this chart.

Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart

To create an XY Scatter Chart

1. Select the first series of chart data – do NOT include header rows OR header columns. A second series can be added at a later stage
2. Click on the **Custom Chart** button
3. In the Chart Type list, select **XY Scatter Chart**



4. Click **Next** – the data ranges will automatically be completed



5. To add another series select **Add Another Series**
6. Click on the button next to the **X Range** field. This will collapse the dialog and take you to the worksheet. Select the labels from your worksheet. The cell references for this range will appear in the X Range field
7. Click **OK**
8. Repeat the above two steps for the **Y Range** field
9. Check the option **Columns include series names**
10. Click **Finish**. The formatted chart will appear on the worksheet

To add data labels, click on the chart and then

11. Click on the **Add Data Labels** button
12. Click in the **Series field** and choose the relevant series
13. Click on the button next to the **Label Range** field. This will collapse the dialog.
14. Select the labels from your worksheet. The cell references for this range will appear in the Label Range field.
15. Click **OK**
16. Repeat steps 9 to 13 if you wish to add data labels for any additional data ranges
17. Click **OK**. The formatted chart will appear on the worksheet
18. **Save** the workbook
19. If copying to PowerPoint or Word ensure that you are clicked into a placeholder
20. In Excel from the **Send Chart To** group, select **PowerPoint** or **Word** and choose **Resized only** from the submenu. The chart will be inserted into the placeholder in your presentation in Word or PowerPoint

Note:

Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart.

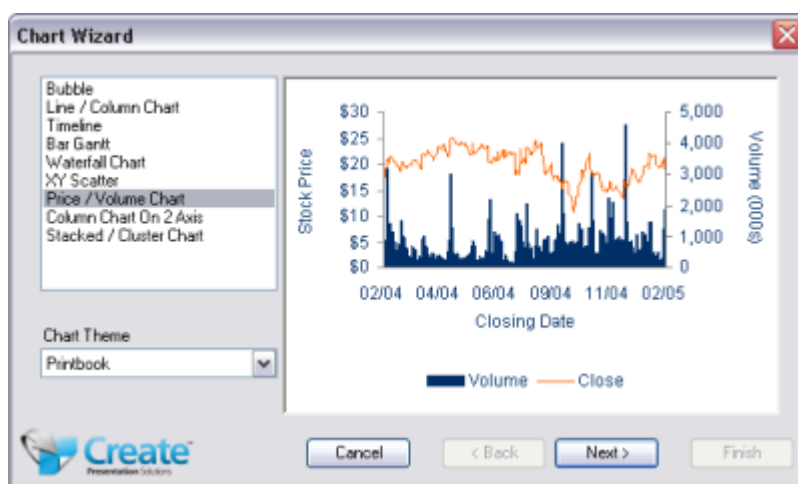
Price / Volume Charts

The **Custom Chart** wizard creates and formats this chart.

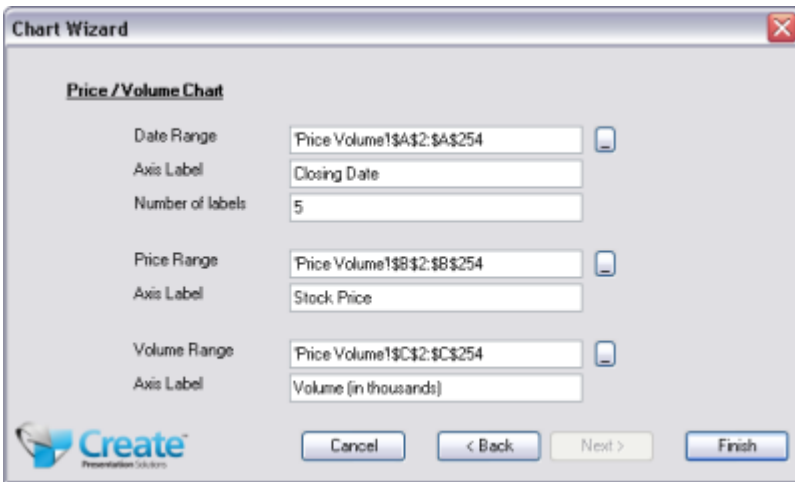
Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart.

To create a Price / Volume Chart

1. Select the data from the worksheet (do not include header rows)
2. Click on the **Custom Chart** button
3. In the Chart Type list, select **Price / Volume Chart**



4. Click **Next**



5. The fields will already be populated in the next dialog
6. In the **Number of labels** field type in the number of labels you wish to display
7. Click **Finish**. The formatted chart will appear on the worksheet
8. **Save** the workbook
9. If copying to PowerPoint or Word ensure you are in a placeholder
10. In Excel from the **Send Chart To** group, select **PowerPoint** or **Word** and choose **Resized only** from the submenu. The chart will be inserted into the placeholder in your presentation in Word or PowerPoint.

Note:

Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart.

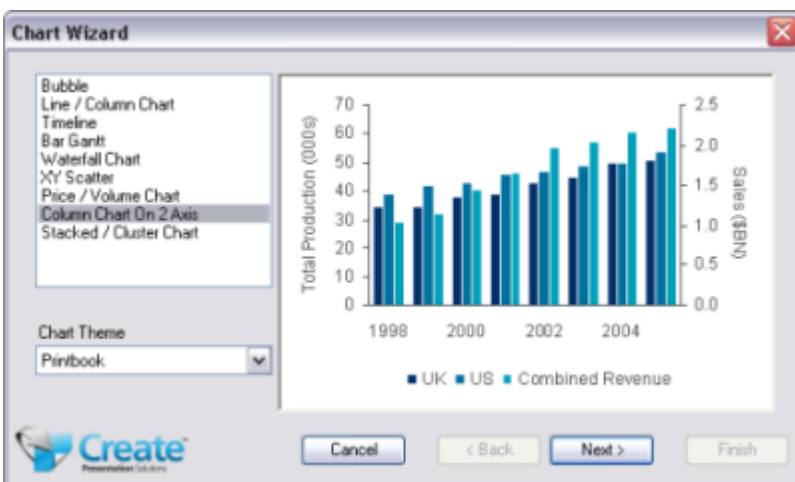
Column Charts on 2 Axes

The **Custom Chart** wizard creates and formats this chart.

