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# ActiveGraf

## First Steps Guide v3

Using Instructions



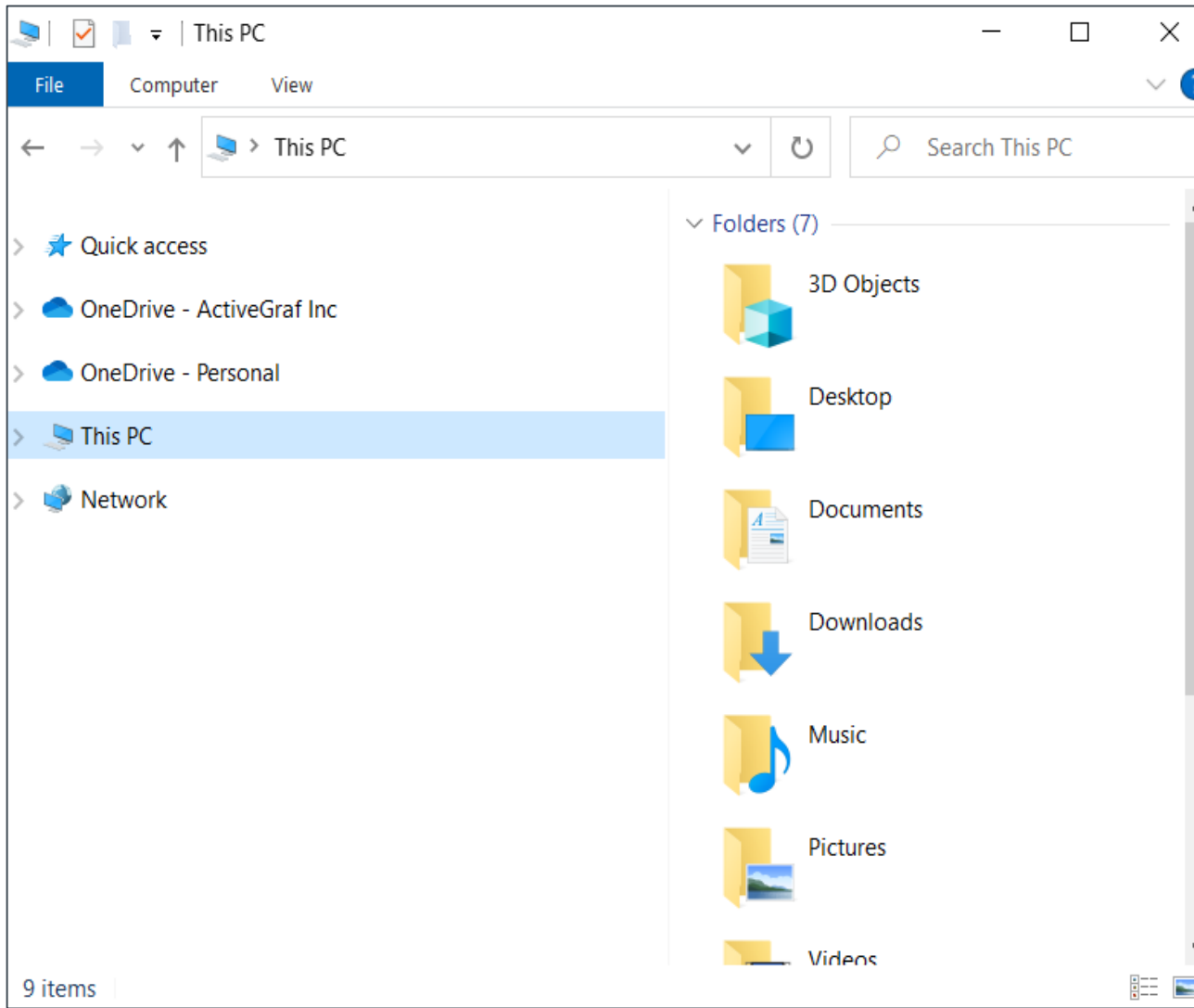
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# First step



**ActiveGraf enabled files (Excel, PowerPoint) must be saved in one of the following drives:**

- local drive
- OneDrive
- OneDrive for Business
- Box
- Dropbox
- Google Drive

Note: ActiveGraf Archives (.actg) can be shared to any cloud drives.

# System Components

ActiveGraf System components:

1. **ActiveGraf Office Ribbon**  
The Ribbon contains the main menu functions of ActiveGraf.
2. **Insert Chart Command and Pane**  
This panel shows the basic chart types available to use. Select Insert Chart from the Quick Access menu to initiate the chart placement action.
3. **Task pane:**  
The Task pane hosts configuration options
4. **Charts:**  
Charts display bi-directionally synchronized interactive data visualizations

The screenshot shows the Microsoft Office interface with the following components highlighted:

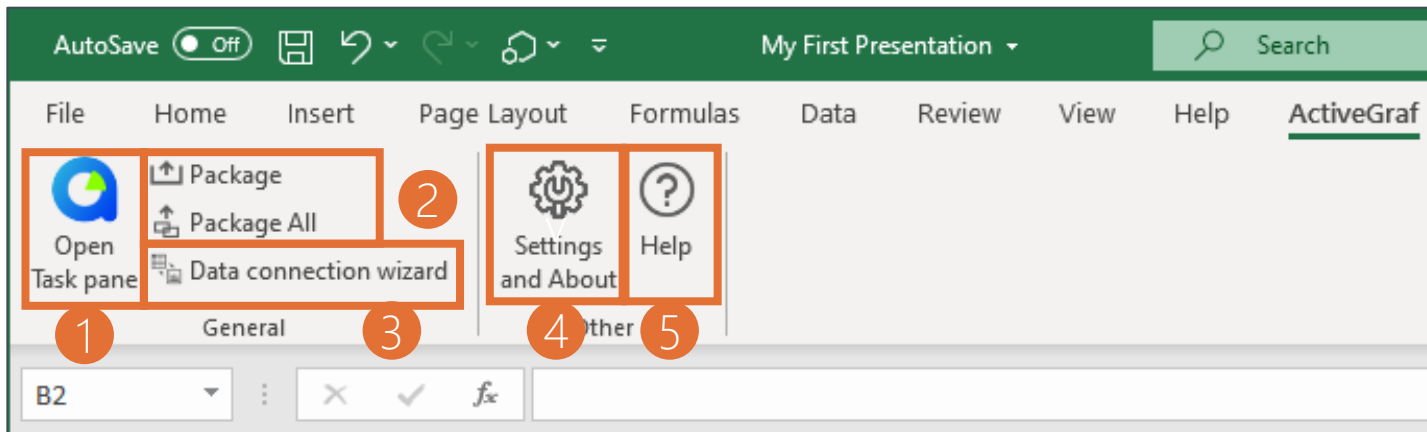
- 1. ActiveGraf Office Ribbon:** The 'ActiveGraf' tab is visible on the ribbon.
- 2. Insert Chart Command and Pane:** The 'Insert Chart' command is highlighted in the 'Recently Used Add-ins' pane.
- 3. Task pane:** The 'ActiveGraf' task pane is open, showing configuration options for a 'Column Chart'. The 'Chart Name' is 'Column Chart', 'Chart Type' is 'Column', 'Add Tag (Optional)' is 'Clear All', 'Assigned GrafData' is 'chart1', 'GrafData Path' is 'C:\Users\BernadettKepeny\My First Presentation.xlsx', 'Chart Style' is 'Default', and 'Color Palette' is 'Office'.
- 4. Charts:** A 'Column Chart' is displayed on the worksheet, showing data for three columns and three rows.

	Column1	Column2	Column3
Row1	12	13	14
Row2	8	7	7
Row3	20	20	21

# The Office-Ribbon

The ActiveGraf Office Ribbon includes the following core functions:

1. Enabling the ActiveGraf add-in by opening the add-in Task Pane.
2. Packaging individual or Multiple ActiveGraf presentations alongside with all corresponding Excel and database files.
3. Data connection wizard: reconnects PowerPoint files, Excel files, and Grafdata, if the original files were moved or renamed.
4. License information
5. Opening the ActiveGraf Help window



# The Task Pane

The screenshot shows the 'GrafData' tab of the ActiveGraf Task Pane. At the top is a blue button with a plus icon and the text 'Create GrafData'. Below it is a section 'Choose from your previous GrafDatas' with a dropdown menu showing 'chart1' and a checked checkbox labeled 'Current File only'. The main area contains several input fields: 'GrafData Name' with 'chart1', 'GrafData Range' with 'Sheet1!B2:E5', and 'GrafData Path' with 'C:\Users\AGDemo708\Documents\My First ActiveGraf'. There is also an 'Add Tag (Optional)' section with a text input 'Add tags...' and a 'Clear All' link. At the bottom, a 'Range Manager' table is visible.

Series Name	Range
Row1	Sheet1!B3:E3

The screenshot shows the 'Chart' tab of the ActiveGraf Task Pane. It contains various configuration options: 'Chart Name' (My First Chart), 'Chart Type' (Column), 'Add Tag (Optional)' (Add tags...), 'Assigned GrafData' (chart1), 'GrafData Path' (C:\Users\AGDemo708\Documents\My First ActiveGraf Presentation.xlsx), 'Chart Style' (Default), 'Color Palette' (ActiveGraf Default), 'Editable Data' (YES (unlocked)), 'Stacking' (Not Stacked), 'Inverted Axis' (unchecked), 'Minor Edit Interval' (0.01), and 'Major Edit Interval' (5). A 'Manage styles...' button is located next to the Chart Style dropdown.

The Task Pane is the host for most ActiveGraf actions.

The ActiveGraf Task Pane must always be enabled and open when using ActiveGraf functions.

The Task Pane is used to create GrafData (Excel) and configure the global properties of ActiveGraf Charts (Excel and PowerPoint).

