ActiveGraf

First Steps Guide v4

Instructions to Create Your First Interactive Scenario Analysis Dashboard

Welcome to the comprehensive ActiveGraf User Guide, your premier solution for scenario analysis and visual modeling!

Please proceed to the following sections of this guide to delve deeper into the first steps, explore the capabilities of ActiveGraf and how it empowers your data analysis and decision-making journey.

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 learning curve.

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.
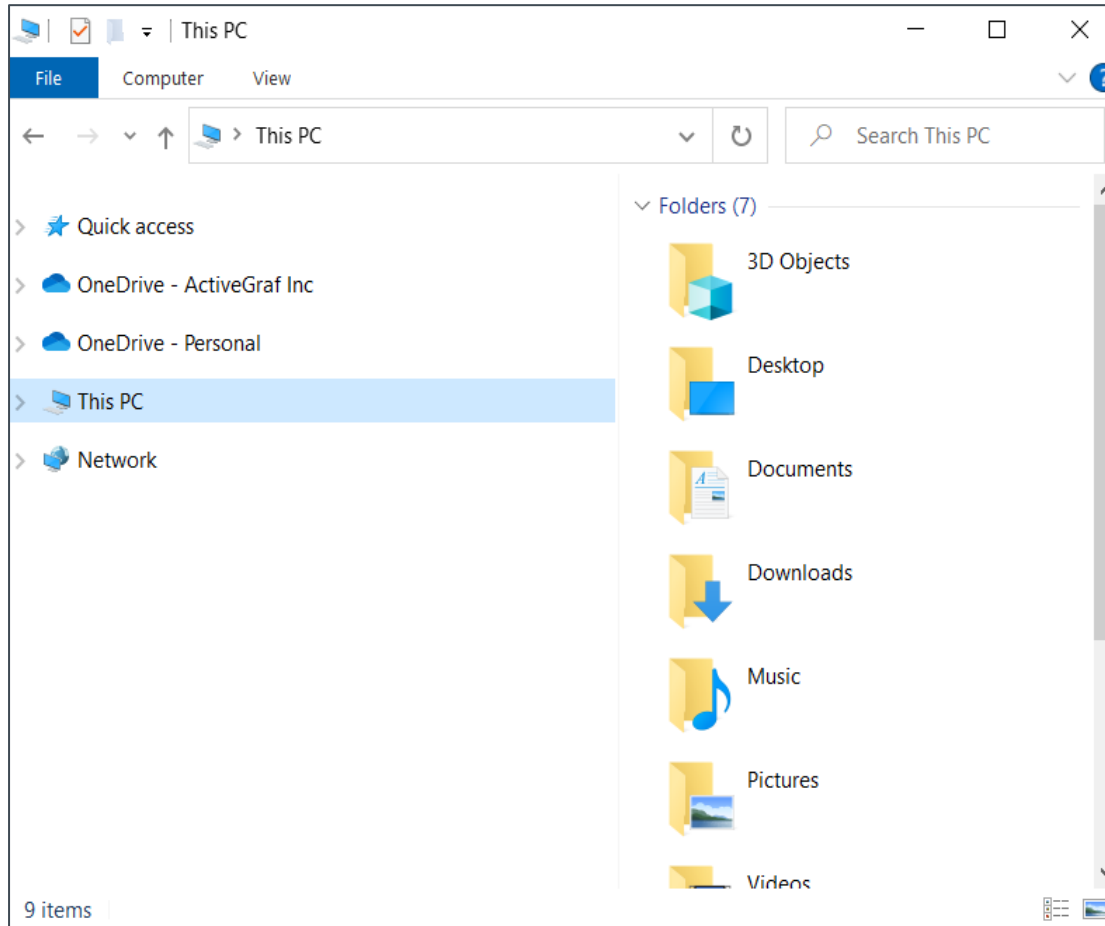
Table Contents

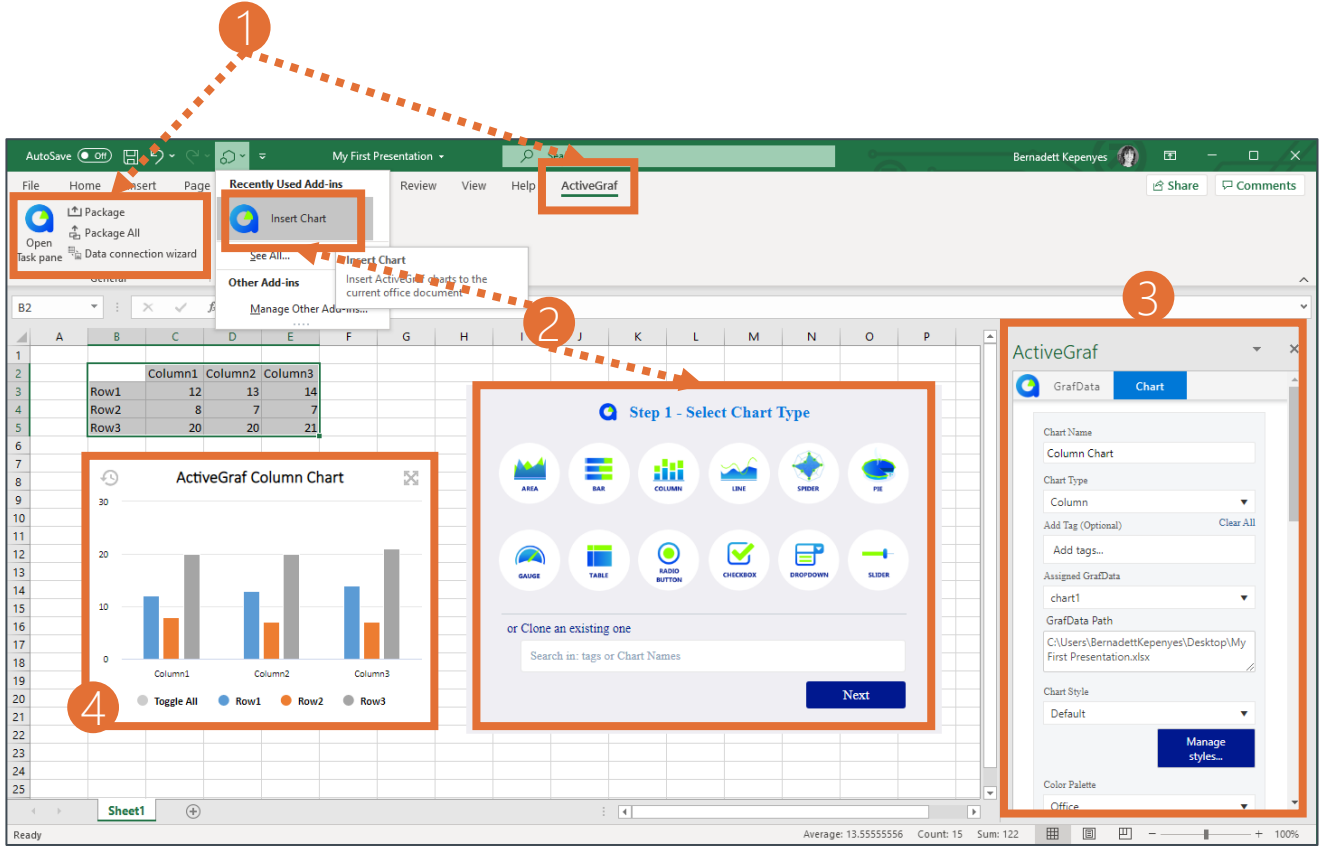# Supported Locations for ActiveGraf-Enabled Excel and Power Point Files

For optimal functionality, ensure that your ActiveGraf enabled files (Excel, PowerPoint) are stored in any of the following drives:

- Local Drive

- OneDrive

- OneDrive for Business

- Box

- Dropbox

- Google Drive [NOT Google streaming drives]

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

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. (For how to add Insert Chart to Quick Access, see the Easy Install Guide.)

3. **Task pane**:
   The Task pane hosts configuration options to finetune your settings.

4. **Charts**:
   Charts display bi-directionally synchronized interactive data visualizations that breathe life into your data.

As you proceed through this guide, you'll better understand how these components work together harmoniously.

Exploring the ActiveGraf Office-Ribbon: Core Functions
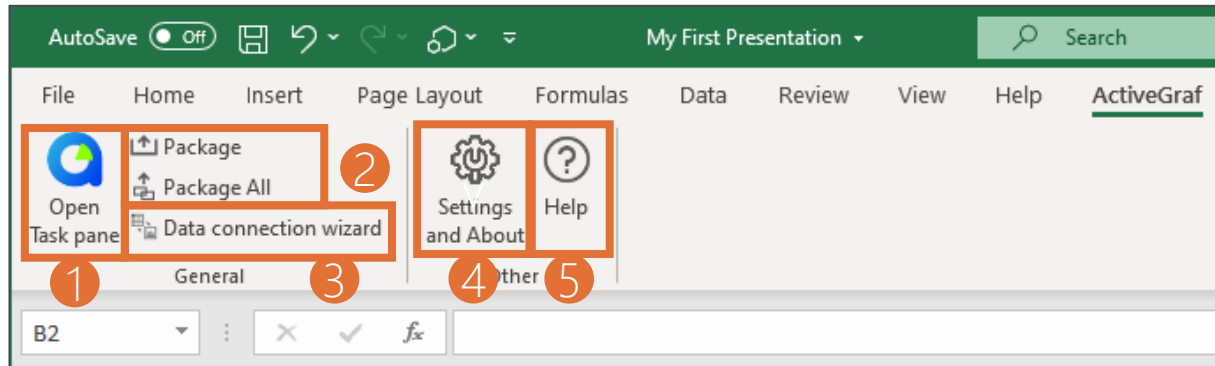
The ActiveGraf Office Ribbon includes the following core functions:

1. **Enabling the ActiveGraf add-in** by opening the add-in Task pane. (In Excel, the Task pane should always be open, in PowerPoint it should only be open when you edit charts.)

2. **Packaging** individual or Multiple ActiveGraf presentations alongside all corresponding Excel and database files.

3. **Data connection wizard**: reconnects PowerPoint files with Excel files, if the files were moved or renamed.

4. **Settings and About** displays License information, installed version number, ActiveGraf Publication Server URL, and log-in credentials.

