

# ActiveGraf

## Easy Install Guide v4

Installation, Add-ins Activation, Publication Server URL Connection



Welcome to the comprehensive guide on installing and updating ActiveGraf, your premier solution for scenario analysis and visual modeling.

Whether you're a first-time user eager to harness the power of ActiveGraf or an existing user seeking to enhance your experience through an updated version of ActiveGraf, this guide will navigate you through the process.

Our step-by-step instructions, coupled with visual aids, will ensure that you embark on this journey with confidence, resulting in a seamless and efficient installation.

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## Table of Contents

System Requirements	4
Get ActiveGraf Installation File	5
Get ActiveGraf Update File	6
Installing ActiveGraf	7
Installing ActiveGraf – Windows .NET	8
Add-ins in Excel	9
License Activation	10
Quick Access in Excel	11
Publication Server URL	12
Add-ons in PowerPoint	13
Quick Access in PowerPoint	14
Update ActiveGraf	15



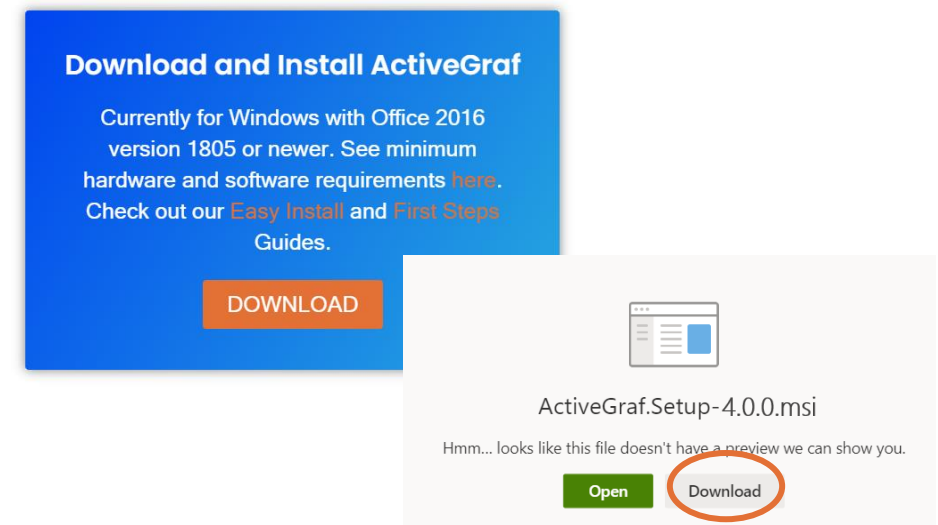
# System Requirements

- ActiveGraf is an on-premise software application which runs in a single instance personal computer.
- To unlock the potential of ActiveGraf, ensure your system meets the following minimal hardware requirements:
  - A Microsoft Windows Compatible PC as your base platform.
  - An 8<sup>th</sup> gen Intel Core i7 processor or faster equivalent, enabling efficient performance.
  - A minimum of 8 GB RAM or more to manage multitasking capabilities.
  - The ActiveGraf user experience has been specifically tailored to support direct screen interactions on touch capable devices.
- ActiveGraf integrates into your Windows environment, with the support of the following software requirements:
  - Windows 8.1, Windows 10, Windows 11
  - Microsoft Office for Windows 2016 (version 1805 of above)
  - Microsoft ASP .NET Core 6.0 and Microsoft Windows .NET Desktop Runtime 6.0
  - ActiveGraf requires full on-premise installation of Microsoft Office.
- ActiveGraf leverages Office Add-in technology (Excel and PowerPoint add-ins)
- The ActiveGraf Application Server operates locally on your computer, enhancing efficiency and control of your data.



# Get ActiveGraf Installation File

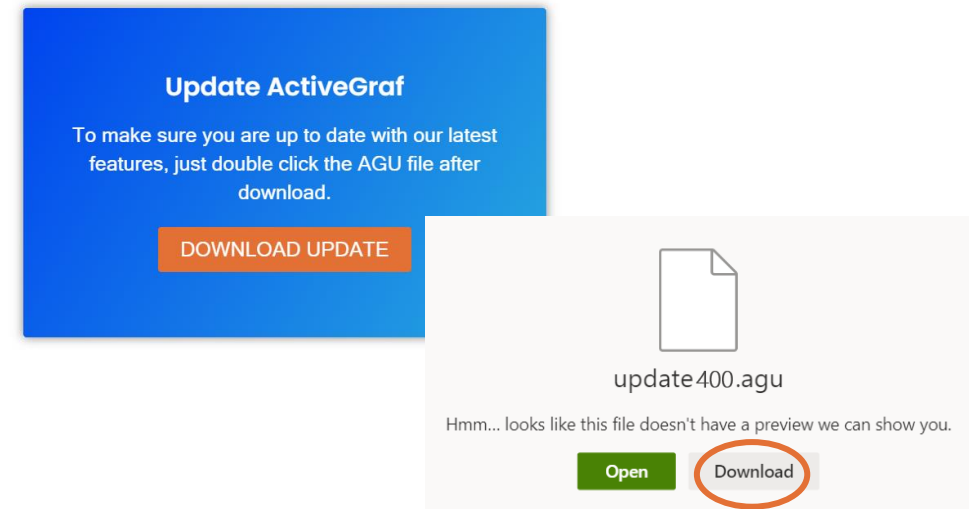
1. Begin by accessing the [Get ActiveGraf](#) webpage.
2. Upon reaching the webpage. Locate the "Try ActiveGraf 30-days Free" option and click on "Download", which will direct you to the designated download page.
3. Within the download section, click on the "Download" button to initiate the download process of the installer file.
4. The subsequent slide will present you with instructions. Follow these instructions to ensure successful installation.