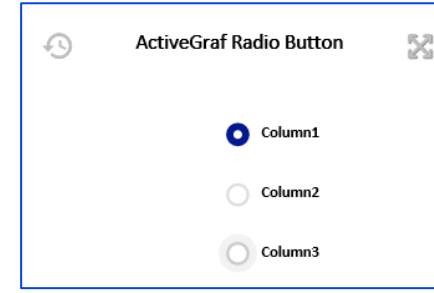
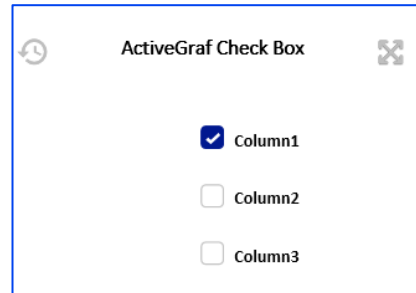
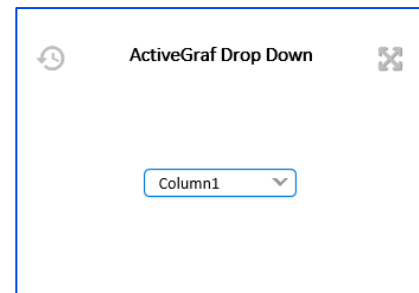
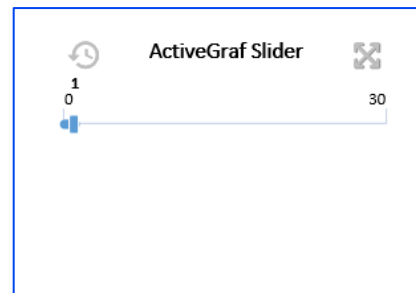
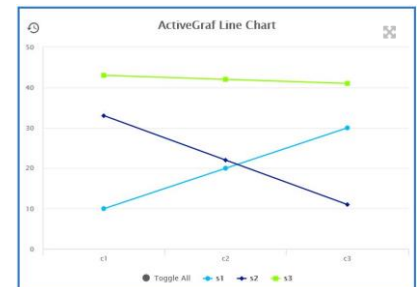
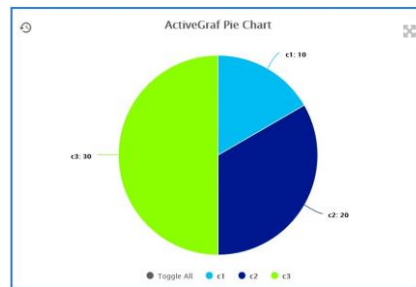
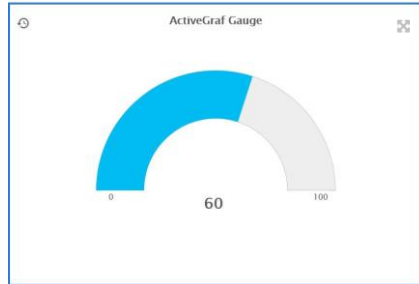
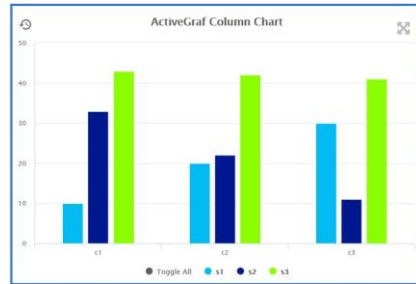
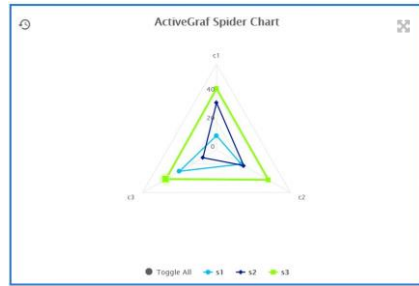
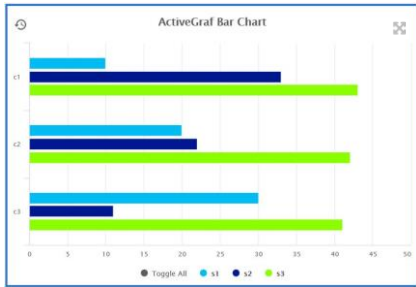
Note: Charts are configured, but not created in the Task Pane. ActiveGraf charts can only be created through the Insert Chart functions (see page 10 – Creating Charts)

Using the Task Pane Users are able to

- Create/Modify GrafData in Excel
- Configure ActiveGraf Charts in Excel and PowerPoint

**Warning:** Avoid using the Excel and PowerPoint Standard Auto-Save feature, as it conflicts with the operation of the Task Pane.

# The Charts



ActiveGraf Table

	c1	c2	c3
s1	60	20	30
s2	33	22	11
s3	93	42	41

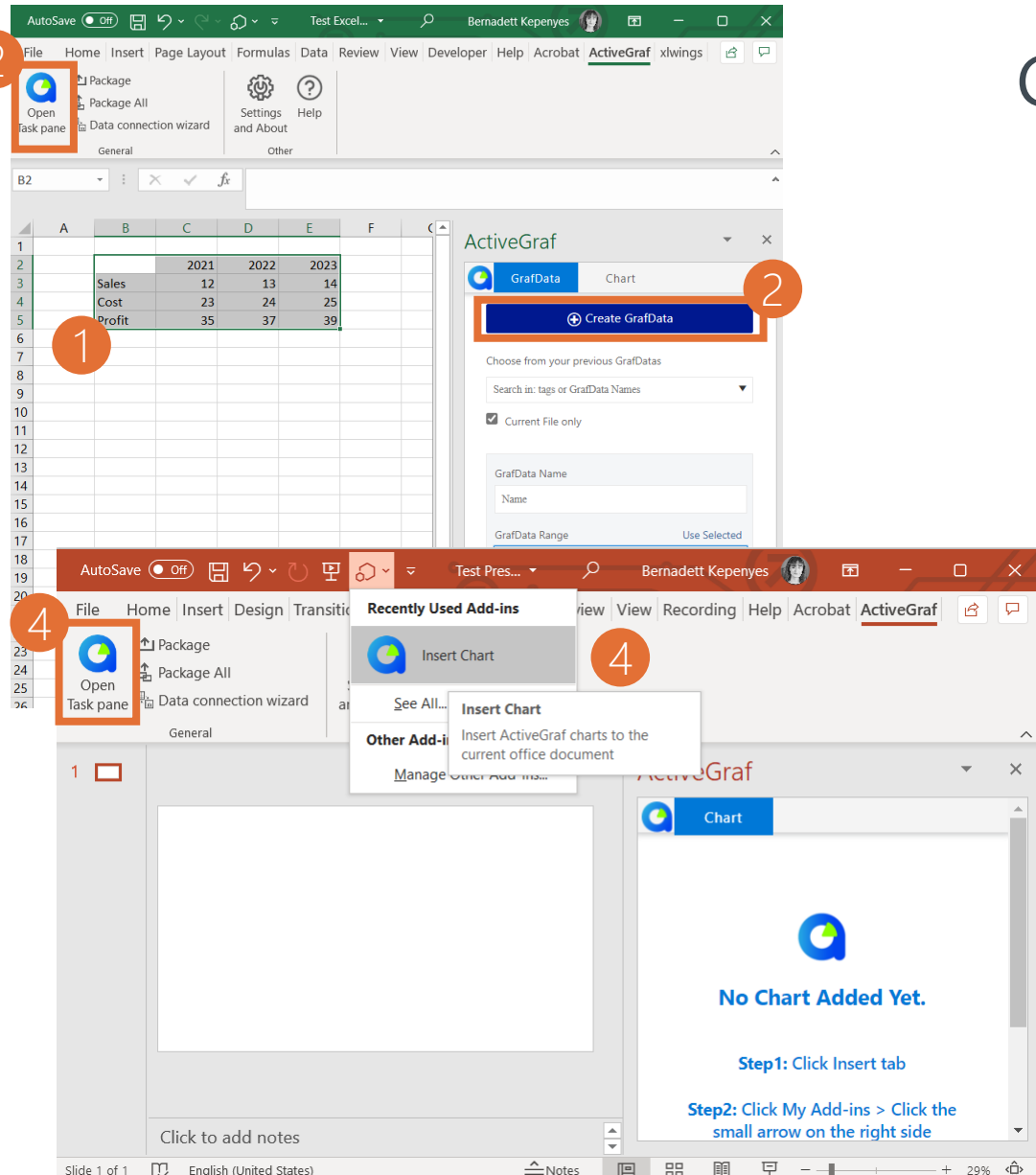
ActiveGraf Charts are interactive, bi-directionally synchronized with their bound data sources (GrafData).

Charts display data and provide interaction options

ActiveGraf charts provide intelligent, auto scale data display using many different chart formats.

Chart attributes can be set in the Authoring process/mode, while editable values(drivers) and filtering can be set in Slide Show or Presentation mode as well.

# Creating New ActiveGraf Presentations



1. Open Excel and design the data model.  
Note: if you already have your Excel files and GrafData sets available you can skip to Step 3.
2. Open the ActiveGraf Task Pane in Excel and create GrafData data sets.
3. Open PowerPoint, design your presentation.
4. Open the ActiveGraf Task Pane in PowerPoint, create or clone your charts.
5. Test your presentation by using the graphical data edit functions provided by ActiveGraf.

Note: do not forget to save all your files before closing them!

**Warning:** keep in mind whether the Excel cell of the given data is a formula, that data point is not draggable on ActiveGraf charts.



# Working with GrafData - Create

The image shows two side-by-side screenshots illustrating the process of creating GrafData. The left screenshot shows an Excel spreadsheet with a data range selected (B2:E5), marked with a red circle '1'. The right screenshot shows the ActiveGraf 'GrafData' dialog box, with steps 2 through 5 marked by red circles. Step 2 points to the 'Create GrafData' button. Step 3 points to the 'GrafData Name' input field. Step 4 points to the 'Create' button at the bottom. Step 5 points to the 'GrafData Range' input field, which contains 'Sheet1!B2:E5'. Below the Excel screenshot, a green status bar displays the message 'GrafData has been saved!' with a red circle '6' next to it.

1

	Column1	Column2	Column3
Row1	1	13	14
Row2	8	7	7
Row3	9	20	21

6 GrafData has been saved!

2 Create GrafData

3 GrafData Name

5 GrafData Range Use Selected Sheet1!B2:E5

4 Create

1. Select a data range in Excel.  
Note: The range must be minimum 2x2 cells in size.
2. Click *Create GrafData*.
3. Name the new GrafData.
4. Click *Create*.
5. In the Range Manager Section you can see the corresponding series and categories
6. Status messages related to user actions will pop up in the top of the Task Pane.