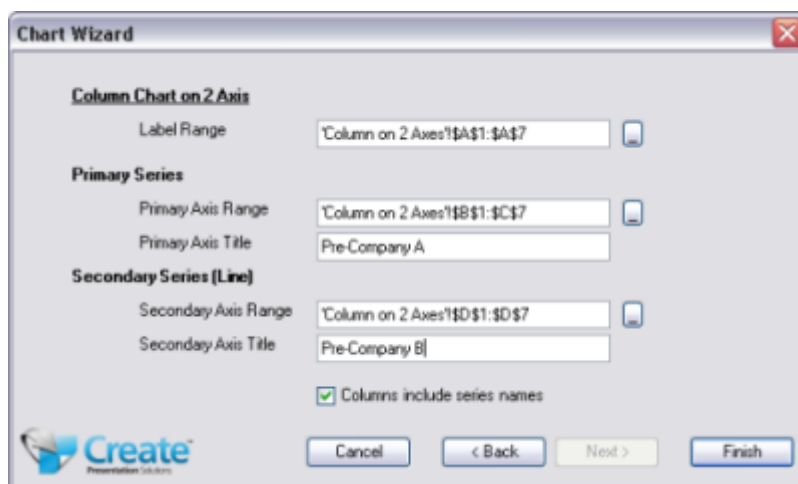
Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart.

To create a Column Chart on 2 Axes

1. Click on the **Custom Chart** button
2. In the Chart Type list, select **Column Chart on 2 Axis**



3. Click **Next**
4. Click on the button next to the **Label Range** field. This will collapse the dialog and take you to your worksheet. Select the labels from your worksheet. You can select the empty cell above the labels if you wish. The cell references for this range will appear in the Label Range field. Click **OK**.
5. Click on the button next to the **Primary Axis Range** field. This will collapse the dialog. Select the data from your worksheet. The cell references for this range will appear in the Primary Axis Range field. Click **OK**.
6. Click into the **Primary Axis Title** field and type in a title
7. Repeat steps 5 and 6 for the **Secondary Axis** range and title
8. Check the option **Columns include series names**, if required



9. Click **Finish**. The formatted chart will appear on the worksheet
10. **Save** the workbook
11. If copying to Word or PowerPoint, ensure you are in a placeholder
12. In Excel from the **Send Chart To** group, select **PowerPoint** or **Word** and choose **Resized only** from the submenu. The chart will be inserted into the placeholder in your presentation in Word or PowerPoint.

Note:

Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart.

Stacked / Cluster Charts

The **Custom Chart** wizard creates and formats this chart. The function will add data to and manipulate the original chart data. Therefore, you should copy your chart data to a blank area of the worksheet and use this to create the chart. This way your original data remains unaffected..

Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart.

To create a Stacked Cluster Chart

1. Click on the **Custom Chart** button
2. In the Chart Type list, select **Stacked / Cluster Chart**



3. Click **Next**
4. Click on the button next to the **Label Range** field. This will collapse the dialog and take you to your worksheet. Select the label range from your worksheet. You must include the empty cell above the labels. The cell references for this range will appear in the Label Range field. Click **OK**.
5. Repeat step 4 for the **Stacked Range** and **Clustered Range** fields, including header rows in the data range
6. Check the option **Columns include series names**, if required



7. Click **Finish**. The formatted chart will appear on the worksheet
8. **Save** the workbook
9. If copying to PowerPoint or Word, ensure you are clicked into a placeholder
10. In Excel from the **Send Chart To** group, select **PowerPoint** or **Word** and choose **Resized only** from the submenu. The chart will be inserted into the placeholder in your presentation.

Note:

When using this function to create Stacked Cluster charts, your data is rearranged on the worksheet. Do not delete or rearrange the data, as this is necessary to ensure the chart is generated correctly.

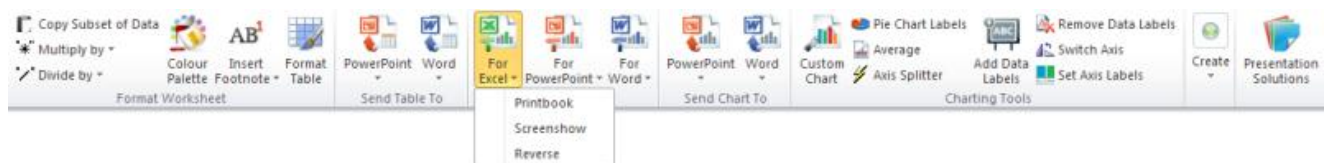
The X-axis may require manual labels (text boxes) to display all the relevant information.

Do not run the **Send Chart To – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart.

6. Formatting Charts for Excel

This function formats a chart in your spreadsheet, without sending it to, or sizing it for insertion into a placeholder in PowerPoint or Word. This function might be used when there is no destination presentation / document or if the chart is to remain in Excel.

1. Create the chart using the native Excel Chart wizard
2. Select the chart
3. Click on **For Excel** in the **Format Chart** group

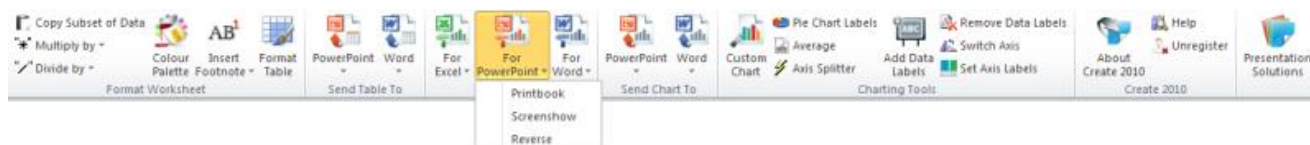


The selected chart will be formatted in your corporate style.

7. Formatting Charts for PowerPoint

This function formats a chart in your spreadsheet, without sending it to, or sizing it for insertion into a placeholder in PowerPoint. This function might be used when there is no destination presentation in PowerPoint or you wish to view how a chart would look before sending it to your PowerPoint presentation.

1. Create the chart using the native Excel Chart wizard
2. Select the chart
3. Click **For PowerPoint** in the **Format Chart** group



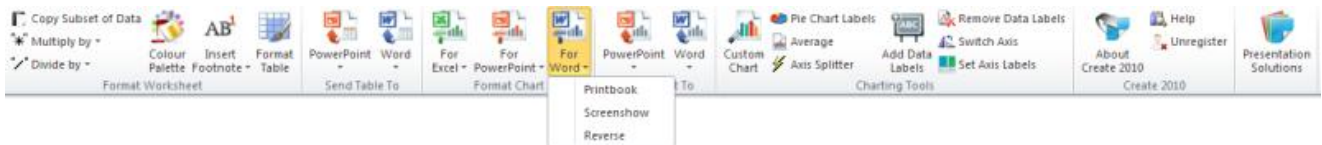
4. From the dropdown menu, select the document type you are using in PowerPoint (Note: Printbooks are for printing and screenshows are for projection)

The selected chart will be formatted in your corporate style, ready for inserting into a PowerPoint presentation.

8. Formatting Charts for Word

This function formats a chart in your spreadsheet, without sending it to, or sizing it for insertion into a placeholder in Word. This function might be used when there is no destination document in Word, or you wish to view how a chart would look before sending it to your Word document.