# Get ActiveGraf Update File

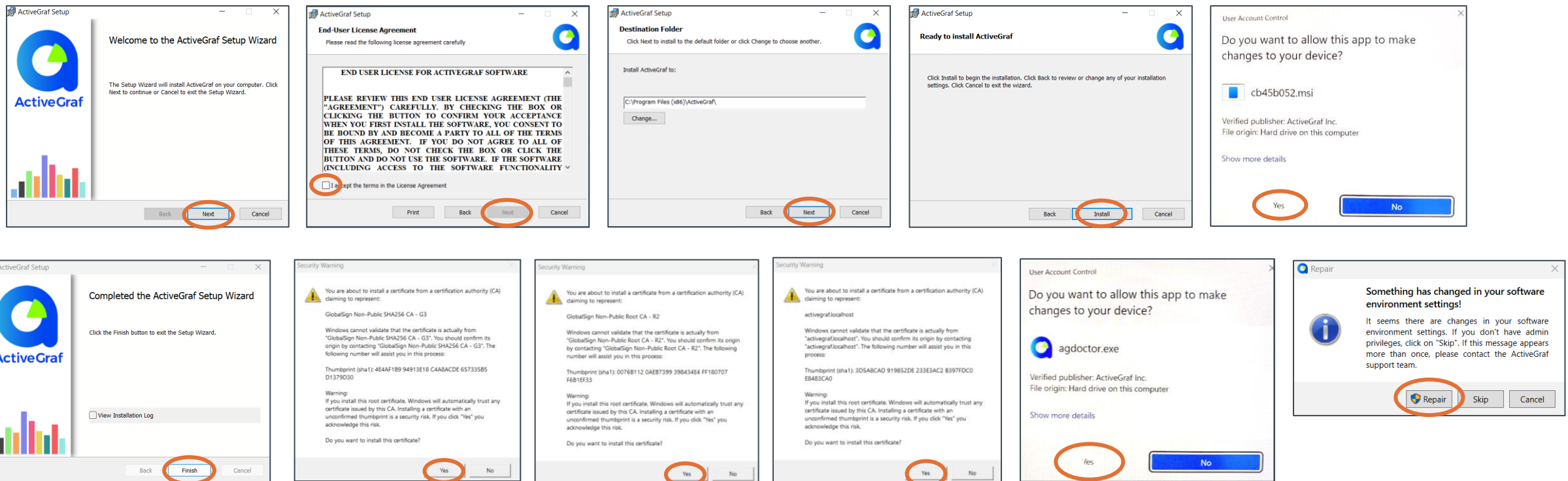
For users seeking to update their existing ActiveGraf version, please note the following:

1. The update process necessitates a previously installed version of ActiveGraf on your system.
2. Unlike the initial installation, updating ActiveGraf does not require administrative rights, streamlining the process for your convenience.
3. Begin by accessing the [Get ActiveGraf](#) webpage.
4. Upon reaching the webpage. Locate the "Get the Latest Update" option and click on "Download Update", which will direct you to the designated download page.
5. Within the download section, click on the "Download" button to initiate the download process of the updater file.
6. Jump to Page 15 to follow next steps.



# Installing ActiveGraf

Once the .msi installer file has finished downloading, navigate to the location where you saved it. This is usually in your computer's "Downloads" folder or wherever you chose to save it. Double-click on the .msi installer file and follow these simple steps after downloading the .msi installer:

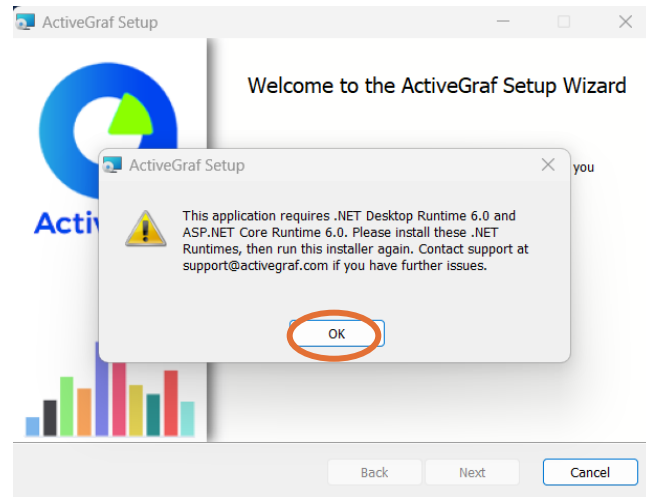


Congratulations on installing ActiveGraf!  
Now it's time to activate the Add-ins and check that all connections are properly installed.