5. Opening the ActiveGraf **Help** window
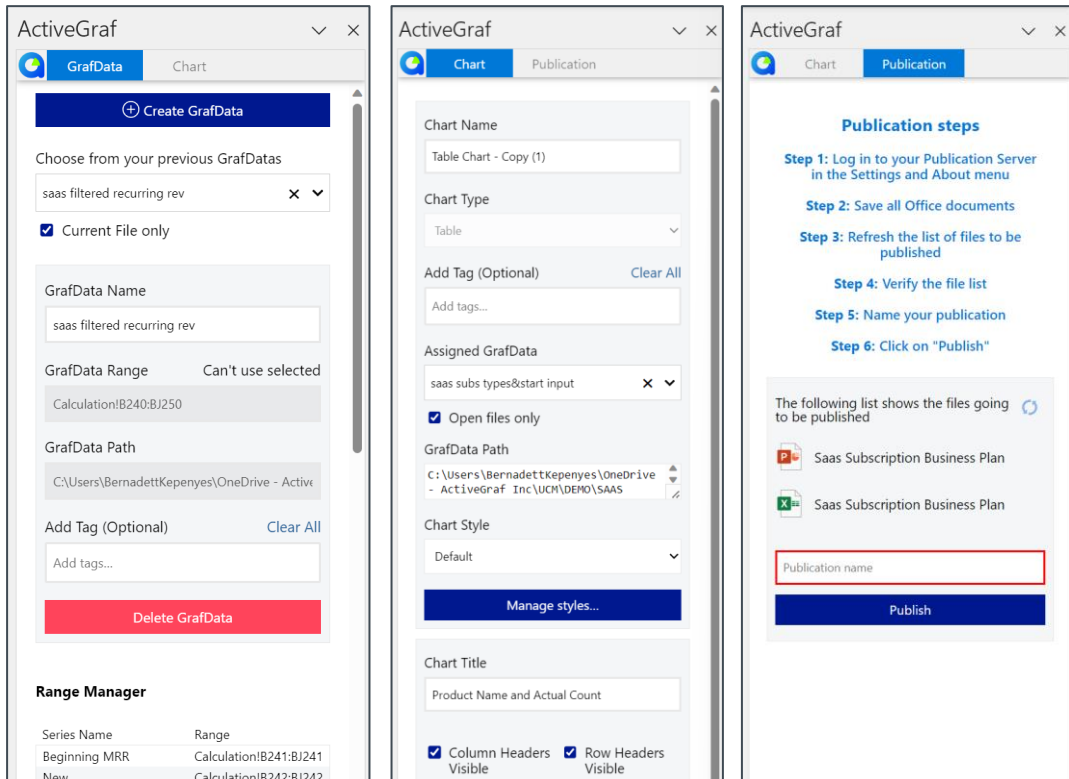
The Task Pane is the host for most ActiveGraf actions. Here's an overview to guide your interactions:

Understanding the Task Pane:

1. **Constant Enablement:** The ActiveGraf Task Pane is more than just a feature, it's a necessity. Always ensure that the Task Pane is enabled and open whenever you engage with ActiveGraf functions.

2. **Functionality Overview:** The Task Pane is your hub for fundamental actions and settings. It is used to create GrafData (Excel), configure the global properties of ActiveGraf Charts (Excel and PowerPoint), and publish your presentation on your ActiveGraf Publication Server (if you have purchased server access).

3. **Chart Configuration:** While chart configuration takes place within the Task Pane, it's important to note that actual chart creation happens through the dedicated "Insert Chart" functions. (Refer to page 13 for insights on Creating Charts.)

Using the Task Pane empowers you to

- Create/Modify GrafData in Excel, shaping your data foundation
- Configure ActiveGraf Charts in both Excel and PowerPoint, ensuring your visualizations are tailored to perfection.
- Direct channel for publishing your dashboards (ppt+xls) to the designated Publication Server.

Cautionary Note: for optimal performance, avoid using the Excel and PowerPoint Standard Auto-Save feature, as it can lead to increased response times.
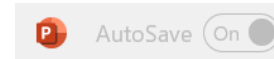
Understanding ActiveGraf Charts

ActiveGraf Charts bring your data to life by making it interactive and synchronized with the data sources (GrafData). These Charts not only display data but also offer ways for you to interact with it.

Key features of ActiveGraf Charts:

1. **Interactive and Synchronized:** ActiveGraf Charts allow you to explore your data interactively, with changes to values in one chart affecting others (depending on your model formulations).

2. **Intelligent Data Display:** Experience intelligent auto-scaling – ActiveGraf Charts adapt to your data.

3. **Customization and Control:** Tailor your Charts and adjust attributes to suit your presentation needs. You can edit values (drivers) and apply filters, giving you flexibility and control.

4. **Advanced Analytics:** Connect the Charts directly to Python scripts to turn your analytics into real time iterative, predictive and prescriptive data apps.
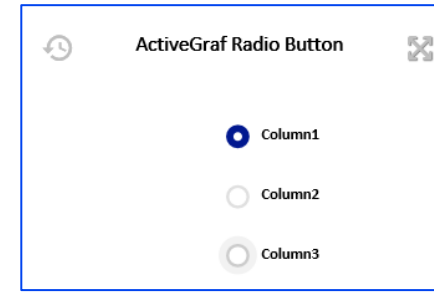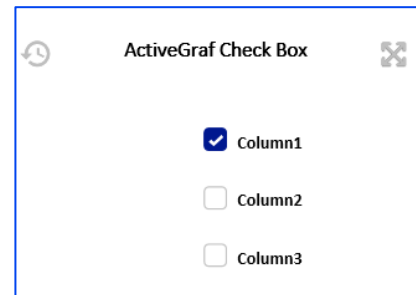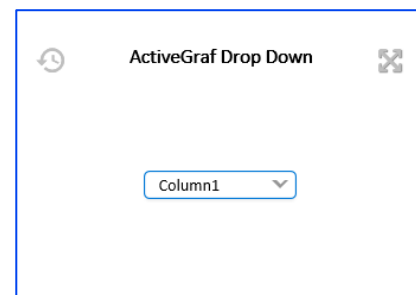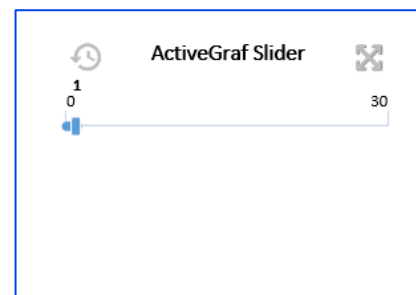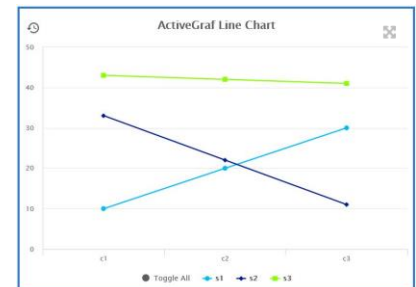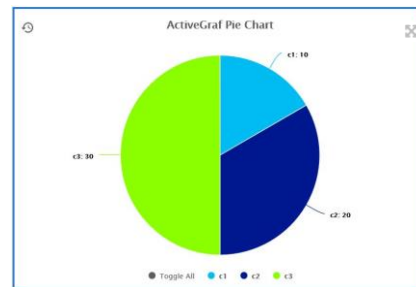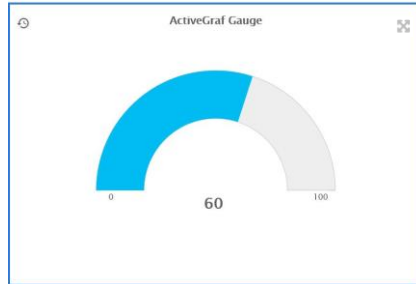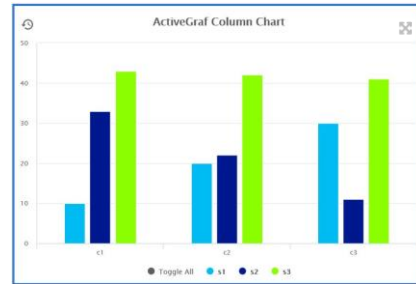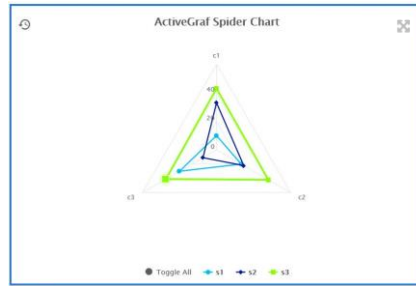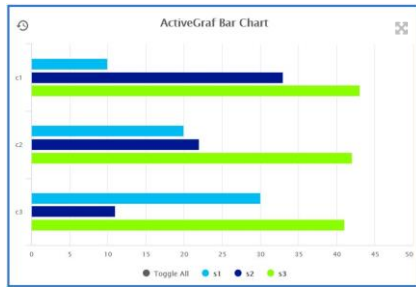
Creating New ActiveGraf Presentations
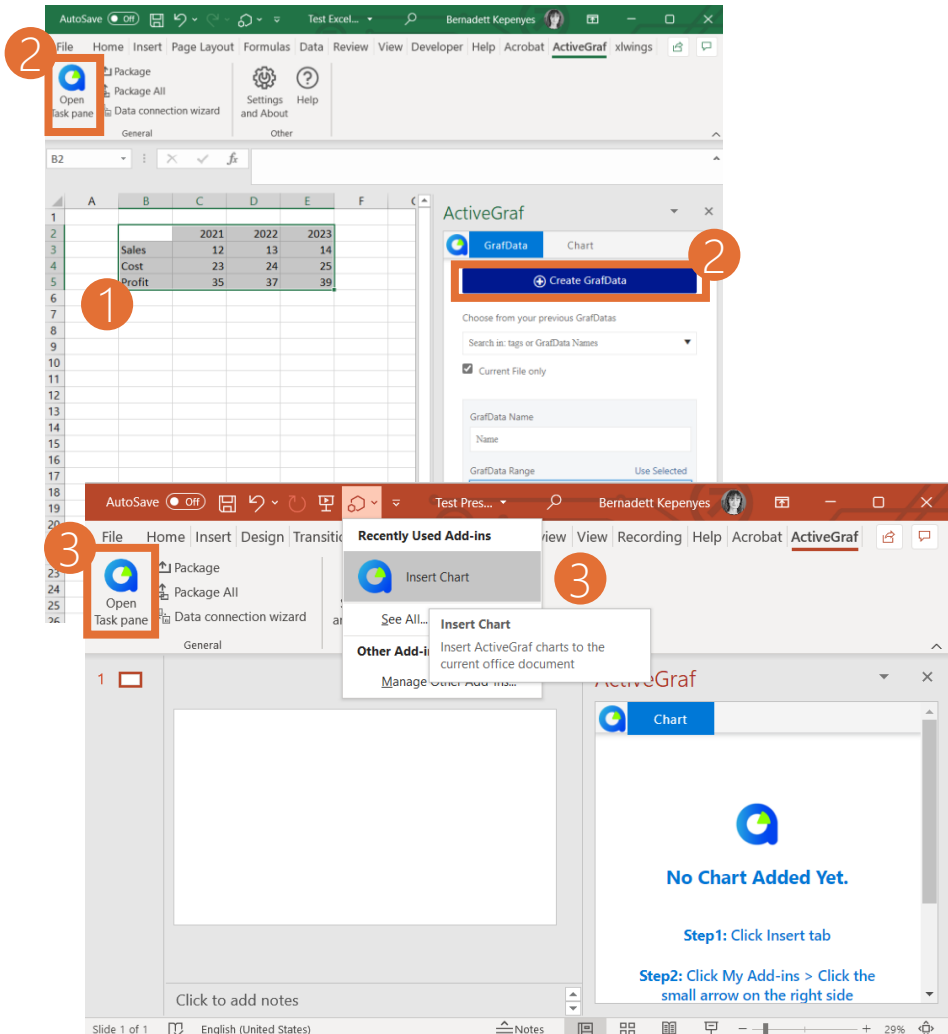
Step 1: Prepare Data in Excel
- Open Excel and design your data model. (It is a good practice to copy the original Excel file and archive it for future model creation.)
- If you have an existing Excel file with GrafData sets, you can proceed to Step 3.