1. Create the chart using the native Excel Chart wizard
2. Select the chart
3. Click **For Word** in the **Format Chart** group



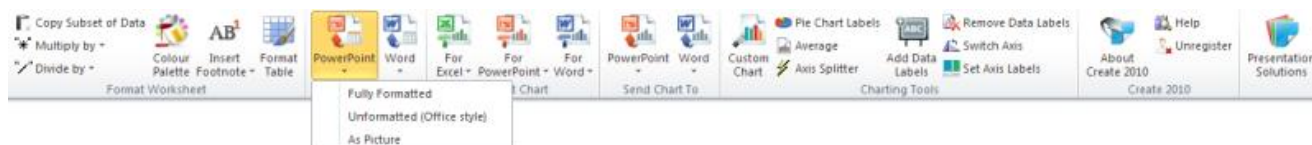
4. From the dropdown menu, select the document type you are using in Word

The selected chart will be formatted in your corporate style, ready for inserting into a Word document.

9. Copying Charts to PowerPoint

This function copies a chart to a placeholder in your PowerPoint presentation. There are a number of options to copy the chart, format it and link it back to the source data in Excel. Remember to save your worksheet in Excel in order that the chart references link correctly.

1. Place your cursor in a placeholder in PowerPoint
2. Go to your Excel worksheet and select the chart to be copied to PowerPoint
3. Click **PowerPoint** in the **Send Chart To** group



4. Select, from the dropdown menu either **Fully Formatted** (and the document type you are using in PowerPoint), **Unformatted** or **As Picture**

All three **Send Chart To PowerPoint** options paste the chart into PowerPoint and link it back to the source data in Excel

Additionally:

Fully Formatted formats and resizes the chart to fit the placeholder in PowerPoint. This applies to all charts created via the Native Chart Wizard

Unformatted resizes the chart to fit the placeholder only. This applies to all charts created via the Custom Chart Wizard

As Picture pastes the selected chart as it is in Excel, including the size of the chart

5. **Save** the workbook

The macro will copy the chart and paste it into your placeholder in PowerPoint, with a link back to your source data in Excel

Note:

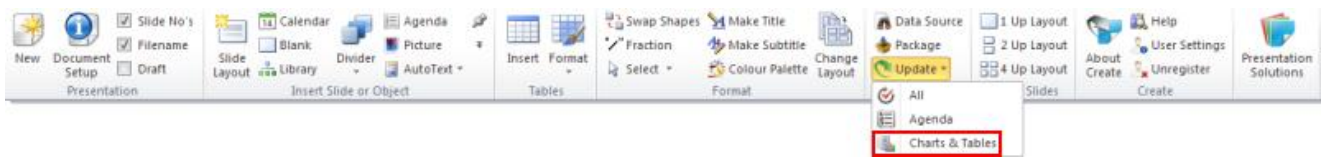
If the chart was created using one of the Custom Chart options, do not run the **To PowerPoint Chart – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart.

10. Making Changes to Charts in PowerPoint

As long as the chart in PowerPoint has been copied using the **Send Chart To, PowerPoint** function the chart is linked to the Excel data. Therefore, if you change the data in Excel and then use the **Update** function in PowerPoint the changes will be reflected in your chart in PowerPoint.

1. Make the changes on the Excel worksheet
2. **Save** the workbook
3. Go to your PowerPoint presentation and select **Update, Charts & Tables** from the **Create™ 8.0** tab. The macro will update the links from the Excel chart into PowerPoint.

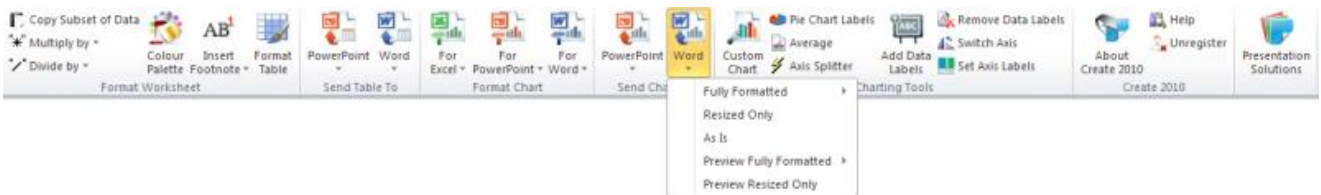
Ribbon in PowerPoint



11. Copying Charts to Word

This function copies a chart to a placeholder in your Word presentation. There are a number of options to copy the chart, format it and link it back to the source data in Excel. Remember to save your worksheet in Excel in order that the chart references link correctly.

1. Place your cursor in a placeholder in Word
2. Go to the Excel worksheet and select the chart to be copied to Word
3. Click **Word** in the **Send Chart To** group



4. Select from the dropdown menu either **Fully Formatted** (and the document type you are using in Word), **Resized only** or **As is**

All three *Send Chart To Word* options paste the chart into Word and link it back to the source data in Excel

Additionally:

Fully Formatted formats and resizes the chart to fit the placeholder in Word. This applies to all charts created via the Native Chart Wizard

Resized Only resizes the chart to fit the placeholder only. This applies to all charts created via the Custom Chart Wizard

As Is pastes the selected chart as it is in Excel, including the size of the chart

5. **Save** the workbook

The macro will copy the chart and paste it into your placeholder in Word, with a link back to your source data in Excel

Note:

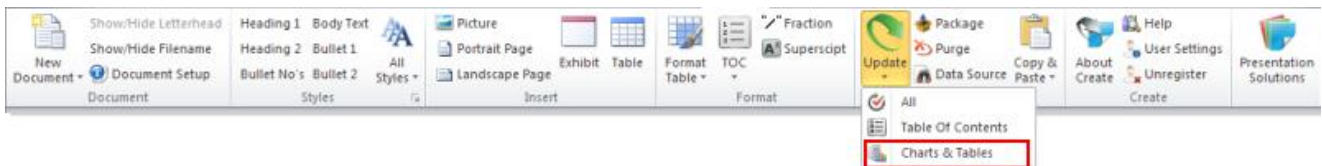
If the chart was created using one of the Custom Chart options, do not run the **Send Chart To Word – Fully Formatted** command after creating this chart as this may expose hidden values required to create your chart.

12. Making Changes to Charts in Word

As long as the chart in Word has been copied using the **Send Chart To, Word** function the chart is linked to the Excel data. Therefore, if you change the data in Excel and then use the **Update** function in Word the changes will be reflected in your chart in Word.

1. Make the changes on the Excel worksheet
2. **Save** the workbook
3. Go to your Word document and select **Update, Charts & Tables** from the **Create™ 8.0** tab. The macro will update the links from the Excel chart into Word

Ribbon in Word



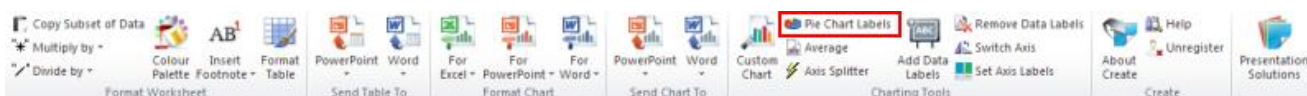
13. Charting Tools

In addition to the **Custom Chart** function, there are a number of other functions available on the **Create™ 2007 Charting Tools** tab to customise charts further.

