

ActiveGraf

First Steps Guide v3

Using Instructions

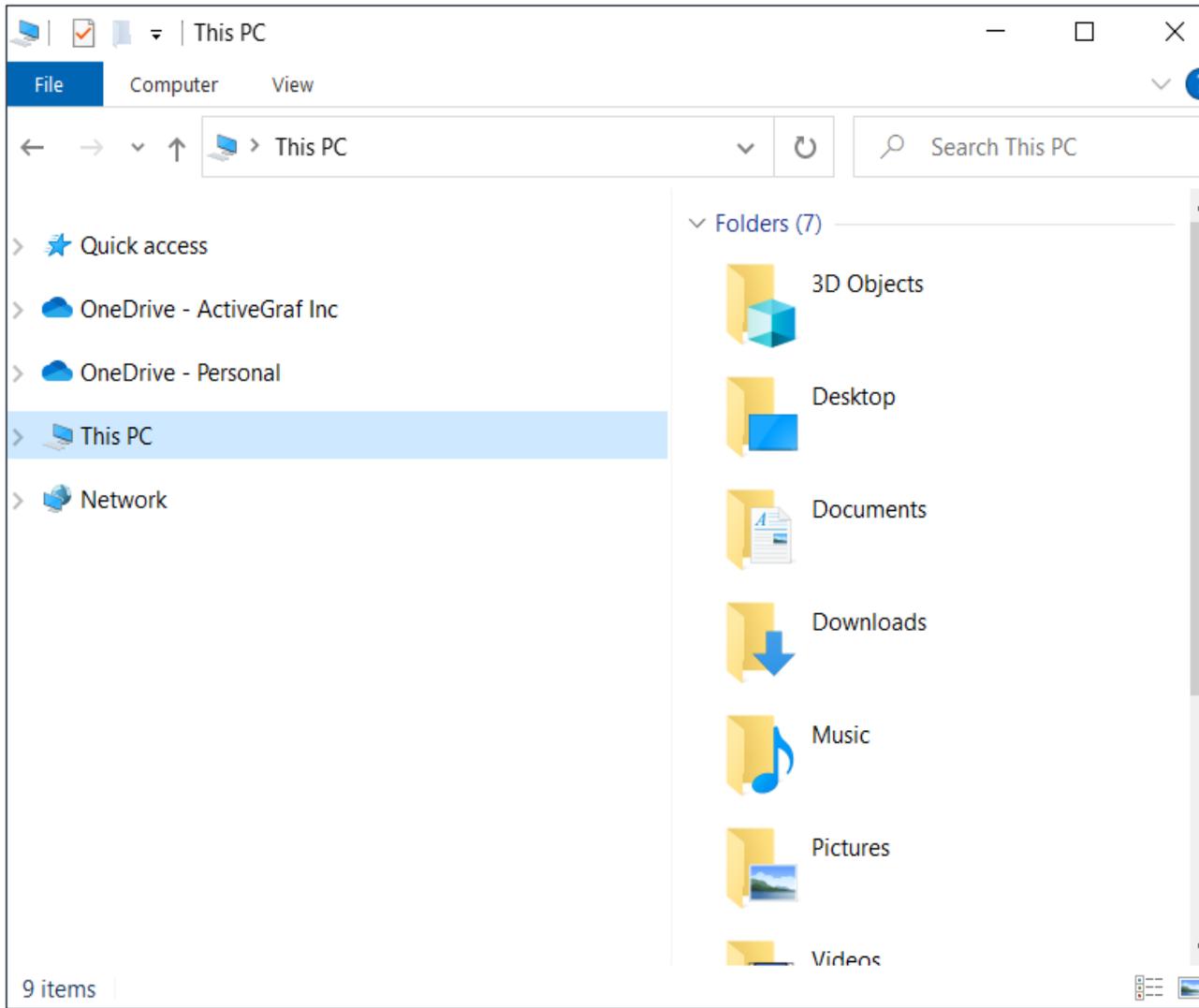


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First step



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

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

- 1. ActiveGraf Office Ribbon:** Located in the top ribbon, it includes the 'Insert Chart' command and the 'ActiveGraf' task pane.
- 2. Insert Chart Command and Pane:** A dialog box titled 'Step 1 - Select Chart Type' is shown, allowing users to choose from various chart types (Area, Bar, Column, Line, Spider, Pie, Gauge, Table, Radio Button, Checkbox, Dropdown, Slider) or clone an existing one.
- 3. ActiveGraf Task Pane:** A panel on the right side of the screen that provides configuration options for the chart, such as Chart Name, Chart Type, Add Tag, Assigned GrafData, GrafData Path, Chart Style, and Color Palette.
- 4. ActiveGraf Column Chart:** A chart displayed on the worksheet, showing data for three columns (Column1, Column2, Column3) across three rows (Row1, Row2, Row3). The chart is interactive, with a 'Toggle All' button and row selection options.

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

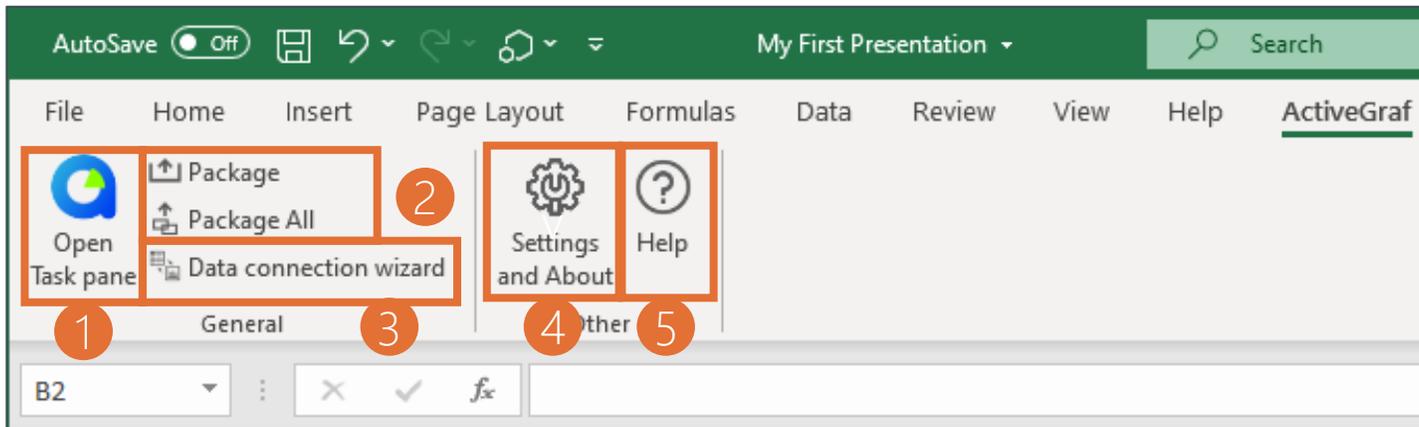
ActiveGraf System components:

