

empower® Document Automation

Release 10.0

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empower

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1. Introduction

Do your quotes and contracts repeatedly contain incorrect information or omit important pieces of information completely? Do your colleagues spend more time searching for content or old documents to reuse and (re)formatting than doing their actual job?

With the help of the empower® Document Automation, you will be able to easily create automated templates to create ready-to-use documents in PowerPoint and Word.

1.1. System Requirements

In order to use the latest empower® Document Automation release in your Windows environment, your system will need to fulfill the requirements listed in the following sections.

Windows Version

- Windows 11

Office Version

- Microsoft Office 2024

> The language adapts to the system language of Microsoft Office. In case the required language is not supported by Microsoft Office, the default language is English.

Subscription Models

- Office 365 Pro Plus, Enterprise E3 or E5

1.2. Permission Distribution

empower® Document Automation allows for the creation of templates that can be run by all users in the company.
Similar to other items in the empower® Library, permissions for these templates can be adjusted.

The creation and editing of automated templates via the ribbon, on the other hand, is reserved for admins.

These admins are assigned admin permissions for empower® Document Automation via the empower® Database.

This ensures that only users familiar with the design features of empower® Document Automation have the ability to create and edit automated templates.

Therefore, the features are only visible in the ribbon if the required permissions have been assigned to the current user.

If you have the required permissions, the button **Automation Designer** integrates into your ribbon in PowerPoint and Word (Figure 1).



Figure 1. Button **Automation Designer** in PowerPoint

For further information regarding the permission concept, refer to our **empower® Content Enablement manual**.

1.3. Update Behavior

In PowerPoint, neither update groups nor translation groups can be created for automated templates. However, slide updates are possible for presentations that have been created using an automated template under the following conditions:

- The slide was directly inserted from the empower® Library during the creation of the automated template.
- The slide was inserted as a linked slide through an empower® Link.

This update behavior does not apply to presentations that have been inserted via an empower® Link.

Presentations will not be updated.

For further information regarding update groups and translation groups, refer to our **empower® Content Enablement manual**.

1.4. Telemetry Tracking in empower®

By default, the software sends anonymous telemetry data to a central server of empower.

This data can be accessed by empower and discussed with you in a meeting. It helps to understand how well the software's features are used.

If required, telemetry tracking can be disabled for your company.

If you want to access your telemetry report, contact your Onboarding Specialist or Customer Success Manager.

2. Use Automated Templates in PowerPoint

Automated templates have a special icon indicating that they are automated (Figure 2).

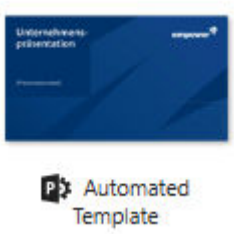


Figure 2. Automated Presentation with Icon

To open such a template, double-click on it or click on the button **Open** (Figure 3 **(1)**).

If you want to insert an automated template into your current presentation, click on the button **Insert** (Figure 3 **(2)**).

A dialog box opens.

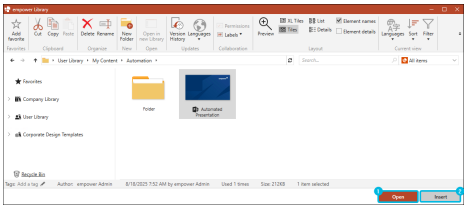


Figure 3. Open Automated Template



If it is your first time using an automated template, a login window opens before you can fill in the template.

In this window, use your empower® Credentials. You will then be forwarded automatically.

Fill in Templates

In the dialog box, you will find all the questions and instructions that were defined when the automated template was created (Figure 4).

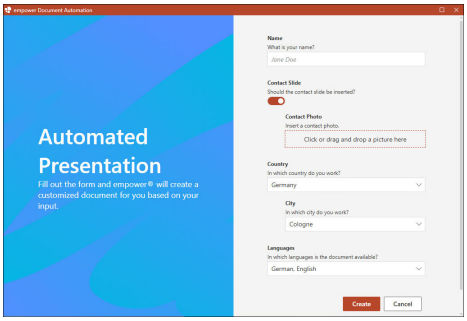


Figure 4. Dialog Box for Automated Template

Depending on the type of question or instruction, there are different ways to answer the questions and follow the instructions:

- **Text Input** – Enter the answer to the question or instruction into the input field (Figure 5).

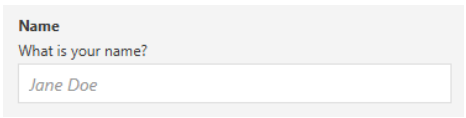


Figure 5. Text Input Question

- **Yes/No** – To answer the question, enable or disable the toggle button (Figure 6).
  The answer can also be shown in form of a checkbox. In this case, tick the checkbox if you want to answer with *Yes*.

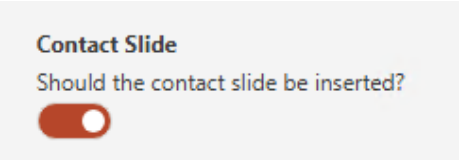


Figure 6. Yes/No Question

- **Picture** – Insert a picture that matches the question or instruction by clicking inside the box or using drag & drop (Figure 7).

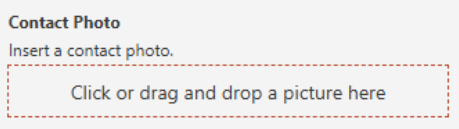


Figure 7. Picture Question

- **Single Choice** – Choose the most appropriate answer option from the drop-down menu (Figure 8).

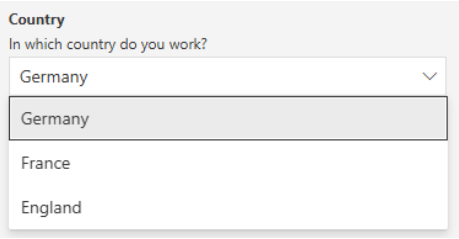


Figure 8. Single Choice Question

- **Multiple Choice** – Choose the most appropriate answer options from the drop-down menu (Figure 9).

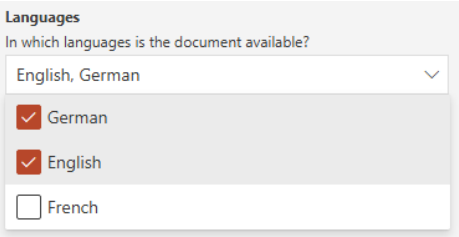


Figure 9. Multiple Choice Question

If there is a dependent question or instruction, it will appear once the parent question has been answered.

Required questions are marked by an asterisk.

If a question or instruction defined as required has not been answered, a corresponding message appears (Figure 10).



Figure 10. Missing Answer

The presentation cannot be created until the required questions and instructions have been answered.

If you have answered all questions and instructions properly, click on the button **Create**.

Before saving and using it, review the automatically generated presentation or slide.

Use Template with Agenda

If an agenda was created via the empower® Agenda feature during the creation of the template, the agenda must be manually updated after the presentation or slide is created in order to include the responses in the agenda.

To do so, follow the following steps:

1. Create the document.
   The agenda will appear in the document with the wrong numbering if sections are omitted due to the conditions and responses.
2. Open the *Agenda Editor*.
3. Do not make any changes here.
   To reload the agenda, click on the button **Update Agenda**.

The agenda will automatically recognize which sections are missing and will update the numbering.



This method only works if there is an agenda overview slide available.

3. Use Automated Templates in Word

Automated templates have a special icon indicating that they are automated (Figure 11).

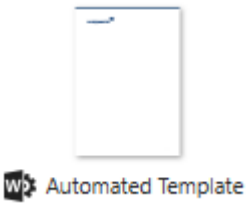


Figure 11. Automated Document with Icon

To open such a template, double-click on it or click on the button **Open** (Figure 12).
A dialog box opens.

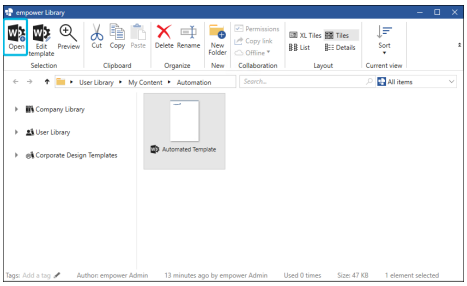


Figure 12. Open Automated Template

If it is your first time using an automated template, a login window opens before you can fill in the template.
In this window, use your empower® Credentials. You will then be forwarded automatically.

Fill in Templates

In the dialog box, you will find all the questions and instructions that were defined when the automated template was created (Figure 13).

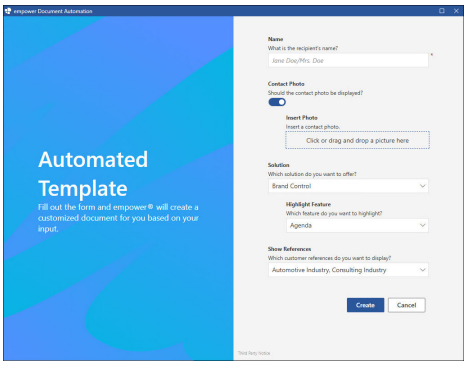


Figure 13. Dialog Box for Automated Template

Depending on the type of question or instruction, there are different ways to answer the questions and follow the instructions:

- **Text Input** – Enter the answer to the question or instruction into the input field (Figure 14).

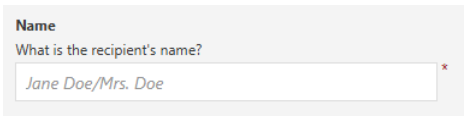


Figure 14. Text Input Question

- **Yes/No** – To answer the question, enable or disable the toggle button (Figure 15).
  The answer can also be shown in form of a checkbox. In this case, tick the checkbox if you want to answer with *Yes*.

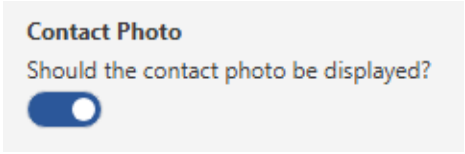


Figure 15. Yes/No Question

- **Picture** – Insert a picture that matches the question or instruction by clicking inside the box or using drag & drop (Figure 16).

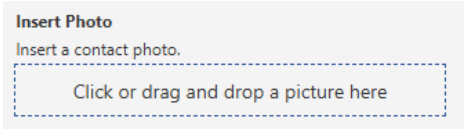


Figure 16. Picture Question

- **Single Choice** – Choose the most appropriate answer option from the drop-down menu (Figure 17).



Figure 17. Single Choice Question

- **Multiple Choice** – Choose the most appropriate answer options from the drop-down menu (Figure 18).



Figure 18. Multiple Choice Question

If there is a dependent question or instruction, it will appear once the parent question has been answered.

Required questions are marked by an asterisk.

If a question or instruction defined as required has not been answered, a corresponding message appears (Figure 19).



Figure 19. Missing Answer

The document cannot be created until the required questions and instructions have been answered.

If you have answered all questions and instructions properly, click on the button **Create**.

Before saving and using it, review the automatically generated document.

Check for Updated Elements

To check your filled-in template for updated content blocks and pictures, click on the option **Update elements** (Figure 20).

If there are updates available for outdated elements, a dialog box opens.

Confirm that you want to update these elements.

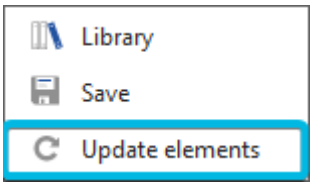


Figure 20. Option **Update elements**

Content blocks are not automatically updated during document creation, and there is no update notification for automated templates.

As described above, updates must be triggered manually.

4. Create Automated Templates in PowerPoint

For Administrators

If you have the required permissions, you can access the button **Automation Designer** via your ribbon (Figure 21).



Figure 21. Button **Automation Designer**

If you click on this button, a drop-down menu opens, featuring the following options (Figure 22):

- Wizard Designer
- Fields
- Conditions
- Linked slides

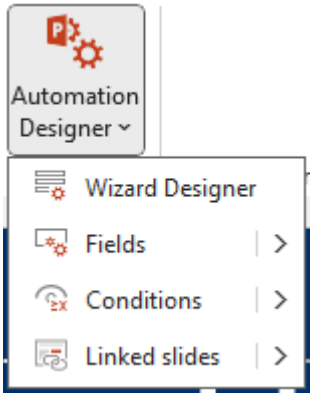


Figure 22. Options under **Automation Designer**

You can use these options to either create a new automated template or to edit an automated template.