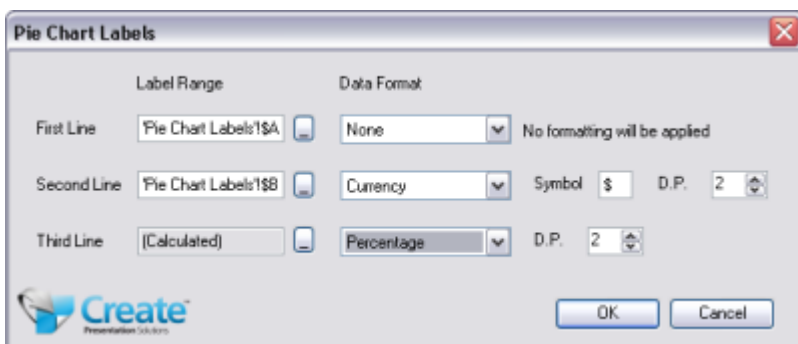
Adding Pie Chart Labels

This function adds pie labels to a pie chart as unattached text boxes. This is useful if you wish to customise the labels in any way (e.g. add a currency symbol), to fix text wrapping, or if you have long labels that cannot be resized in native Excel.

1. Create your pie chart using the native Excel Chart wizard. Delete the Excel generated pie labels
2. Click **Pie Chart Labels** in the **Charting Tools** group



The **Pie Chart Labels** dialog will open



3. Click on the **Label Range** for the **First Line** field (the dialog will collapse)
4. Select the data for the first line of your data labels
5. Choose a **Data Format** for the label from the dropdown list (optional).
6. Repeat steps 3, 4 & 5 for the Label Ranges for the Second and Third Lines if required
7. Click **OK** when the dialog is completed
8. You may need to move and resize the labels if necessary. The labels are unattached text boxes which can also be formatted e.g. changing text alignment, size and colour
9. To delete these labels, select the labels (individually) and press **Delete**

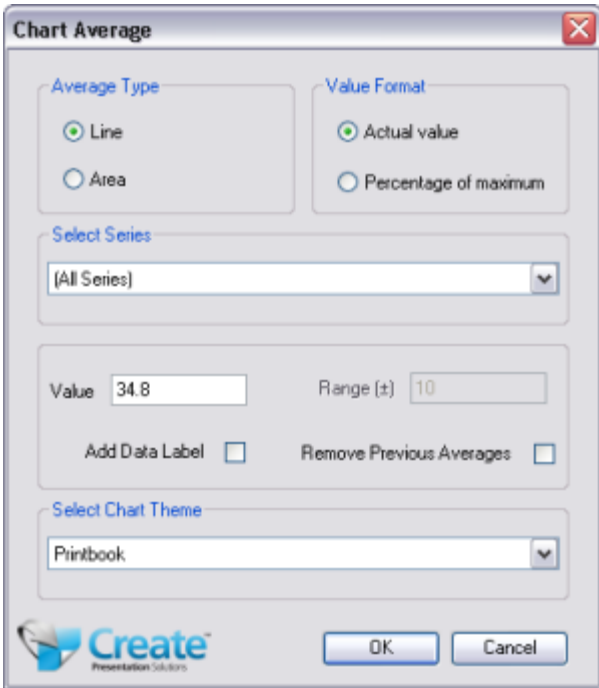
Adding an Average Line

This function enables the user to insert an average line on a chart.

1. Select the chart in Excel
2. Click **Average** in the **Charting Tools** group



The **Chart Average** dialog will open



3. In **Average Type** field select **Line**
4. In **Value Format** field check **Actual value** or **Percentage of maximum** and the amount will be calculated for you
5. Alternatively, you can enter an average value manually under **Value**
6. To display the average value label on the chart, select **Add Data Label**
7. Click **OK**

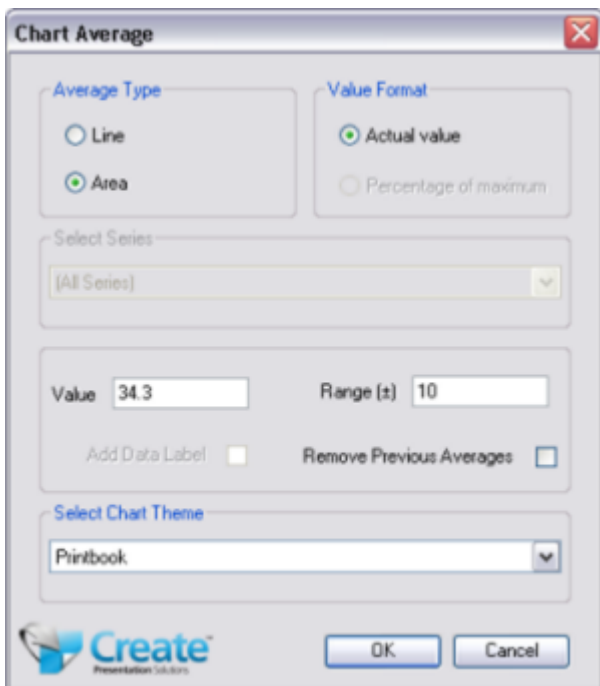
Adding an Average Area

This function enables the user to insert an average area on a chart.

1. Select the chart in Excel
2. Click **Average** in the **Charting Tools** group



The *Chart Average* dialog will open



3. In **Average Type** field select **Area**
4. In **Value Format** check **Actual value** or **Percentage of maximum** and the amount will be calculated for you
5. Alternatively, you can enter the average value manually under **Value**
6. In **Range** type in the area range you wish to be displayed above and below the average value
7. Click **OK**

Adding an Axis Splitter

This function inserts a graphic to display a broken axis on a chart

1. Select the chart in Excel
2. Click **Axis Splitter** in the **Charting Tools** group



3. Move the graphic to the correct location on the axis

Adding Data Labels to a Chart

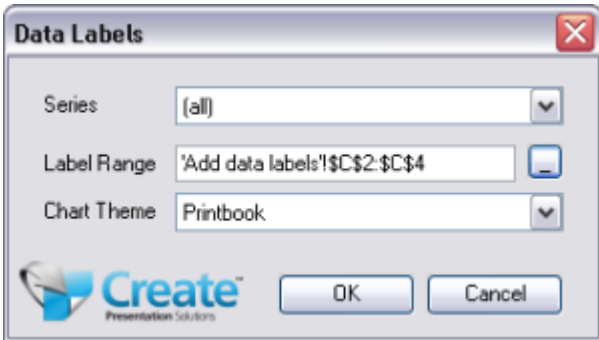
This function inserts chart labels as standard Excel data labels. They are linked to the chart data but will have to be updated manually if the data changes. They cannot be resized but individually they can be moved. This function is particularly useful with an XY scatter chart where you would not select the data labels for plotting but add them after your chart is created.