Hint: Add Tags to the GrafData. Tags help to find specific GrafData and Charts in various dialog boxes (the tag is saved by hitting the SPACE bar and clicking outside the input area).

# Working with GrafData - Modify

ActiveGraf

GrafData Chart

+ Create GrafData

Choose from your previous GrafDatas

chart1

☒ Current File only

GrafData Name

chart1

GrafData Range

Sheet1!B2:E5

GrafData Path

C:\Users\AGDemo708\Documents\My First ActiveGraf

Add Tag (Optional) Clear All

Add tags...

Delete GrafData

Range Manager

Series Name	Range
Row1	Sheet1!B3:E3

Sum: 100 95%

Select a GrafData from the list of available GrafData. The Excel data range bound to the selected GrafData will automatically be highlighted in the excel worksheet.

Note: the *Current File Only* check box is ticked by default, and narrows the list to the GrafData originated in the current Excel file. To view your whole GrafData library, uncheck the box.

Available editing options:

- Change the name of the GrafData
- Add Tags to the GrafData.

Note: inserting cells within the range of a given GrafData will automatically extend it. Give it a try!

You cannot extend the GrafData range by adding cells above or below the range, nor can you currently change the cell range manually once set (though this feature is coming soon).

Hint: Tags help to find specific GrafData and charts in various dialog boxes.

# Working with GrafData - Delete

ActiveGraf

GrafData Chart

+ Create GrafData

Choose from your previous GrafDatas

chart1

☒ Current File only

GrafData Name  
chart1

GrafData Range  
Sheet1!B2:E5

GrafData Path  
C:\Users\AGDemo708\Documents\My First ActiveGraf

Add Tag (Optional) Clear All

Add tags...

Delete GrafData

Range Manager

Series Name	Range
Row1	Sheet1!B3:E3

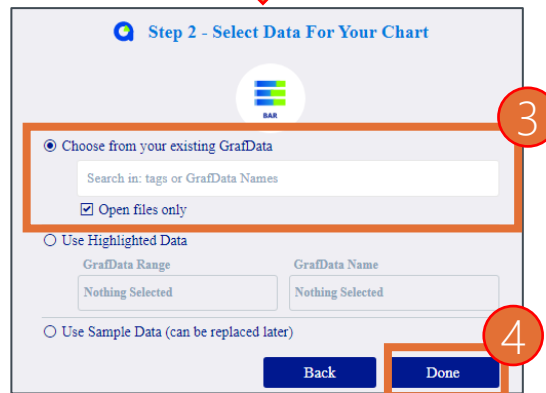
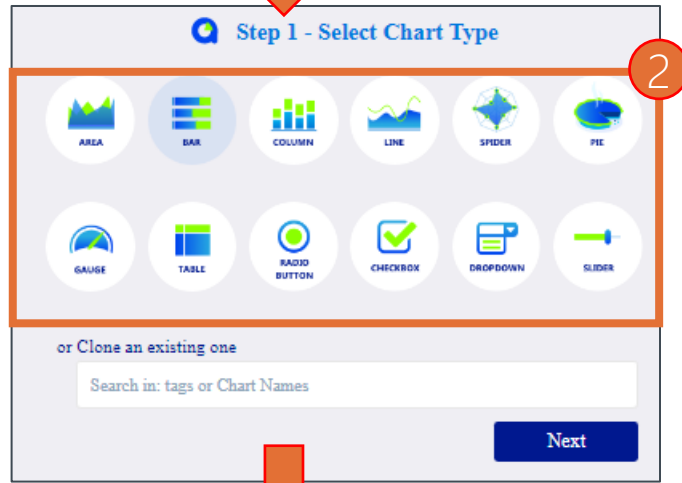
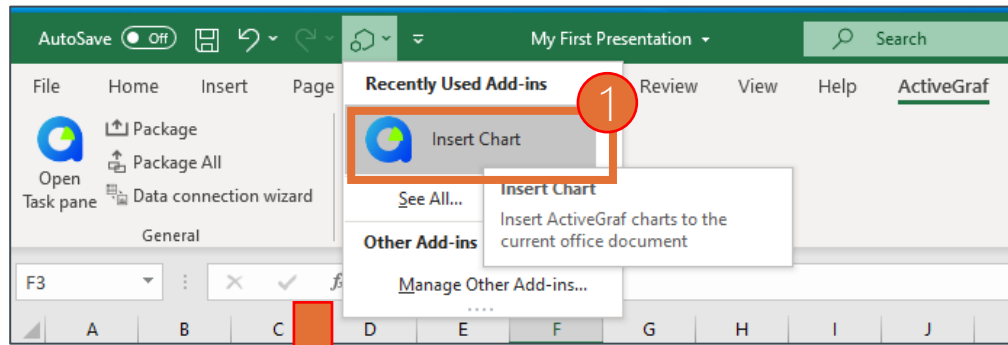
Sum: 100 95%

- Delete GrafData

1. Select a GrafData from the list of available GrafDatas. Hint: You can narrow the list to the GrafDatas originated in the current Excel file only by clicking the *Current File Only* check box
2. Click on the *Delete GrafData* Button
3. Confirm the Delete action.

**Warning:** all charts bound to the selected GrafData will be orphaned! This action is not reversible!

# Create Charts



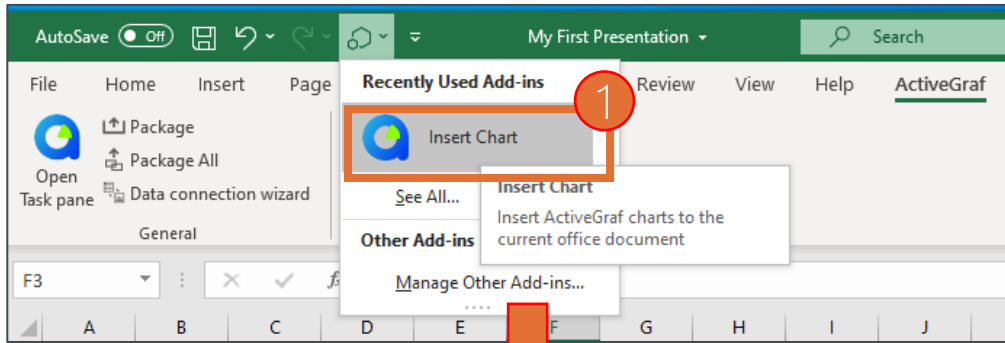
The only way to create ActiveGraf Charts is to use the *Insert Chart* function.

Create a new chart and bind it to an existing GrafData

1. Select Insert Chart from the Quick Access Add-in menu
2. Choose the desired Chart type
3. Select the GrafData to be bound to the Chart (the Current File Only check box is ticked by default and narrows the list to the GrafData originated in the current Excel file. To view your whole GrafData library, uncheck the box.)
4. Click Done

**Warning:** Copy/Paste of Charts does not work across files with ActiveGraf Charts, due to their special data binding and synchronization features. Single Cut and Paste functionality to move a chart to a different slide or tab is supported. Copy/Paste within a file is also possible, as described on the following page 13 - Cloning Charts.

# Clone Charts

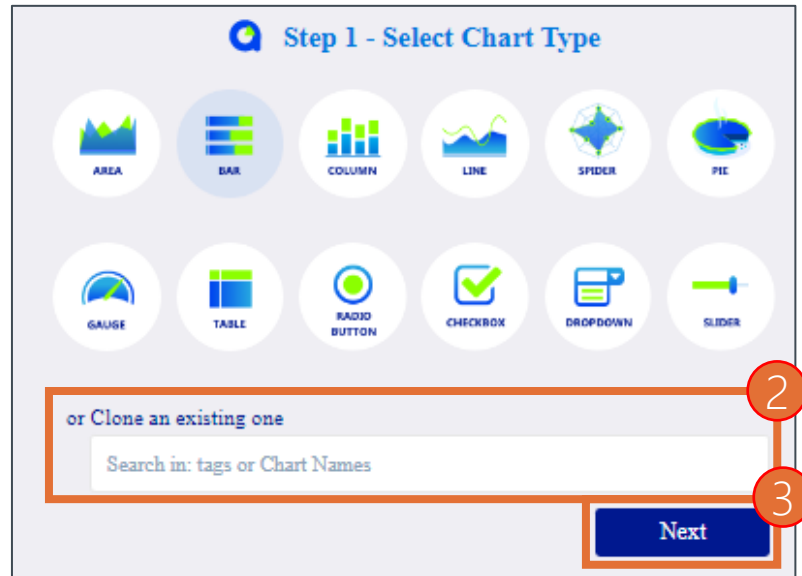


First option - clone an existing Chart and customize it

1. Select *Insert Chart* from the Add-in menu
2. Select an existing Chart from the menu (Step 1)
3. Click *Next*

Second option - Copy/Paste of Charts within the file.

**Warning:** Copy/Paste of Charts works only within the file, you cannot copy a chart from Excel to PowerPoint or vice versa due to their special data binding features.



# Basic Chart Settings

Select the Chart in either Excel or in PowerPoint.

You can reference this name later when searching for the specific Chart for cloning.

Display/Select the GrafData assigned to the selected Chart

You can manage your presentation styles here.

Select the pre-defined color palette to be used by the selected chart.

Turning this off will disable the interactive editing of the chart values.

Values in these fields define the minimum and maximum edit intervals for visual editing of the chart elements. Editable chart elements will snap to the multiple of the values defined here. Also affects the value increase/decrease steps when using the Tool-Tip based value editing.

ActiveGraf

GrafData Chart

Chart Name  
My First Chart

Chart Type  
Column

Add Tag (Optional) Clear All  
Add tags...

Assigned GrafData  
chart1

GrafData Path  
C:\Users\AGDemo708\Documents\My First ActiveGraf Presentation.xlsx

Chart Style  
Default Manage styles...

Color Palette  
ActiveGraf Default

Editable Data  
☒ YES (unlocked)

Stacking  
Not Stacked

Inverted Axis

Minor Edit Interval 0.01 Major Edit Interval 5

Specify the basic Chart type here: Line, Bar, Column, etc.