- 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

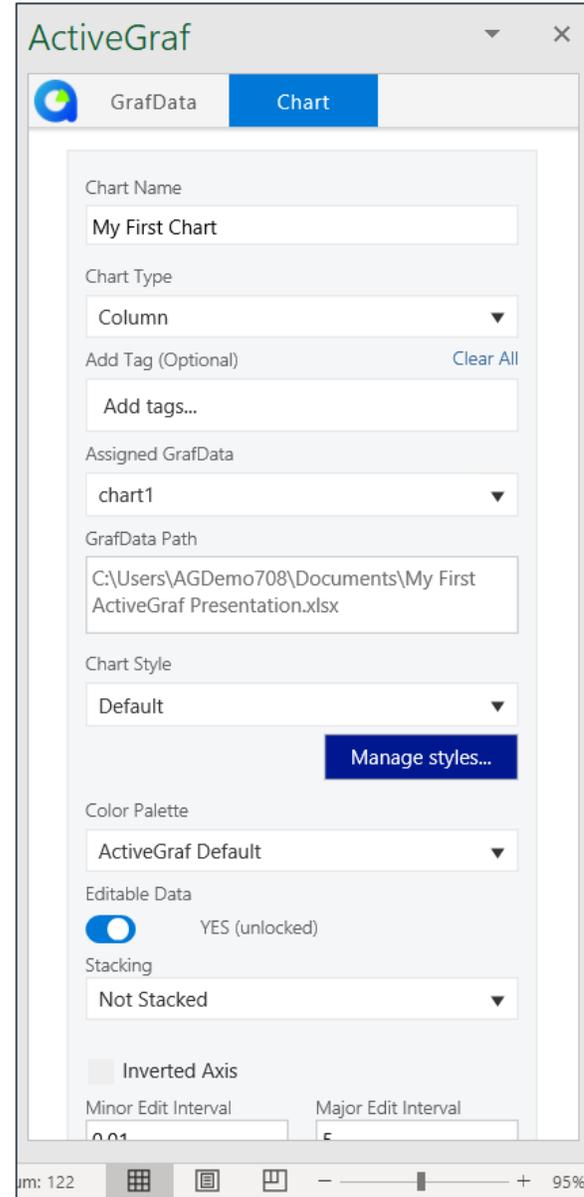
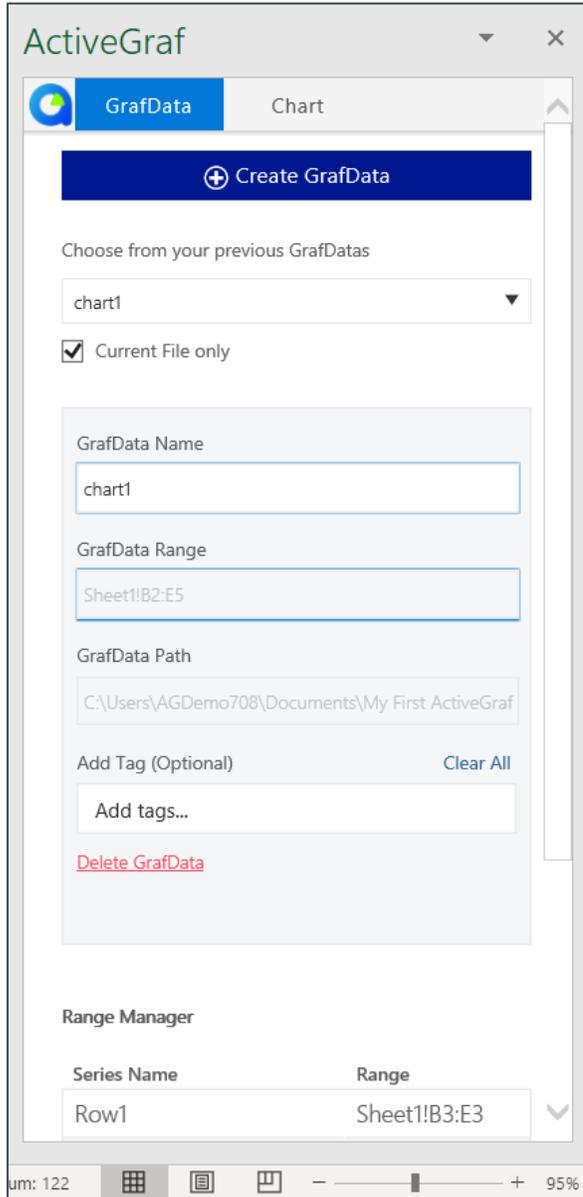
The Office-Ribbon

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 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).

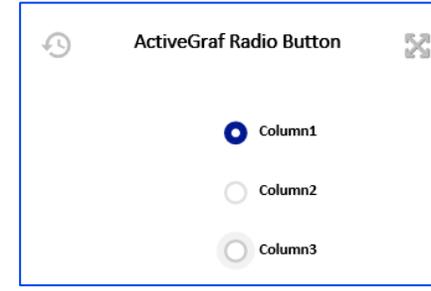
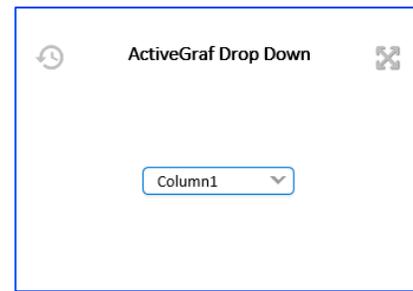
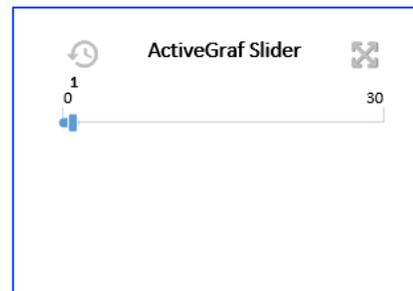
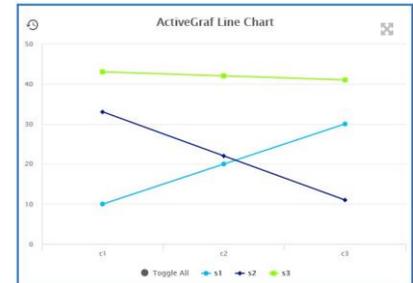
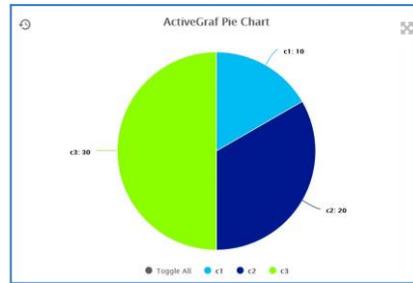
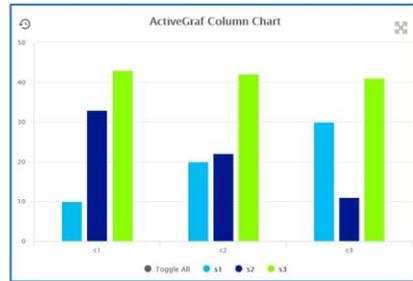
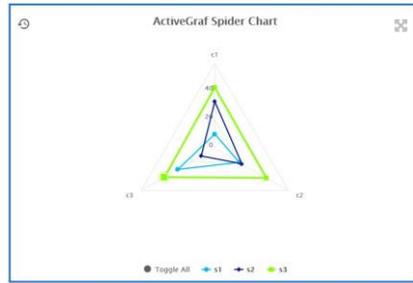
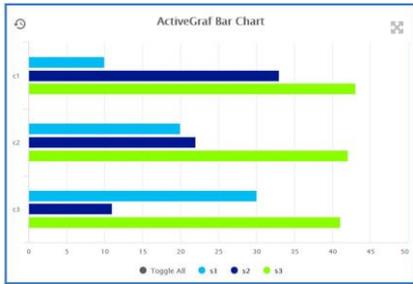
Note: Charts are configured, but not created in the Task Pane. ActiveGraf charts can only be created through the Insert Chart functions (see page 10 – Creating Charts)

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 showing three data series (x1, x2, x3) across three categories (c1, c2, c3). The table displays the following data:

	c1	c2	c3
x1	60	20	30
x2	33	22	11
x3	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

The top screenshot shows Microsoft Excel with a data table in the range B2:E5. The data is as follows:

	2021	2022	2023
Sales	12	13	14
Cost	23	24	25
Profit	35	37	39

The ActiveGraf task pane is open on the right, showing the 'Create GrafData' button. A red box highlights this button, and a red circle with the number '2' is next to it. Another red circle with the number '1' is next to the data table.

The bottom screenshot shows Microsoft PowerPoint with the ActiveGraf task pane open. The 'Insert Chart' button is highlighted with a red box and a red circle with the number '4'. A tooltip for 'Insert Chart' is visible, stating 'Insert ActiveGraf charts to the current office document'. The main slide area displays a message: 'No Chart Added Yet. Step1: Click Insert tab. Step2: Click My Add-ins > Click the small arrow on the right side'. A red circle with the number '4' is also next to the 'Insert Chart' button in the task pane.

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

	A	B	C	D	E
1					
2			Column1	Column2	Column3
3		Row1	1	13	14
4		Row2	8	7	7
5		Row3	9	20	21
6					
7					

6 GrafData has been saved!

ActiveGraf

GrafData Chart

+ Create GrafData

Choose from your previous GrafDatas

Search in: tags or GrafData Names

Current File only

GrafData Name

GrafData Range Use Selected

Sheet!B2:E5

GrafData Path

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

Add Tag (Optional) Clear All

Add tags...