1. Select the chart in Excel

2. Click **Add Data Labels** in the **Charting Tools** group



The *Data Labels* dialog will open



3. Select the series to which the labels are to be applied from the **Series** dropdown menu
4. Select the **Label Range** button
5. A dialogue will appear. Click into the worksheet and select the cells containing the category labels you wish to display
6. The selected range will populate the Range dialogue. Click **OK**
7. The selected series will now display the labels selected. You may need to click on **For Printbook** or **For Word** in the **Format Chart** group to ensure the labels are in the correct house style.

Note:

The labels are native Excel data labels. You can sub-select one label and move it or edit the text. You cannot resize the labels.

Removing Data Labels

This function deletes text boxes that have been created via the Add Data Labels function, which are not normally part of the data used to create a chart. It will also remove all native Excel data labels from a selected chart.

1. Select the chart in Excel
2. Click on **Remove Data Labels** in the **Charting Tools** group



Switching the Axes

This function enables the user to swap the axes on a chart that has two Y-axes.

1. Select the chart in Excel
2. Click on **Switch Axis** in the **Charting Tools** group



The axes will switch and the data series will follow

Note:

It may be necessary to check formatting of the X & Y axis and scale settings after running this function. To reformat the chart, select **For Excel**, **For PowerPoint** or **For Word** in the **Format Chart** group.

Setting the Axis Labels on a Chart

This function allows the user to include a specific beginning and end date for category X-axis labels. For example, if your chart data shows a year of daily plot points (e.g. 365 labels) it can be customised to display 12 category X-axis labels including the start and end dates.

1. Select the chart in Excel
2. Click on **Set Axis Labels** in the **Charting Tools** group



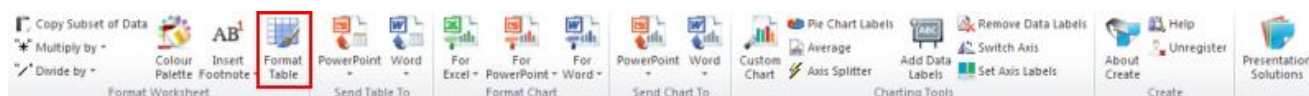
3. Type in the number of X axis labels to display (e.g. to display a label per month over one year, type in 12)
4. Click **OK**

14. Formatting Excel Tables

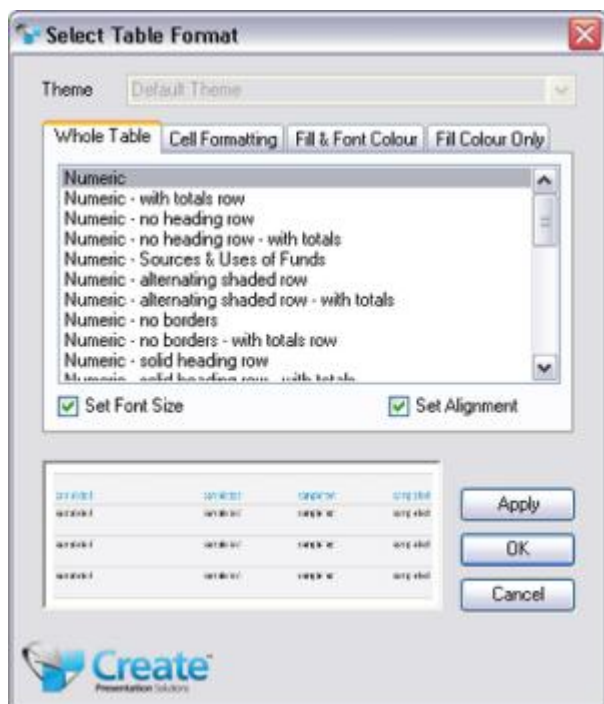
To apply formatting to your Excel table data, such as highlighting a row with fill colours or applying specific styles to a row or column, use the **Format Table** option from the **Format Worksheet** group. This function is similar to the formatting options in PowerPoint and Word (if your version of **Create™ 8.0** includes this application), but rather than selecting *Format “Whole Table”*, *“Selected Cells”* or *“Selected Rows”*, the function will simply format your selection. There is a selection of formatting options with previews available – extend the window to improve the preview.

Formatting Tables

1. Select the whole table or the cells you wish to format. From the **Create™ 8.0** tab select **Format Table** from the **Format Worksheet** group



The *Select Table Format* dialog will appear



2. Select the type of formatting required from the tabs – i.e. **Whole Table**, **Cell Formatting**, **Fill & Font Colour**, **Fill Colour Only**
3. Make your sub-selection of the style
4. As you click on each option, a preview will be displayed underneath. To improve the size of the preview click on the right hand bottom corner of the window and pull to expand
5. To apply the default font size, check **Set Font Size**. If you wish to retain a particular font size that you have applied previously, leave this unchecked
6. To apply default text alignment, check **Set Alignment**. If you wish to retain particular text alignment that you have applied previously, leave this unchecked

7. Click **OK** to apply the change and close the dialogue, or **Apply** to apply the change and leave the dialogue box open to apply further changes (e.g. highlighting from the **Fill and Font Colour** tab). If you have selected the **Apply** option when you have completed your formatting, click **Cancel** to close the dialogue

Note:

Bulleted text is not an option, as bullets cannot be formatted in Excel

Removing Table Formatting

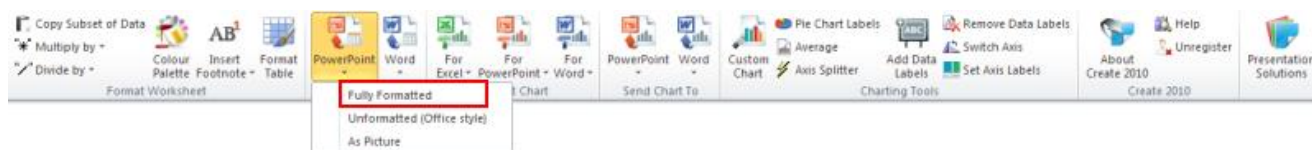
1. Select the row / cells from which you wish to remove shading or other formatting
2. From the **Create™ 8.0** tab select **Format Table** from the **Format Worksheet** group
3. Select the first format from the list (this will be your default table format)
4. Click **OK**

15. Copying Excel Tables to PowerPoint

Copying Excel Tables to PowerPoint Fully Formatted

This function copies a range of data from an Excel worksheet and pastes it into PowerPoint as a formatted table. Once in PowerPoint, the Excel data source details can be viewed and the data can be updated or the table style can be changed.