Tags help to find specific Charts in various dialog boxes.

Displays the path of the excel file for the selected GrafData.

Defines how the data series will be displayed (Not Stacked, Stacked).

Swaps the vertical and horizontal axis of the chart.

# Advanced Chart Settings

Select the Chart in either Excel or in PowerPoint. If you can't see all the options, click on "Open advanced settings" at the bottom of the section:

This Text shows up in the top of the Chart

Defines the Title text of the Vertical and Horizontal Axis

Defines the Title text of the Legend box

Display or hide the History Button

Individual Series can be included in or omitted from the Chart by selecting/deselecting the corresponding Check Box

Individual Categories can be included in or omitted from the Chart by selecting/deselecting the corresponding Check Box

The screenshot shows the 'ActiveGraf' application window with the 'Chart' tab selected. The settings are as follows:

- Chart Title:** ActiveGraf Column Chart
- Vertical Axis:** Axis Y
- Horizontal Axis:** Axis X
- Legend:** Title
- SHOW HISTORY:** ☒
- SHOW TOOLTIP:** ☒
- TRANPOSE DATA:** ☐
- Series List:**

Series Name	Range
<input checked="" type="checkbox"/> Row1	B3:E3
<input checked="" type="checkbox"/> Row2	B4:E4
<input checked="" type="checkbox"/> Row3	B5:E5
- Category List:**

Category Name	Range
<input checked="" type="checkbox"/> Column1	C2:C5
<input checked="" type="checkbox"/> Column2	D2:D5

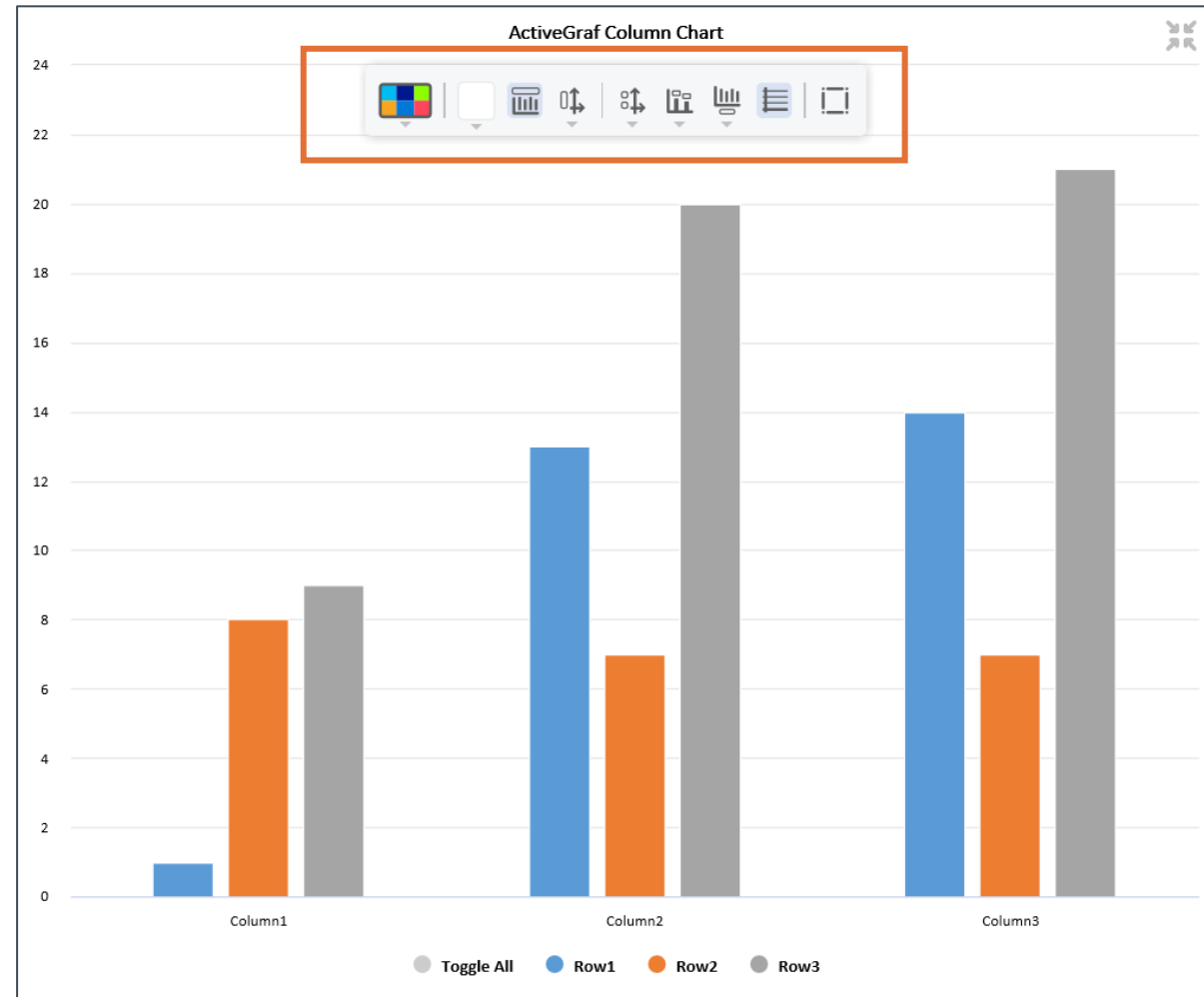
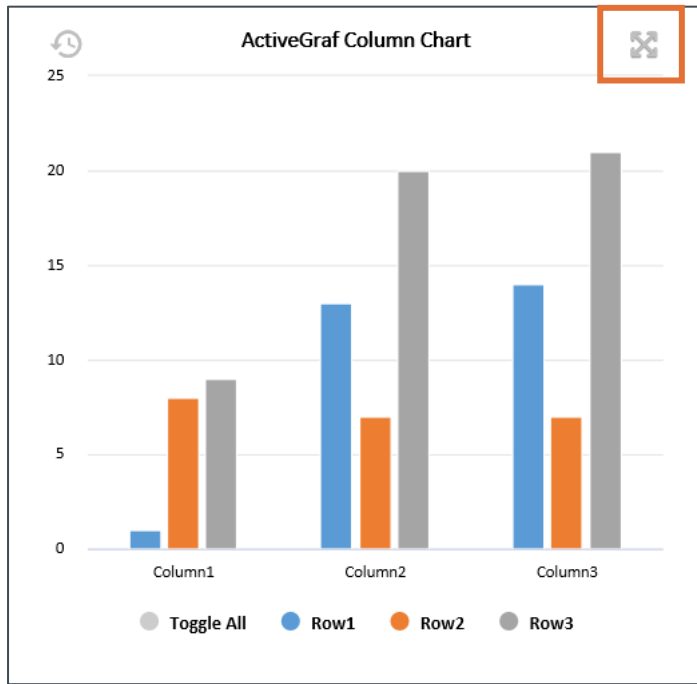
Annotations with orange lines point from the text on the left to the corresponding fields in the settings window:

- From 'This Text shows up in the top of the Chart' to the 'Chart Title' field.
- From 'Defines the Title text of the Vertical and Horizontal Axis' to the 'Vertical Axis' and 'Horizontal Axis' fields.
- From 'Defines the Title text of the Legend box' to the 'Legend' field.
- From 'Display or hide the History Button' to the 'SHOW HISTORY' checkbox.
- From 'Individual Series can be included in or omitted from the Chart by selecting/deselecting the corresponding Check Box' to the 'Row1' checkbox.
- From 'Individual Categories can be included in or omitted from the Chart by selecting/deselecting the corresponding Check Box' to the 'Column1' checkbox.

Annotations with orange lines point from the text on the right to the corresponding fields in the settings window:

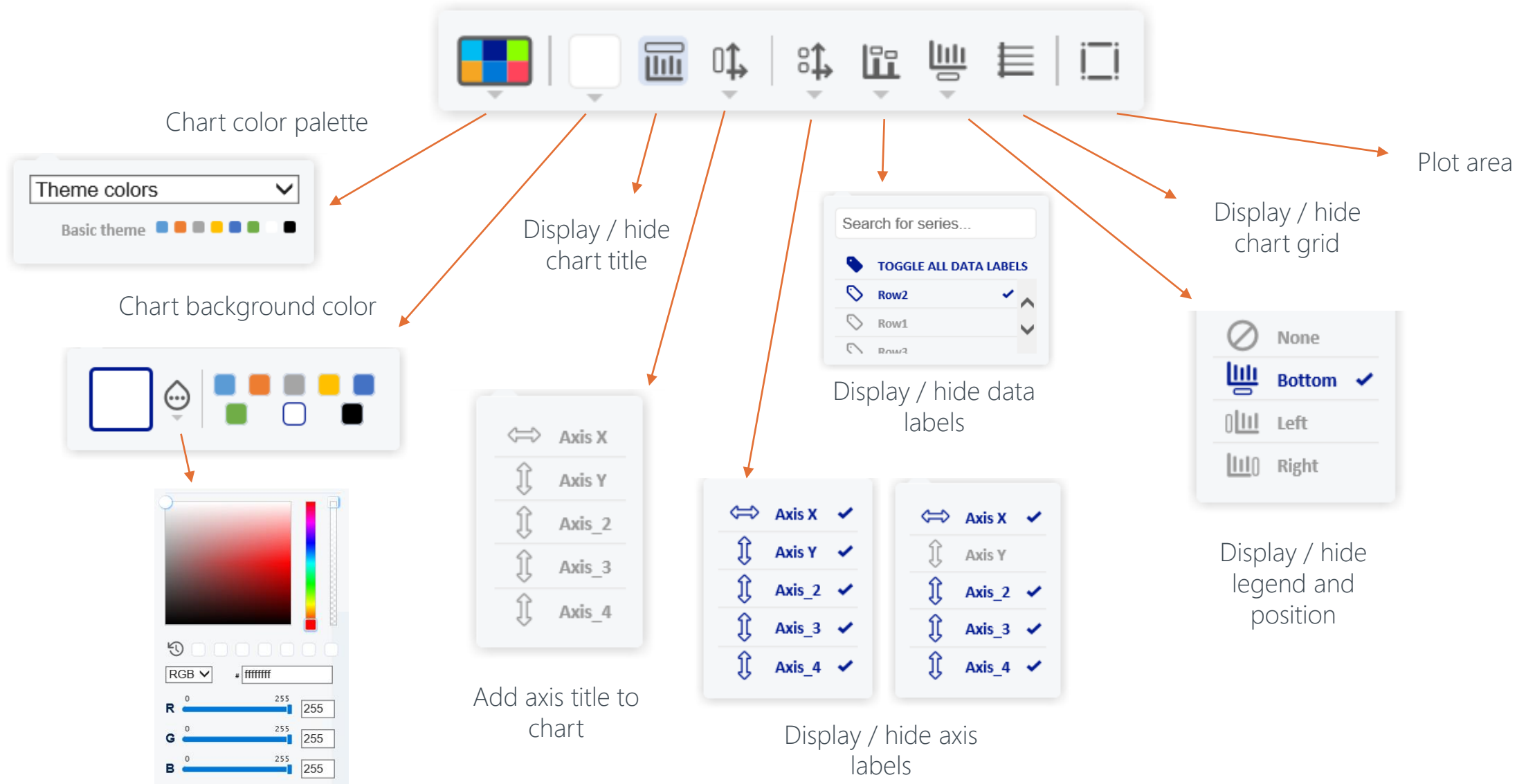
- From 'Display or hide the Tooltip on the chart.' to the 'SHOW TOOLTIP' checkbox.
- From 'Swaps Series and Categories of the connected GrafData' to the 'TRANPOSE DATA' checkbox.
- From 'Text written here overwrites the Title displayed in the Chart. This setting does not affect any other Chart or the original GrafData.' to the 'Legend' field.