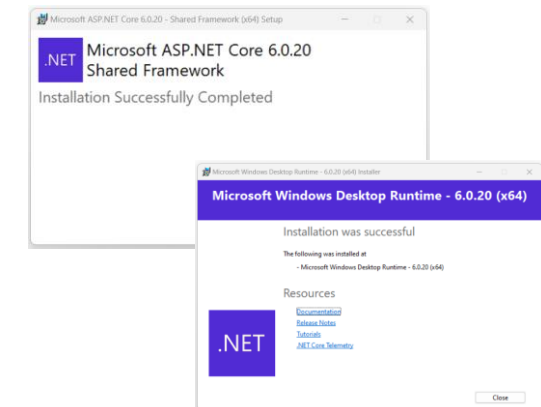
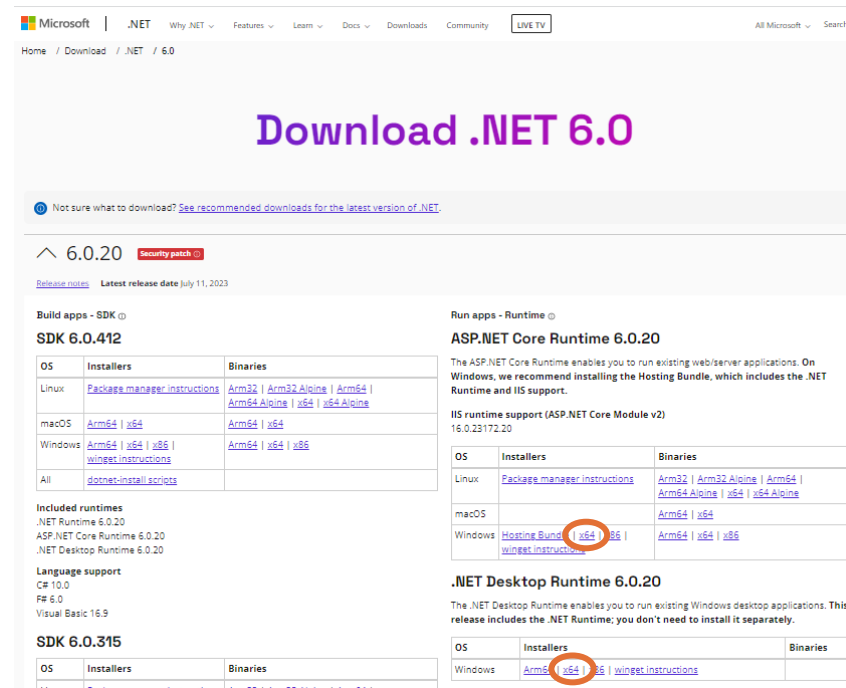


# Installing ActiveGraf – Windows .NET

If the installation didn't start because you don't have the correct .NET versions and if you have admin rights, here's how you can get them up and running from the Microsoft webpage. These two pieces, namely .NET Desktop Runtime 6.0 and ASP.NET Core 6.0 are prerequisites for ActiveGraf installation.



Open the following webpage <https://dotnet.microsoft.com/en-us/download/dotnet/6.0>, download ASP.NET Core Runtime 6.0 and .NET Desktop Runtime 6.0.



Once you've successfully installed both, it's time to restart the journey. Go ahead and restart ActiveGraf installation by double-clicking the .msi file you have.

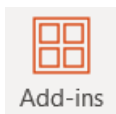
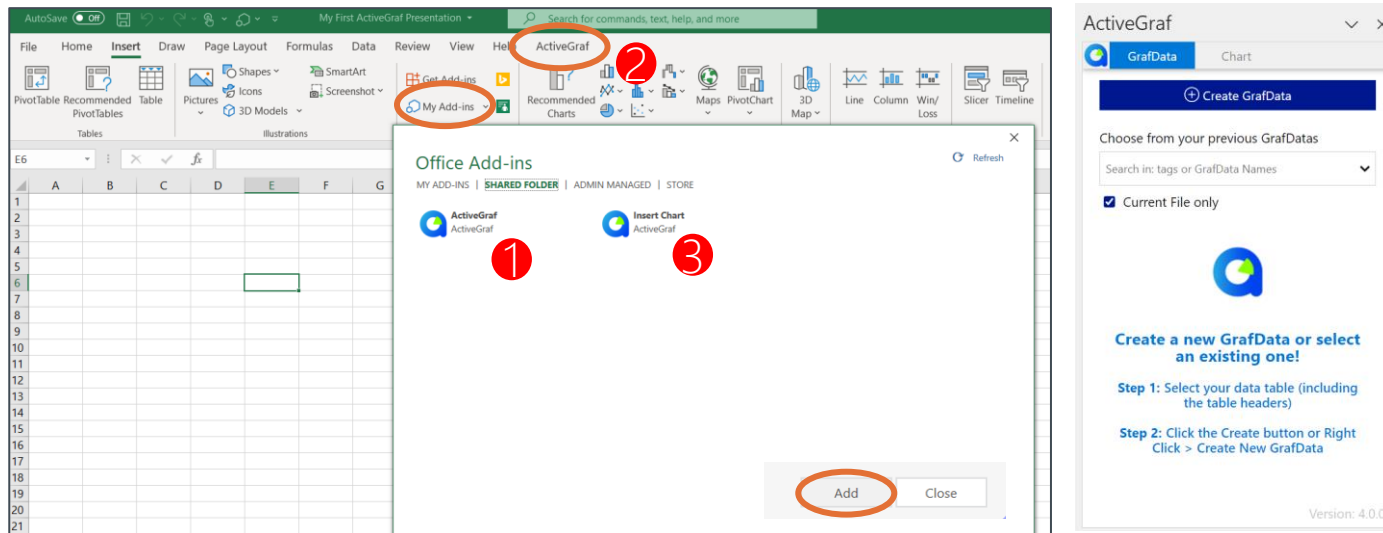