To edit an automated template stored in the empower® Library, navigate to its location and right-click on it.

The context menu opens.

Choose the option **Edit template** (Figure 23).

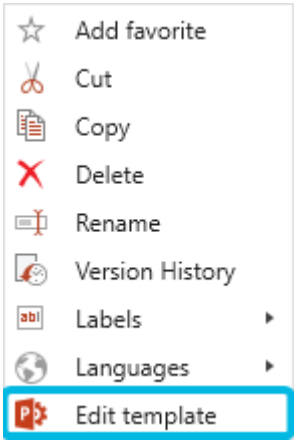


Figure 23. Option **Edit Template**

Before editing the automated template, you need to create questions in the *Wizard Designer*.
For further information regarding the *Wizard Designer*, see **Use the Wizard Designer**.

Technically, there is no limit for the number of slides in an automated presentation.

For further information regarding the admin permissions, see **Permission Distribution**.

Add Fields

You have the option to define placeholders using the button **Fields**, which will be filled with the corresponding user inputs when using the automated template.

In the text, placeholders are marked by square brackets, in which the name of the question is written (**Figure 24**).

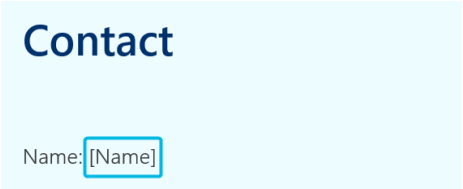


Figure 24. Placeholder on Slide

To insert a field, follow the following steps:

1. Navigate to the location in the presentation where you want to insert the field.
2. Then, click on the button **Automation Designer** and choose the option **Fields** (**Figure 25**).
   A dialog box opens.

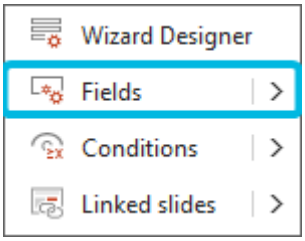


Figure 25. Option **Fields**

3. In the dialog box, select the question for whose answer you want to create a placeholder (**Figure 26**).
4. Then, click on the button **OK**.
   The placeholder will be inserted at the desired location.

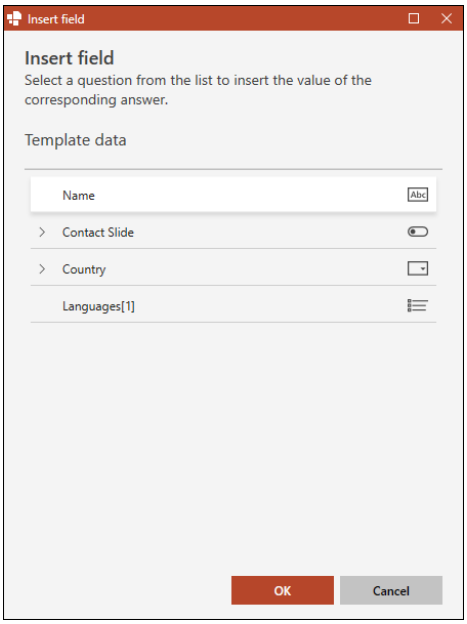


Figure 26. Choose Field

If you want to insert placeholders for the answers to a *Multiple Choice* question, keep in mind that you need to insert multiple placeholders.

Depending on how many answer options you want to insert, you have to insert a separate placeholder for each answer option.

To do so, change the index in the field overview. The number in the index indicates which answer option is displayed (Figure 27).

Index 1 corresponds to the answer that is first selected during the insertion of the template.

If you insert too many placeholders for a *Multiple Choice* question, they will not be filled in when the template is filled in and will still appear as placeholders in the finished presentation. If you insert fewer placeholders than needed, additional response options selected by the user will not be displayed.

Therefore, either provide the exact number of possible answer options in the question, or instruct users to manually remove unnecessary placeholders in the presentation.

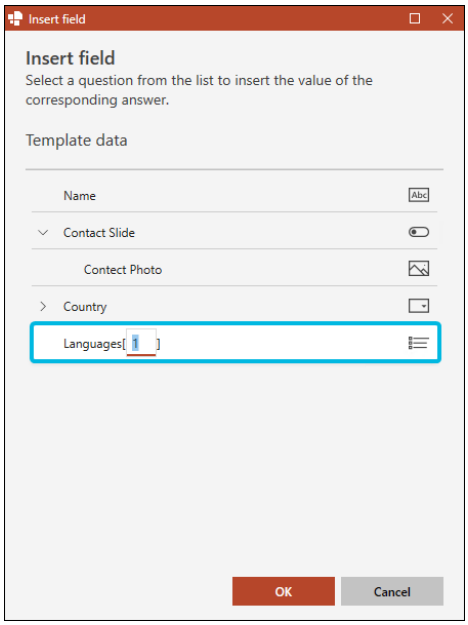


Figure 27. Enter Index

Fields can also be inserted into other objects such as shapes. To do so, follow the following steps:

1. Create a shape in the presentation using the option **Shapes**.
   This option can be accessed via the button **Elements**.
2. Select the shape.
3. Click on the button **Automation Designer** and choose the option **Fields**.
   A dialog box opens.
4. In the dialog box, select the question for whose answer you want to create a placeholder.
   For example, choose a *Picture* question, so the picture the user chooses will be inserted into the presentation.

If you use a shape to create a field for text, make sure the shape supports text. If this is not the case, you cannot apply the respective field.

If you have selected multiple shapes and placeholders and some of them do not support text, you can use the field but it will only be used for shapes that support text.

You can also access the option **Insert Field** via the context menu.

In the template, it is not visible that elements have been provided with a field.

To see all assigned fields, click on the button **Automation Designer** and then click on the **arrow** symbol next to the option **Fields** (Figure 28).

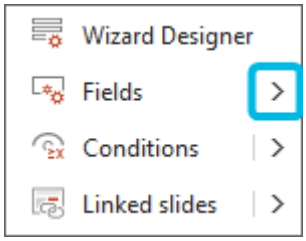


Figure 28. Open Options for Fields

Here, choose the option **Manage Fields** (Figure 29).
A dialog box opens.

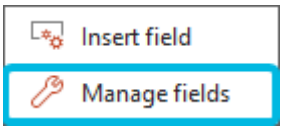


Figure 29. Option **Manage Fields**

In this dialog box, you are provided with an overview of all fields in your presentation.
To insert the field again at your current cursor position, select the entry and click on the button **Insert** (Figure 30 **(1)**).
To add a new field at your current cursor position, click on the button **Create** (Figure 30 **(2)**).

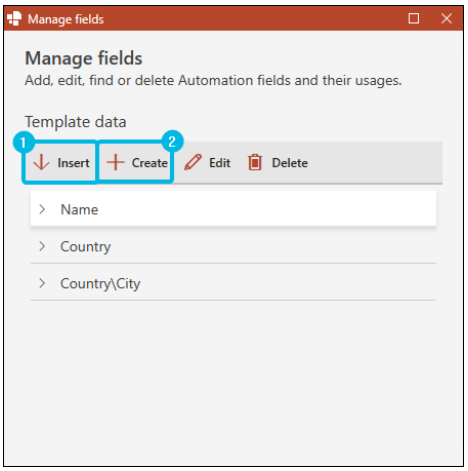


Figure 30. Buttons **Insert** and **Create** for Fields

In the dialog box, choose one of the available fields from the list and click on the button **OK** (Figure 31).
You can now insert the new field via the button **Insert**.

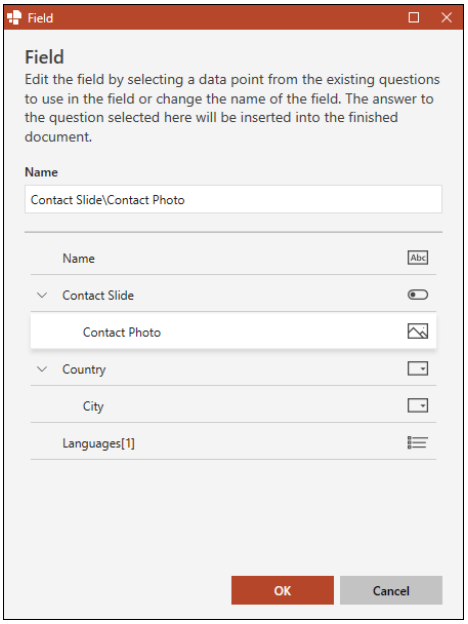


Figure 31. Dialog for Field Creation

To edit an existing entry, select it and click on the button **Edit** (Figure 32).
In the dialog box, you can change the field you have used.

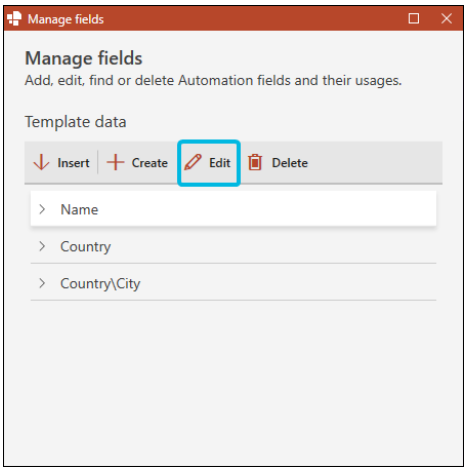


Figure 32. Button **Edit** for Field

The same field can also be inserted multiple times in one presentation.
To see where the field has been inserted, expand the entry (Figure 33).

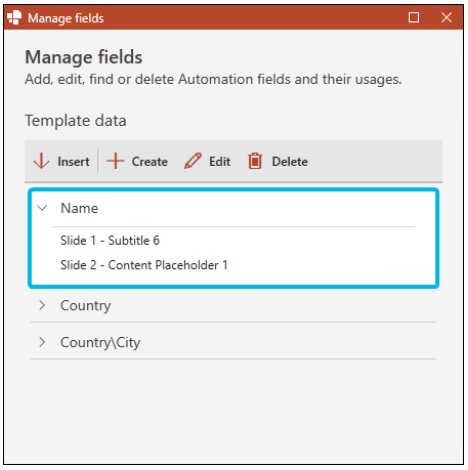


Figure 33. Expanded Field Entry

To delete one occurrence of a field, select it from the entry and click on the button **Delete** (Figure 34).

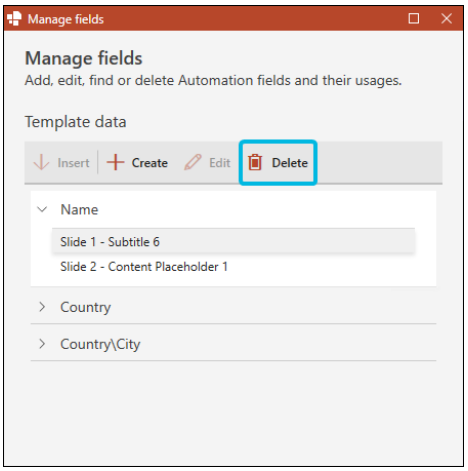


Figure 34. Delete Single Field Occurrence

To delete the entry completely and therefore remove all occurrences of the field, select the entry itself and click on the button **Delete** (Figure 35).

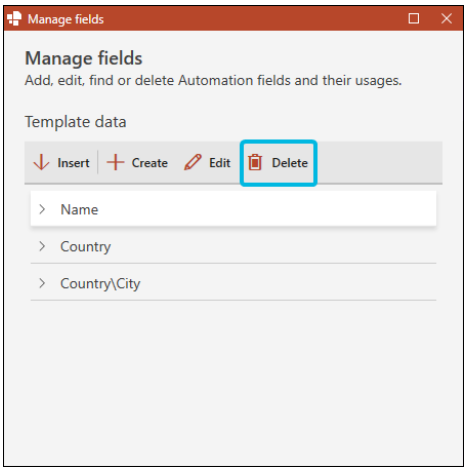


Figure 35. Delete Entire Field Entry

A dialog box opens (Figure 36).