Step 2: Create GrafData Sets
- Open the ActiveGraf Task pane in Excel.
- Use the Task pane to create GrafData sets by highlighting the dataset and hitting "Create GrafData". (Give a reference GrafData name to your dataset.)

Step 3: Design Presentation in PowerPoint
- Open PowerPoint and design your presentation layout.
- Utilize the ActiveGraf Task pane to create or clone your charts by "Insert Chart" function.

Step 4: Test Presentation with Graphical Data Edit
- Ensure data accuracy and visual appeal by testing your presentation.
- Important Note: Beware of Excel cell data that is derived from formulas. Formulated data points are not draggable on ActiveGraf charts.

Step 5: Save your Work
- Remember to save all your files before closing them or publishing the presentation to the server.

GrafData simplifies the process of creating interactive and dynamic charts for your presentations.

Step 1: Select Data Range in Excel
- Open your Excel Worksheet containing the data you want to visualize.
- Highlight a data range of at least 2x2 cells. (Make sure that this condition must always be met.)

Step 2: Create GrafData
- With your highlighted data range, navigate to the ActiveGraf Task pane.
- Locate and click on the "Create GrafData" button.

Step 3: Name your GrafData
- A prompt will appear for you as you see on the picture to provide a name for your new GrafData.
- Enter a meaningful name that describes the data set you're working with. You will only need to remember this name when creating a Presentation.

Step 4: Manage GrafData Range
- You can check the data range of the selected dataset.

Step 5: Enhance Organization Efficiency with Tags
- Consider adding tags by typing them and hitting the SPACE bar, then clicking outside the input area.
- Tags can categorize your GrafData when you have several ongoing projects.

Steps 6 & 7: Confirm Creation and Stay Informed
- Click the "Create" button or hit ENTER.
- As you interact with GrafData and make changes, a status message will appear at the top of the Task pane.

Working with GrafData - Modify

Select a GrafData from the list of available GrafData (**"Choose from your previous GrafDatas"** dropdown menu). 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
- Change the range 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, however you can change the range by highlighting the new dataset range, then click "Use Selected" on the TaskPane.

Sometimes, you may need to **remove unnecessary GrafDatas** to keep your GrafDatas organized. Follow these steps to safely delete GrafData when no longer needed.

Step 1: Select GrafData to Delete

- Open the ActiveGraf Task pane in Excel (you have no GrafData tab in Power Point).
- Locate the list of available GrafDatas "Choose from your previous GrafData".
- Select the one you wish to delete. Ensure you've chosen the correct GrafData, as this action is irreversible.

Step 2: Initiate Deletion

- Once you've selected the GrafData, find and click on the "Delete GrafData" button.
- Please note that any charts associated with this deleted GrafData will be orphaned and disconnected. This means the charts will no longer be linked to the GrafData and cannot be recovered.

Create Charts
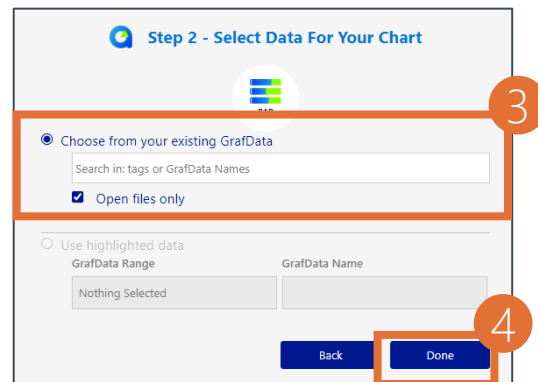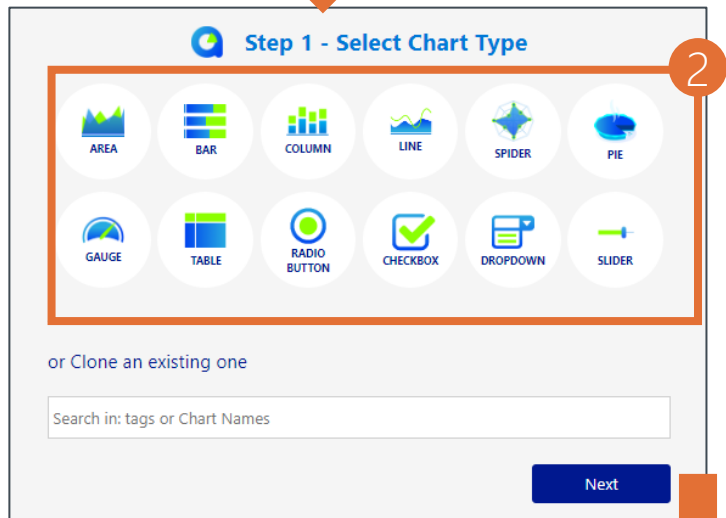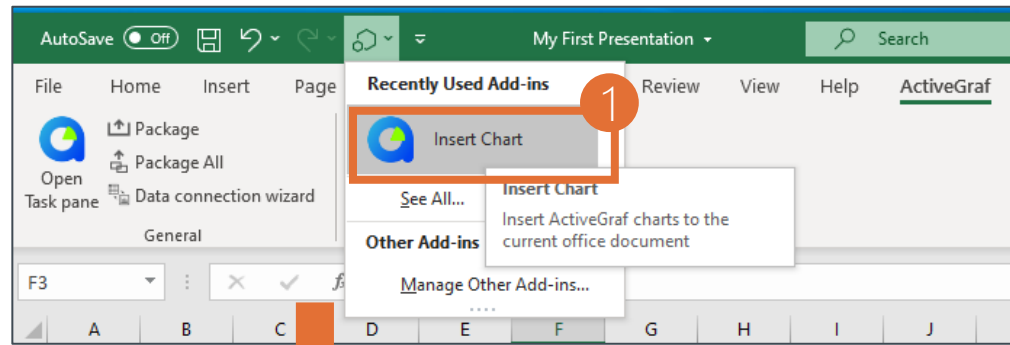
Step 1: Access Insert Chart Function from Quick Access Toolbar
- Open your PowerPoint presentation or Excel worksheet where you want to create the chart.
- Locate the Quick Access Add-in menu.
- Find and select "Insert Chart".

Step 2: Choose Chart Type
- A variety of chart types will be presented to you. Select the chart type that best suits your data visualization needs, then click "Next".

Step 3: Bind Chart to Existing GrafData
- The "Select Data For Your Chart" window will appear. By default, the "Open files only" check box is ticked, showing only GrafData from the currently open Excel file. To see your complete GrafData library, uncheck this box.
- Start typing the GrafData you need to narrow down the list and select the one you want to bind to the chart. 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 15 - Cloning Charts.
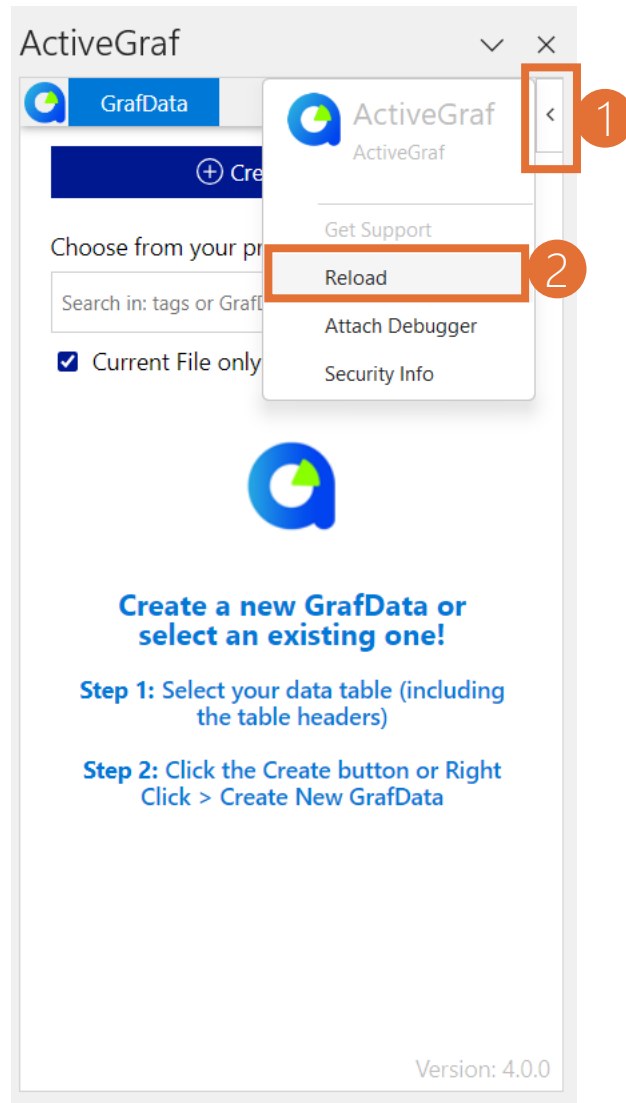
When working with Excel models and presentations simultaneously, on some rare occasions it can happen that changes made to the Excel model (inserting row/column, replacing GrafData element) are not immediately reflected in your charts. This can happen when your computer's performance is strained.

The good news is that these rare instances can be easily remedied, usually with a simple manual reload of the chart and/or Task pane.

To address this issue and ensure your charts accurately reflect the latest changes, follow these steps:

Step 1: Check Your Charts when Editing Excel
- Make sure you've saved any changes you've made to your Excel model.
- Ensure that GrafData exists and linked to your chart.

Step 2: Refresh Charts
- Locate the Excel Task pane (right side of the Excel window).
- Click on the right arrow to open the drop-down menu.
- Select the option to "Reload".

Step 3: Verify Chart Update
- After reloading the Excel Task pane, inspect the charts in your presentation to see if they have updated to reflect the latest changes from your Excel model.

Note: If you notice frequent delays in chart updates due to an overloaded computer, consider closing unnecessary applications or processes to free up resources.