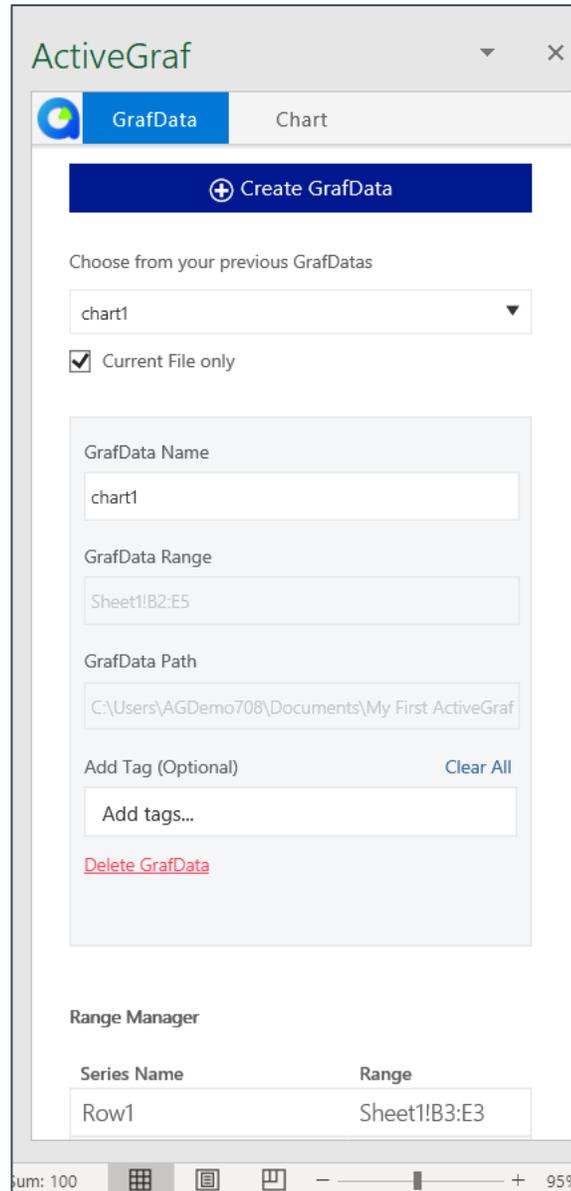
Create

Sum: 100 95%

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



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:

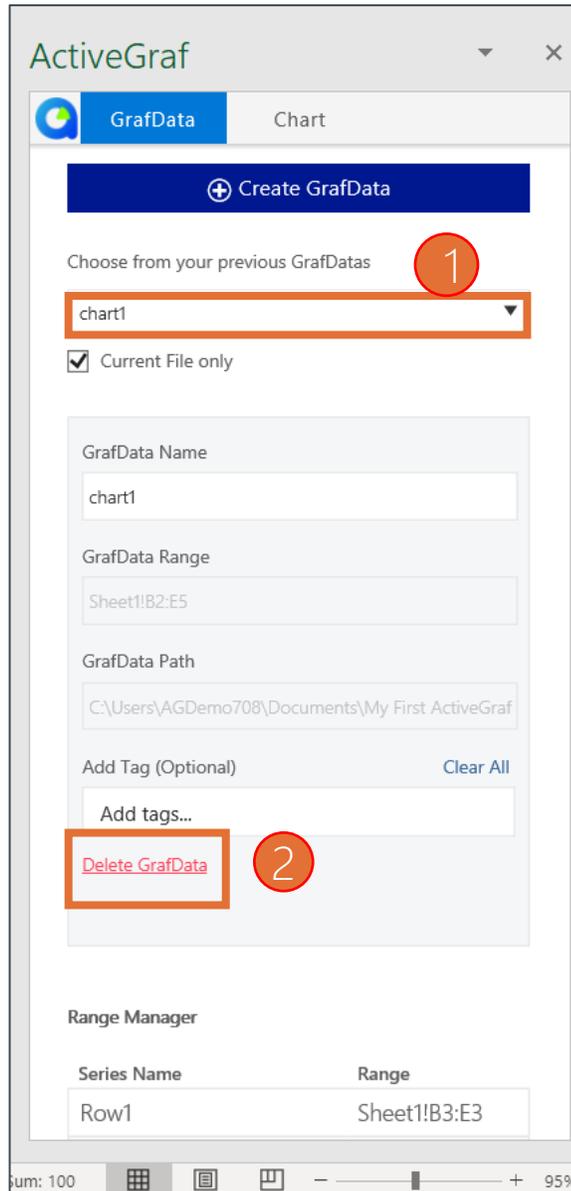
- Change the name of the GrafData
- Add Tags to the GrafData.

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

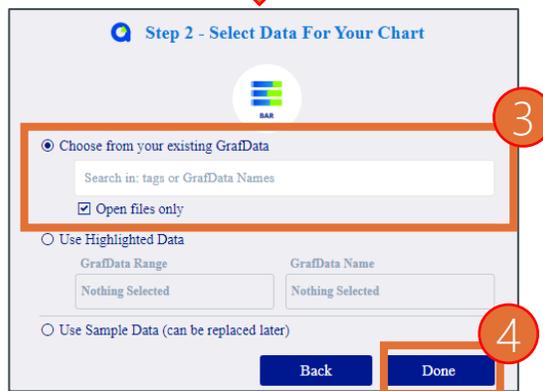
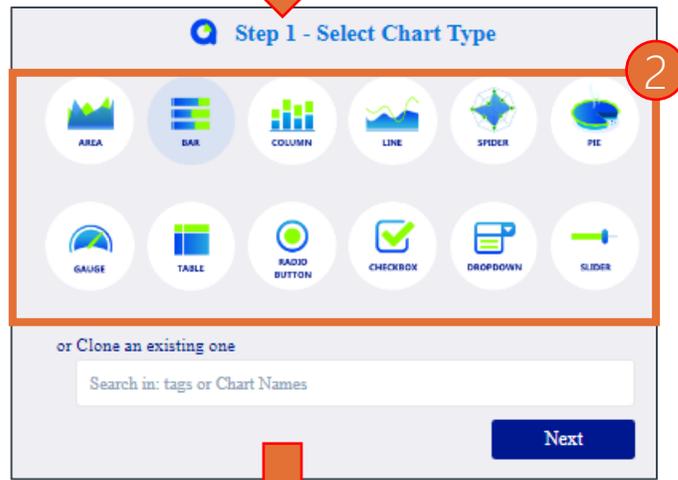
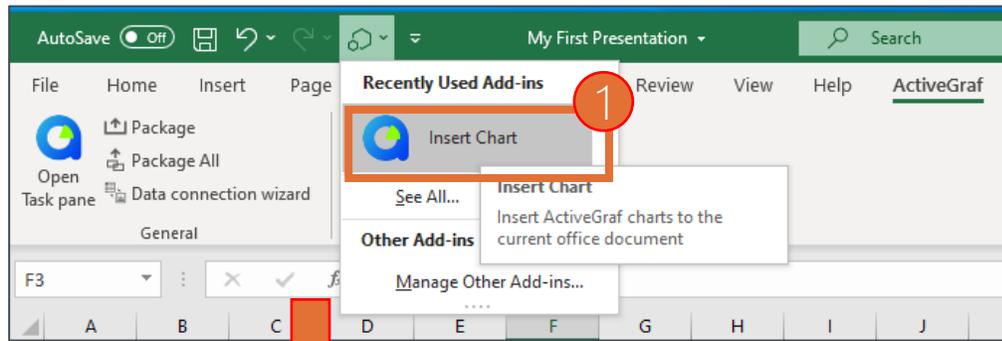


- Delete GrafData

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.

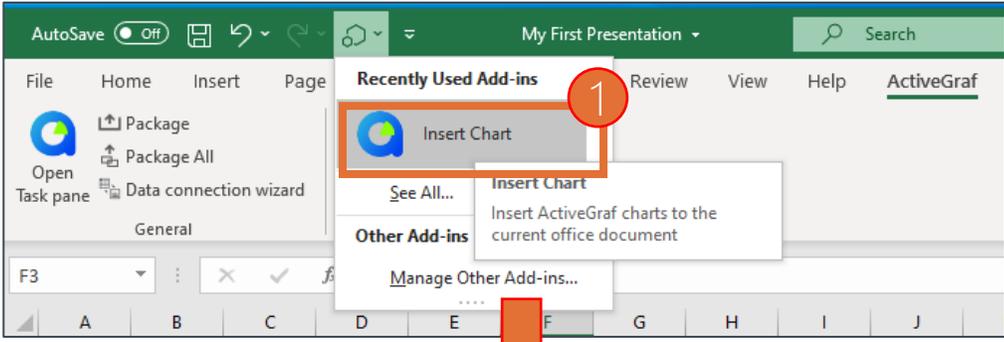
Create a new chart and bind it to an existing GrafData

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

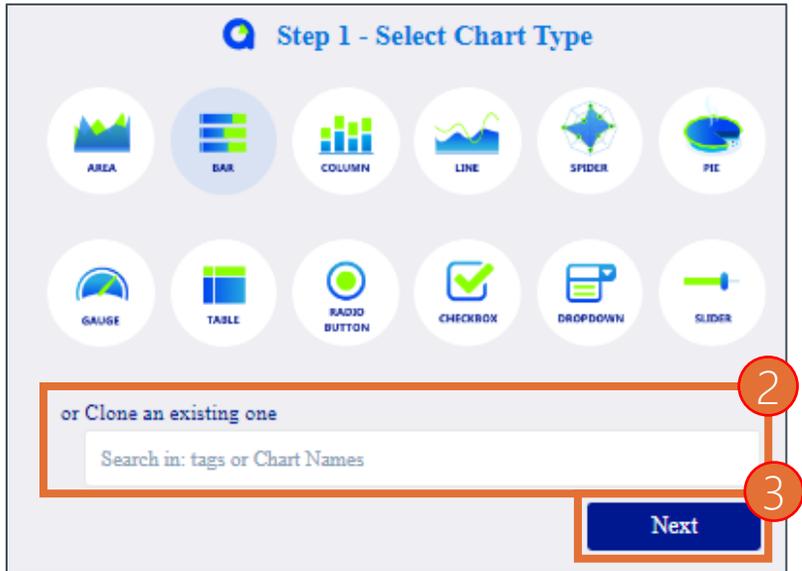


First option - clone an existing Chart and customize it

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.