To confirm the deletion process, click on the button **Yes**.

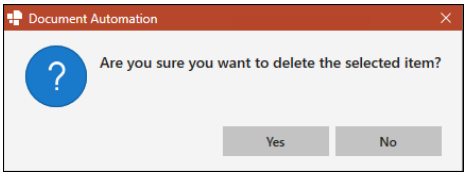


Figure 36. Deletion Confirmation for Fields

If you have opened the field management window and a slide's position in the presentation changes, its slide number does not update automatically.

To make sure all slide numbers are displayed correctly after you have made changes, close the window and reopen it.

Add Conditions

You can use conditions to decide when to display an element or slide and when not to.

For every question or instruction type except for the *Picture* question/instruction, conditions can be created.

Multiple conditions, combined in a rule, can be created, either all of which must be met or at least one of which must be met for the rule to take effect.

The conditions can be linked with either *AND* or *OR*.

If you add two conditions that are linked by *AND* within a rule, both conditions must be met for the rule to apply.

If you add two conditions within a rule that are linked by *OR*, only one of the conditions must be met for the rule to apply.

To insert a condition, follow the following steps:

1. Navigate to the location in the presentation where you want to insert the condition.
2. Choose a shape or slide on which you want to apply the condition.
3. Click on the button **Automation Designer** and choose the option **Conditions** (Figure 37).
   A dialog box opens.

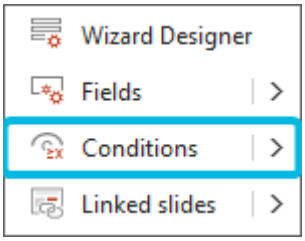


Figure 37. Option **Conditions**

4. In the dialog box, select the condition you want to assign (Figure 38).
   To view the condition rule in a mouse-over, hover over the **information** symbol.
5. Then, click on the button **OK**.

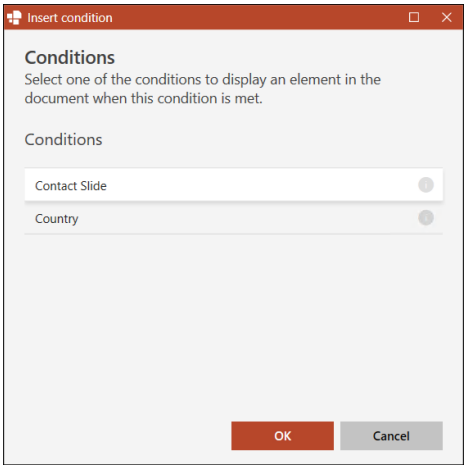


Figure 38. Choose Condition

Conditions are not visible in the presentation.

To see all conditions and their usage in the presentation, click on the button **Automation Designer** and then click on the **arrow** symbol next to the option **Conditions** (Figure 39).

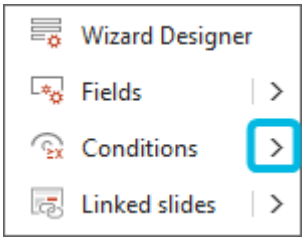


Figure 39. Open Options for Conditions

Then, choose the option **Manage conditions** (Figure 40).

A dialog box opens.

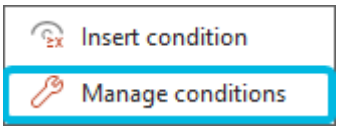


Figure 40. Option **Manage conditions**

In this dialog box, you are provided with an overview of all available conditions.

The conditions are listed on the left-hand side and their rules are displayed on the right-hand side.

To apply the condition to the currently selected shape or slide, first select the element in your presentation and then the condition in the dialog box and click on the button **Insert** (Figure 41).

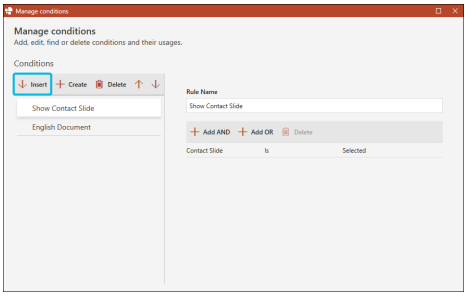


Figure 41. Insert Condition

To add a new condition, click on the button **Create** (Figure 42 **(1)**).

On the right-hand side, enter a name for the rule into the input field (Figure 42 **(2)**).

Then, either click on the button **Add AND** or **Add OR**, depending on the condition you want to create (Figure 42 **(3)**).

For further information regarding the rule structure for the single question types, see **Rule Structure**.

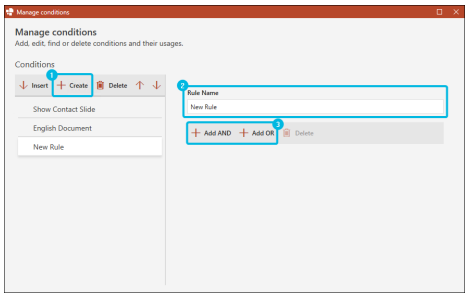


Figure 42. Create Condition

To edit an existing entry, select it from the list. It is then displayed on the right-hand side.

To change the rule name, enter a new name into the input field.

To add new rules to the condition, use the buttons **Add AND** and **Add OR**.

To delete rules from the condition, select the rule and click on the button **Delete** on the right-hand side of the dialog box (Figure 43).

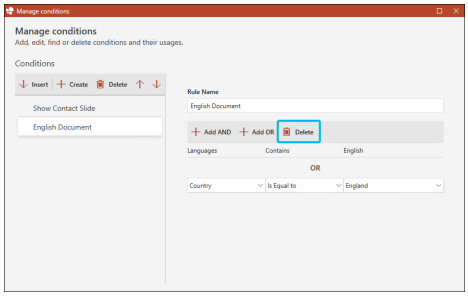


Figure 43. Delete Rule

The same condition can also be applied multiple times in one presentation.

To see where the condition has been applied, expand the entry on the left-hand side of the dialog box (Figure 44).

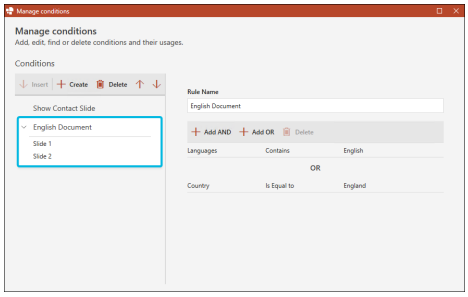


Figure 44. Expanded Condition Entry

To delete one occurrence of a condition, select it from the entry and click on the button **Delete** on the left-hand side of the dialog box (Figure 45).

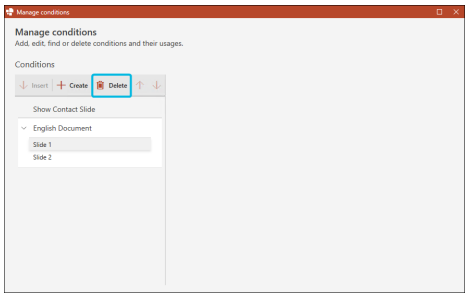


Figure 45. Delete Single Condition Occurrence

To delete the entry completely and therefore remove all occurrences of the condition, select the entry itself and click on the button **Delete** (Figure 46).

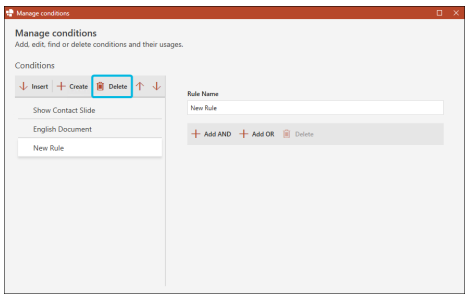


Figure 46. Delete Entire Condition Entry

A dialog box opens (Figure 47).
To confirm the deletion process, click on the button **Yes**.

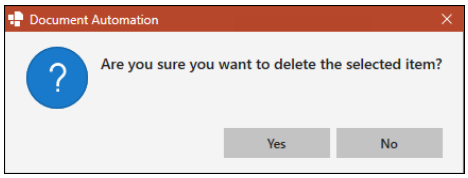


Figure 47. Deletion Confirmation for Condition

If you have opened the condition management window and a slide's position in the presentation changes, its slide number does not update automatically.

To make sure all slide numbers are displayed correctly after you have made changes, close the window and reopen it.

Rule Structure

The rules are structured differently for each type of question:

Text Input Question

Question	Condition	Value	Consequence
[Name of the question]	Is Equal to	[Text Input]	The rule applies if the value of the text input matches the respective question. Capitalization is taken into account.
[Name of the question]	Is Not Equal to	[Text Input]	The rule applies if the value of the text input does not match the respective question. Capitalization is taken into account.

Yes/No Question

Question	Condition	Value	Consequence
[Name of the question]	Is	Selected	The rule applies if the Yes/No Question was answered with *Yes*.
[Name of the question]	Is not	Selected	The rule applies if the Yes/No Question was answered with *No*.

Single Choice Question

Question	Condition	Value	Consequence
[Name of the question]	Is Equal to	[Answer Option]	The rule applies if the value corresponds to the selected answer option.
[Name of the question]	Is Not Equal to	[Answer Option]	The rule applies if the value does not correspond to the selected answer option.

Multiple Choice Question

Question	Condition	Value	Consequence
[Name of the question]	Contains	[Answer Option]	The rule applies if the value corresponds to one of the selected answer options.
[Name of the question]	Not Contains	[Answer Option]	The rule applies if the value does not correspond to any of the selected answer options.

These rules work for slides and single elements.

Add Linked Slides

You can use empower® Document Automation to link single slides or complete presentations to the automated template.
When the template is run, the slide or presentation is inserted instead of the link.

To link a slide or a presentation, follow the following steps:

1. Open the empower® Library.
2. Navigate to the location of the desired slide or presentation.
3. Select the element you want to link.
4. In the navigation bar, click on the button **Copy link to clipboard** (Figure 48).

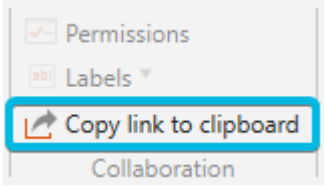


Figure 48. Option **Copy link to clipboard**

5. Go back to your automated template and navigate to the slide after which you want to insert the linked slide.
6. Click on the button **Automation Designer** and choose the option **Linked slides** (Figure 49).
   A dialog box opens.

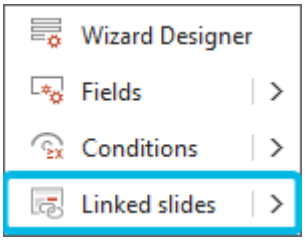


Figure 49. Option **Linked slides**

7. In the dialog box, paste the link into the input field.
   A preview of the slide or presentation appears, as well as its metadata (Figure 50).

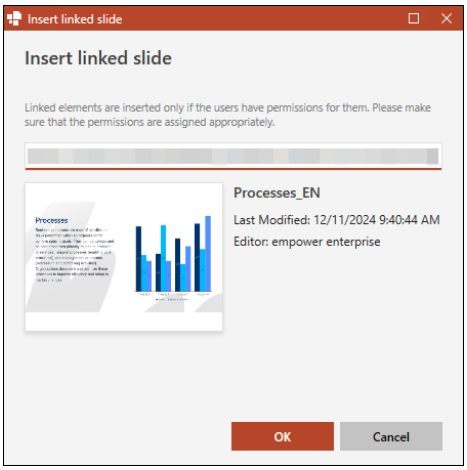


Figure 50. Insert Linked Slide

8. Then, click on the button **OK**.
   A placeholder slide is inserted (**Figure 51**).



Figure 51. Placeholder Slide in Slide Overview

The placeholder slide also shows a preview of the slide or presentation and contains the respective metadata (**Figure 52**).