# Chart Formatting

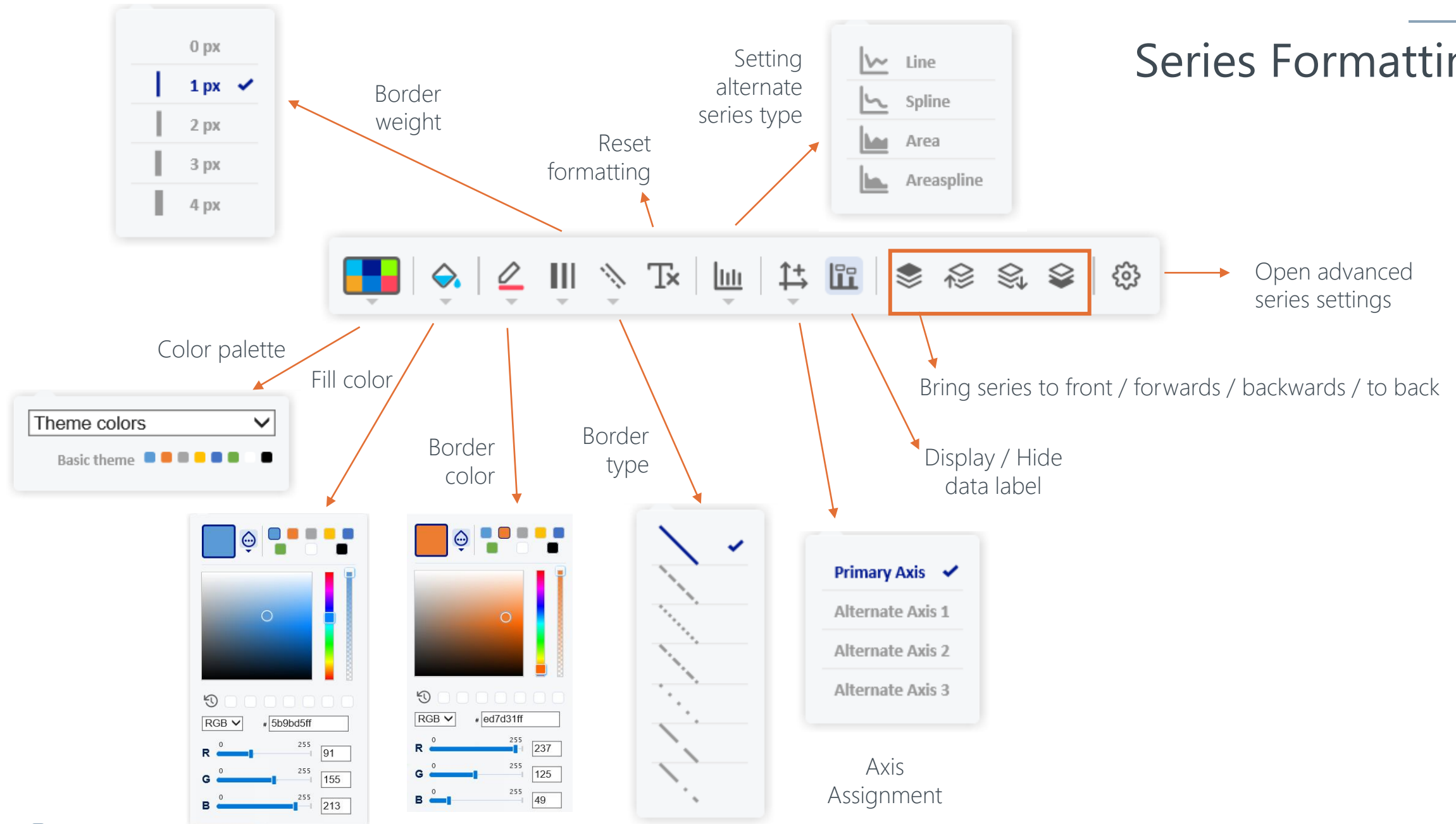




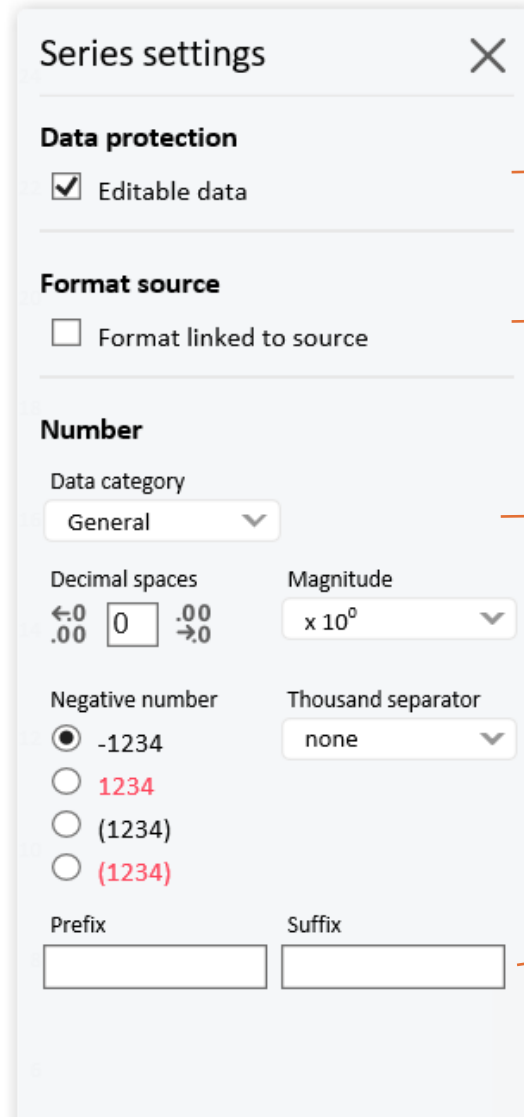
# Chart formatting



# Series Formatting



# Advanced Series Settings



The screenshot shows the 'Series settings' dialog box with the following sections and options:

- Data protection**: ☒ Editable data
- Format source**: ☐ Format linked to source
- Number**:
  - Data category: General (dropdown)
  - Decimal spaces:  $\leftarrow 0$  0  $\rightarrow 0$  (input field)
  - Magnitude:  $\times 10^0$  (dropdown)
  - Negative number: ☒ -1234, ☐ 1234, ☐ (1234), ☐ (1234)
  - Thousand separator: none (dropdown)
  - Prefix: (empty text field)
  - Suffix: (empty text field)

Orange lines connect the explanatory text on the right to the corresponding settings in the dialog box.

Turn this off if you do not want to allow interactive editing of the given Series

Check this box to follow the same format as in the Excel.

Choose the data category: General / Number / Percentage / Currency

Set your label design: decimal spaces, magnitude, negative number and thousand separator (# #, #, #, #.#)

Each Data series can have unique labels before and after.

# Text Formatting – Data Labels, Axis, Legend

Text font

Text size

Text color

Bold / Italic / Underline

Alignment

Rotate text

Reset formatting

Open advanced series settings

Search for fonts...

Agency FB

Algerian

Arial

Arial Black

7pt

8pt ✓

9pt

10pt

12pt

14pt

16pt

18pt

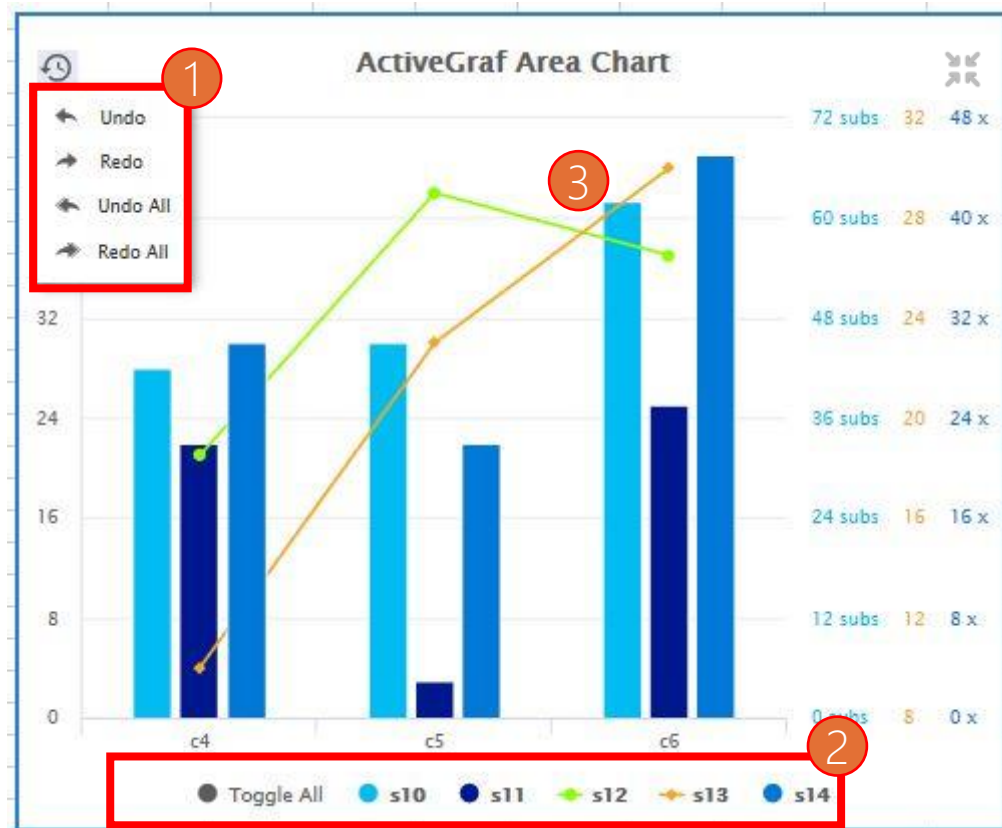
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G 0 255 0