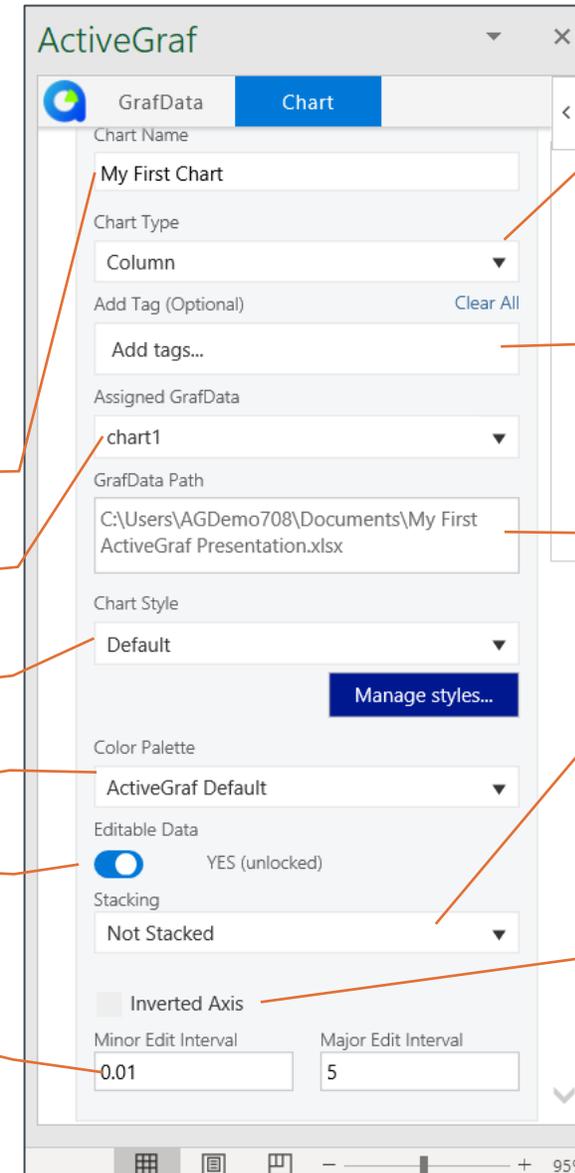
Display/Select the GrafData assigned to the selected Chart

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.



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

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

Display or hide the Tooltip on the chart.

Swaps Series and Categories of the connected GrafData

Text written here overwrites the Title displayed in the Chart . This setting does not affect any other Chart or the original GrafData.