Clone Charts
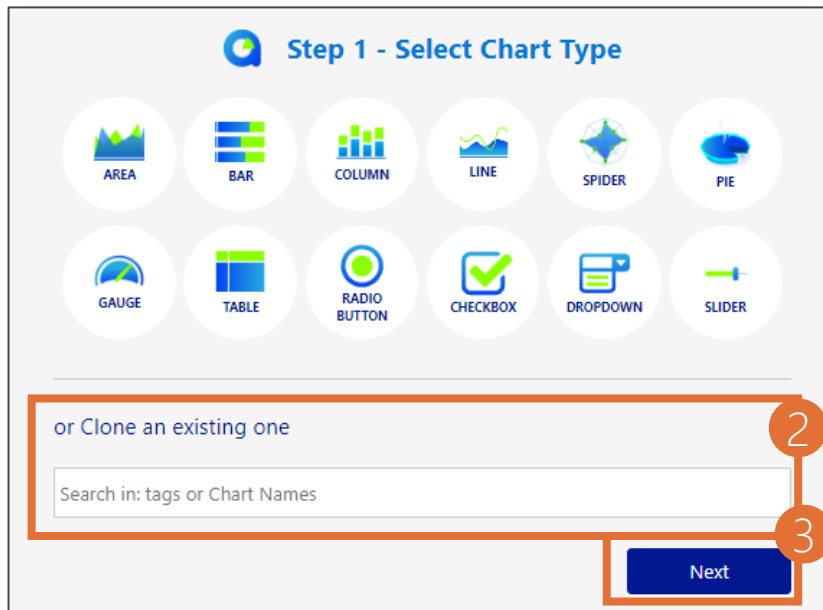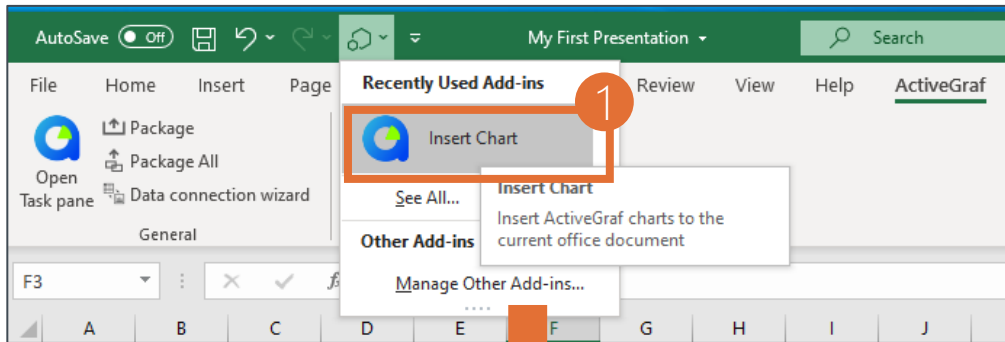
Cloning charts allows you to quickly create duplicates of existing charts, streamlining your design process. The cloned chart will appear, ready for customization – refine the chart while benefiting from the structure of the original. Available in both Excel and PowerPoint.

First option - clone an existing Chart and customize it

Step 0: Save the file where the original chart exists to synchronize data.

Step 1: Select *Insert Chart* from the Add-in menu.

Step 2: Select an existing Chart from the menu by the Chart Name, then click "*Next*".

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

Step 1: Use the copy command (Ctrl+C) to copy the chart to your clipboard.

Step 2: Go to the place where you want to place (within the presentation) to place the cloned chart.

Step 3: Use the paste command (Ctrl+V) to create a copy of the chart.

Warning: Copy/Paste of Charts works only within the same file. You cannot copy a chart from Excel to PowerPoint or vice versa due to their special data binding features. These features restrict cross-file copying for data integrity.

Third option – In PowerPoint Duplicate Slide – will also duplicate all ActiveGrafs on the slide. Simply right click on the slide thumbnail and select "Duplicate Slide".

Cloning Charts, Excel and PowerPoint files
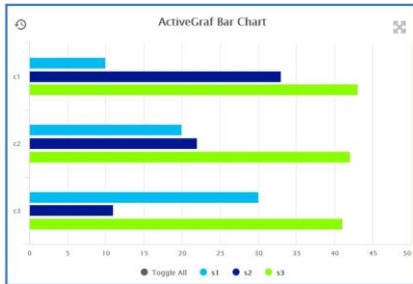
Chart cloning (**copy/paste**) is possible only within the given file (i.e. copy a chart within a spreadsheet or copy a chart in a presentation)

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.

Basic Chart Settings

ActiveGraf

Chart | Publication

Chart Name

Line Chart MRR Target

Chart Type

Line

☐ Spline

Add Tag (Optional) — Clear All

Add tags...

Assigned GrafData

saas filtered recurring rev ✕ ⌄

☑ Open files only

GrafData Path

C:\Users\BernadettKepenyes\OneDrive -
ActiveGraf Inc\UCM\DEMO\SAAS BP\Saas

Chart Style

Default

Manage styles...

Color Palette

Blue Green

Editable Data
☐ Yes (unlocked)

Stacking

Not Stacked

☐ Inverted Axis

Minor Edit Interval | **Major Edit Interval**

0.01 | 5

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 on 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, Percent).

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

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.

ActiveGraf

Chart | Publication

Chart Title
OUTPUT / Production Volume

Vertical Axis | Horizontal Axis
Axis Y | Axis X

Legend
Title

☐ Show History   ☑ Show Tooltip
☐ Transpose Data

☑ Series Name | Range
☑ Factory A | 1
☑ Factory B | 2
☑ Factory C | 3

☑ Category Name | Range
☑ Product A | 1
☑ Product B | 2
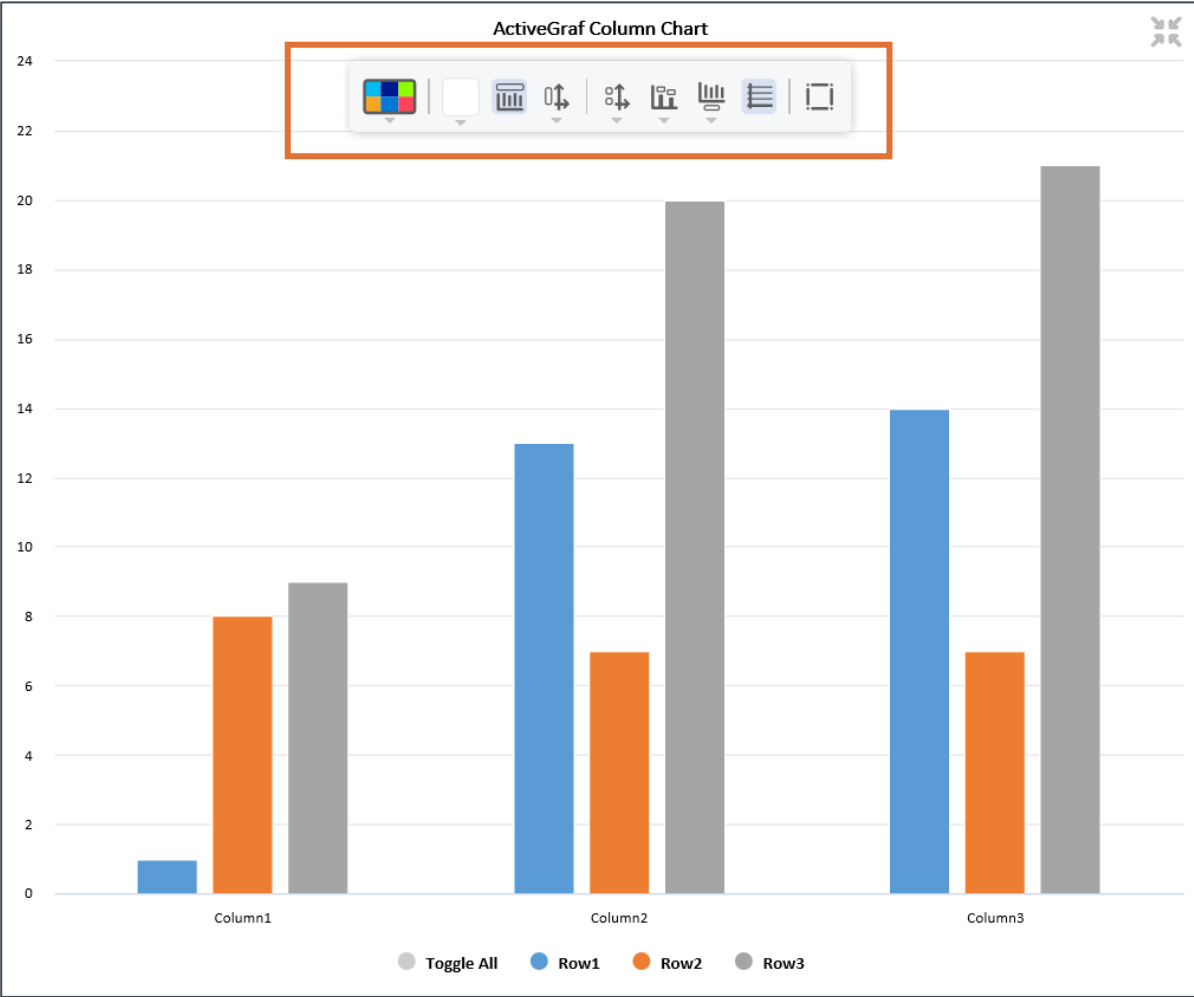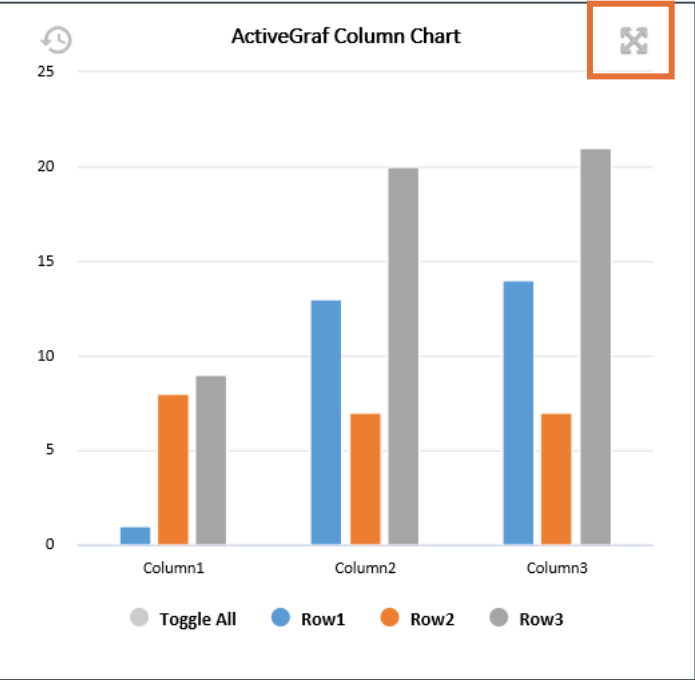
Chart Formatting

(Hint: In the case of a table chart, you can set the column width on the chart, without opening the Design Editor.)

Chart color palette

Theme colors

Basic theme

Chart background color

Display / hide chart title

Search for series...

TOGGLE ALL DATA LABELS

Row2

Row1

Row3

Display / hide data labels

Plot area
(Change the size of the chart content area. Double-click on the plot area outline to return the original.)