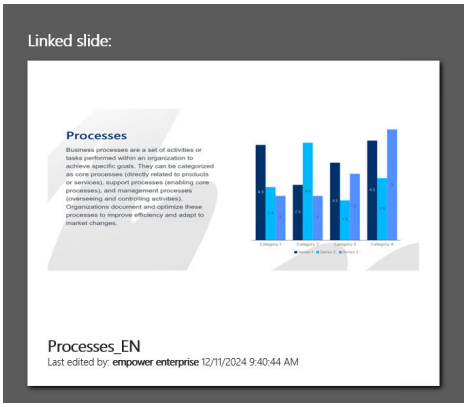


Figure 52. Placeholder Slide Content

To view an overview of all linked slides and presentations, click on the button **Automation Designer** and then click on the **arrow** symbol next to the option **Linked slides** (**Figure 53**).

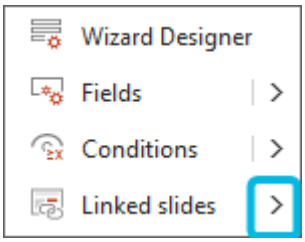


Figure 53. Open Options for Linked Slides

Then, choose the option **Manage linked slides** (**Figure 54**).
A dialog box opens.

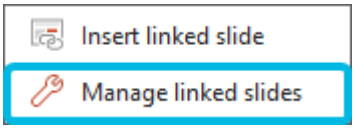


Figure 54. Option **Manage linked slides**

In this dialog box, you are provided with an overview of all linked slides.

To insert the linked slide again, select the entry and click on the button **Insert** (Figure 55 **(1)**).

To add a new linked slide or presentation, click on the button **Create** (Figure 55 **(2)**).

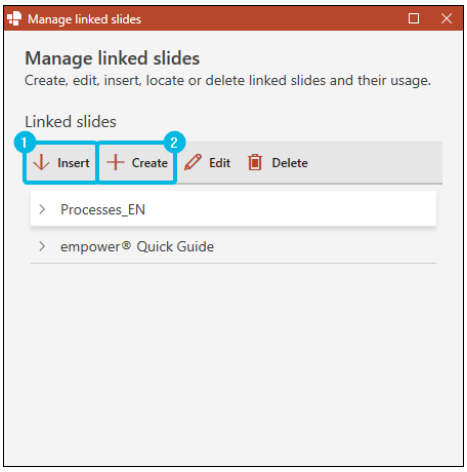


Figure 55. Buttons **Insert** and **Create** for Linked Slides

In the dialog box, enter a name for the linked slide and then paste the link into the second input field (Figure 56).

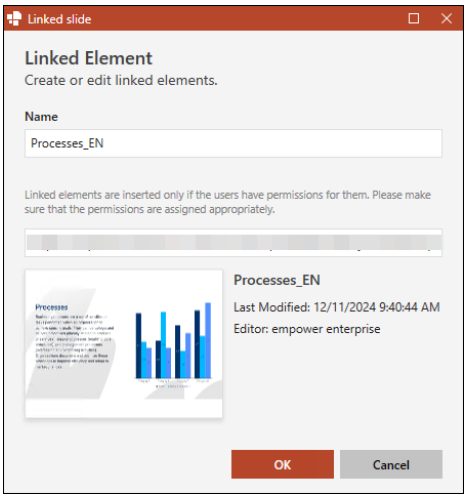


Figure 56. Link New Slide

To edit an existing entry, select it and click on the button **Edit** (Figure 57).

In the dialog box, you can change the entry name and the link you have used.

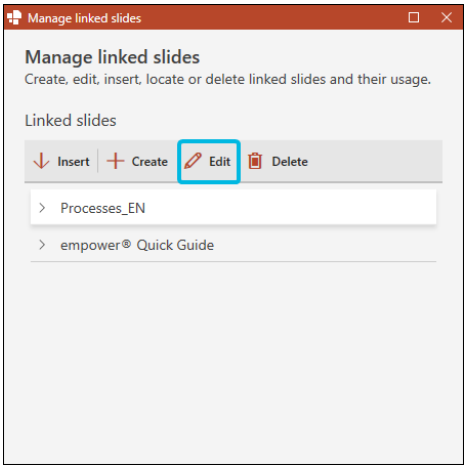


Figure 57. Button **Edit** for Linked Slide

The same slide or presentation can also be linked multiple times in one presentation.

To see where the slide or presentation has been linked, expand the entry (Figure 58).

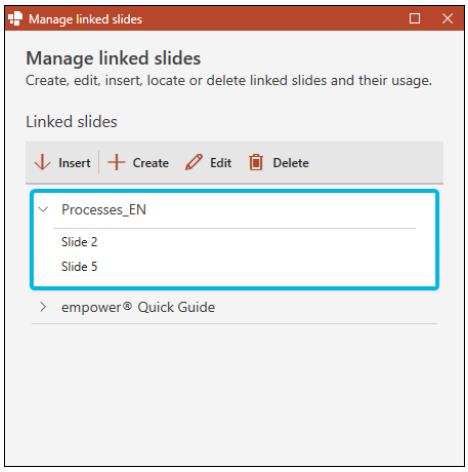


Figure 58. Expanded Linked Slide Entry

To delete one occurrence of a linked slide or presentation, select it from the entry and click on the button **Delete** (Figure 59).

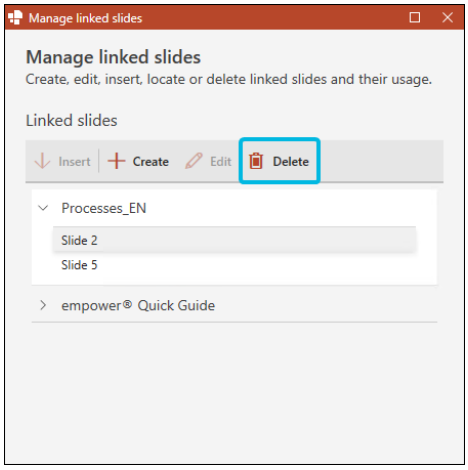


Figure 59. Delete Single Linked Slide Occurrence

To delete the entry completely and therefore remove all occurrences, select the entry itself and click on the button **Delete** (Figure 60).

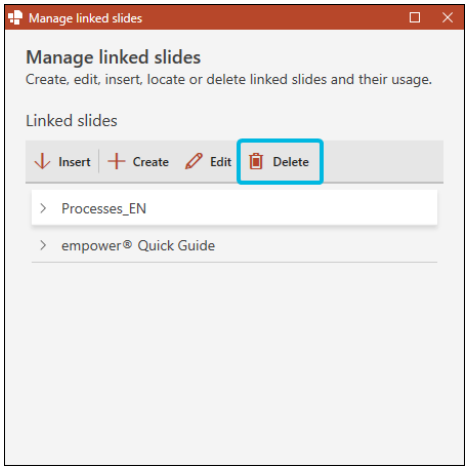


Figure 60. Delete Entire Linked Slide Entry

A dialog box opens (Figure 61).

To confirm the deletion process, click on the button **Yes**.

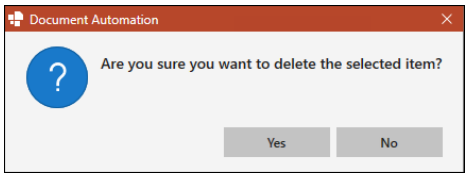


Figure 61. Deletion Confirmation for Linked Slide

If you have opened the linked slides management window and a slide's position in the presentation changes, its slide number does not update automatically.

To make sure all slide numbers are displayed correctly after you have made changes, close the window and reopen it.

When linked slides are inserted into the presentation during the usage of an automated template, the footer of the target master is applied to those slides.

For further information regarding empower® Links, refer to our **empower® Content Enablement manual**.

Display Linked Slides Conditionally

The option to link individual slides or presentations in the automated template can be used to fill the templates with individual slides as needed.

To do so, you can add conditions to placeholders for linked slides or presentations.

The following table shows an example for conditionally linked slides:

Example
Individual contact slides are created, each containing the contact details for individual contacts in various industries. These individual slides are stored in the empower® Library.
In an automated template for a presentation that can be used for clients from different industries, these slides are now linked. To do so, each contact slide must be linked individually and inserted as a placeholder.
In the *Wizard Designer*, a *Single Choice* question can now be created, and multiple answer options can be specified.
The question is: *What industry does the client belong to?*
Conditions are now created under **Conditions**.
The individual placeholders for the contact slides of individual contacts per industry can now be assigned to the corresponding condition. Like this, only the relevant contact slide for the industry will be displayed.

Add Agenda

empower® Document Automation is not directly compatible with the empower® Agenda.

However, the agenda can be used in an automated template by applying a workaround.

To do so, follow the following steps:

1. Start by creating a new presentation for your automated template.
2. First, click on the button **Agenda** to open the *Agenda Editor* (**Figure 62**).

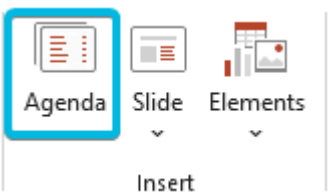


Figure 62. Button **Agenda**

3. Edit your agenda according to your needs.
4. Click on the button **Create Agenda** (Figure 63).

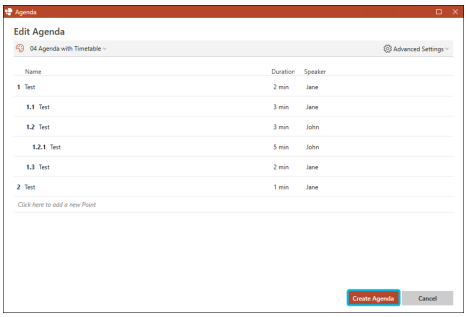


Figure 63. Button **Create Agenda**

5. Create the required slides inside the agenda sections.
6. Then, create the required questions in the *Wizard Designer* (Figure 64).
   a. In order to decide which agenda section to insert when creating an agenda, create *Yes/No* questions.
      i. If you have set up subitems for the respective sections, create a dependent *Yes/No* question for this purpose.

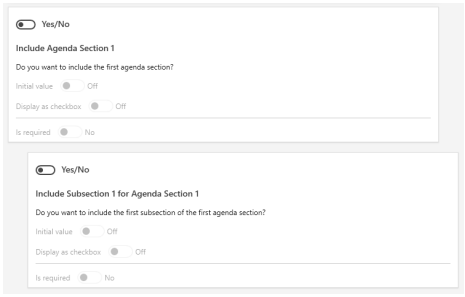


Figure 64. Question in Wizard Designer

7. Now, create your conditions (Figure 65).
   a. To create a condition that includes or excludes the agenda section, select the *Yes/No* question from the left-most drop-down menu, choose *Is* from the middle drop-down menu and then choose *Selected* from the rightmost drop-down menu.
8. Now, apply these conditions to the respective sections.
   a. To apply a condition to a section, select all associated slides, including content slides, divider slides and the overview slide.
      Then link the corresponding condition to the selected slides.
9. Repeat this process for all sections and all conditions.

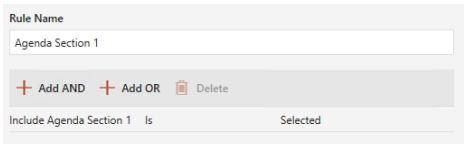


Figure 65. Condition for Agenda

This method only works if there is an agenda overview slide available.

For further information regarding the agenda, refer to our **empower® Brand Control manual**.

Save Template to Library

If you have finished the creation of your automated template, you need to save it to the empower® Library.

It will then be available for all users who have permissions to the folder it is saved in.

To do so, follow the following steps:

1. Click on the lower part of the split button **Library** (Figure 66).



Figure 66. Button **Library**

2. Here, choose the option **Save** (Figure 67).
   A drop-down menu opens.

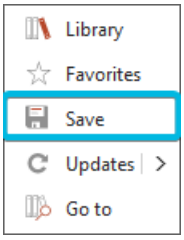


Figure 67. Option **Save**

3. In the drop-down menu, choose the option **Automation Template** (Figure 68 **(1)**).
4. Then, click on the button **Save as** (Figure 68 **(2)**).
   a. If you want to overwrite an existing automated template, click on the button **Save**.