Chart Formatting

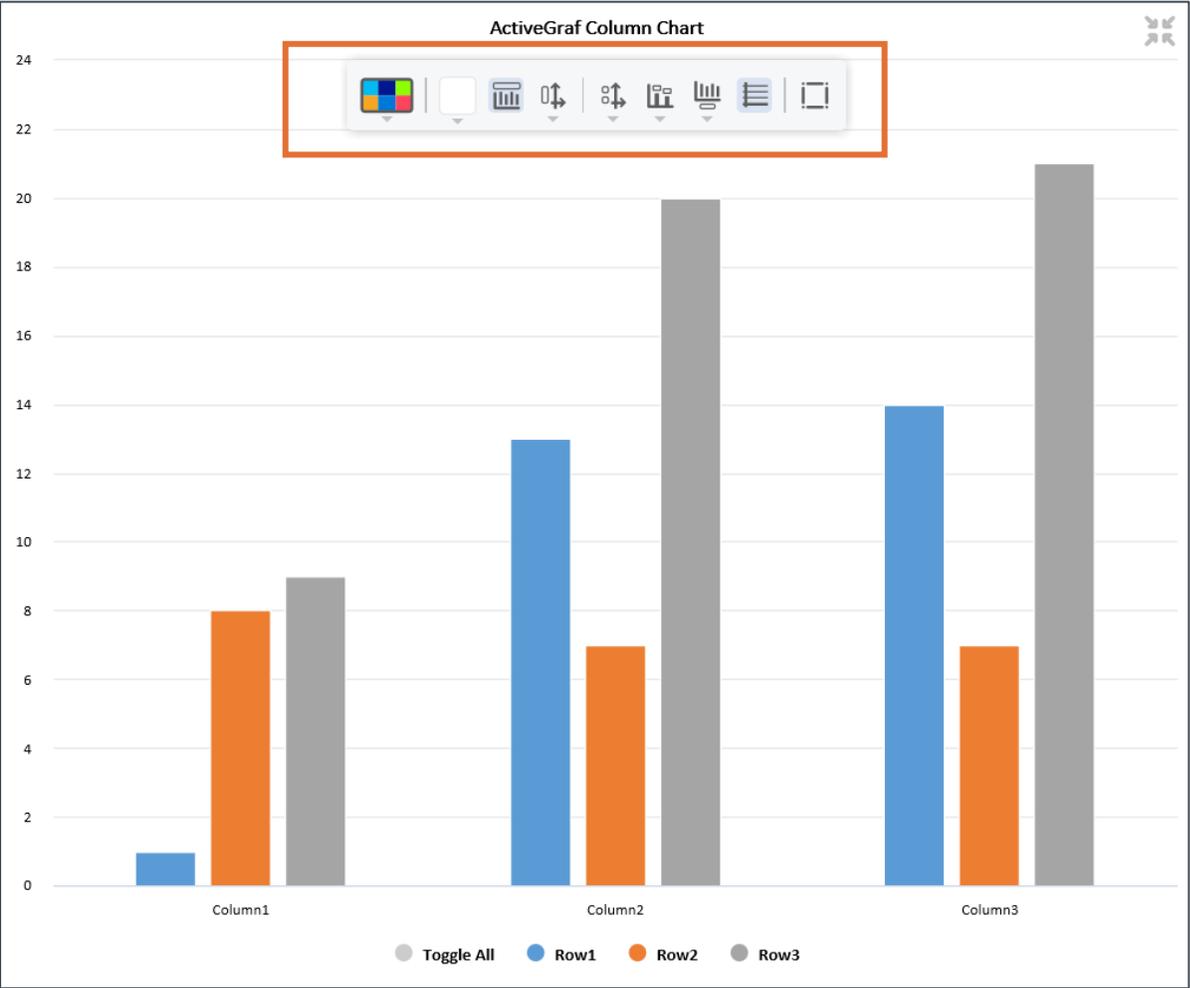
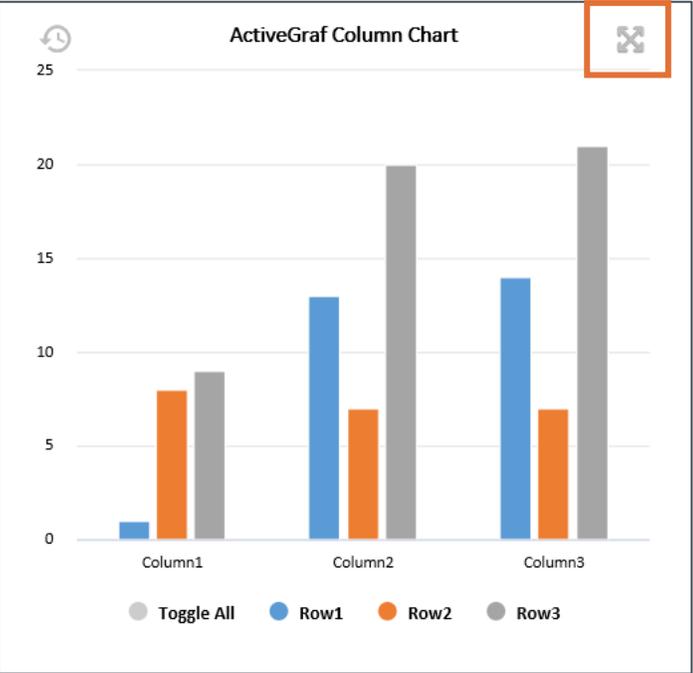
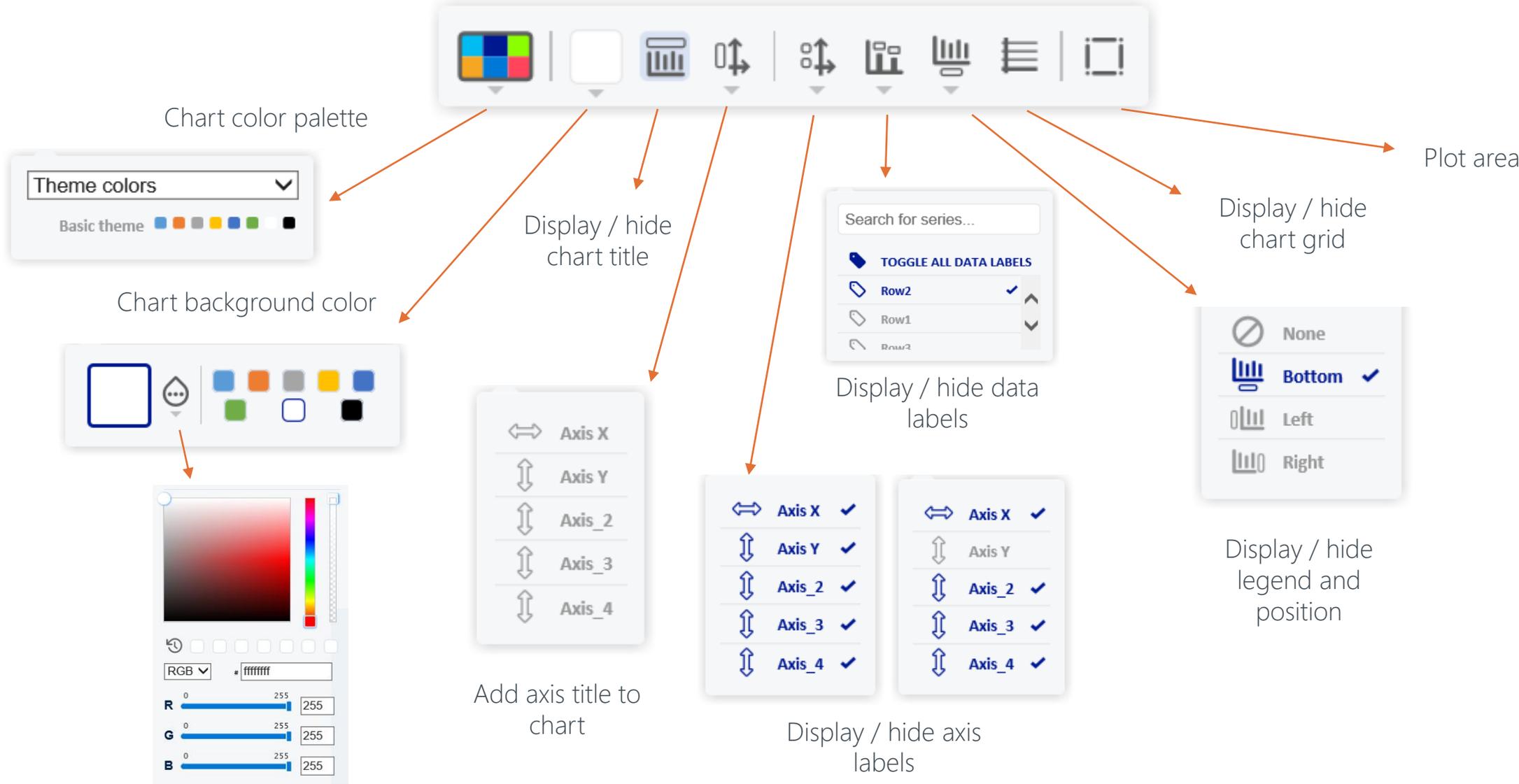
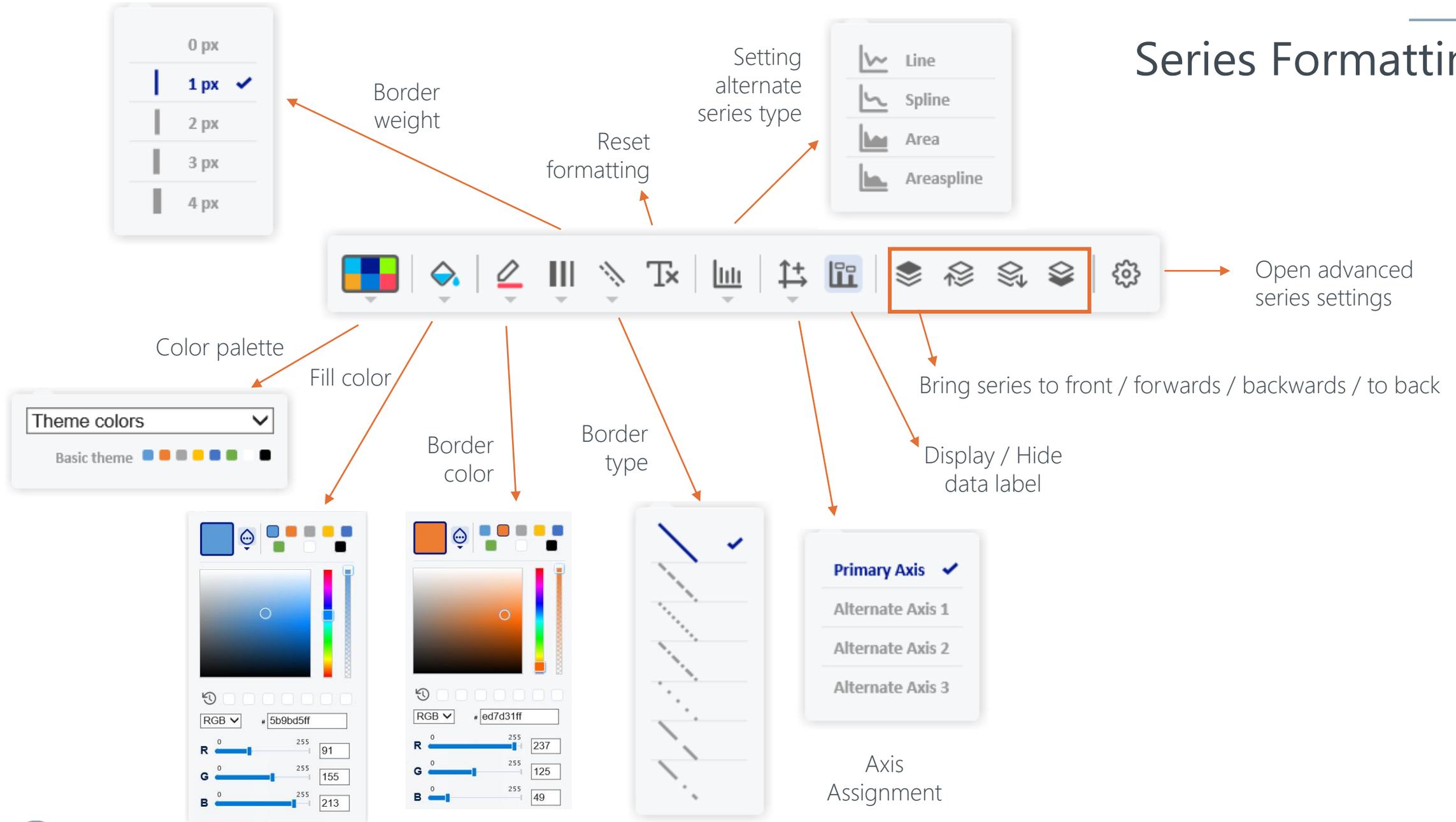


Chart formatting



Series Formatting



Advanced Series Settings

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

- Data protection:** Editable data
- Format source:** Format linked to source
- Number:**
 - Data category: General
 - Decimal spaces: 0
 - Magnitude: x 10⁰
 - Negative number: -1234
 - Thousand separator: none
 - Prefix: (empty)
 - Suffix: (empty)

Orange lines on the right side of the dialog box point to the 'Editable data' checkbox, the 'Format linked to source' checkbox, the 'Data category' dropdown, the 'Decimal spaces' and 'Magnitude' settings, the 'Negative number' and 'Thousand separator' settings, and the 'Prefix' and 'Suffix' input fields.