Display / hide chart grid

RGB | # ffffffff

R 0   255   255
G 0   255   255
B 0   255   255

Axis X
Axis Y
Axis_2
Axis_3
Axis_4

None
Bottom ✔
Left
Right

Display / hide legend and position

Axis X ✔
Axis Y ✔
Axis_2 ✔
Axis_3 ✔
Axis_4 ✔

Axis X ✔
Axis Y
Axis_2 ✔
Axis_3 ✔
Axis_4 ✔

Add axis title to chart

Display / hide axis labels

Series Formatting

Border weight

Setting alternate series type

Reset formatting

0 px
1 px ✓
2 px
3 px
4 px

Line
Spline
Area
Areaspline

Open advanced series settings

Color palette

Fill color

Theme colors
Basic theme

Bring series to front / forwards / backwards / to back

Border color

Border type

Display / Hide data label

RGB # 5b9bd5ff
R 0 255 91
G 0 255 155
B 0 255 213

RGB # ed7d31ff
R 0 255 237
G 0 255 125
B 0 255 49

Primary Axis ✓
Alternate Axis 1
Alternate Axis 2
Alternate Axis 3

Axis Assignment

Formatting and Time-saving Technique: When working on your charts, you save time by **formatting multiple elements simultaneously** by holding down the **"CTRL"** button on your keyboard while clicking on various elements. Once they're selected, any formatting changes you apply will be applied to all the selected elements.

Series settings ✕

Data protection
☐ Editable data

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

Format source
☐ Format linked to source

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

Number

Data category
| General ▾ |

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

Decimal places   Magnitude
←·0 [0] ·00 | x 10⁰ ▾ |
·00   →·0

Negative number   Thousand separator
⦿ -1234 | none ▾ |
○ 1234
○ (1234)
○ (1234)

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

Prefix   Suffix
[   ]   [   ]

Each Data series can have unique labels before and after.

Text Formatting – Data Labels, Axis, Legend

Open advanced series settings

Text font

Text size

Text color

Bold / Italic / Underline

Alignment

Rotate text

Reset formatting

Saving the Chart Design to Styles
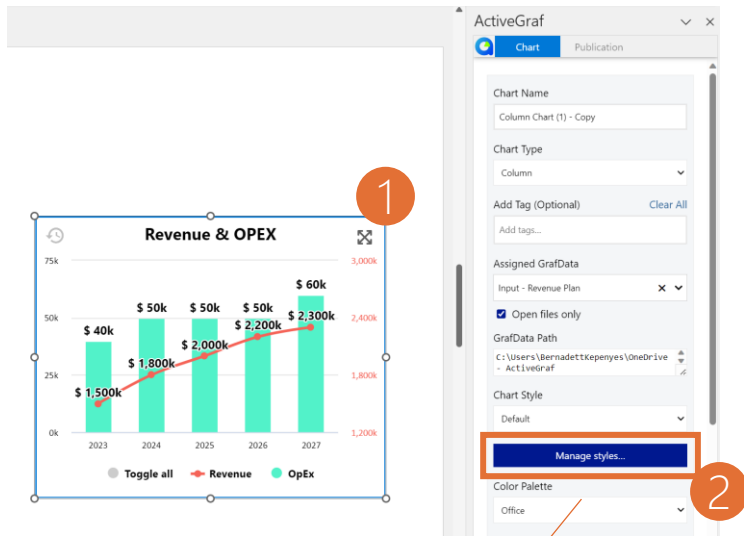
Manage style

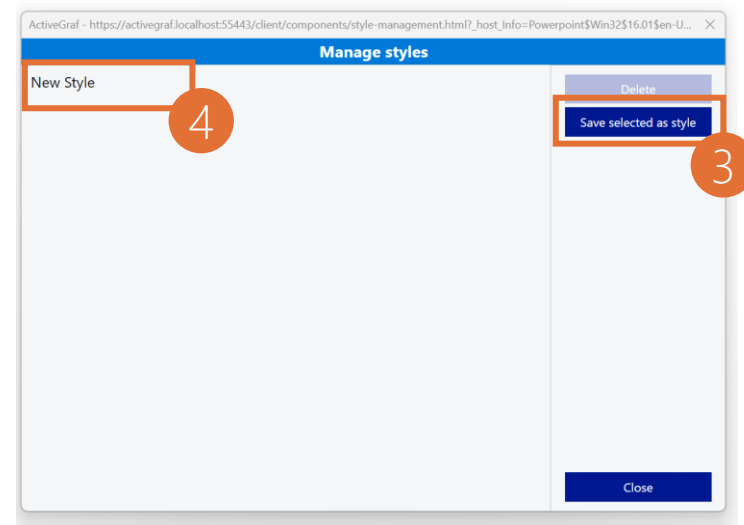Step 1: Select *Chart* (the chart should be outlined with blue)

Step 2: Click on "Manage style..." on the Task pane

Step 3: Click on "Save selected as style"

Step 4: Rename the "New Style" by clicking on the name.

How to use the saved style on another chart?

Step 5: Navigate to Chart Style on the Task pane, and click on the dropdown menu, select your style.
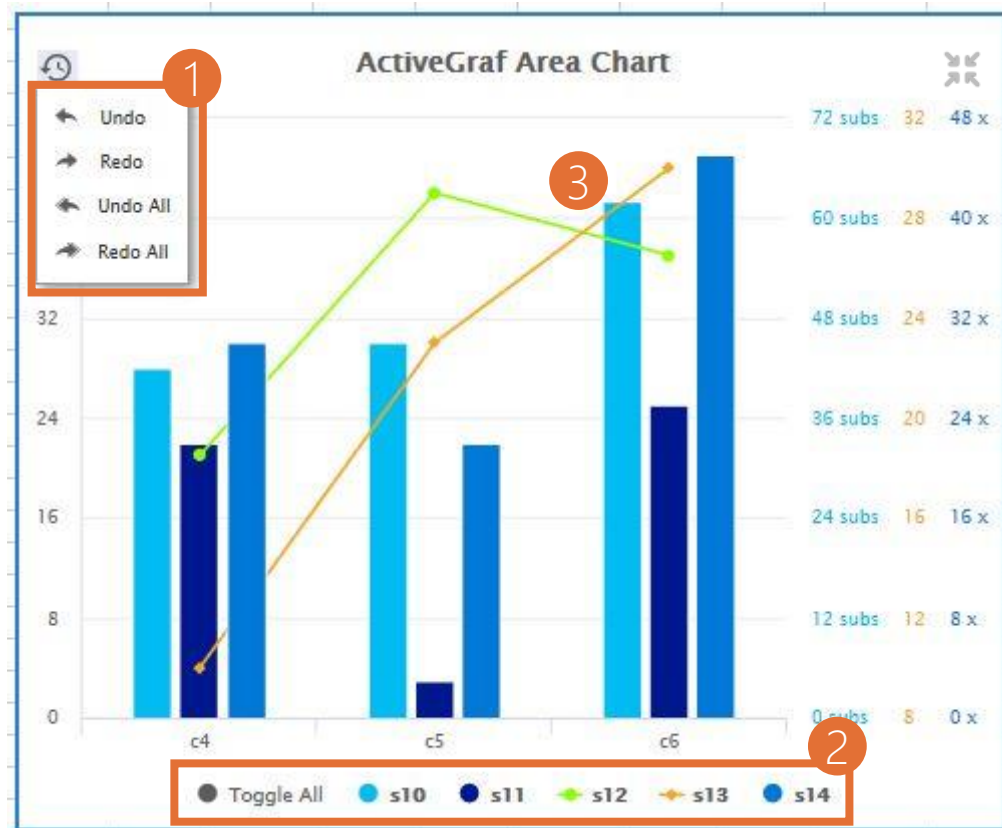
Presentation Phase

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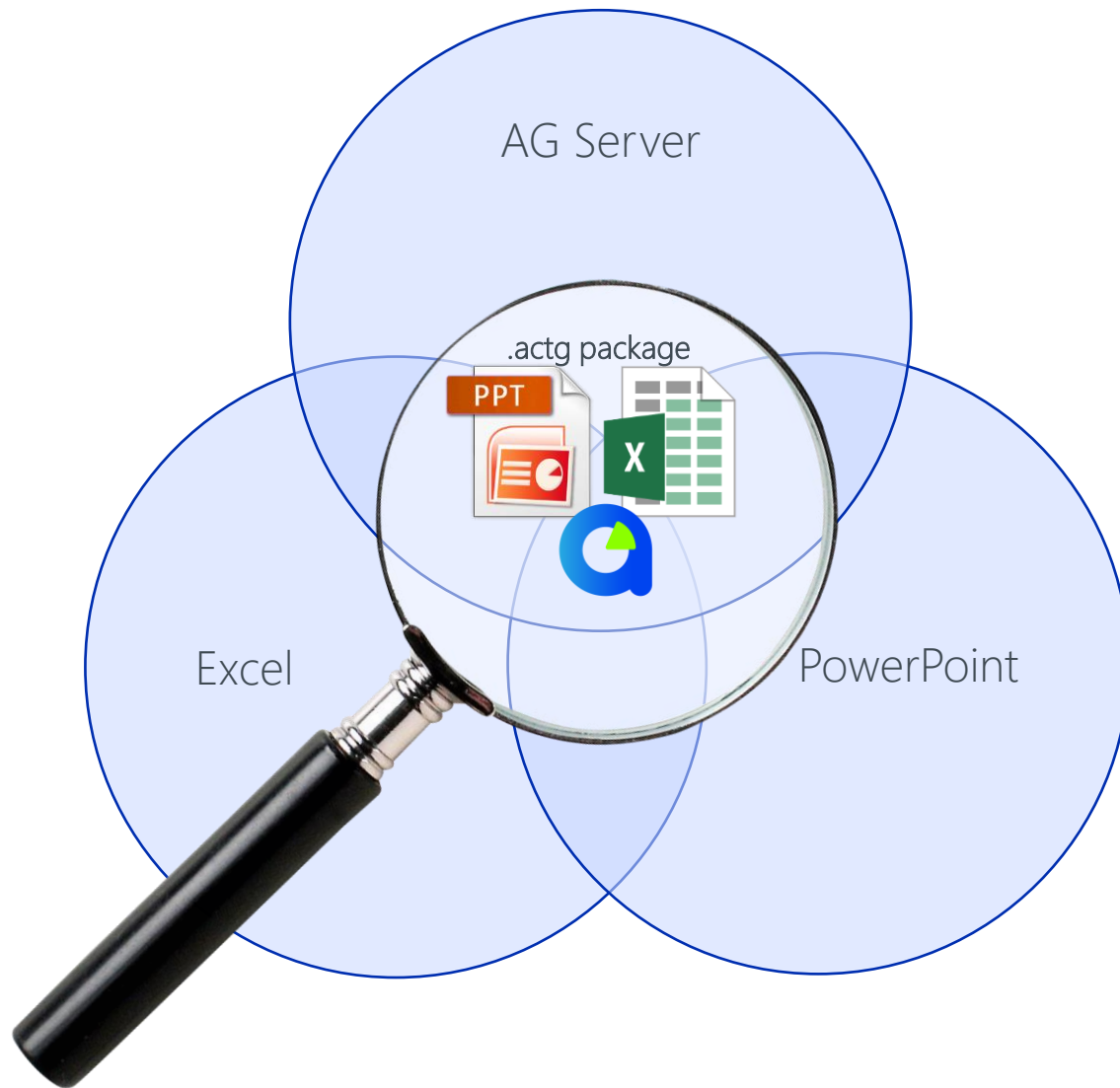
We encourage all users to save their ActiveGraf-enabled files and work by Packaging to .actg **often**. In fact, packaging after every stage of work is a best practice, just as you would with any individual PowerPoint or Excel file.