# Installing ActiveGraf – Add-ins Excel

Once Installation is completed, begin by opening Microsoft Excel and creating a new file. Save this file to your local drive and follow the next steps to load the ActiveGraf Add-ins:

1. Go to Insert My Add-ins, and click on "Shared Folder" tab. Select the first object: ActiveGraf, click Add.
2. Head to the ActiveGraf ribbon, and click on the first icon labeled "Open Task pane".
3. You will need to activate your license, further instruction on activation follows on the next page.
4. Now, head back to My Add-ins Shared Folder. This time select the second object – "Insert Chart", click "Add" to integrate it.

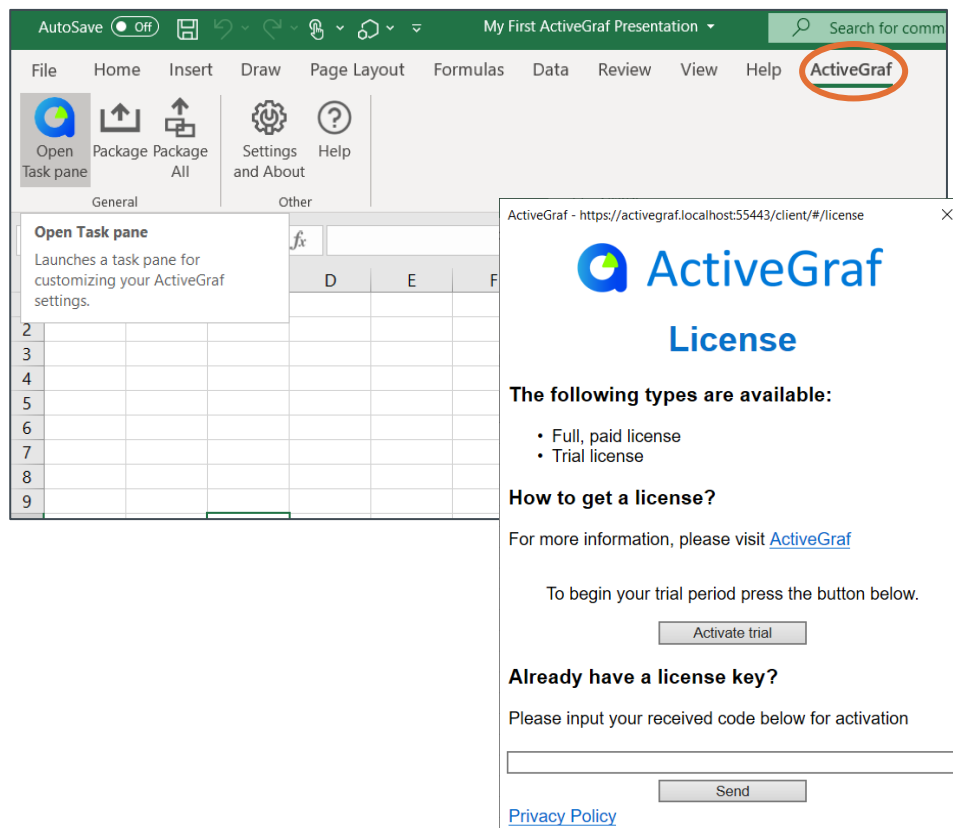


If your Excel or PowerPoint version has the Add-ins menu icon in the Home tab, and not the Insert tab, click on the icon and then click "More Add-ins" to get to the Office Add-ins screen above.

5. To be sure that ActiveGraf is working properly, take a look at the Task pane. If it's loaded correctly and matches the image, you're good to go. If things look a bit different, it might be a sign to double-check the Minimum Install Requirements.
6. If you need further guidance on enterprise and network environment settings, open this [IT checklist](#).
7. If you ever run into any issues along the way, don't hesitate to reach out to us.

# Installing ActiveGraf – License Activation

Working with ActiveGraf is a breeze, but it requires a license. If you just want to try ActiveGraf, activate a trial license. (Users without a working license will not be able to benefit from the interactive analysis features.)