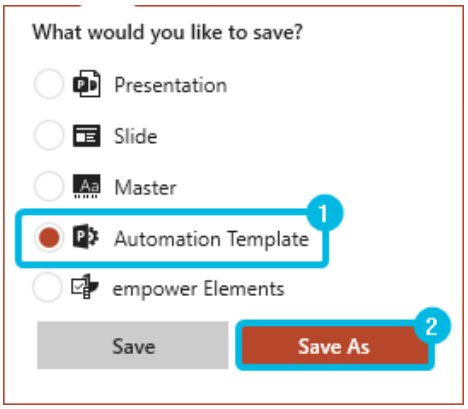


Figure 68. Saving Dialog

5. Navigate to the location in the library where you want to save the automated template.
6. Type in a name in the input field (Figure 69 **(1)**).
7. Click on the button **Save** (Figure 69 **(2)**).
   a. If you are overwriting an existing template, click on the button **Overwrite**.

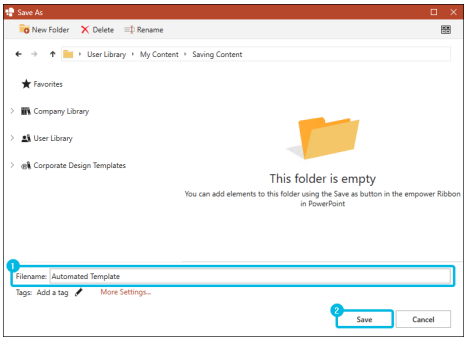


Figure 69. Save Automated Template

If you save an automated template as a normal slide or presentation, all automation features are lost.
A dialog box opens (Figure 70).

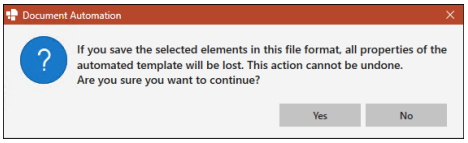


Figure 70. Dialog Box – File Format

If you save a filled-in automated template as an automated template again, the automation features will not work as expected.
A dialog box opens (Figure 71).



Figure 71. Dialog Box – Filled-in Template

Automated templates can also be saved to the subsection *Corporate Presentations* in the section *Corporate Design Templates*.

5. Create Automated Templates in Word

For Administrators

If you have the required permissions, you can access the button **Automation Designer** via your ribbon (Figure 72).



Figure 72. Button **Automation Designer**

If you click on this button, a drop-down menu opens, featuring the following options (Figure 73):

- Wizard Designer
- Fields
- Conditions
- Linked content blocks

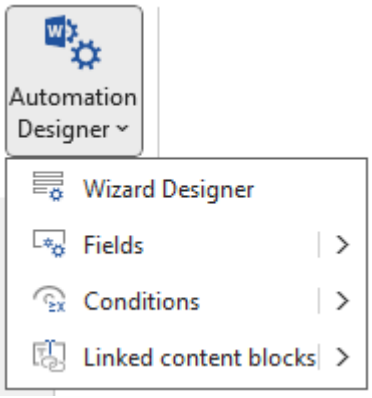


Figure 73. Options under **Automation Designer**

You can use these options to either create a new automated template or to edit an automated template.

To edit an automated template stored in the empower® Library, navigate to its location and right-click on it.

The context menu opens.

Choose the option **Edit template** (Figure 74).

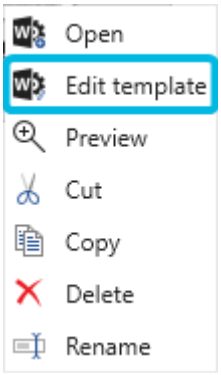


Figure 74. Option **Edit Template**

Before editing the automated template, you need to create questions in the *Wizard Designer*.
For further information regarding the *Wizard Designer*, see **Use the Wizard Designer**.

For further information regarding the admin permissions, see **Permission Distribution**.

Add Fields

You have the option to define placeholders using the button **Fields**, which will be filled with the corresponding user inputs when using the automated template.

In the text, placeholders are marked by square brackets, in which the name of the question is written (Figure 75).

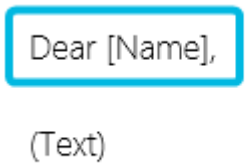


Figure 75. Placeholder in Document

To insert a field, follow the following steps:

1. Navigate to the location in the document where you want to insert the field.
2. Then, click on the button **Automation Designer** and choose the option **Fields** (Figure 76).
   A dialog box opens.

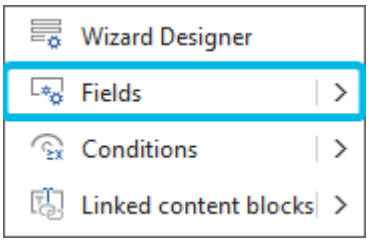


Figure 76. Option **Fields**

3. In the dialog box, select the question for whose answer you want to create a placeholder (Figure 77).
4. Then, click on the button **OK**.
   The placeholder will be inserted at the desired location.

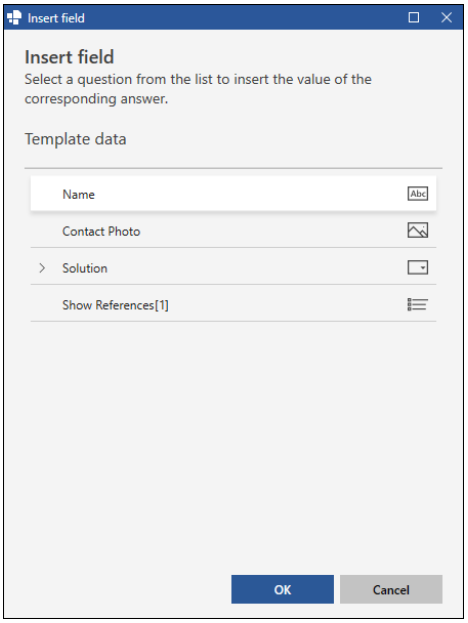


Figure 77. Choose Field

If you want to insert placeholders for the answers to a *Multiple Choice* question, keep in mind that you need to insert multiple placeholders.

Depending on how many answer options you want to insert, you have to insert a separate placeholder for each answer option.

To do so, change the index in the field overview. The number in the index indicates which answer option is displayed (Figure 78).

Index 1 corresponds to the answer that is first selected during the insertion of the template.

If you insert too many placeholders for a *Multiple Choice* question, they will not be filled in when a user fills in the template and will still appear as placeholders in the finished document.

If you insert fewer placeholders than needed, additional response options selected by the user will not be displayed.

Therefore, either provide the exact number of possible answer options in the question, or instruct users to manually remove unnecessary placeholders in the document.

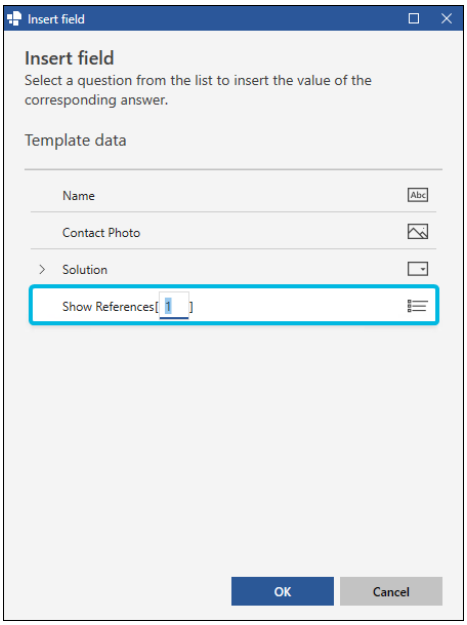


Figure 78. Enter Index

Fields can also be inserted into other objects such as shapes. To do so, follow the following steps:

1. Create a shape in the document using the Word built-in functions.
2. Select the shape.
3. Click on the button **Automation Designer** and choose the option **Fields**.
   A dialog box opens.
4. In the dialog box, select the question for whose answer you want to create a placeholder.
   For example, select a *Picture* question in the overview so that the image selected by the user appears in this shape.

You can also access the option **Insert Field** via the context menu.

In the template, it is not visible that elements have been provided with a field.

To see all assigned fields, click on the button **Automation Designer** and then click on the **arrow** symbol next to the option **Fields** (Figure 79).

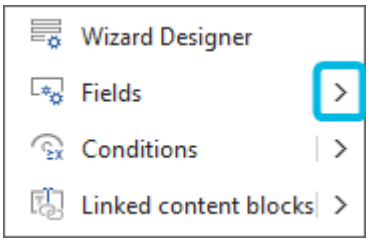


Figure 79. Open Options for Fields

Here, choose the option **Manage Fields** (Figure 80).

A dialog box opens.

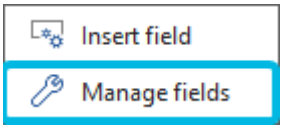


Figure 80. Option **Manage fields**

In this dialog box, you are provided with an overview of all fields in your document.

To insert the field again at your current cursor position, select the entry and click on the button **Insert** (Figure 81 **(1)**).

To add a new field at your current cursor position, click on the button **Create** (Figure 81 **(2)**).

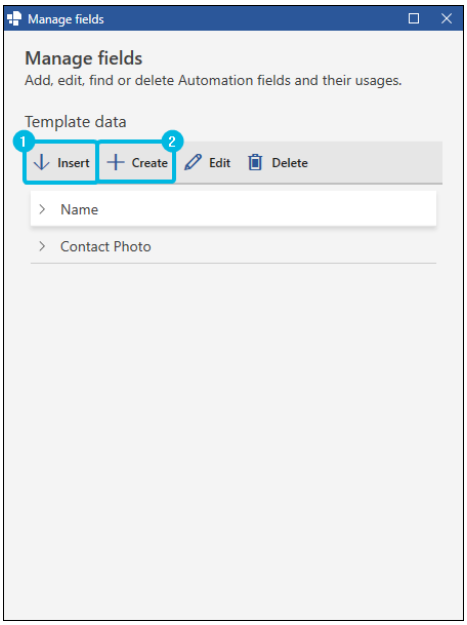


Figure 81. Buttons **Insert** and **Create** for Fields

In the dialog box, choose one of the available fields from the list and click on the button **OK** (Figure 82).

You can now insert the new field via the button **Insert**.

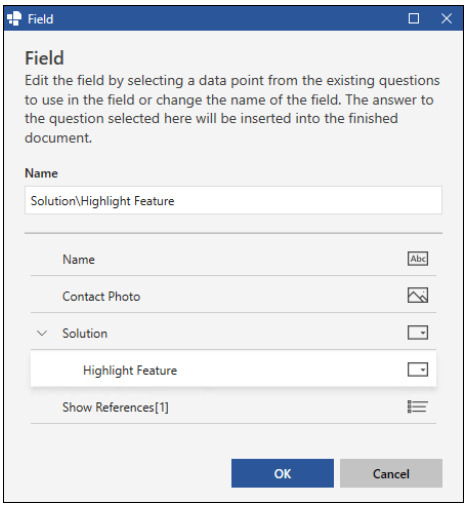


Figure 82. Dialog for Field Creation

To edit an existing entry, select it and click on the button **Edit** (Figure 83).

In the dialog box, you can change the field you have used.

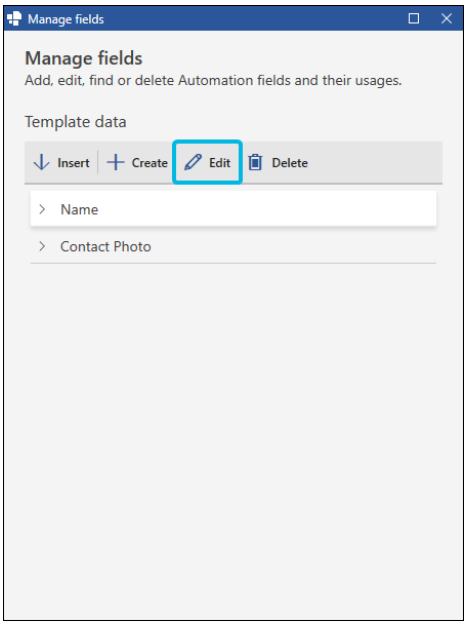


Figure 83. Button **Edit** for Field

The same field can also be inserted multiple times in one document.

To see where the field has been inserted, expand the entry (Figure 84).