B 0 255 0

# Working with Charts

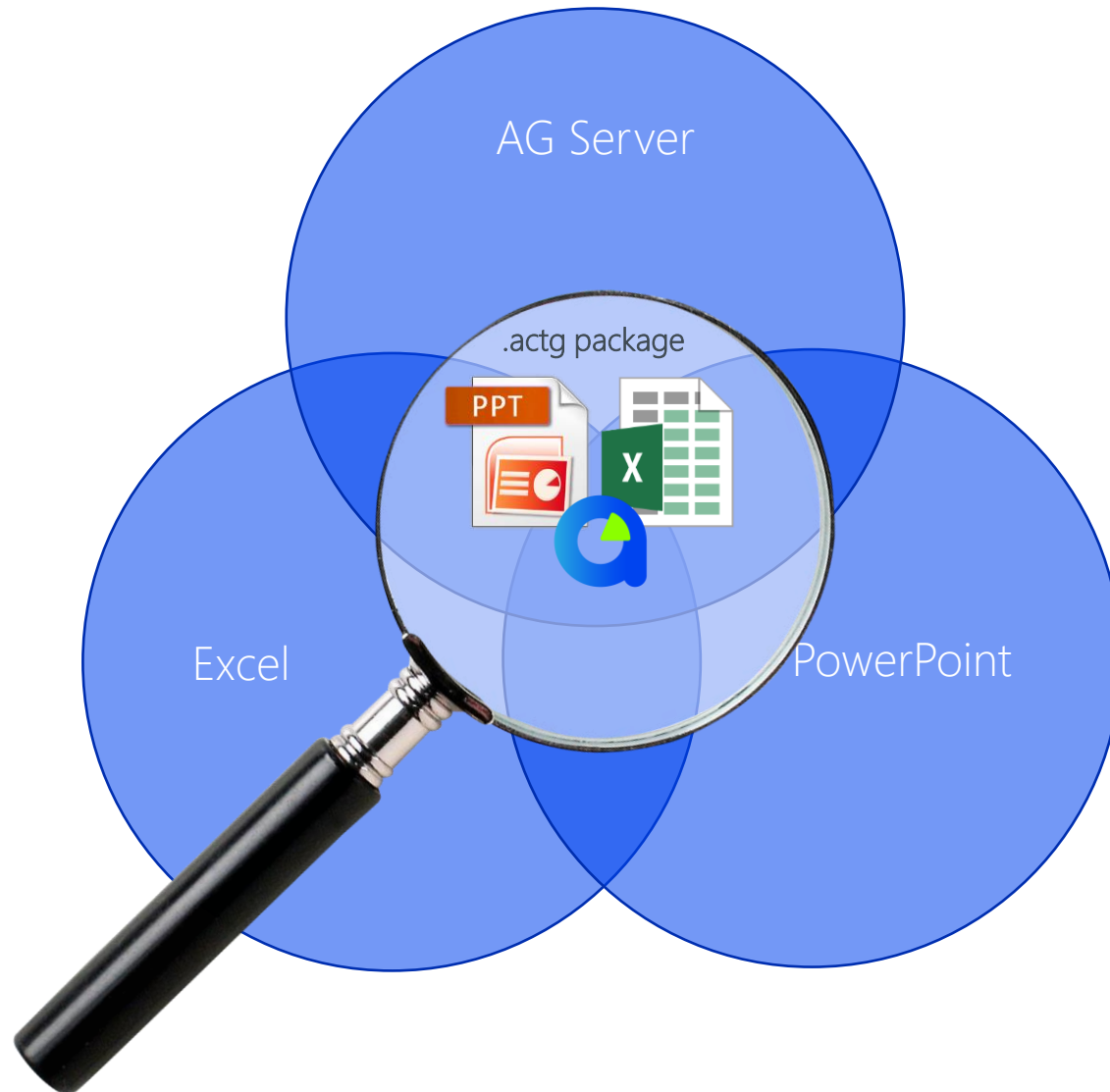


## Presentation Phase

- In presentation mode users present developed data models visually and run What-If and scenario analysis tasks.
- User actions are within the ActiveGrafs
- The following actions are available:
  1. Undo/Redo graphical data change actions
  2. Turning Series On/Off – the set of available Series is configured during Authoring Phase
  3. Editing chart Data-Points graphically

Note: Excel formula driven values are not editable (similar to Excel). Excel formulas remain intact, but the results of any calculations dynamically update on all connected Charts.

# Packaging and Saving ActiveGraf Enabled PowerPoint and Excel files the .ACTG file format



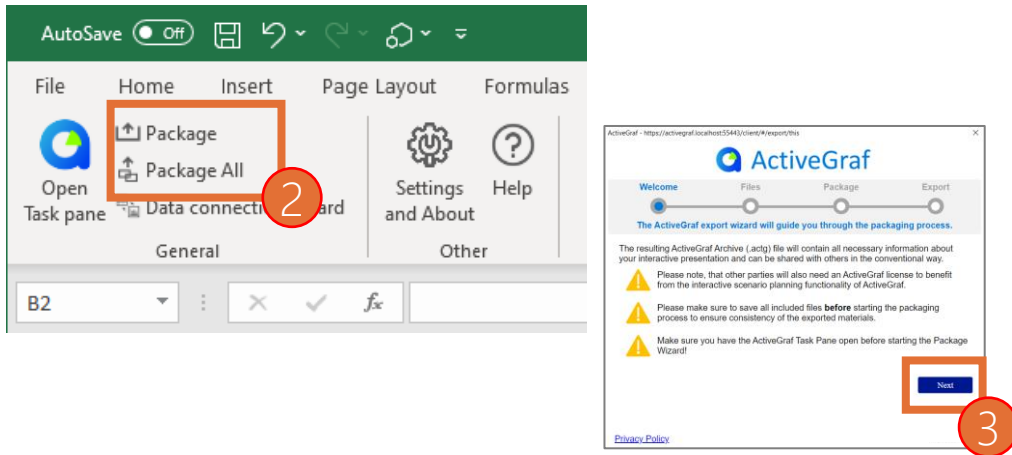
We encourage all users to save their ActiveGraf enabled file and work by Packaging to .actg **often**. In fact, packaging after every stage of work is a best practice, just as you would with any individual PowerPoint or Excel file.

Think of .actg files as **the** ActiveGraf file that contains all ActiveGraf related info needed for a specific scenario planning presentation or dashboard.

ACTG files are also the primary means of achieving **Scenario Versioning**, as well as **Sharing and Collaborating** with ActiveGraf enabled content.

- ActiveGraf enabled presentations (PowerPoint) and data sources (Excel) are bound together.
- ActiveGraf packages(.actg files) include everything needed to archive and share ActiveGraf presentations.

# Packaging and Saving ActiveGraf enabled Files and Presentations I



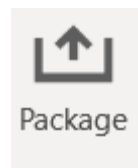
ActiveGraf Presentations consist of specially bound Excel and PowerPoint files and Database content. Sending such presentations to other users require special preparation process.

Use The *Package* and *Package All* functions in the ActiveGraf Office Ribbon to prepare your files. The resulting .actg file contains all necessary information about your interactive presentation and can be shared with others in the conventional way.

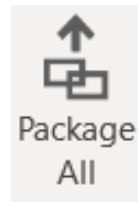
**Important:** make sure every chart is loaded and don't forget to save the individual Excel and PowerPoint files before Packaging!

## Steps

1. Save and Close All PowerPoint and Excel files, then Open your PowerPoint presentation or your Excel model. All connected files (Excel) will open automatically. Make sure all connected files (Excel) are open and every chart is loaded.
2. Select *Package* or *Package All* from the ActiveGraf Office Ribbon in PowerPoint.
3. Read the instructions on the next page and then click Next.

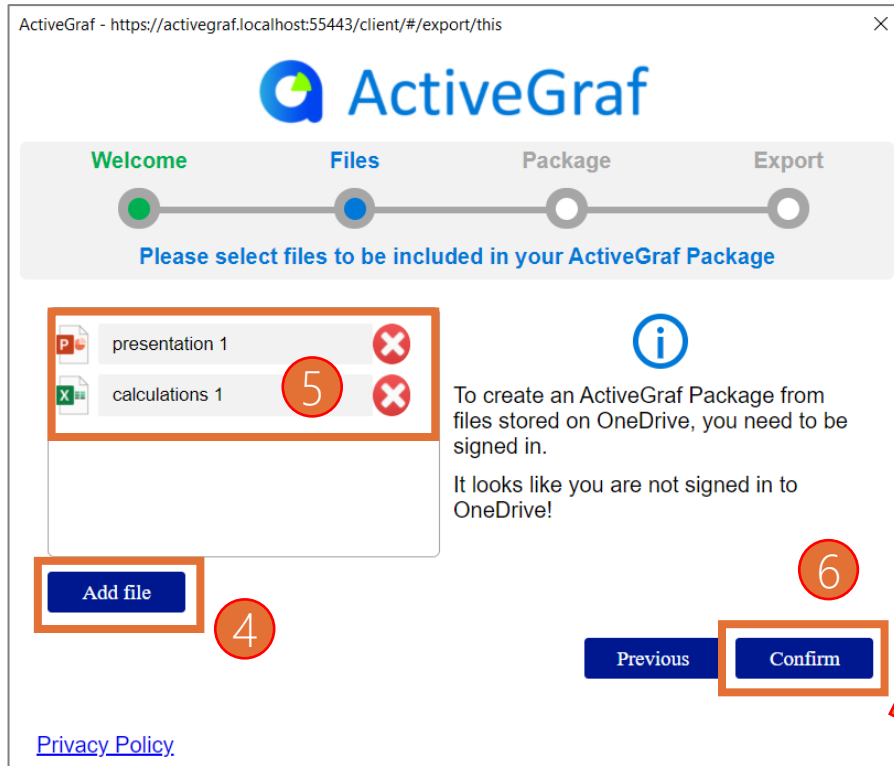


**Package** only the currently open PowerPoint file (from which you start the packaging) with the corresponding Excel file(s).