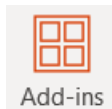
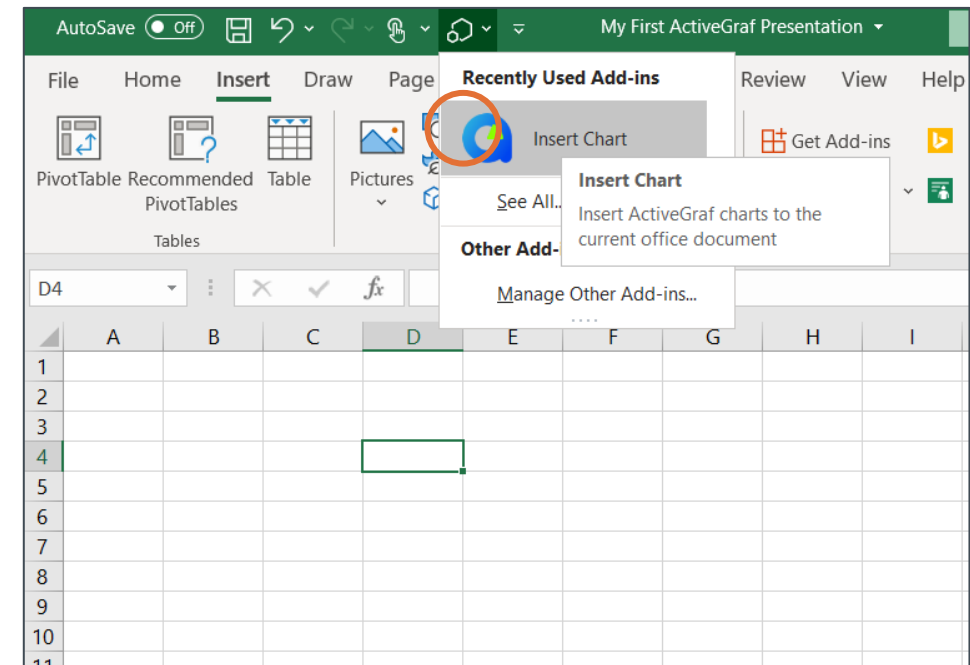
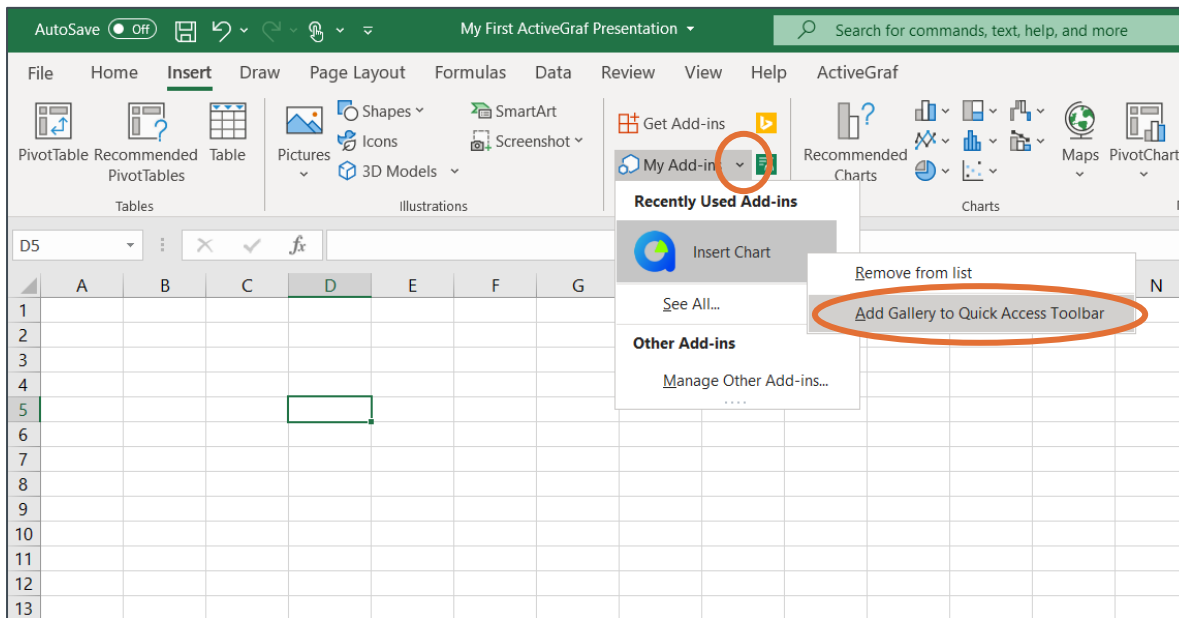
The screenshot shows the 'ActiveGraf License' window. It displays the ActiveGraf logo and the title 'License'. The text reads: 'The following types are available:' followed by a list: 'Full, paid license' and 'Trial license'. Below this, it says 'How to get a license?' and 'For more information, please visit [ActiveGraf](#)'. It then says 'To begin your trial period press the button below.' and has an 'Activate trial' button. Further down, it asks 'Already have a license key?' and 'Please input your received code below for activation' with a text input field and a 'Send' button. At the bottom is a 'Privacy Policy' link. The registration form section is partially visible, showing fields for 'First Name \*' (with 'John' entered and a red error message 'Firstname is required'), 'Last Name \*' (with 'Smith' entered), 'E-mail \*' (with 'example@mail.com' entered), 'Company' (with 'Company Name' entered), and a 'Register' button.