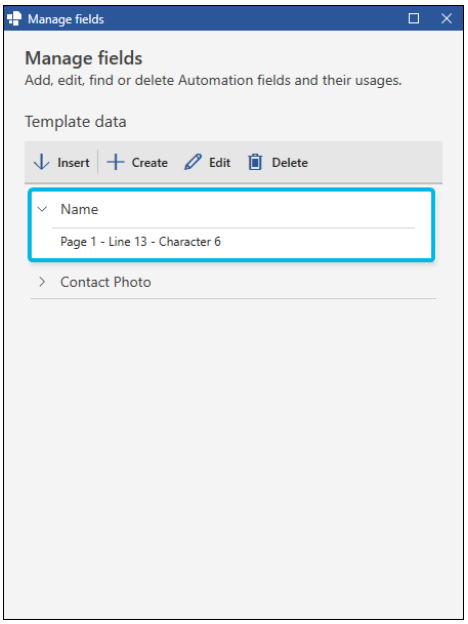


Figure 84. Expanded Field Entry

To delete one occurrence of a field, select it from the entry and click on the button **Delete** (Figure 85).

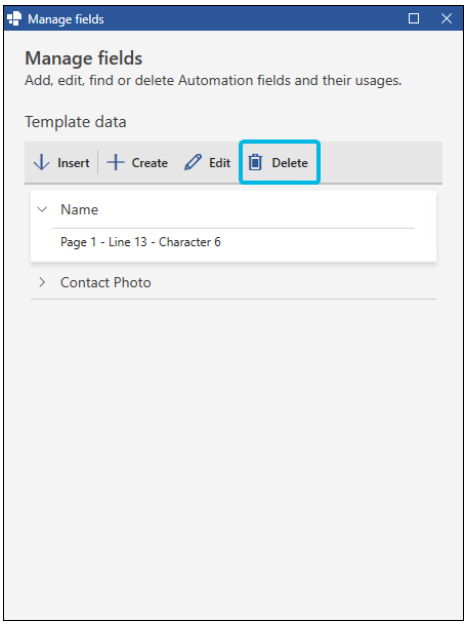


Figure 85. Delete Single Field Occurrence

To delete the entry completely and therefore remove all occurrences of the field, select the entry itself and click on the button **Delete** (Figure 86).

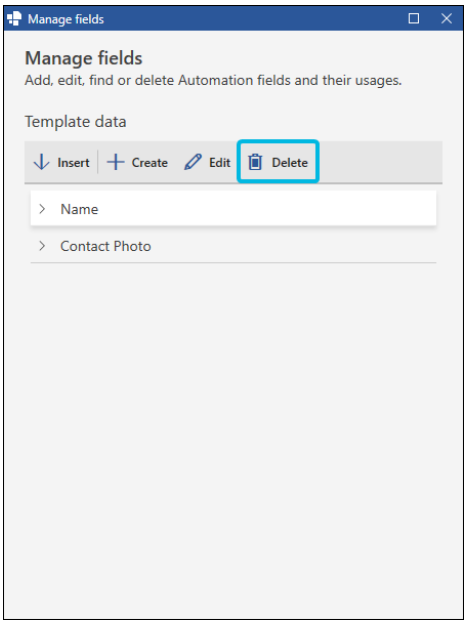


Figure 86. Delete Entire Field Entry

A dialog box opens (Figure 87).
To confirm the deletion process, click on the button **Yes**.

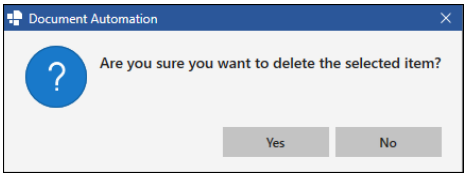


Figure 87. Deletion Confirmation for Fields

Add Conditions

You can use conditions to decide when to display an element or a content block and when not to.

For every question or instruction type except for the *Picture* question/instruction, rules can be created that include conditions.

For one rule, multiple conditions can be created, either all of which must be met or at least one of which must be met for the rule to take effect.

The conditions can be linked with either *AND* or *OR*.

If you add two conditions that are linked by *AND* within a rule, both conditions must be met for the rule to apply.

If you add two conditions within a rule that are linked by *OR*, only one of the conditions must be met for the rule to apply.

To insert a condition, follow the following steps:

1. Navigate to the location in the document where you want to insert the condition.
2. Choose a shape or content block on which you want to apply the condition.
3. Click on the button **Automation Designer** and choose the option **Conditions** (Figure 88).
   A dialog box opens.

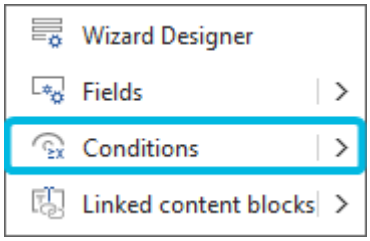


Figure 88. Option **Conditions**

4. In the dialog box, select the condition you want to assign (Figure 89).
   To view the condition rule in a mouse-over, hover over the **information** symbol.
5. Then, click on the button **OK**.

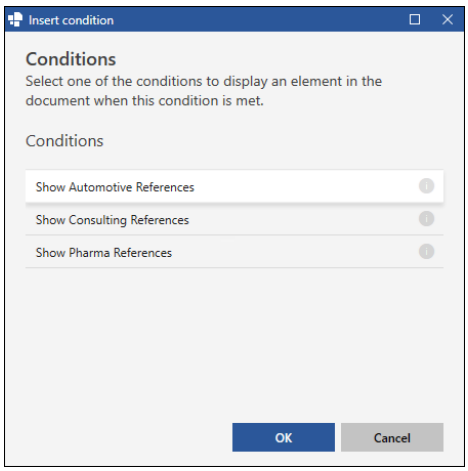


Figure 89. Choose Condition

Conditions are not visible in the document.

To see all conditions and their usage in the document, click on the button **Automation Designer** and then click on the **arrow** symbol next to the option **Conditions** (Figure 90).



Figure 90. Open Options for Conditions

Then, choose the option **Manage conditions** (Figure 91).

A dialog box opens.

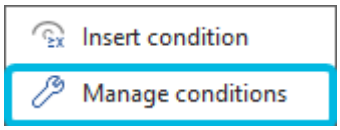


Figure 91. Option **Manage conditions**

In this dialog box, you are provided with an overview of all available conditions.

The conditions are listed on the left-hand side and their rules are displayed on the right-hand side.

To apply the condition on the currently selected shape or text, first select the element in your document and then the condition in the dialog box and click on the button **Insert** (Figure 92).

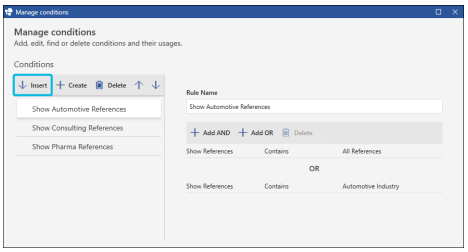


Figure 92. Insert Condition

To add a new condition, click on the button **Create** (Figure 93 **(1)**).

On the right-hand side, enter a name for the rule into the input field (Figure 93 **(2)**).

Then, either click on the button **Add AND** or **Add OR**, depending on the condition you want to create (Figure 93 **(3)**).

For further information regarding the rule structure for the single question types, see Rule Structure.

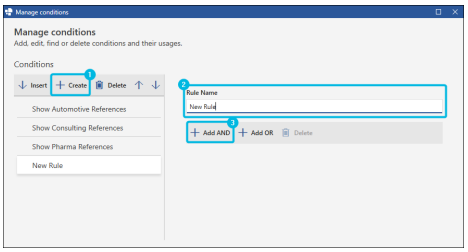


Figure 93. Create Condition

To edit an existing entry, select it from the list. It is then displayed on the right-hand side.

To change the rule name, enter a new name into the input field.

To add new rules to the condition, use the buttons **Add AND** and **Add OR**.

To delete rules from the condition, select the rule and click on the button **Delete** on the right-hand side of the dialog box (Figure 94).

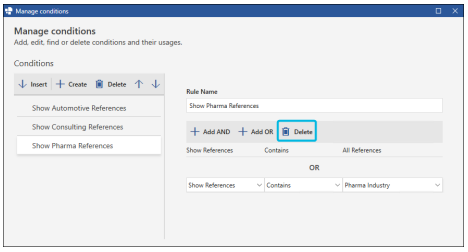


Figure 94. Delete Rule

The same condition can also be applied multiple times in one document.

To see where the condition has been applied, expand the entry on the left-hand side of the dialog box (Figure 95).

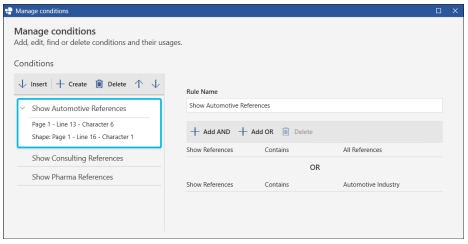


Figure 95. Expanded Condition Entry

To delete one occurrence of a condition, select it from the entry and click on the button **Delete** on the left-hand side of the dialog box (Figure 96).

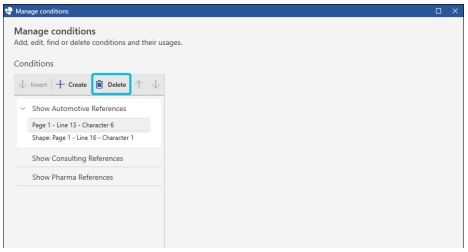


Figure 96. Delete Single Condition Occurrence

To delete the entry completely and therefore remove all occurrences of the condition, select the entry itself and click on the button **Delete** (Figure 97).

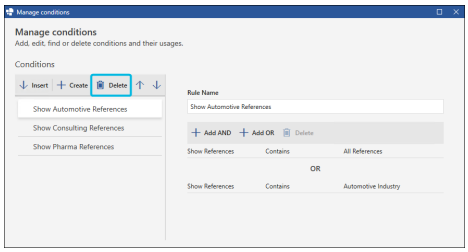


Figure 97. Delete Entire Condition Entry

A dialog box opens (Figure 98).
To confirm the deletion process, click on the button **Yes**.

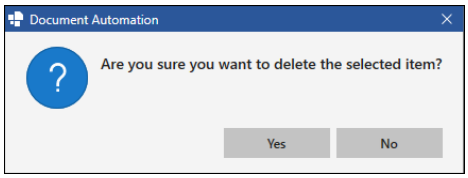


Figure 98. Deletion Confirmation for Condition

Rule Structure

The rules are structured differently for each type of question:

Text Input Question

Question	Condition	Value	Consequence
[Name of the question]	Is Equal to	[Text Input]	The rule applies if the value of the text input matches the respective question. Capitalization is taken into account.
[Name of the question]	Is Not Equal to	[Text Input]	The rule applies if the value of the text input does not match the respective question. Capitalization is taken into account.

Yes/No Question

Question	Condition	Value	Consequence
[Name of the question]	Is	Selected	The rule applies if the Yes/No Question was answered with *Yes*.
[Name of the question]	Is not	Selected	The rule applies if the Yes/No Question was answered with *No*.

Single Choice Question

Question	Condition	Value	Consequence
[Name of the question]	Is Equal to	[Answer Option]	The rule applies if the value corresponds to the selected answer option.
[Name of the question]	Is Not Equal to	[Answer Option]	The rule applies if the value does not correspond to the selected answer option.

Multiple Choice Question

Question	Condition	Value	Consequence
[Name of the question]	Contains	[Answer Option]	The rule applies if the value corresponds to one of the selected answer options.
[Name of the question]	Not Contains	[Answer Option]	The rule applies if the value does not correspond to any of the selected answer options.

Add Linked Content Blocks

You can use empower® Document Automation to link content blocks to the automated template.

When the template is run, the content block is inserted instead of the link.

To link a content block, follow the following steps:

1. Open the empower® Library.
2. Navigate to the location of the desired content block.
3. Select the element you want to link.
4. In the navigation bar, click on the button **Copy link** (Figure 99).