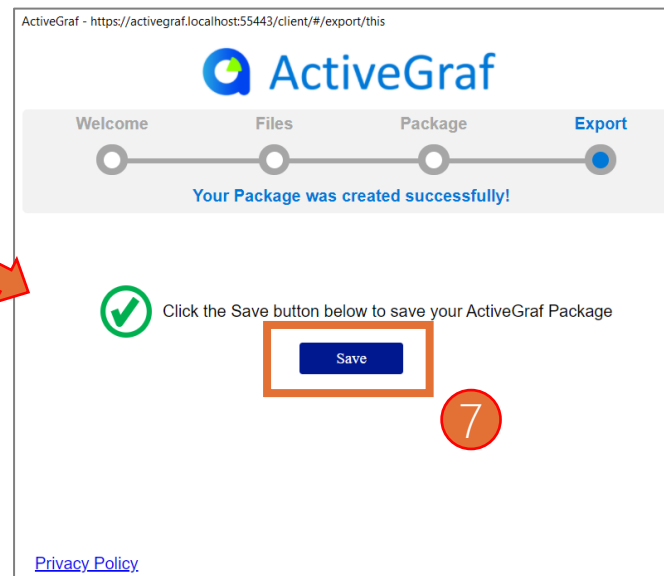
**Package All** the currently open all PowerPoint files with the corresponding Excel file(s).

# Packaging and Saving ActiveGraf enabled Files and Presentations II



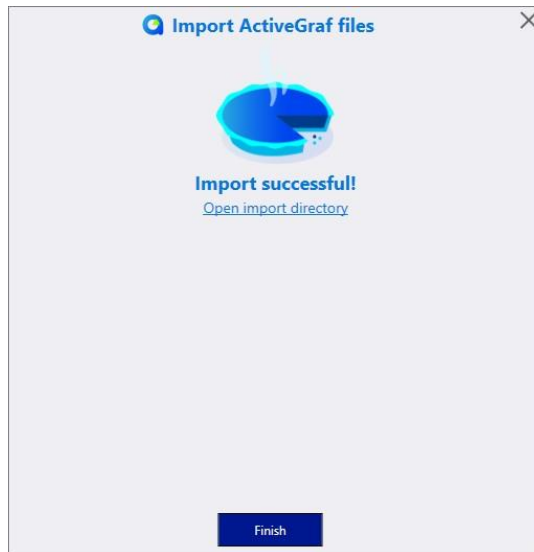
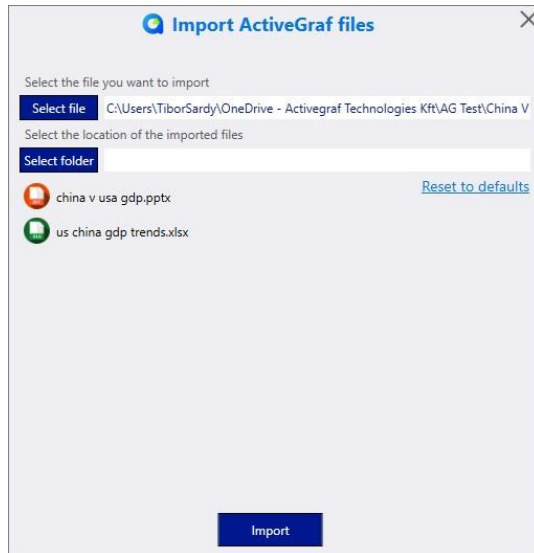
## Continue the following steps:

4. Add more files to your package file. All types of files can be added.
5. Rename your files as necessary.
6. Confirm the changes.
7. Finally Save your ActiveGraf Package to one of the following drivers in a conventional way:  
Local drive, OneDrive, OneDrive for Business, Box, Dropbox, Google Drive





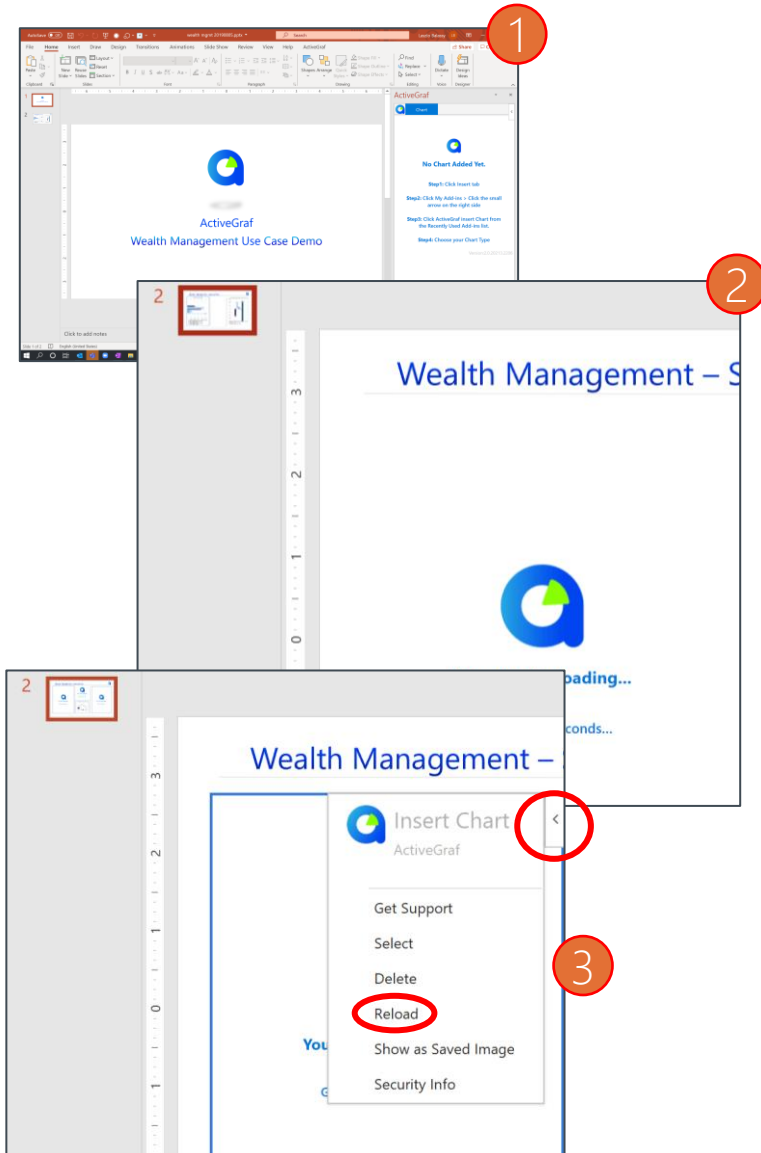
# Importing ActiveGraf Presentations



- To import .actg ActiveGraf files follow the below steps
- Double-click on the .actg file
- The Import Dialog appears (you may need to manually switch to the ActiveGraf server window depending other software you have running)
- Select the destination folder where you want to place the Excel and PowerPoint files. Be careful with the folder name, it should not contain special characters. Corresponding database content will be merged to the ActiveGraf Server database automatically.
- Name your files. (Click on the file name) The system will warn you if files with the same name already exists in the defined location.

Note: To ensure that all data synchronization integrity is retained, the *Import* process does not allow the replacement of already existing files with new ones.

# Opening ActiveGraf Presentations



1. Open your ActiveGraf enabled PowerPoint file and wait for the ActiveGraf logo in the Task Pane to spin.
2. Click on a slide that contains an ActiveGraf, and the chart starts loading. ActiveGraf recognizes the active content and opens all connected Excls automatically!
3. On the rare occasion that a chart gets stuck loading, just click on the top right corner of the given chart, a dropdown menu will appear and choose "Reload".

If you have too many applications running, it can happen that your machine does not have sufficient memory or processing power to run ActiveGraf, and they will not load. If this happens, close all applications, including the subject PowerPoint or Excel. Then repeat steps 1 and 2 above.

Please wait until all files are properly opened and the ActiveGraf Task Bars are fully loaded both in PowerPoint and in Excel. If you only want to work with Excel content you can also open the Excel file alone.

Note: The first time you open an ActiveGraf enabled presentation or spreadsheet after import, the loading process takes a bit longer, as this when ActiveGraf builds its connections.