1. In PowerPoint, position your cursor in a placeholder
2. In Excel, select the cells containing the data
3. Select **PowerPoint, Fully Formatted** from the **Send Table To** group



The data will be pasted as a formatted table within the placeholder in PowerPoint with a traceable, updateable link to the source data in Excel

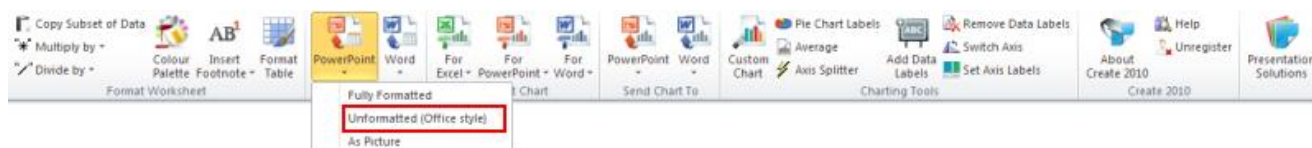
Note:

If the data changes in Excel, you can update the linked data via the **Update, Charts & Table** button on the **Create™ 8.0** tab in your PowerPoint presentation

Copying Excel Tables to PowerPoint Unformatted

This function copies a range of data from an Excel worksheet and pastes it into PowerPoint as it is with no new formatting applied. Once in PowerPoint, the Excel data source details can be viewed and the data can be updated.

1. In PowerPoint, position your cursor in a placeholder
2. In Excel, select the cells containing the data
3. Select **PowerPoint, Unformatted** from the **Send Table To** group



The data will be pasted as an unformatted native PPT table within the placeholder in PowerPoint with a traceable, updateable link to the source data in Excel (note: the table will apply native settings for borders and table text)

Note:

If the data changes in Excel, you can update the linked data via the **Update, Charts & Table** button on the **Create™ 8.0** tab in your PowerPoint presentation

Copying Excel Tables to PowerPoint as Pictures

You can create a table from a selected range in Excel and send to PowerPoint as a linked picture. When the data is updated, the picture will be replaced and display the updated numbers, automatically. The function will proportionally size the table to fit the selected placeholder, once the table is in your document, you can click on the corner handles and resize.

1. Place your cursor in a placeholder in PowerPoint and go to Excel

2. Remember to use the **Format Table** function to format your Excel table first so that it will match your PowerPoint tables
3. In Excel, select the cells containing your data
4. Select **PowerPoint, As Picture** from the **Send Table To** group

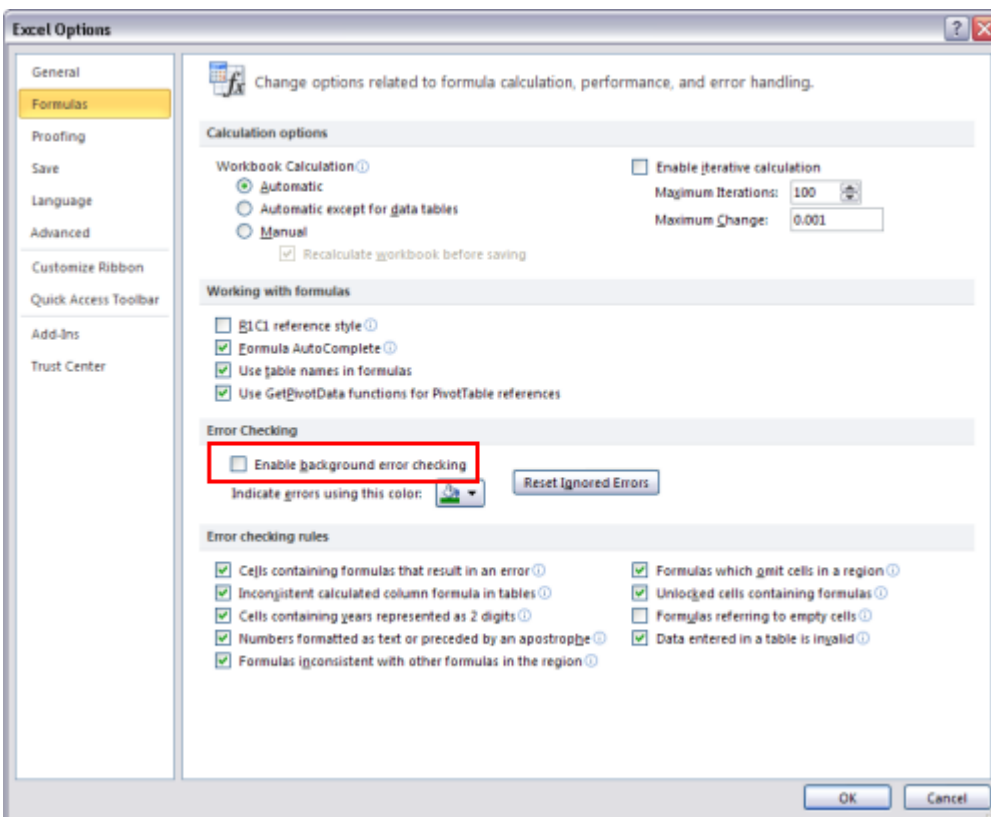


Your data will be pasted into a formatted table in the placeholder with an updateable link should the data change.

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

1. From the Office button, select **Excel Options, Formulas**



2. Uncheck the Enable background error checking box and click **OK**
3. 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 PPT, simply click on this and Excel will replace the image and link)

Copying Table Data from the Clipboard to PowerPoint

1. In PowerPoint place your cursor inside a placeholder
2. In Excel, select your data range
3. Press **CTRL+C** to copy it to your clipboard

4. In PowerPoint, select **Table** from the **Insert** group on the **Create™ 8.0** tab. The dialogue that appears will highlight **From Clipboard** and the cell range and worksheet name will appear
 5. Click **OK** and the table data will be inserted, formatted and linked back to Excel source
-

Note:

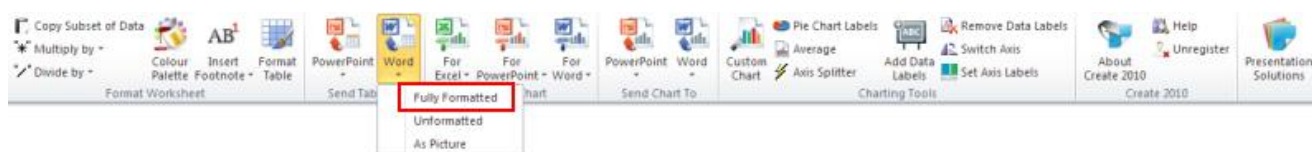
If the data changes in Excel, you can update the linked data via the **Update** button on the **Create™ 8.0** tab in your PowerPoint presentation.

16. Copying Excel Tables to Word

Copying Excel Tables to Word Fully Formatted

This function copies a range of data 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 style can be changed.

1. In Word, position your cursor in an exhibit placeholder
2. In Excel, select the cells containing the data
3. Select **Word, Fully Formatted** from the **Send Table To** group



The data will be pasted as a formatted table within the placeholder in Word with a traceable, updateable link to the source data in Excel.