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 (# #, #,#, #.#)

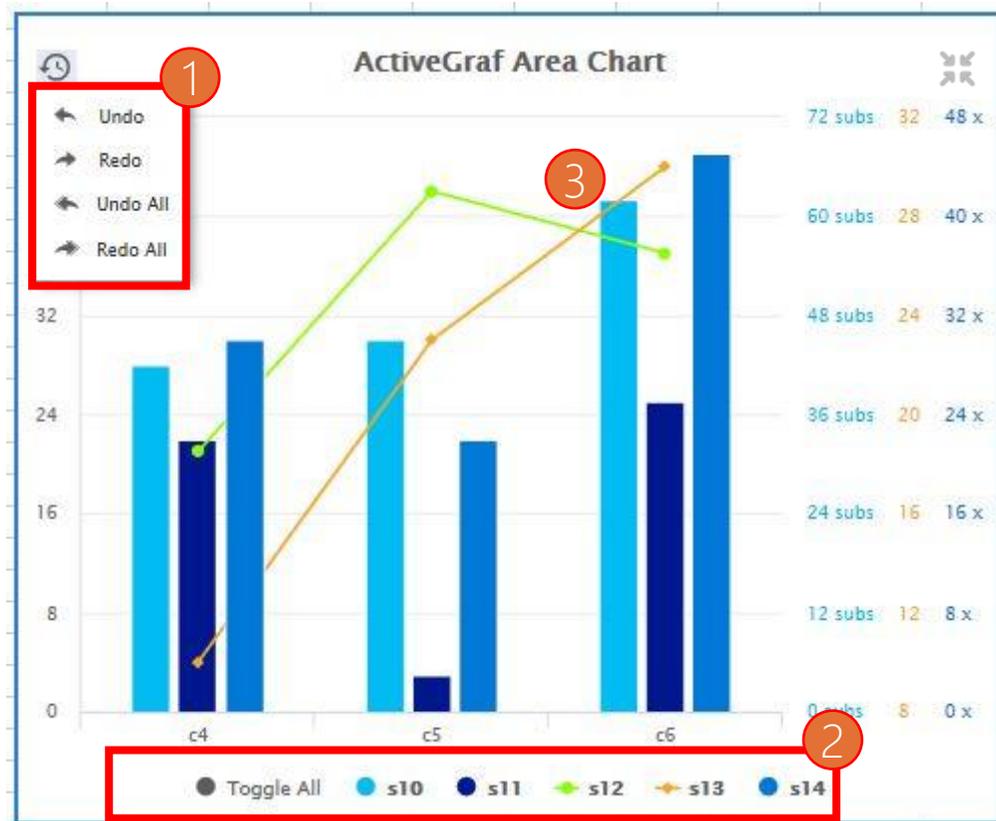
Each Data series can have unique labels before and after.

Text Formatting – Data Labels, Axis, Legend

The diagram illustrates the text formatting toolbar and its associated panels. The toolbar includes icons for font (T), size (8pt), color (A), bold (B), italic (I), underline (U), alignment (≡), rotate (↻), text rotation (Tx), and advanced settings (gear). Arrows point from these icons to their respective panels:

- Text font:** A panel with a search bar and a list of fonts including Agency FB, Algerian, Arial, and Arial Black.
- Text size:** A vertical list of font sizes from 7pt to 18pt, with 8pt selected.
- Text color:** A color selection panel featuring a color wheel, a color bar, and RGB input fields (R: 0, G: 0, B: 0).
- Alignment:** A panel with three horizontal lines representing different text alignment options.
- Advanced settings:** A gear icon labeled "Open advanced series settings".

Working with Charts

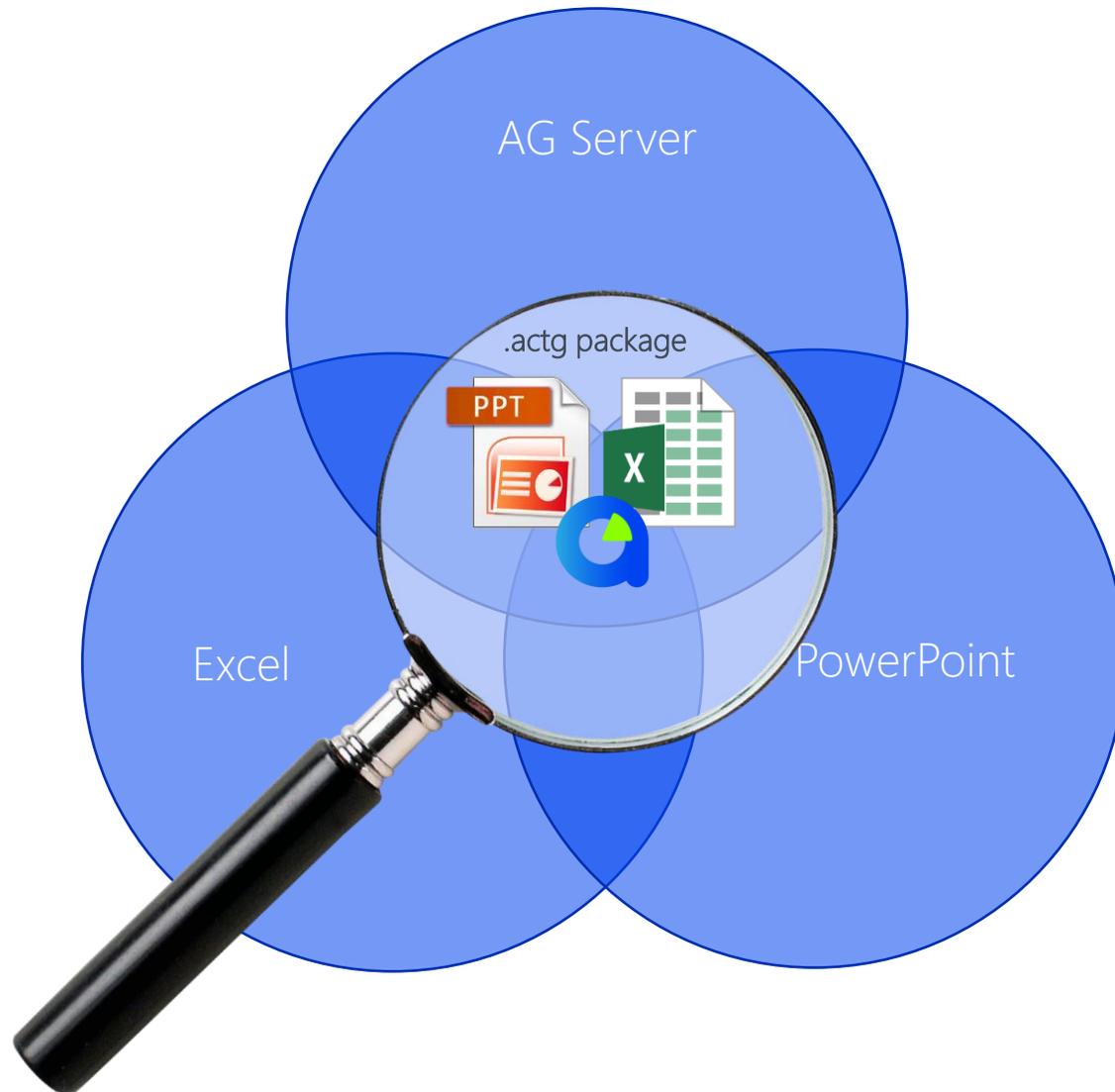


Presentation Phase

- In presentation mode users present developed data models visually and run What-If and scenario analysis tasks.
- User actions are within the ActiveGraf
- 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



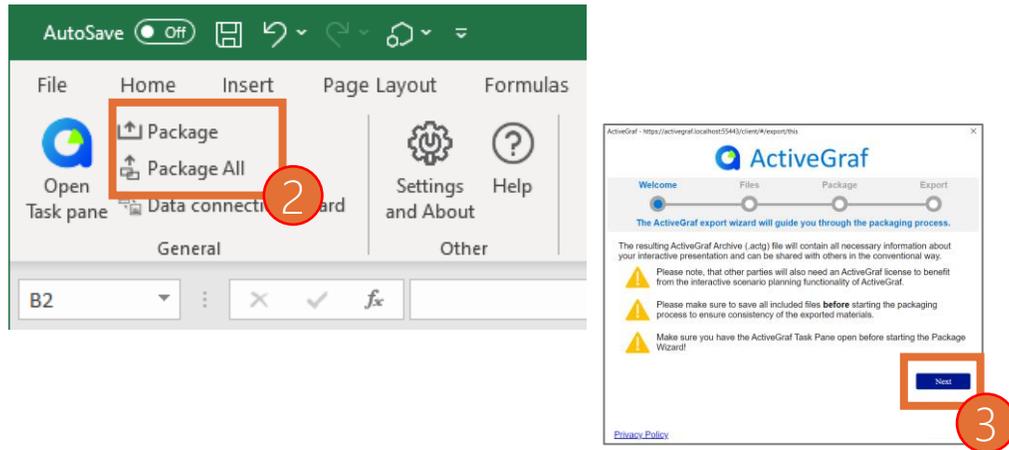
We encourage all users to save their ActiveGraf enabled file and work by Packaging to .actg **often**. In fact, packaging after every stage of work is a best practice, just as you would with any individual PowerPoint or Excel file.

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



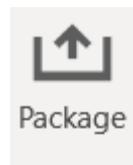
ActiveGraf Presentations consist of specially bound Excel and PowerPoint files and Database content. Sending such presentations to other users require special preparation process.

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.

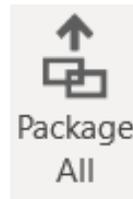
Important: make sure every chart is loaded and don't forget to save the individual Excel and PowerPoint files before Packaging!

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.