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
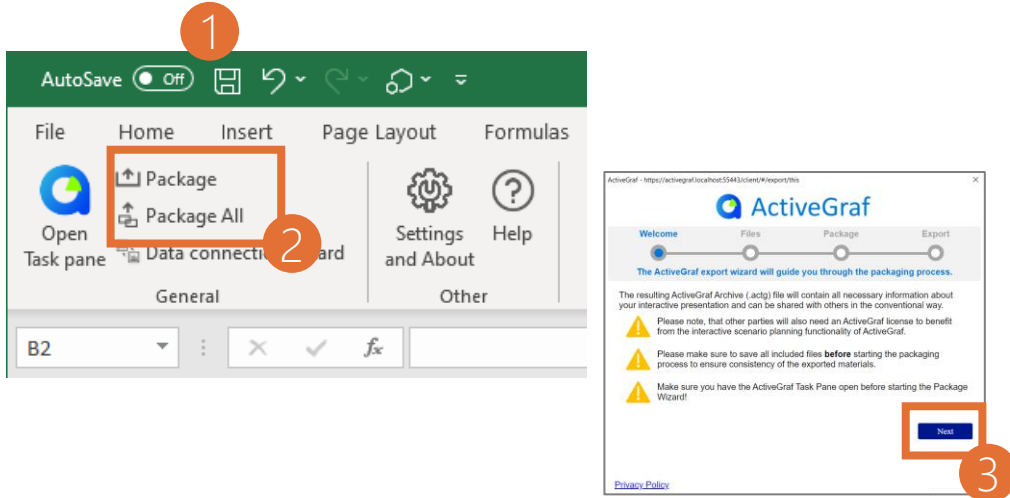
ActiveGraf Packages consist of specially bound Excel and PowerPoint files.

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

Step 1: Prepare Files for Packaging
- Save PowerPoint and Excel files. Make sure all connected files (Excel) are open.
- Before proceeding, confirm that every chart in your presentation is fully loaded and displayed properly.

Step 2: Access Packaging Function
- In PowerPoint, navigate to the ActiveGraf Office Ribbon.
- Find and select *Package (or Package All)* function.

Step 3: Read the instructions and Proceed
- A window with packaging instructions will appear.
- Carefully review the instructions provided. Once you've read and understood the instructions, click the "Next" button to continue.

Continue on the following page.
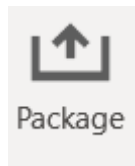
Package only the currently open PowerPoint file (from which you start the packaging) with the corresponding Excel file(s).
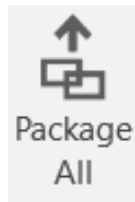
Package All the currently open all PowerPoint files with the corresponding Excel file(s).

Packaging and Saving ActiveGraf enabled Files and Presentations II

Continuing from the previous steps, here is how to add more files to your Package:

Step 4: Add More Files to Your Package
- After initiating the packaging process, you have the option to include additional files in your Package.
- Click on the "Add File" button to select and include various types of files, such as documents, images, text, etc.

Step 5: Rename Files (If Necessary)
- To improve clarity or organization, you can rename the files within your ActiveGraf Package.
- Click on a file's name to edit it, providing a more descriptive or meaningful title.

Step 6: Confirm Changes
- Review the files you've added and their names.
- Ensure that the package content accurately represents your presentation and associated materials.

Step 7: Save your ActiveGraf Package
- Finally use the standard saving procedure for your chosen storage option (Local Drive, OneDrive, OneDrive for Business, Box, Dropbox, Google Drive) by clicking the "Save" button.

Importing ActiveGraf Presentations
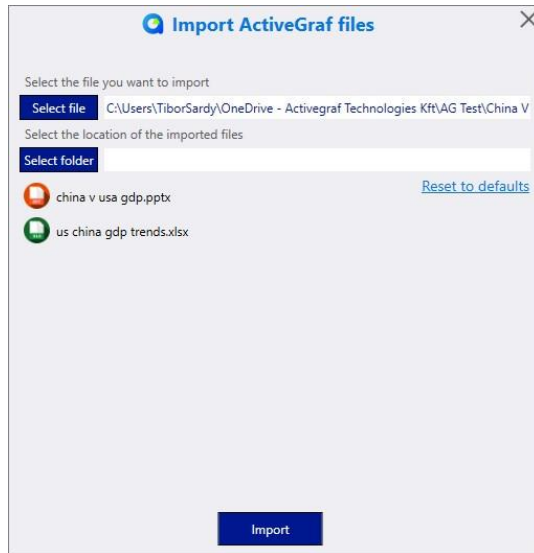
To import .actg ActiveGraf files follow the below steps

- Double-click on the .actg file to initiate the import process.

- ActiveGraf logo will pop up on the Windows Taskbar. Click on it.

- In the Import Dialog, select the destination folder where you want to place the Excel and PowerPoint files.

- Name your files. (Click on the file name) The system will warn you if files with the same name already exist 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.
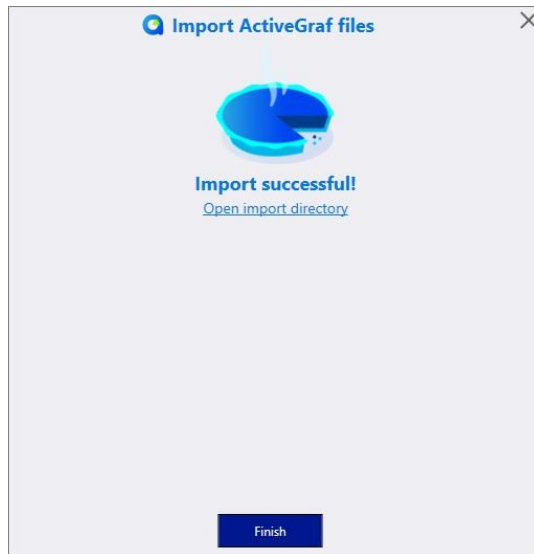
Opening ActiveGraf Presentations
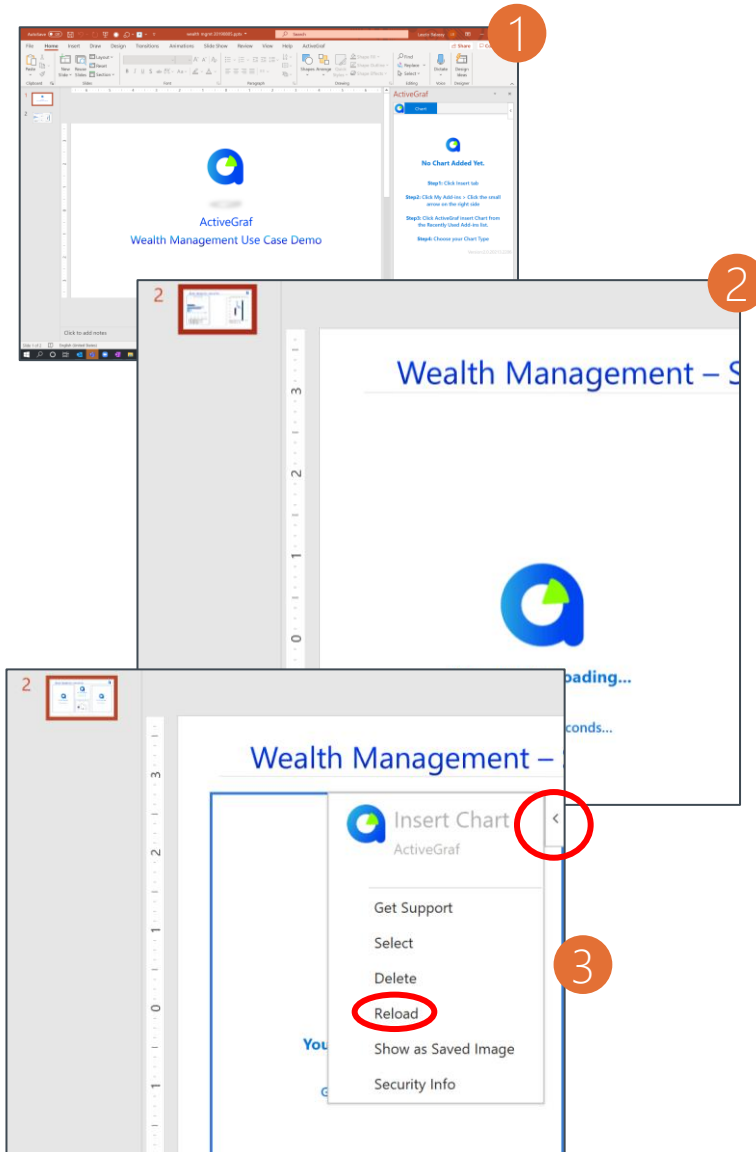
Step 1: Open your ActiveGraf-enabled PowerPoint file and wait for the ActiveGraf logo in the Task Pane to spin.

Step 2: Click on a slide that contains an ActiveGraf, and the chart starts loading. ActiveGraf recognizes the active content and opens all connected Excels automatically!

Step 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 ActiveGrafs, 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 panes 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 is when ActiveGraf builds its connections.

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

Note: For moving data points on ActiveGrafs: click & drag

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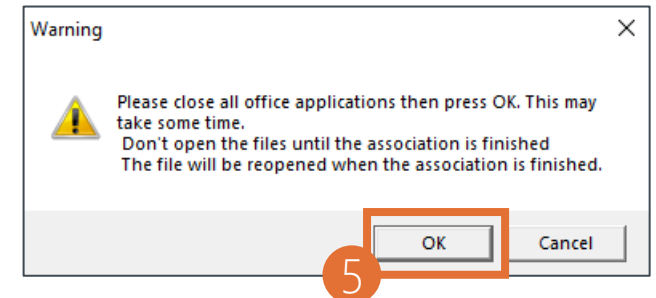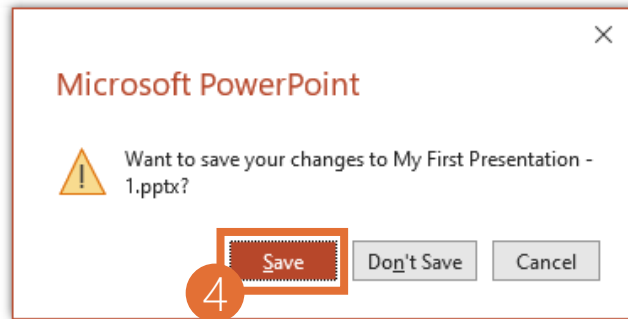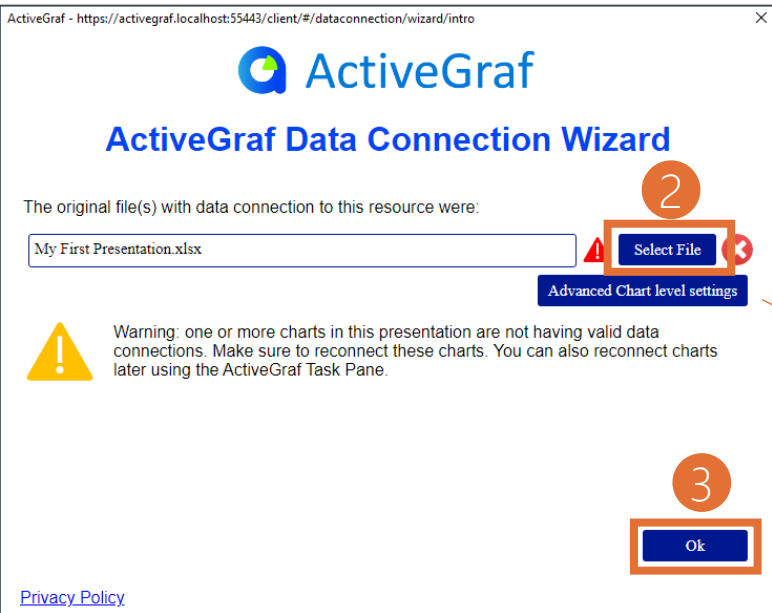
Open the Advanced Chart level settings to connect specific charts with the appropriate Grafdatas.