The screenshot shows the 'ActiveGraf License' window. It displays the ActiveGraf logo and the title 'License'. The text reads: 'The current trial license key will expire on **August 13, 2020.** You have **10 days** to renew your license.' Below this is a green box with the message: 'Thank you for activating ActiveGraf! You can close this box now.' At the bottom is a 'Privacy Policy' link.



# Installing ActiveGraf – Quick Access in Excel

Complete the process by including ActiveGraf Insert Chart in the Excel Quick Access Toolbar. Simply open “My Add-ins” by clicking the small arrow, then right-click and add ActiveGraf to Quick Access Toolbar. This approach makes it easier to insert ActiveGraf into your dashboards and spreadsheets.



If your Excel or PowerPoint version has the Add-ins menu icon in the Home tab, and not the Insert tab, you can add the Add-ins menu to your Quick Access Toolbar by clicking on the Quick Access Toolbar settings down arrow, choose “More Commands”, find and highlight the “My Add-ins” command and click Add to add it to your Quick Access Toolbar.

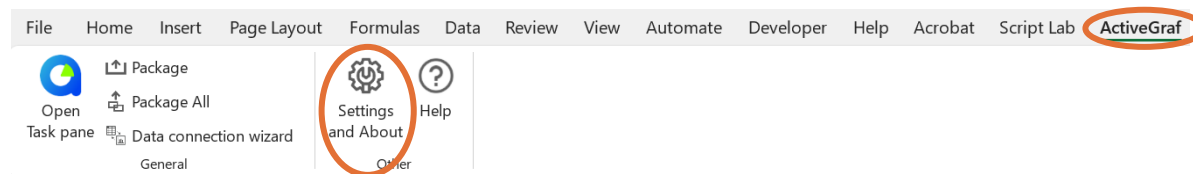


# Installing ActiveGraf – Publication Server URL

(this step is applicable to users who have purchased ActiveGraf Publication Server)

To establish a connection between your Power Point ActiveGraf Add-in and the ActiveGraf Publication Server, you'll need to set the server URL along with your log-in credentials. Follow these simple steps to ensure a seamless connection.

**Please Note:** Detailed server setup instructions for IT personnel can be found in the "ActiveGraf Publication Server Setup Guide". Make sure your server settings are configured before proceeding with the following steps.