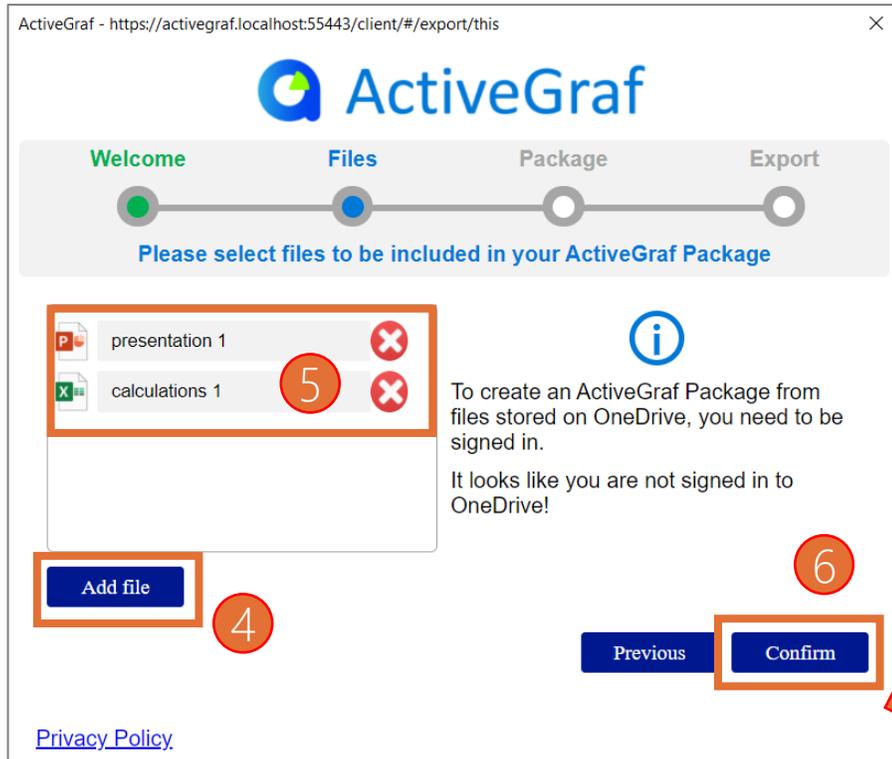


Package only the currently open PowerPoint file (from which you start the packaging) with the corresponding Excel file(s).



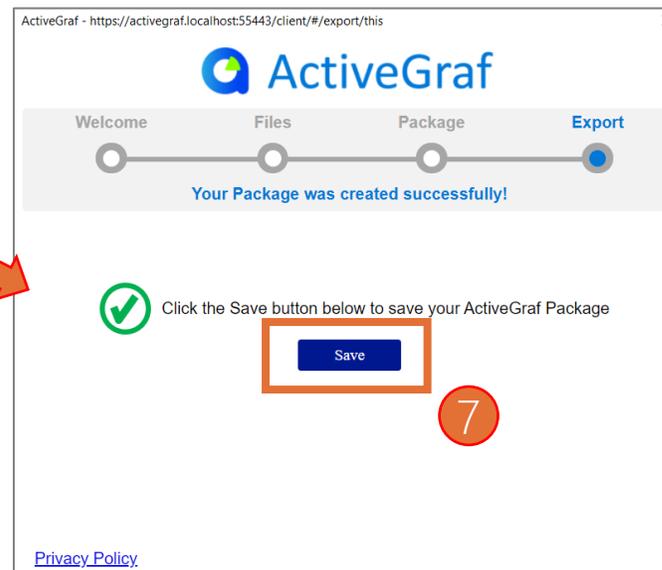
Package All the currently open all PowerPoint files with the corresponding Excel file(s).

Packaging and Saving ActiveGraf enabled Files and Presentations II

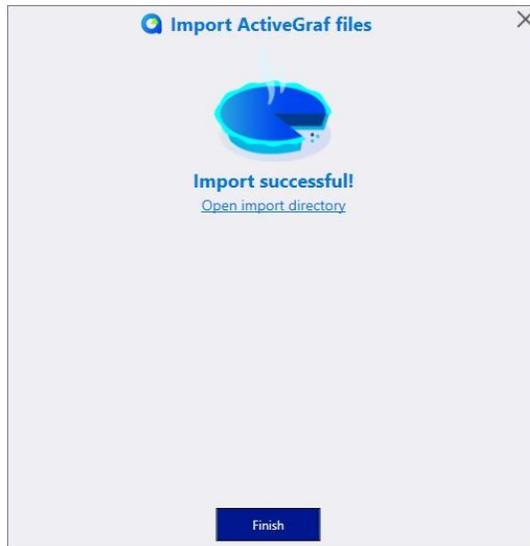
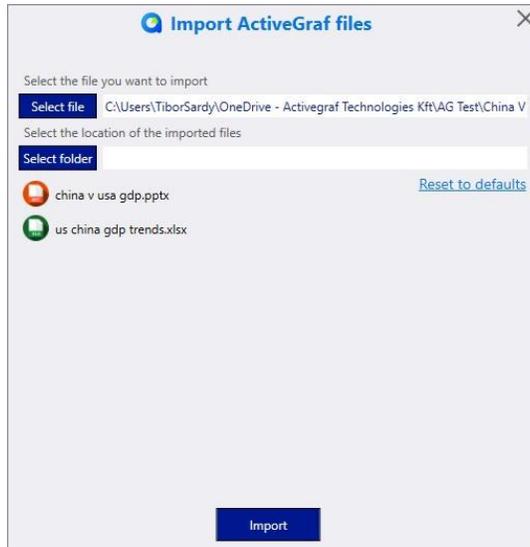


Continue the following steps:

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



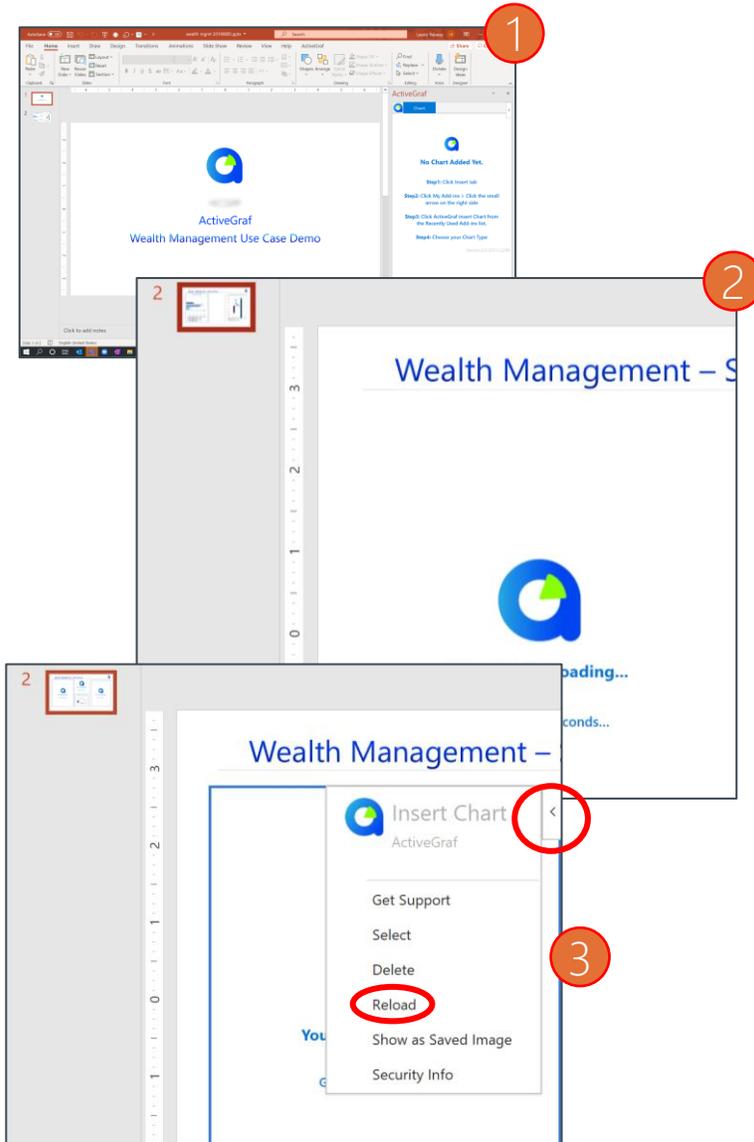
Importing ActiveGraf Presentations



- 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 ExceIs 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)