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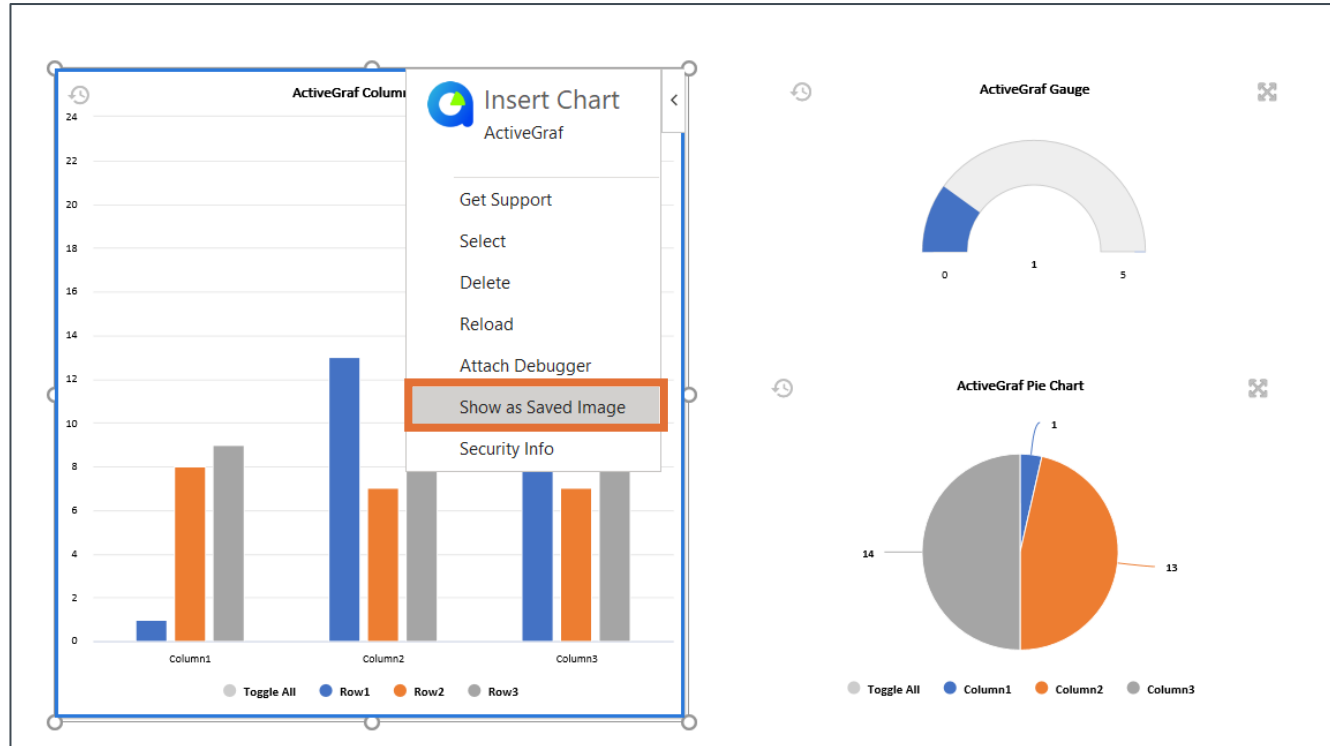
Working with and presenting ActiveGraf-enabled presentations require a locally installed ActiveGraf license. Users without a working license will not be able to benefit from the interactive analysis features.

You can share your ActiveGraf presentations with people without an ActiveGraf license in **PDF format** or send the **presentation link** if you have uploaded your files to an **ActiveGraf Publication Server**.

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 ActiveGrafs will be visible to the recipient. (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.)

ActiveGraf Publication Server – Login Process
(for users who have purchased ActiveGraf Publication Server)
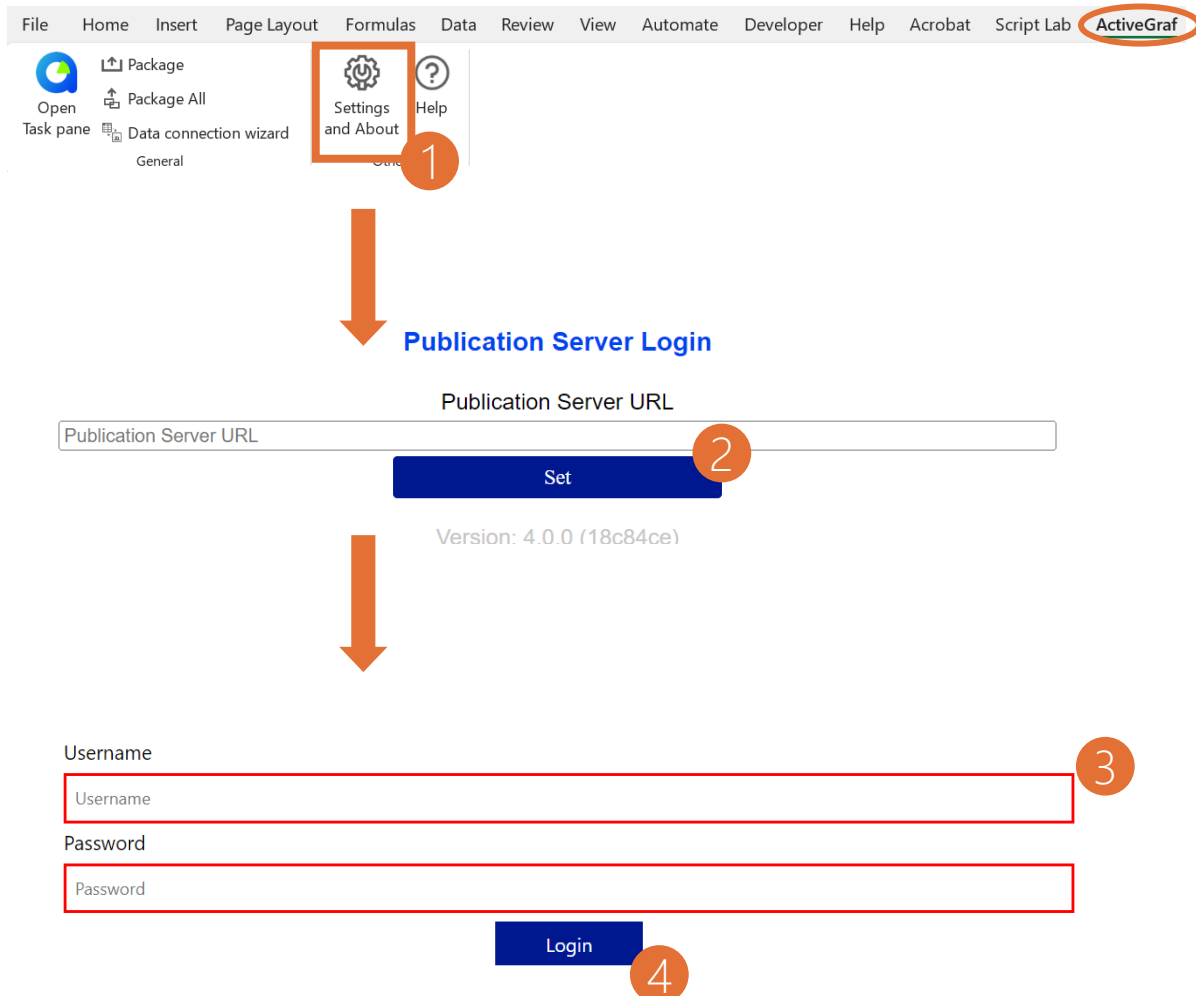
To **establish a connection between your PowerPoint ActiveGraf Add-in and the ActiveGraf Publication Server**, you'll need to set the server URL along with your log-in credentials. Follow these simple steps to ensure a seamless connection.

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.

Step 1:
Go to ActiveGraf Ribbon and click **"Settings and About".** This is where you'll define the server URL and log-in details.

Step 2:
Copy-paste the **Publication Server URL** to the designated field. And click "Set".

Step 3:
Fill in your **Username and Password –** this should be provided to you by your IT personnel.

Step 4:
Click Login. This action triggers the connection process between the ActiveGraf Publication Server and your use cases. You will see a confirmation message with the logged-in username and server URL under the "Set" button. You can close now this dialog.

ActiveGraf Publication Server – Uploading Methods
(for users who have purchased ActiveGraf Publication Server)

The ActiveGraf Publication Server empowers you to share your presentations and dashboards effectively.