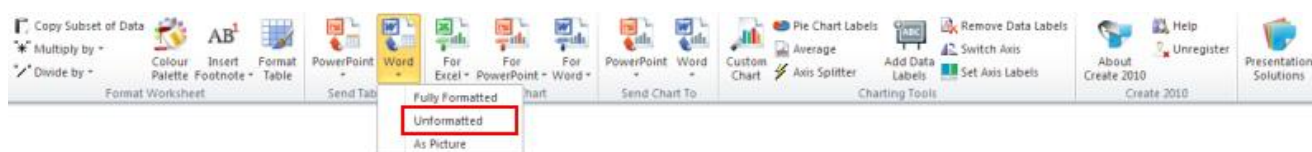
Note:

If the data changes in Excel, you can update the linked data via the **Update, Charts & Tables** button on the **Create™ 8.0** tab in your Word presentation.

Copying Excel Tables to Word Unformatted

This function copies a range of data from an Excel worksheet and pastes it into Word as it is with no new formatting applied. Once in Word, the Excel data source details can be viewed and the data can be updated.

1. In Word, position your cursor in an exhibit placeholder
2. In Excel, select the cells containing the data
3. Select **Word, Unformatted** from the **Send Table To** group



The data will be pasted as an unformatted native Word table within the placeholder in Word with a traceable, updateable link to the source data in Excel (note: the table will apply native settings for borders and table text)

Note:

If the data changes in Excel, you can update the linked data via the **Update, Charts & Tables** button on the **Create™ 8.0** tab in your Word presentation.

Copying Table Data from the Clipboard to Word

1. In Word place your cursor inside an exhibit placeholder
2. In Excel, select your data range
3. Press **CTRL+C** to copy it to your clipboard
4. In Word, select **Table** from the **Insert** group on the **Create™ 8.0** tab,
5. The dialogue that appears will highlight **From Clipboard** and the cell range and worksheet name will appear

6. Click **OK** and the table data will be inserted, formatted and linked back to Excel source

Note:

If the data changes in Excel, you can update the linked data via the **Update** button on the **Create™ 8.0** tab in your Word document.

17. Worksheet Tools

Copying a Subset of Data

This function allows the user to select part of the data in an Excel table and copy and paste it in an existing table in PowerPoint.

1. In Excel select the cell/s of the table to be copied
2. Select **Copy Subset of Data** in the **Format Worksheet** group of the **Create™ 8.0** tab



3. Go to PowerPoint and click into the first cell of the range you wish to replace
4. From the **Create™ 8.0** tab select **Format Table** from the **Format Worksheet** group and choose **Paste Subset** from the submenu

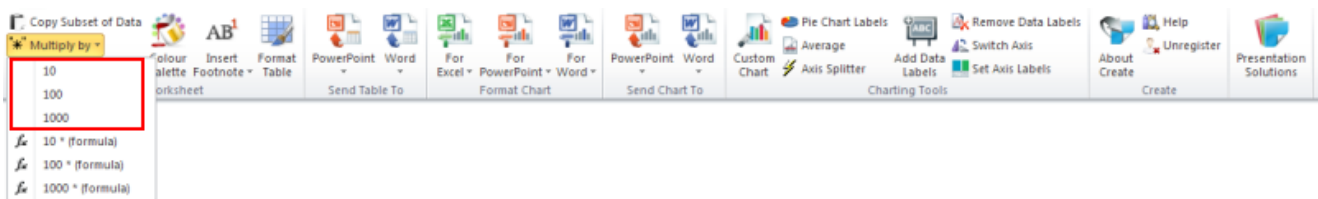
The selected cells will replace the cells in the existing table, retaining the formatting of the destination table.

Multiply by

This function multiplies a range of Excel data by 10, 100 or 1,000. There are two options; the first will remove any formulae and simply gives the result: the second will retain the formulae.

To multiply by 10, 100 or 1,000 and remove the formulae

1. In Excel, select the range of data to be multiplied
2. Click **Multiply by**

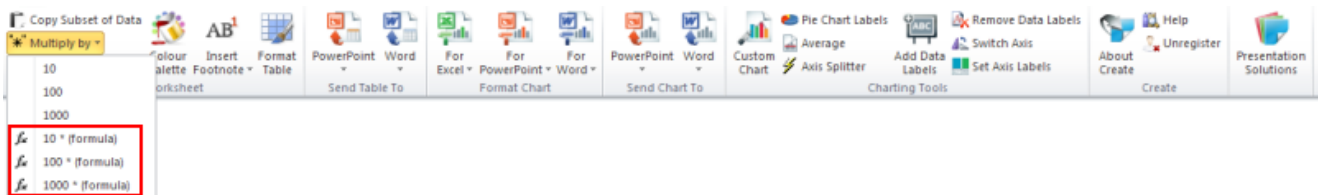


3. Select 10, 100 or 1,000

The macro will multiply the data values by your chosen number

To multiply by 10, 100 or 1,000 and retain the formulae

1. In Excel, select the range of data to be multiplied
2. Click **Multiply by**



3. Select 10*, 100* or 1,000* to retain any formula and multiply by the selected amount

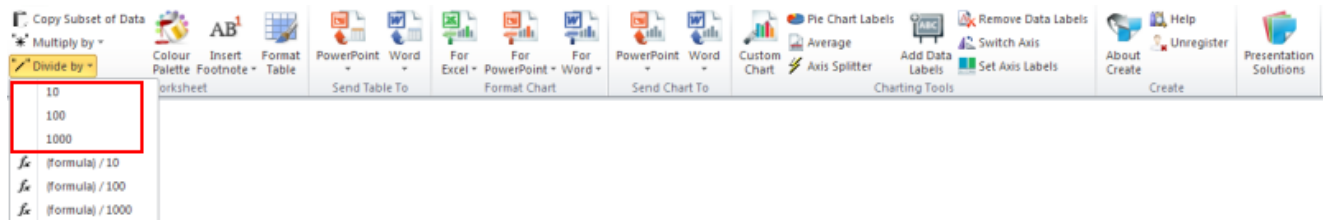
The macro will multiply the data values by your chosen number

Divide by

This function divides a range of Excel data by 10, 100 or 1,000. There are two options; the first will remove any formulae and simply gives the result: the second will retain the formulae.