**Important:** Before presentation load all ActiveGraf. In presentation mode, the usage is easier if the "On Mouse Click" is disabled (Transition > Advance Slide)

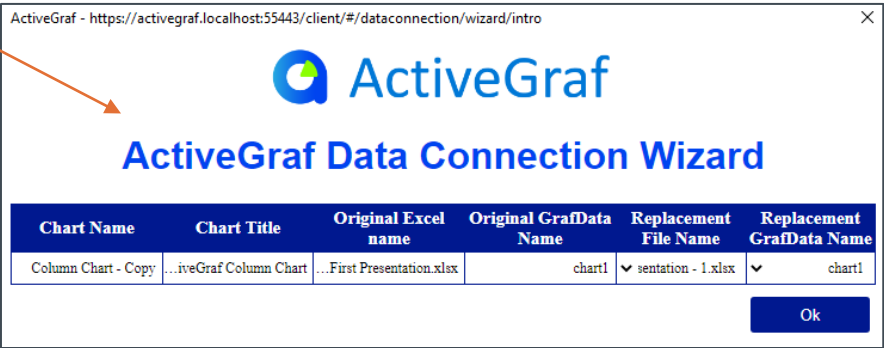
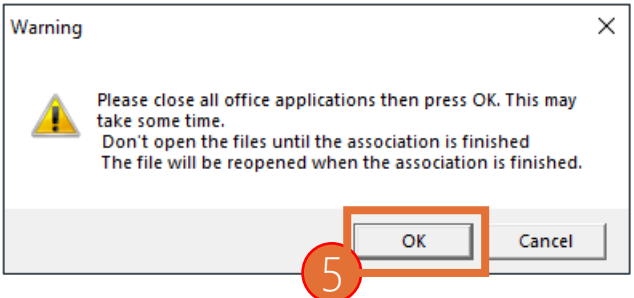
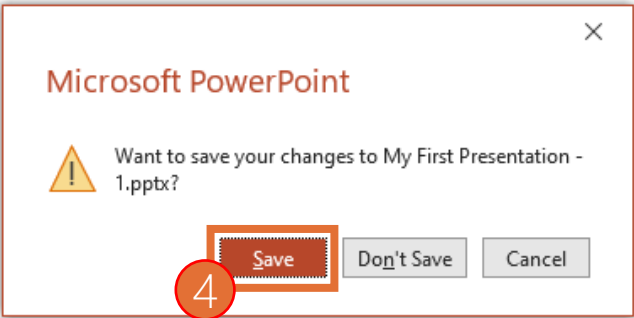
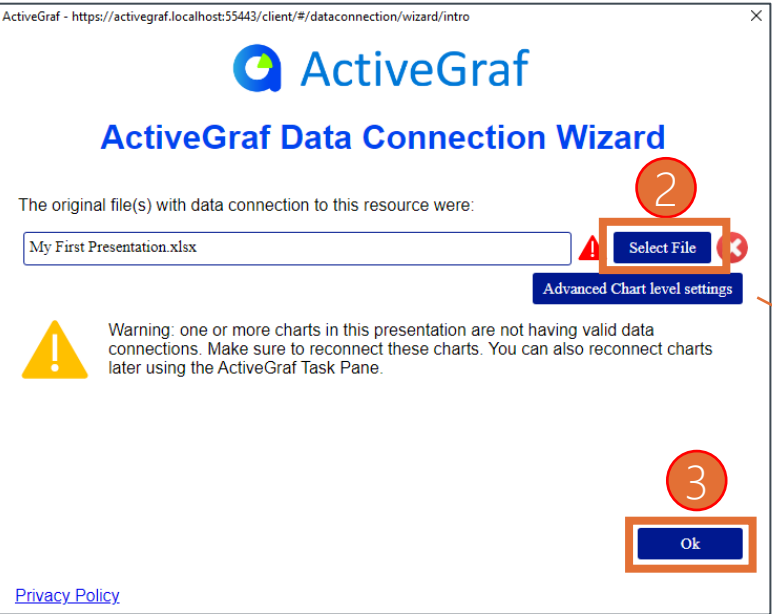
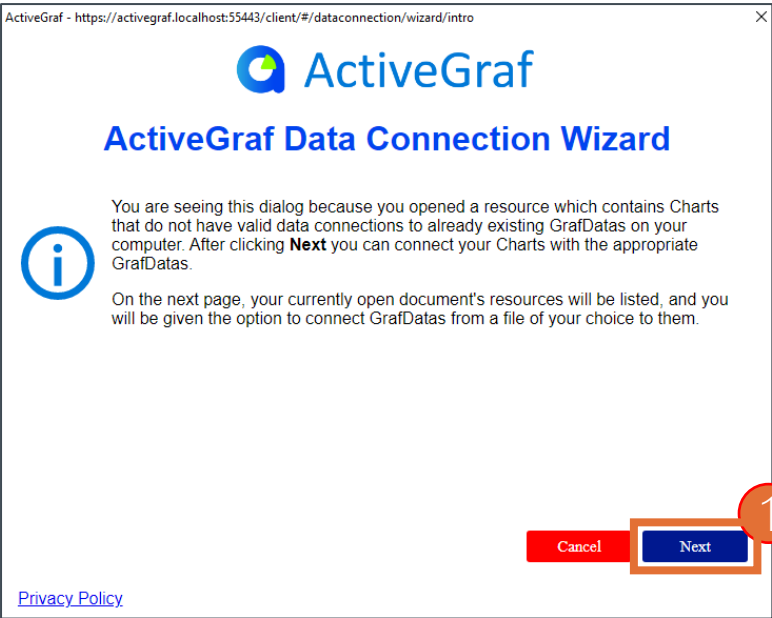
Note: For moving datapoints on ActiveGraf: click – drag – click

# Data Connection Wizard

If the file path and/or the file name were changed, a data connection wizard will pop up when you open the PowerPoint presentation. You can also manually initiate the Data Connection Wizard to link a different version of your spreadsheet to the presentation or dashboard.

You will receive a pop-up alert. Before clicking OK, SAVE and close your PowerPoint and Excel files.

Then hit OK and the PowerPoint presentation and reconnected Excel(s) will re-open automatically.



Open the Advanced Chart level settings to connect specific charts with the appropriate Grafdatas.



# Cloning Charts, Excel and PowerPoint files

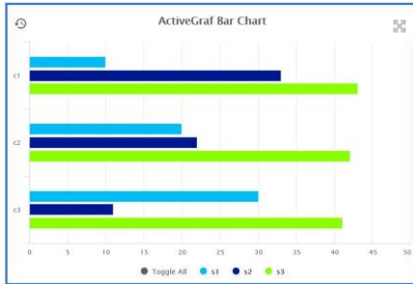


Chart cloning (**copy/paste**) is possible only within the given file (i.e. copy a chart within a spreadsheet or copy a chart in a presentation)

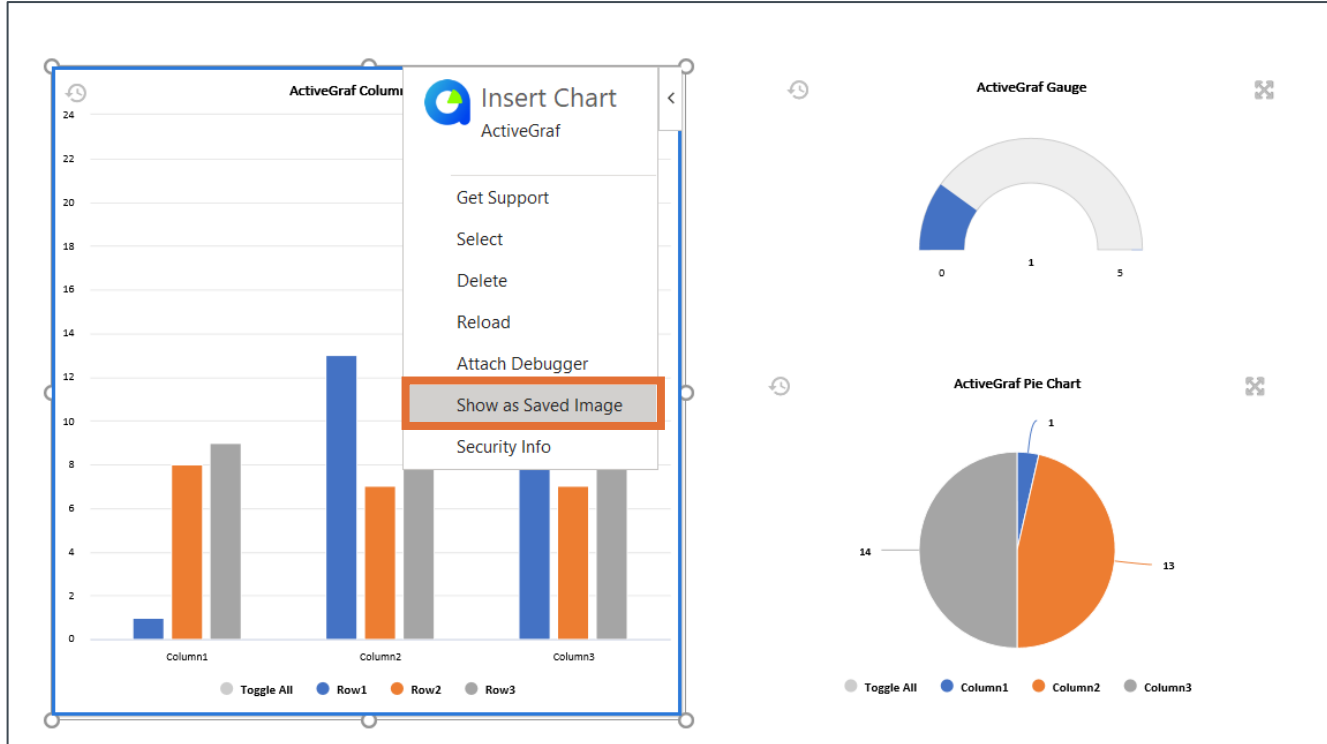


You can **Save As** Excel files with ActiveGraf active content. Grafdatas will be cloned, the GrafData name will remain the same.



You can **Save As** PowerPoint files with ActiveGraf active content. The new PowerPoint file will be connected to the original Excel file from which the Grafdatas come.

# Sending ActiveGraf Enabled Spreadsheets and Presentations



Working with and presenting ActiveGraf enabled presentations require a locally installed ActiveGraf license. Users without a working license will not be able to benefit from the interactive analysis features.

You can share your ActiveGraf presentations with people without ActiveGraf license in PDF format.

You can also choose 'Show as Saved Image' on the charts you would like to send in a PowerPoint file. Only the static view of the ActiveGraf will be visible to the recipient.

Note: This function "freezes" the charts in their current state. Do not forget to switch them back before you continue working with the files in an ActiveGraf enabled environment.

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## Happy Insights!

We believe that ActiveGraf is user friendly but if you have any feedback on how we can improve the experience, we would love to hear it!  
Just leave a message at [CustomerService@activegraf.com](mailto:CustomerService@activegraf.com).  
Thank you!