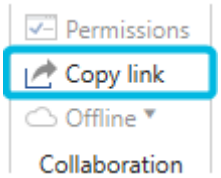


Figure 99. Button **Copy link**

5. Go back to your automated template and navigate to the position where you want to insert the linked content block.
6. Click on the button **Automation Designer** and choose the option **Linked content blocks** (Figure 100).
   A dialog box opens.

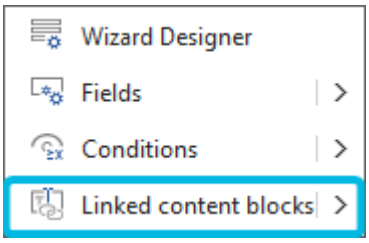


Figure 100. Option **Linked content blocks**

7. In the dialog box, paste the link into the input field.
   A preview of the content block appears, as well as its metadata (Figure 101).
8. Then, click on the button **OK**.
   A placeholder for the content block is inserted.

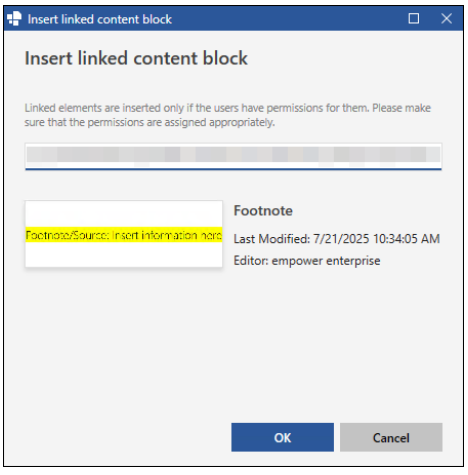


Figure 101. Insert Linked Content Block

To view an overview of all linked content blocks, click on the button **Automation Designer** and then click on the **arrow** symbol next to the option **Linked content blocks** (Figure 102).

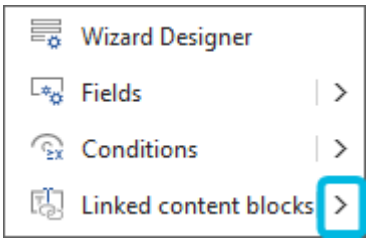


Figure 102. Open Options for Linked Content Blocks

Then, choose the option **Manage linked content blocks** (Figure 103).

A dialog box opens.

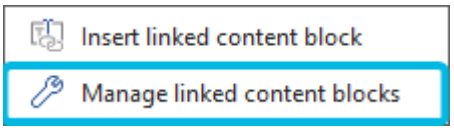


Figure 103. Option **Manage linked content blocks**

In this dialog box, you are provided with an overview of all linked content blocks.

To insert the linked content block again, select the entry and click on the button **Insert** (Figure 104 **(1)**).

To add a new linked content block, click on the button **Create** (Figure 104 **(2)**).

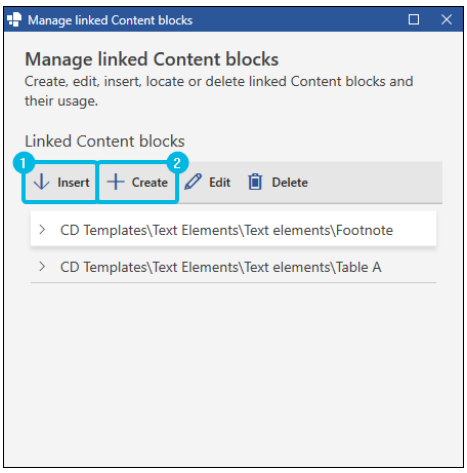


Figure 104. Buttons **Insert** and **Create** for Linked Content Blocks

In the dialog box, enter a name for the linked content block and then paste the link into the second input field (Figure 105).

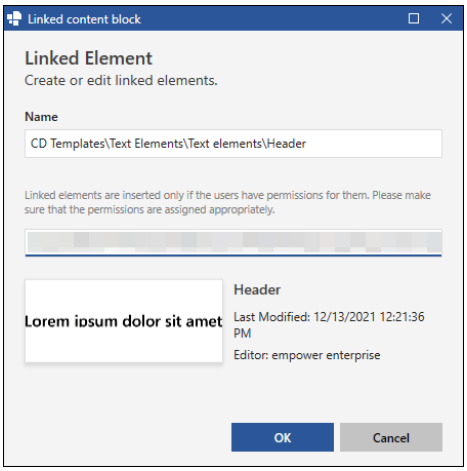


Figure 105. Link New Content Block

To edit an existing entry, select it and click on the button **Edit** (Figure 106).

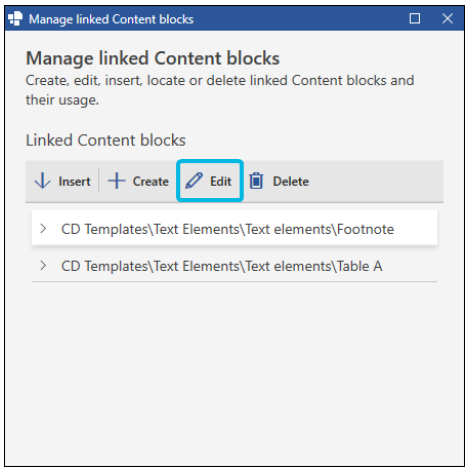


Figure 106. Button **Edit** for Linked Content Block

In the dialog box, you can change the entry name and the link you have used.

The same content block can also be linked multiple times in one document.

To see where the content block has been linked, expand the entry (Figure 107).

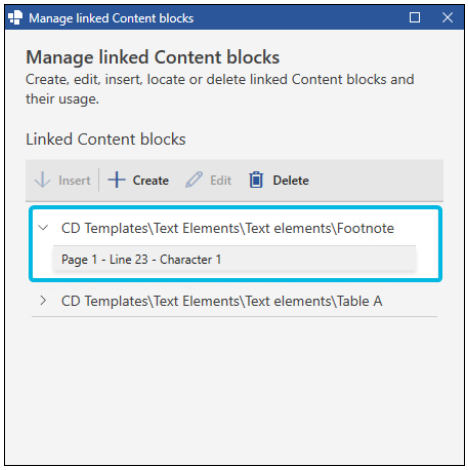


Figure 107. Expanded Linked Content Block Entry

To delete one occurrence of a linked content block, select it from the entry and click on the button **Delete** (Figure 108).

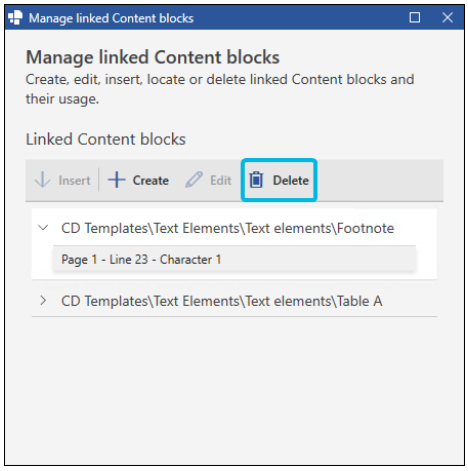


Figure 108. Delete Single Linked Content Block Occurrence

To delete the entry completely and therefore remove all occurrences, select the entry itself and click on the button **Delete** (Figure 109).

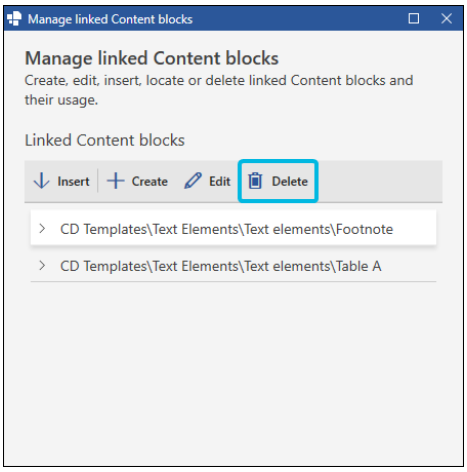


Figure 109. Delete Entire Linked Content Block Entry

A dialog box opens (Figure 110).

To confirm the deletion process, click on the button **Yes**.

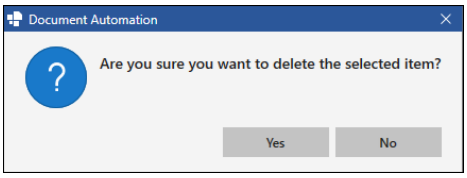


Figure 110. Deletion Confirmation for Linked Content Block

If you insert content blocks as linked content blocks using an empower® Link, the content block cannot be updated when it is updated in the empower® Library.

Since empower® Document Automation is intended to create ready-to-use documents that are not updated, linked content blocks should be preferred.

If you still want the content block to be updatable, follow the instructions under **Insert Content Blocks via Library**.

For further information regarding empower® Links, refer to our **empower® Content Enablement manual**.

Insert Content Blocks via Library

In automated templates, you can also insert content blocks from the empower® Library.

To do so, follow the following steps:

1. Navigate to the position in your document where you want to insert the content block.
2. Open the empower® Library.
3. Navigate to the storage location of the required content block.
4. Double-click on the content block to insert it.
   The content block is inserted into your document.

If a condition is applied on content blocks from the empower® Library, this condition must entirely encompass the content block.

If you insert content blocks from the empower® Library, the content block can be manually updated when it is updated in the empower® Library.

If you do not want the content block to be updated, follow the instructions under **Add Linked Content Blocks**.

Save Template to Library

If you have finished the creation of your automated template, you need to save it to the empower® Library.

It will then be available for all users who have permissions to the folder it is saved in.

To do so, follow the following steps:

1. Click on the lower part of the split button **Library** (**Figure 111**).

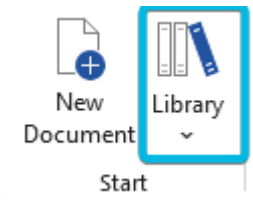


Figure 111. Button **Library**

2. Here, choose the option **Save** (**Figure 112**).
   A drop-down menu opens.

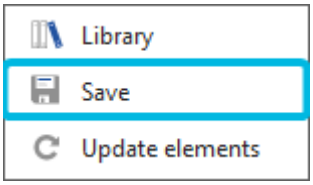


Figure 112. Option **Save**

3. In the drop-down menu, choose the option **Automation Template** (**Figure 113 (1)**).
4. Then, click on the button **Save as** (**Figure 113 (2)**).

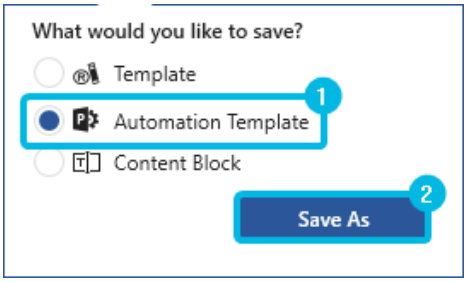


Figure 113. Saving Dialog

5. Navigate to the location in the library where you want to save the automated template.
6. Type in a name in the input field (**Figure 114 (1)**).
7. Click on the button **Save** (**Figure 114 (2)**).
   a. If you are overwriting an existing template, click on the button **Overwrite**.

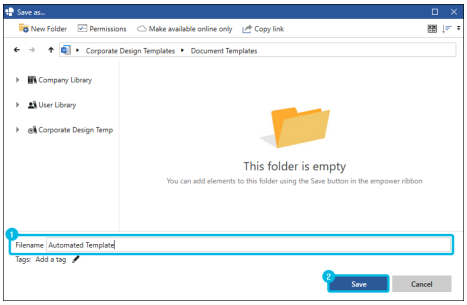


Figure 114. Save Automated Template

If you save an automated template as a normal *Document Template*, all automation features are lost.

A dialog box opens (**Figure 115**).

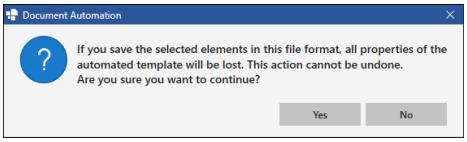


Figure 115. Dialog Box – File Format

If you save a filled-in automated template as an automated template again, the automation features would not work as expected.
A dialog box opens (**Figure 116**).



Figure 116. Dialog Box – Filled-in Template

6. Use the Wizard Designer

For Administrators

In the *Wizard Designer*, various questions can be defined that the user must answer when selecting a template in order to fill in the template.