Uploading Presentations to the ActiveGraf Server:

There are two methods to publish presentations on the publication server:
1. Uploading from the PowerPoint Task pane. Refer to Page 31 for detailed instructions on how to upload presentations directly from PowerPoint.
2. After logging in to your ActiveGraf Publication Server main page, either
   a. Drag and drop an ActiveGraf .actg package/archive file onto your ActiveGraf Publication Server browser main page after logging in. This hassle-free method quickly shares your content with the server, or
   b. Click on the upload button on the top right and choose an .actg file to upload.
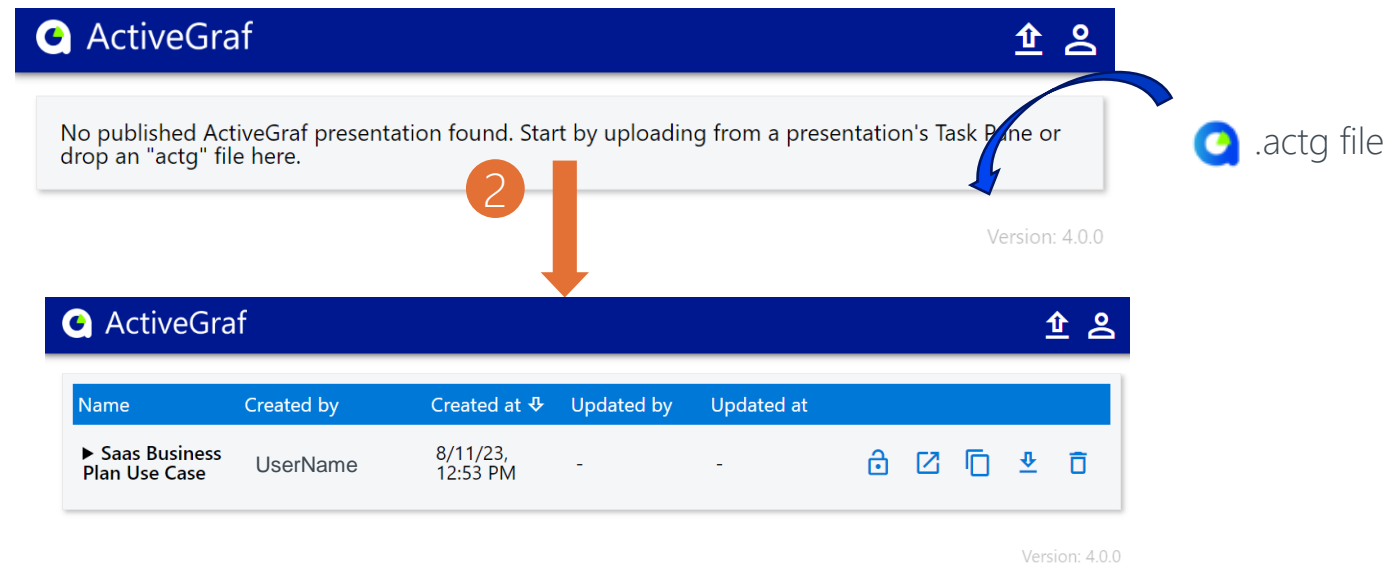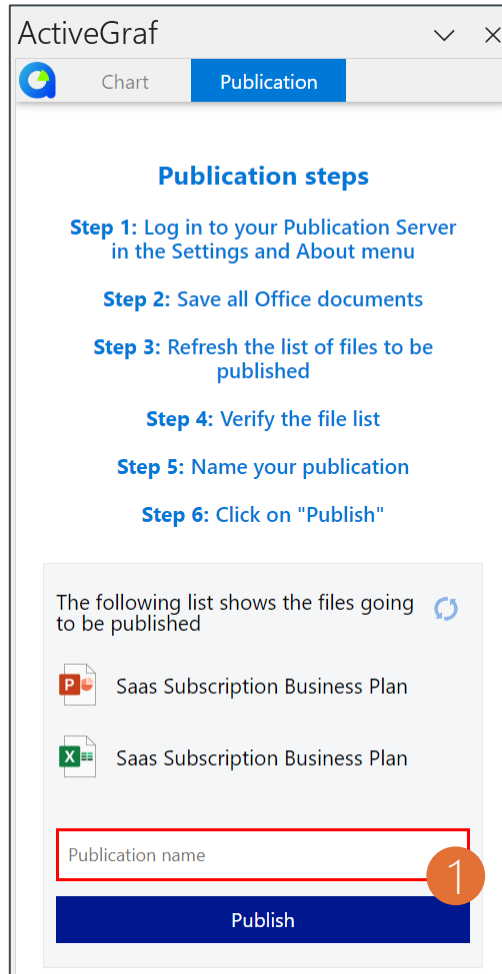
ActiveGraf Publication Server – Uploading on PowerPoint Task Pane
(for users who have purchased ActiveGraf Publication Server)
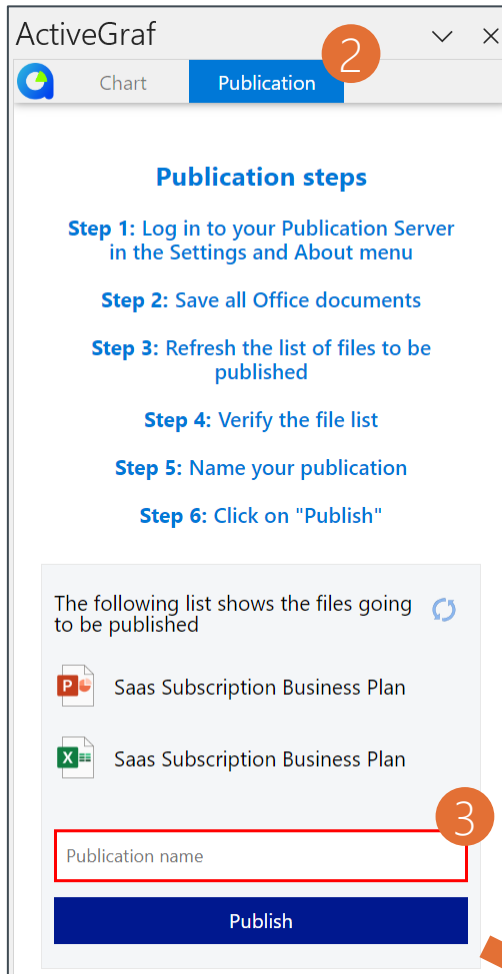
When you want to share your presentation, you can publish it to ActiveGraf Publication Server with ease.

Step 1: Save Your Files
- Before proceeding, confirm that every chart in your presentation is fully loaded and displayed properly.
- Save PowerPoint and Excel files.

Step 2: Name Publication Package
- With the PowerPoint and Excel open, click on the second tab "Publication" in the PowerPoint.
- Follow the Publication steps described on the Task pane. (Note: You can publish only one ppt, but with one or several attached excels.)

Step 3: Publish Your Presentation
- Click Publish. (If you aren't signed in to ActiveGraf Publication Server, you will receive a message: "The Publication Server URL is missing, see Login process on Page 29.)
- After successfully publishing, you will see the Published URL on the Task pane. If this is your first time publishing, test your server connection. (Refresh your browser if not all charts are loaded or reopen tab.)
- Let others know the presentation is available on the Server by sending the Published URL link. (With "Copy" you will copy the URL link, with "Open" you will be navigated to the published liveboard in your browser.

ActiveGraf Publication Server – Managing Presentations
(for users who have purchased ActiveGraf Publication Server)

Once your presentation or dashboard is uploaded, you'll have several options to interact with it. Whether you're sharing internally or with a a wider audience, the Publication Server provides a secure and versatile platform for distributing your content.

Reorder the columns if necessary. Default is by "Created at".

Delete publication

If needed, you can delete the published presentation. Confirm the action when prompted. Be cautious when using this "Delete Publication" option, as it will permanently remove the presentation from the publication server (but will not delete your original .actg file)

Password protection

You can secure your presentation with a password. Enter the password in the designated field. Leave it empty to remove any existing password protection.

Open the presentation

Clicking this option opens your presentation in a new browser tab, making it easily accessible for you or your audience. Click F11 to go full screen.
Click on the "Save" button to save your changes. The presentation status will be updated.

Download .actg file

Use this option to download the current version in an .actg file.

Copy presentation link

Clicking this option generates the URL link to your presentation. A success message will appear, confirming that the URL has been copied to your clipboard successfully.

ActiveGraf Publication Server – Managing Presentations
(for users who have purchased ActiveGraf Publication Server)

Once your presentation or dashboard is uploaded, you'll have several options to interact with it. Whether you're sharing internally or with a a wider audience, the Publication Server provides a secure and versatile platform for distributing your content.

ActiveGraf

Presentations | Custom Links

Financing - CAPEX

Publication name	Created by	Created at ⬇	Updated at
▶ Financing - CAPEX and Funding Stra...	UserName	8/7/24, 4:01 PM	-
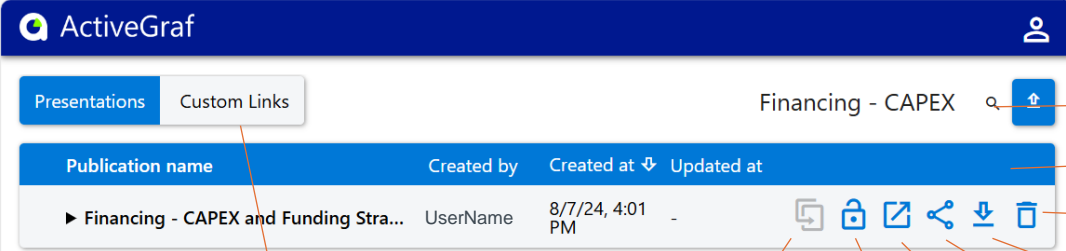
Search scenarios by starting to write the words.

Reorder the columns if necessary. Default is by "Created at".

Delete publication

If needed, you can delete the published presentation. Confirm the action when prompted.

Download .actg file

Use this option to download the current version in an .actg file.

Copy presentation link or embed code

You can generate the URL link to your presentation or the embed code to use the LiveBoard in your own HTML page. A success message will appear, confirming that the URL/code has been copied to your clipboard successfully.

Open the presentation

Clicking this option opens your presentation in a new browser tab, making it easily accessible for you or your audience.

On the presentation page you click on the first icon to export to PDF (it can't handle transitions). Click on the "Save" or "Save as" button to save your changes.. Click F11 to toggle full screen.

Custom Links

By going to the Custom Links tab and clicking on the "Plus" icon, you can create custom links for presentations, specify a link name and select the connected presentation.

[+]

Password protection

You can secure your presentation with a password. Enter the password in the designated field. Leave it empty to remove any existing password protection.

Publication password ✕

Enter a password for the publication here, or leave it empty to clear the current password

[   ]

Cancel | Confirm

Scenario cloning

Clicking this option enables scenario cloning for presentation viewers by clicking "Save as".

Create a copy from this presentation ✕

E-mail

[Your e-mail address]

Save as new

Best Practices for ActiveGraf Publisher Use Cases

- Excel Formulation:
  - Add the IFERROR function to the dynamic formulas if you plan to upload the use case to the ActiveGraf Publication Server. (This can prevent the calculation from running into #VALUE errors.
  - Use the LOOKUP function with vectors instead of formulating cells one by one to save on the calculation time of Excel.

- Page Numbering:
  - If your goal is to upload the use case to the ActiveGraf Publication Server, you do not need to use page numbering, because this is done in the browser.

- Special Fonts:
  - If you have a special custom font, you can upload it to the Publication Server. Please ask your ActiveGraf IT Help Desk for assistance.

- Use Case Structure:
  - Currently the ActiveGraf Publication Server can handle only in-file Power Queries.
  - If you have several linked Excels, place the GrafDatas in the master Excel only (do not create GrafDatas in the slave Excels.)

- Naming files:
  - To easily find the LiveBoards in your published use case directory, follow a consistent naming procedure for the actg files.

Happy Insights!

At ActiveGraf, we strive to provide a user-friendly experience that empowers you to create dynamic and engaging liveboards and presentations.

Your feedback is invaluable to us, as it helps us enhance the ActiveGraf experience even further. If you have any suggestions, ideas, or thoughts on how we can improve the software, please don't hesitate to share them with us. We genuinely appreciate your input and are committed to continually refining and optimizing our tools to better meet your needs. Just leave a message at CustomerService@activegraf.com.

Thank you for choosing ActiveGraf, and we look forward to helping you create impactful and interactive presentations with ease!