To divide by 10, 100 or 1,000 and remove the formulae

1. In Excel, select the range of data to be divided
2. Click **Divide by** and select 10, 100 or 1,000

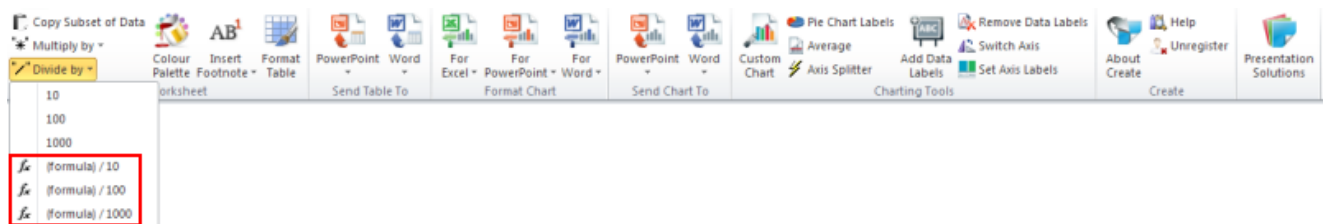


3. Select 10, 100 or 1,000

The macro will divide the data values by your chosen number

To divide by 10, 100 or 1,000 and retain the formulae

1. In Excel, select the range of data to be divided
2. Click **Divide by**



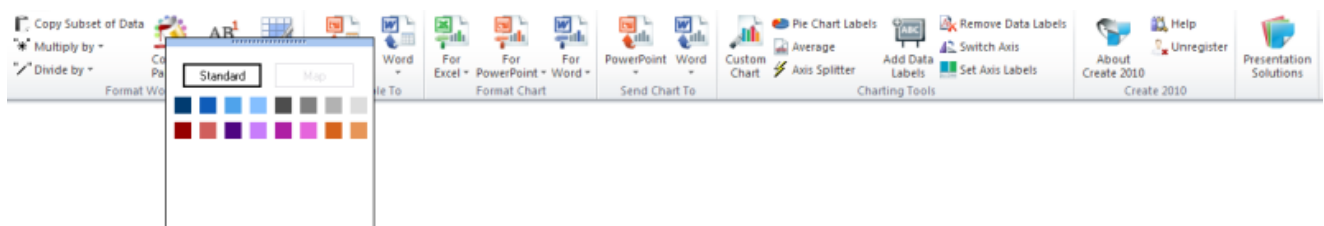
3. Select 10*, 100* or 1,000* to retain any formula and divide by the selected amount

The macro will divide the data values by your chosen number

The Colour Palette

The corporate colour palette is available on the **Create™ 8.0** tab. You can “drag off” a copy of the palette and this will remain on top of your desktop until closed. You can use these to format your worksheet cells in Excel and to recolour a selected series fill or line colour of a chart. If you hover your cursor over the colour, the name of the colour will appear.

1. From the **Create™ 8.0** tab, select **Colour Palette**. This is a pull-off menu i.e. you can click and drag the palette anywhere on the screen
2. Select **Standard** to show the standard colour palette



3. Select the cell(s) of the worksheet or the series or line of the chart that you wish to colour
4. Select the colour you wish to apply (i.e. the next colour in the hierarchy)

Note:

To close the colour palette, click on the “X” box in the top right hand corner.

We do not recommend using the map palette to colour worksheet cells as most colours contain a border specifically designed for map fills.

Remember to close the colour palette once you have applied your selection.

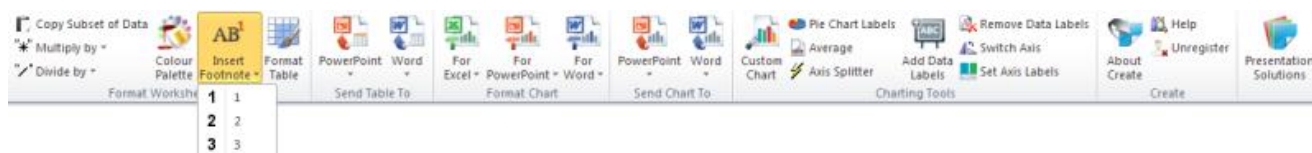
You cannot use the Excel colour palette in Word or PowerPoint or vice-versa.

You can recolour a whole series of a chart but not individual data points – these should be recoloured manually using native Excel

Inserting a Footnote

This function allows the user to add a superscript note number to text or data on a worksheet.

1. In Excel, select the cell to which the footnote is to be added
2. In the **Format Worksheet** group on the **Create™ 8.0** tab click **Insert Footnote** and the relevant number **(1, 2 or 3)**



The note number will be added next to the selected text

Note:

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

If the corresponding data appears in a chart, the superscript number will also appear in the chart labels.

Formatting Tables

See Formatting Excel Tables

18. Unregistering

This option disables the software – it does not remove the software. Use this option if you no longer need the license for the software (e.g. you are moving departments or leaving the company). Unregistering the software returns the licence to the server.

1. From the **Create™ 8.0** tab select **Unregister**



2. To re-register, click on the **Create™ 8.0** tab and select any item

Note:

This option may be deactivated in some builds at the request of your IT department – if this is the case and you no longer wish to use Create™ 8.0, please contact your local administrator.

19. Switching Brands

This option is only available for clients with a multiple brand version of the Create™ 8.0 software. If you are not a multiple brand client the function will not show on the Create™ 8.0 ribbon. The function enables you to switch between brands.

1. From **Create™** group on the **Create™ 8.0** tab select **Switch Brand**



2. Select from the dropdown menu the required brand

All new worksheets created from now on will be based on the selected brand. Existing worksheets will not be affected.

20. Navigating Create™ 8.0 Net Help for Excel

An online help is available in each programme in Create™ 8.0 (i.e. Word, PowerPoint and Excel).

1. To access the Help menu, from the **Create™** group, select **Help**



The Contents Pane



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.

The Index Pane



Click on the **Index** pane to display to all the topics in the Help alphabetically or to search for a specific topic. This will search the Index headings. To perform a specific word search, go to the Search pane.

The Search Pane



Click on the **Search** pane and type in the word for which you wish to search. This function will look through all the topics and their content for the searched word. All the topics in which the word appears will be listed in the window on the left. As you select each topic, the content will be displayed on the right window with the searched word highlighted.

21. Create™ 8.0 Documentation

Instruction Manuals, QRGs and FAQs

http://www.presentation solutions.eu/downloads/support/Create_2010_Manuals_FAQs_QRGs.zip

Sample Excel Data for Charts

http://www.presentation solutions.eu/Downloads/Support/Sample_Excel_Data.zip

22. About Presentation Solutions

Presentation Solutions offers a unique combination of skills and resources. Our consulting service combines leading edge design, business intelligence and creativity delivered through our Microsoft accredited software.

Our creative and software designers are some of the best in the business. Our team provides solutions to your communication needs that are more than the sum of our collective expertise.

The lessons that we have learned in major global organisations are available now to save you time and allow you to profit from our know-how. With clients using our software in over 30 countries including the US, UK, Europe, UAE and Asia, Presentation Solutions have become the customised document design and software supplier of choice to professional services industries Worldwide. We are one of only a handful of Microsoft Gold Certified Partners to have worked directly with Microsoft ADC software application development teams to develop, test and accredit our software to Microsoft global standards.

For the latest product information, visit us at: www.presentationssolutions.eu



Charter House | 9 Castlefield Road
Reigate | Surrey RH2 0SA

T +44 (0) 845 543 8228
E info@presentationsolutions.eu
W www.presentationsolutions.eu