The following five types of questions are available in the *Wizard Designer* when creating an automated template (Figure 117):

- Text Input
- Yes/No
- Picture
- Single Choice
- Multiple Choice

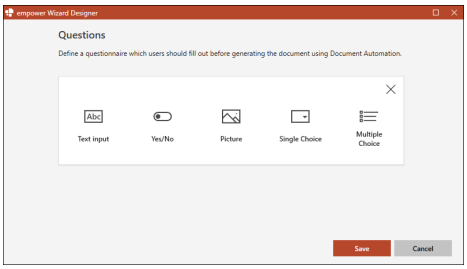


Figure 117. Question Types

The screenshots and examples in this chapter refer to the user interface in PowerPoint.
In Word, you can use the *Wizard Designer* the same way as in PowerPoint.

To open the *Wizard Designer*, click on the button **Automation Designer** and then choose the option **Wizard Designer** (Figure 118).

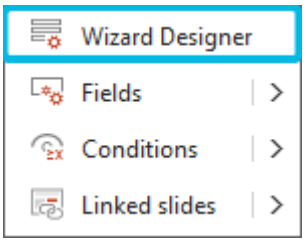


Figure 118. Option **Wizard Designer**

To add a new question, click on the button **Add new question** (Figure 119 **(1)**).

To edit a question, click into the question panel (Figure 119 **(2)**).

To delete a question, click into the question panel and then click on the **bin** symbol (Figure 119 **(3)**).

To move a question up or down, use the **arrow** symbols in the question panel (Figure 119 **(4)**).

To save your changes, click on the button **Save** (Figure 119 **(5)**).

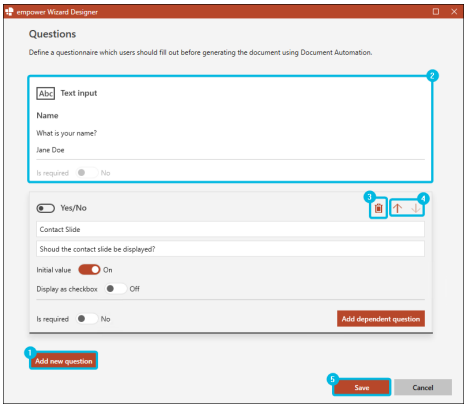


Figure 119. General Options in *Wizard Designer*

After saving the questions, you cannot change the question name via the *Wizard Designer* anymore.

To change the name of a question, navigate to the option **Manage fields**, select the question and click on the button **Edit**.

For further information, see **Add Fields** for PowerPoint and **Add Fields** for Word.

Use Text Input Questions

The question type **Text Input** is used to define the content of text fields.

To create a *Text Input* question, follow the following steps (**Figure 120**):

1. Name the question.
2. Enter a question to be displayed for the user.
3. If required, enter a watermark that will be displayed in the response field for the user and serves as an example.
4. To make the question mandatory to be answered, switch the toggle button for **Is required** to *Yes*.

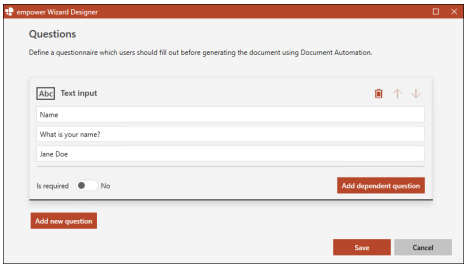


Figure 120. *Text Input* Question

The following example provides a use case for this question:

Example
Name of the Question: Name
Question: What is your name?
Watermark: Jane Doe
Required: No

Use Yes/No Questions

The question type **Yes/No** is closely related to the conditions that can be assigned to individual slides as well as individual elements. They primarily serve to decide whether and when certain elements or slides should be displayed.

To create a *Yes/No* question, follow the following steps (**Figure 121**):

1. Name the question.
2. Enter a question to be displayed for the user.
3. To set the initial value for the question to *Yes*, switch the toggle button for **Initial Value** to *On*.
4. To display the *Yes/No* question in form of a checkbox, switch the toggle button for **Display as checkbox** to *On*.
5. To make the question mandatory to be answered, switch the toggle button for **Is required** to *Yes*.

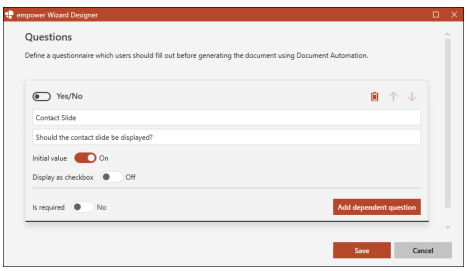


Figure 121. *Yes/No* Question

If you make the question mandatory, the toggle button for **Initial Value** is automatically set to *Off* and the toggle button for **Display as checkbox** is automatically set to *On*.

These settings cannot be changed and are therefore grayed out.

The following example provides a use case for this question:

Example

Name of the Question: Contact Slide

Question: Should the contact slide be displayed?

Initial Value: On

Checkbox: Off

Required: No

Making a *Yes/No* Question mandatory only makes sense if the user is supposed to give their consent for something and the document cannot be created without this consent.

Use Picture Questions

The question type **Picture** is used to insert pictures to be displayed at a specific position in a slide or document.

To create a *Picture* question, follow the following steps (Figure 122):

1. Name the question.
2. Enter a question to be displayed for the user.
3. To make the question mandatory to be answered, switch the toggle button for **Is required** to *Yes*.

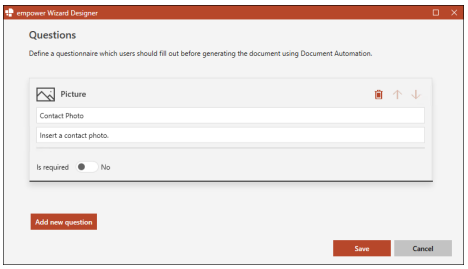


Figure 122. *Picture* Question

The following example provides a use case for this question:

Example

Name of the Question: Contact Photo

Question: Choose a photo to be inserted as the contact photo.

Required: No

Use Single Choice Questions

The question type **Single Choice** is used to define a question with multiple predefined answer options.

The user is allowed to select only one of the answer options when answering the question.

You can offer as many answer options as you like.

To create a *Single Choice* question, follow the following steps (**Figure 123**):

1. Name the question.
2. Enter a question to be displayed for the user.
3. Add answer options by typing them into the input fields.
   To add additional options, click on the button **Add choice**.
4. To make the question mandatory to be answered, switch the toggle button for **Is required** to *Yes*.

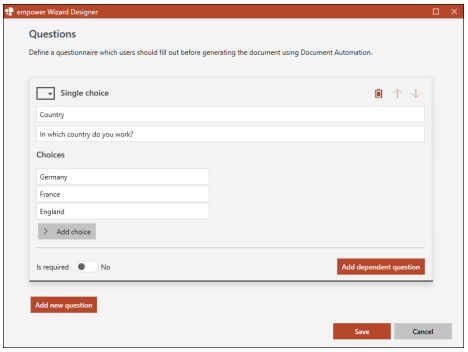


Figure 123. *Single Choice* Question

To delete one of the answer options, hover over the input field and click on the **X** symbol next to it.

The following example provides a use case for this question:

Example
Name of the Question: Country
Question: In which country do you work?
Answer Options: Germany, France, England
Required: No

When the user answers a *Single Choice* question while filling in the template, the answer to a *Single Choice* question cannot be revoked.

To provide the user with this option, you can add an answer option like *None* or - . Then, do not apply any condition to the respective field for this option, but for all other options.

Use Multiple Choice Questions

The question type **Multiple Choice** is used to define a question with multiple predefined answer options.

The user is allowed to select multiple options when answering the question.

You can offer as many answer options as you like.

To create a *Multiple Choice* question, follow the following steps (Figure 124):

1. Name the question.
2. Enter a question to be displayed for the user.
3. Add answer options by typing them into the input fields.
   To add additional options, click on the button **Add choice**.
4. To make the question mandatory to be answered, switch the toggle button for **Is required** to *Yes*.

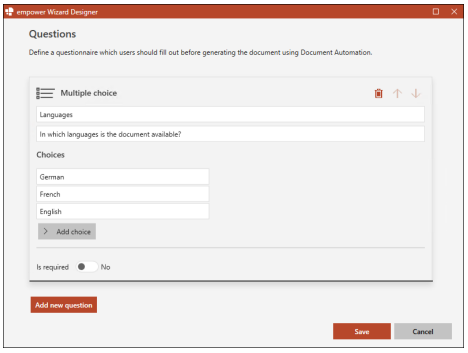


Figure 124. *Multiple Choice* Question

The following example provides a use case for this question:

Example

Name of the Question: Languages

Question: In which languages is the document available?

Answer Options: German, French, English

Required: No

Conditions can be applied to the question type **Multiple Choice**. If the answer options are inserted as text placeholders, this can lead to issues because certain aspects of text placeholders need to be considered.

For further information regarding this issue, see Add Fields.

Add Dependent Questions

For the question types **Text Input**, **Yes/No** and **Single Choice**, it is possible to create one or more dependent questions.

For the dependent questions, you can also choose from the five question types.

To add a dependent question to an existing question, select the existing question and click on the button **Add dependent question** (Figure 125).

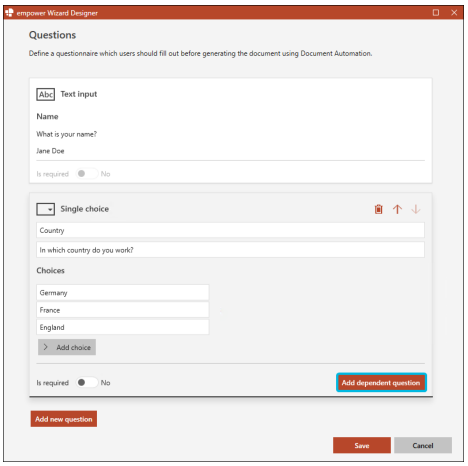


Figure 125. Button **Add dependent question**

The following example provides a use case for this scenario:

Example

Parent Question (Yes/No): Should the contact slide be displayed?

Answer: Yes

Dependent Question (Picture): Choose a contact photo to be displayed on the contact slide.

The *Picture* question only becomes available if the parent question is answered with *Yes*.

If the parent question is answered with *No*, the *Picture* question remains hidden and is therefore skipped.

Add Dependent Questions for Single Choice

If you create a dependent question for a *Single Choice* question and this dependent question is a *Single Choice* or *Multiple Choice* question, you can determine for the dependent question whether the answer options depend on the answer to the parent question (**Figure 126**).

This way, you can determine which answer options are offered to the user when they give a specific answer to the parent question.

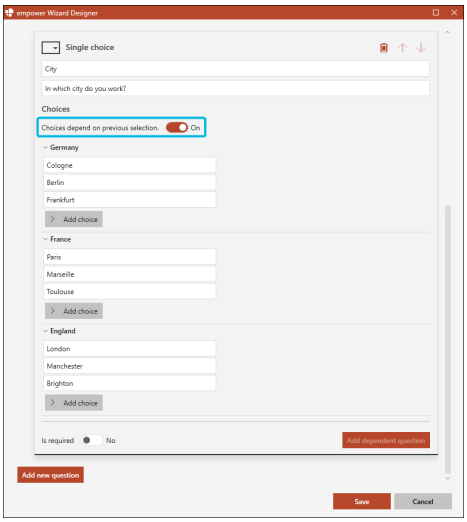


Figure 126. Toggle Button for Dependent *Single Choice* Question

The following example provides a use case for this scenario:

Example

Parent Question (Single Choice): In which country do you work?

Answer Options for Parent Question: Germany, France, England

Dependent Question (Single Choice): In which city do you work?

Answer Options for Dependent Question:

- If *Germany* has been selected in the parent question: Cologne, Berlin, Frankfurt
- If *France* has been selected in the parent question: Paris, Marseilles, Toulouse
- If *England* has been selected in the parent question: London, Manchester, Brighton



If you need any further help, refer to our **Help Center** and to our **Video Tutorials**.