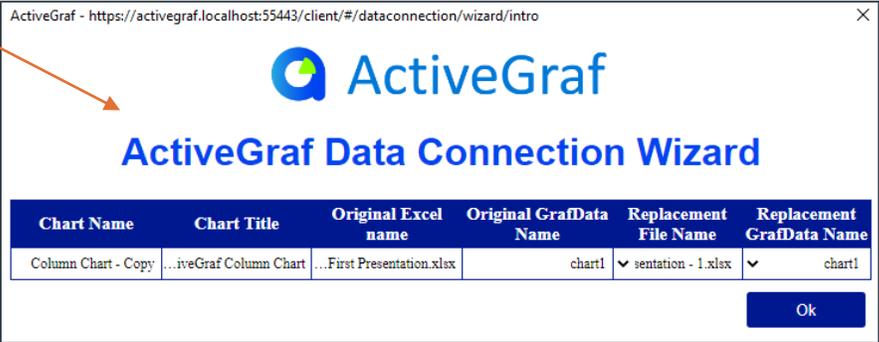
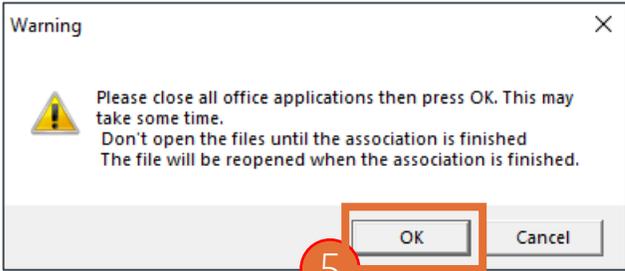
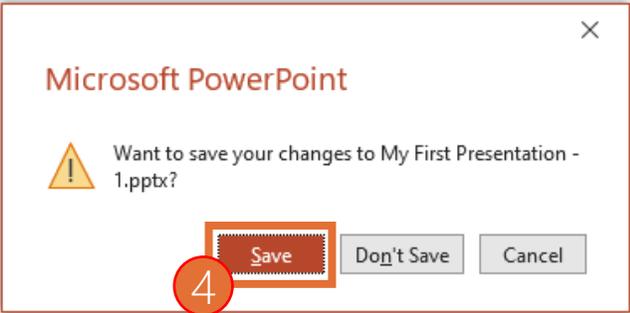
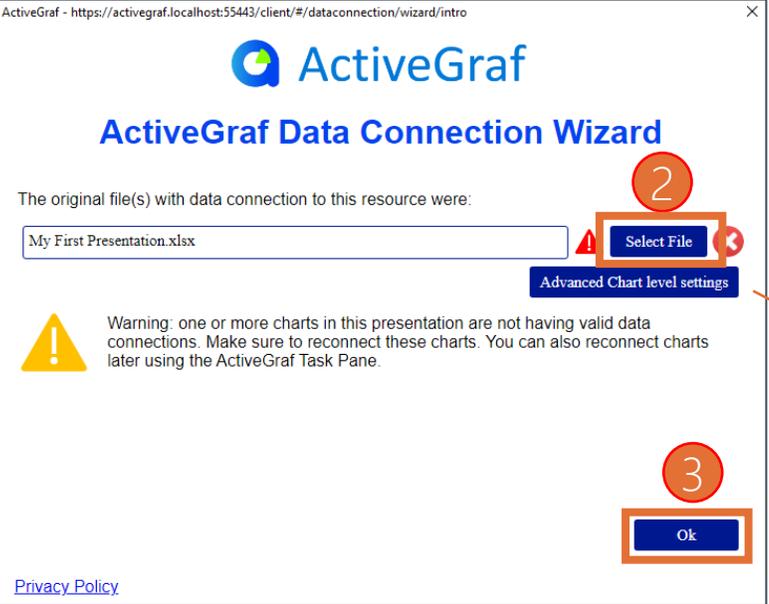
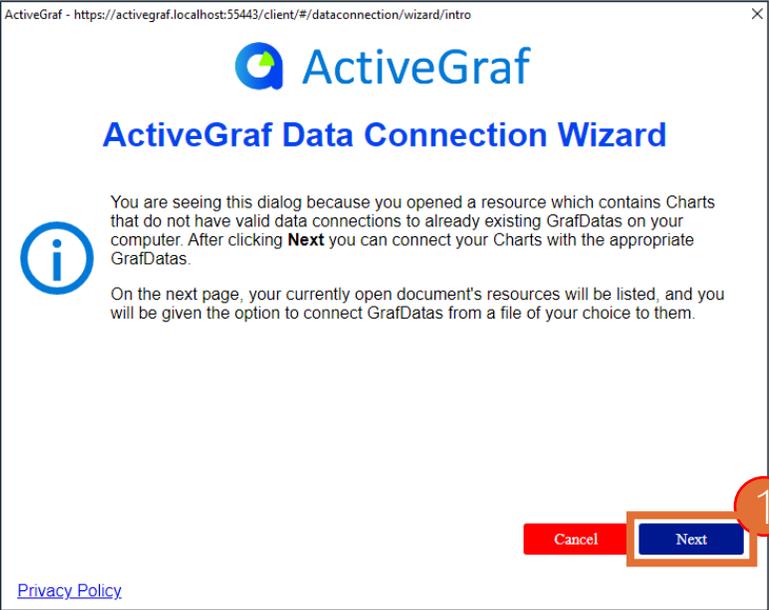
Note: For moving datapoints on ActiveGraf: click – drag – click

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

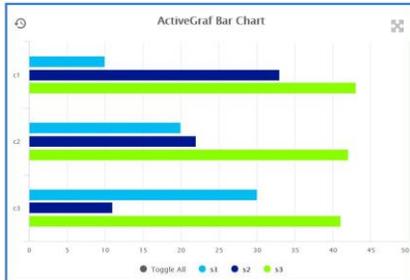
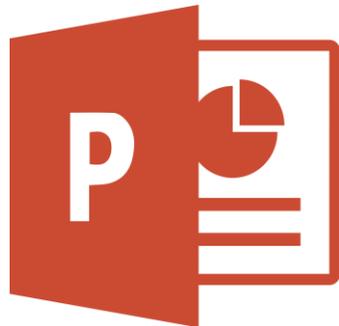


Chart cloning (**copy/paste**) is possible only within the given file (i.e. copy a chart within a spreadsheet or copy a chart in a presentation)

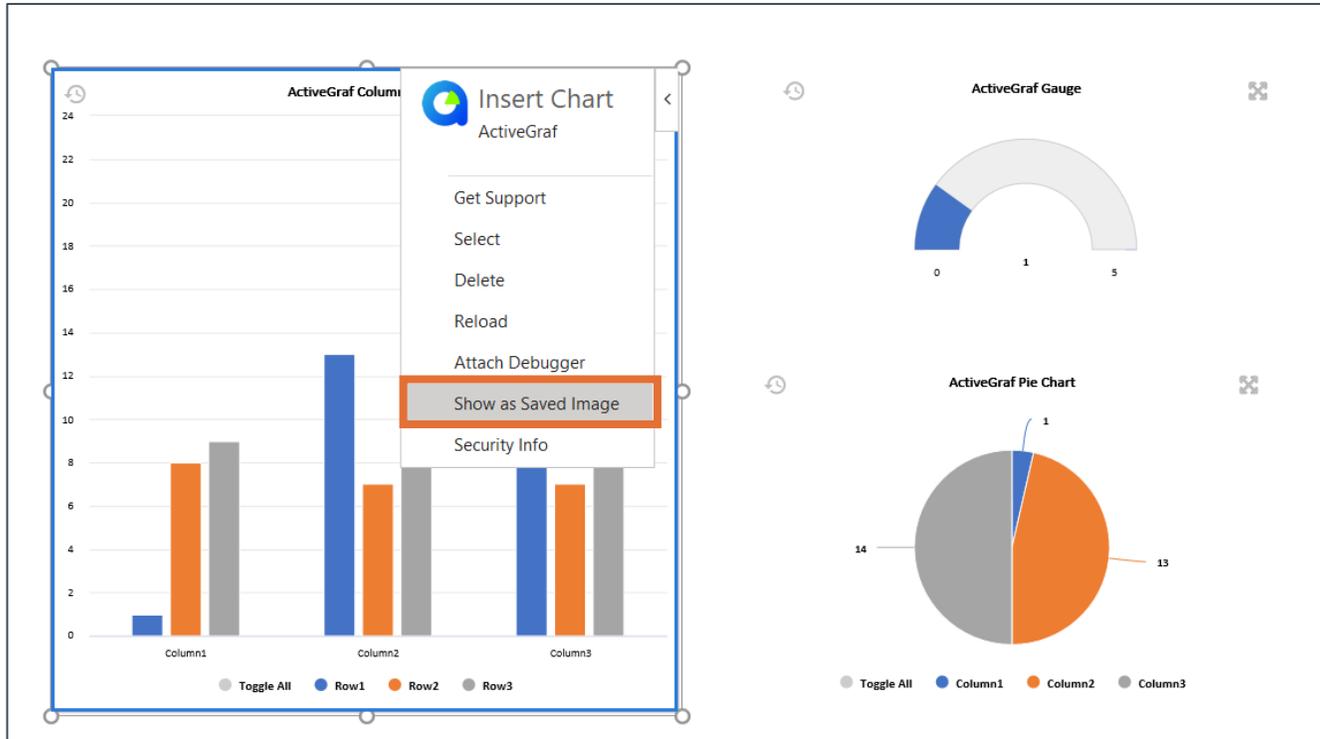


You can **Save As** Excel files with ActiveGraf active content. Grafdatas will be cloned, the GrafData name will remain the same.



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.

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.
Thank you!