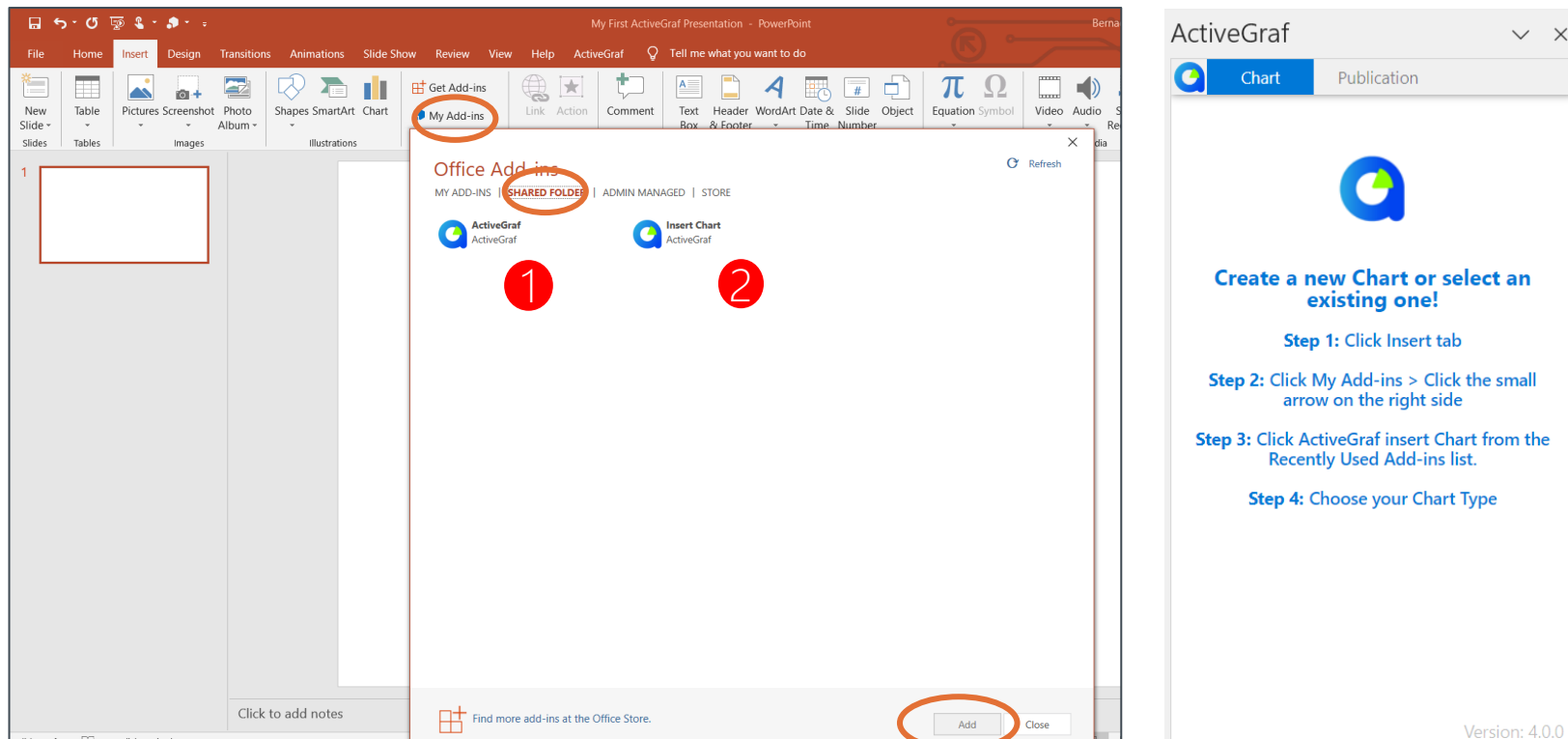


1. Go to ActiveGraf Ribbon and click "Settings and About". This is where you'll define the server URL and log-in details.
2. Copy-paste the Publication Server URL to the designated field.
3. Fill-in your Username and Password.
4. Click Login. This action triggers the connection process between the ActiveGraf Publication Server and your use cases.

A screenshot of the 'Publication Server Login' dialog box. It has a title bar 'Publication Server Login'. Below it, there is a text input field for 'Publication Server URL' with a 'Set' button next to it. Below that, there are two text input fields: 'Username' and 'Password'. At the bottom, there is a 'Login' button.

# Installing ActiveGraf – Add-ins Power Point

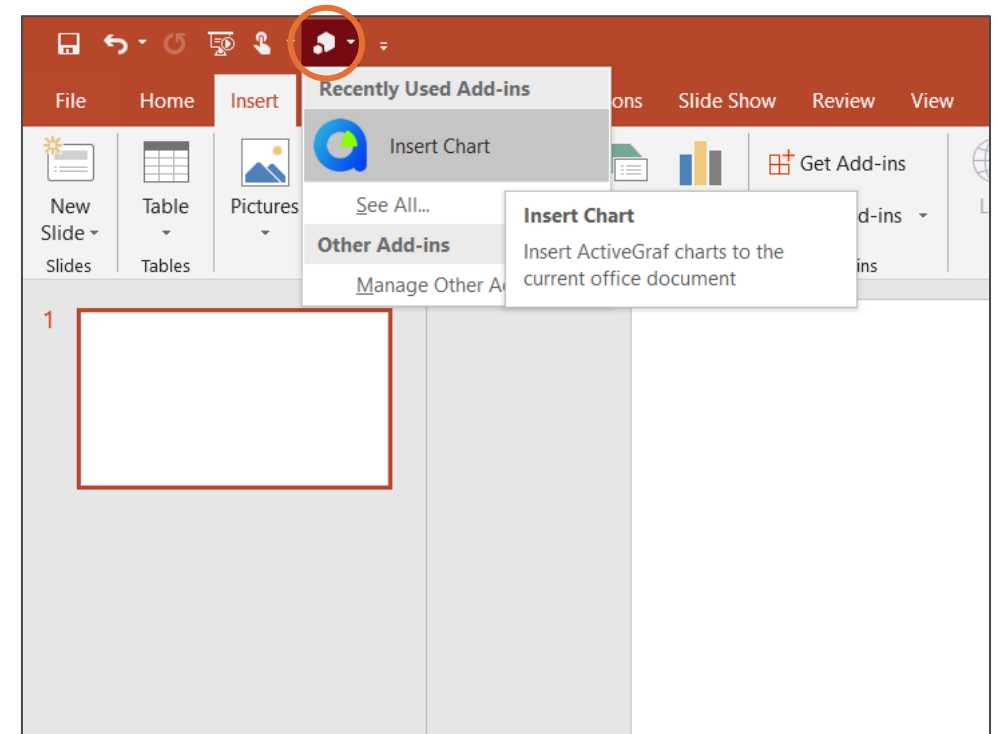
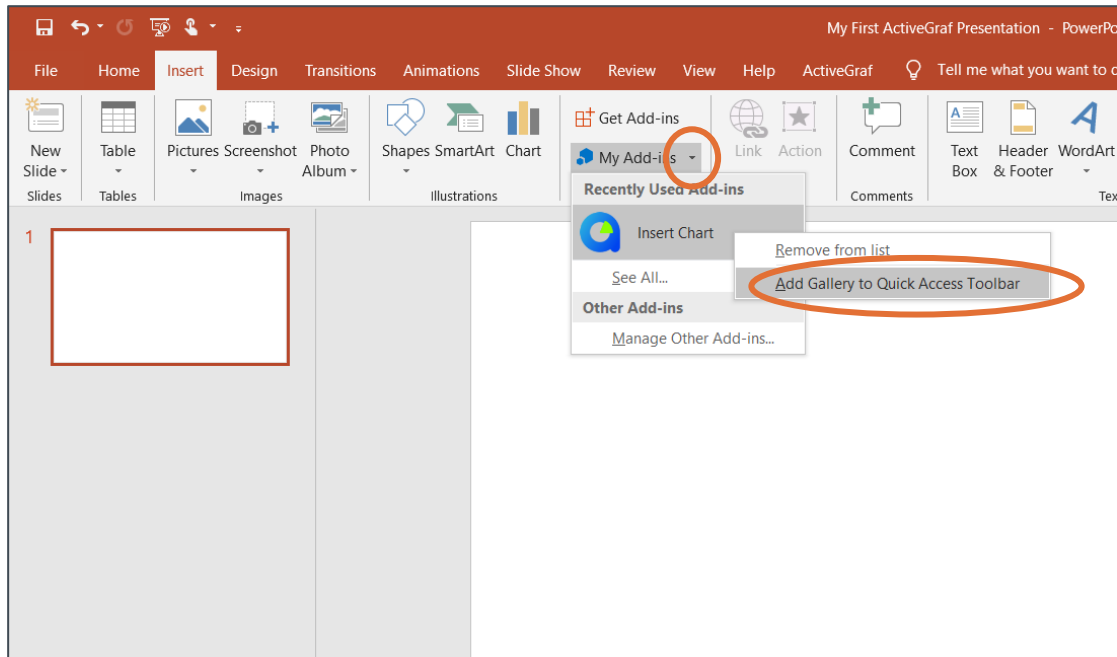
Now, let's do the same steps in Power Point by opening Microsoft Power Point and creating a new file. Save this file to your local drive and follow the same steps to load the ActiveGraf Add-ins. To be sure that ActiveGraf is working properly on your PC, take a look at the Task pane. If it's loaded correctly and matches the image, you're good to go.



If your Excel or PowerPoint version has the Add-ins menu icon in the Home tab, and not the Insert tab, click on the icon and then click "More Add-ins" to get to the Office Add-ins screen.

# Installing ActiveGraf – Quick Access in PowerPoint

Now add ActiveGraf Insert Chart function to Power Point Quick Access Toolbar. Simply open “My Add-ins” by clicking the small arrow, then right-click and add ActiveGraf to Quick Access Toolbar.



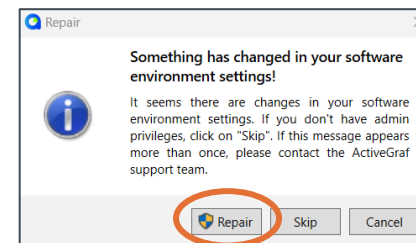
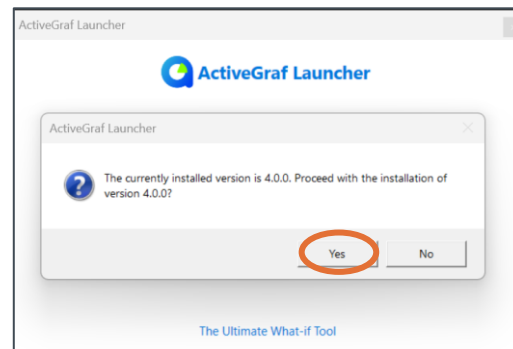
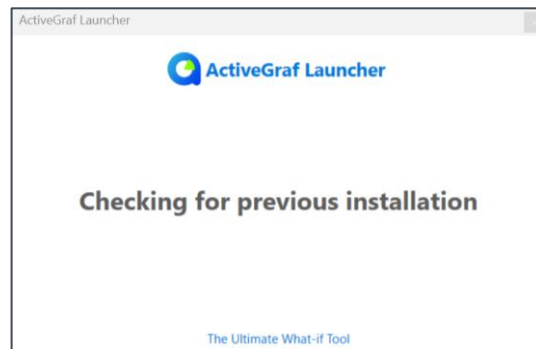
If your Excel or PowerPoint version has the Add-ins menu icon in the Home tab, and not the Insert tab, you can add the Add-ins menu to your Quick Access Toolbar by clicking on the Quick Access Toolbar settings down arrow, choose “More Commands”, find and highlight the “My Add-ins” command and click Add to add it to your Quick Access Toolbar.

# Update ActiveGraf

Keeping your software up to date ensures that you have access to the latest enhancements and features.

1. As explained on the page 6, download the ActiveGraf updater from the official website.
2. Once the updater file is downloaded, navigate to the location where you saved it.
3. Double-click on the updater .agu file to initiate the update process. The updater doesn't require admin rights – it will automatically proceed with the update.
4. Alongside the straightforward update process, it's essential to address the handling of existing use cases created with previous ActiveGraf versions. Your Client Success Consultant will provide specific instructions tailored to your workflow if any additional steps are necessary to ensure seamless use case migration.

For any inquiries or assistance regarding updates, use cases, or other aspects of ActiveGraf, your Client Success Consultant is just a message away. We're here to support your scenario analysis journey.



If ActiveGraf detects a deficiency during the update, you can initiate the repair and update by clicking the "Repair" button.

Congratulations! You have successfully installed ActiveGraf.

As a next step, we invite you to explore our “First Steps Guide”. This guide will walk you through the process of creating your very first interactive scenario analysis dashboard.

We are excited to be part of your data-driven journey.

Here's to a future filled with impactful insights and fast, superior decision-making - empowered with our visual modeling 'what-if' engine.

