empower® Mails

Release 9.10

empower

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1. Introduction

empower® Mails is a central signature management system for Microsoft Outlook.

The add-in allows central administration and management of your e-mail signatures which ensures they are always correct and up-to-date – all while keeping in line with corporate design.

> Certain features also integrate into the empower® Web Components.
>
> If your company uses the empower® Web Components, you can use the features in the Office Online applications.
>
> For further information regarding the web components, refer to our **empower® Web Components manual**.

1.1. System Requirements

In order to use the latest empower® Mails release in your Windows environment, your system will need to fulfill the following requirements:

Windows Version

- Windows 11

Office Version

- Microsoft Office 2021, 2024

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

Subscription Models

- Office 365 Pro Plus, Enterprise E3 or E5
  - with classic Outlook installed

> Due to technical reasons, empower® for Outlook cannot be used with the new Outlook.
>
> If it is not an option to use the classic Outlook, you can use empower® Mails Online, the empower® Web Component for Outlook, in your browser as an alternative. empower® Mails Online offers a reduced feature set.
>
> For further information regarding the empower® Web Components, refer to our **empower® Web Components manual**.

1.2. empower® Sync

The empower® Sync is a background process that synchronizes data between the server and the individual clients.

This process is used to make data available offline so that you can also work with empower® offline. Templates and library searches also work offline.

The following data is synchronized:

- Metadata – e.g. folders, users, designs and permissions
- Content data from the empower® Backend – e.g. templates

If an element's content data is also synchronized, it can be inserted entirely without a connection to the empower® Backend.

Write functions such as uploading an element to the empower® Library are not available offline.

If there is no connection to the empower® Sync, only elements that have been made available offline by synchronization can be opened.

For further information regarding offline and online availability, see **Online Availability of Library Content**.

User Interface

To access the empower® Sync, navigate to the Windows task bar. Here, click on the empower® Icon (**Figure 1**).

The icon will either be displayed in the taskbar or in the context menu of the taskbar.

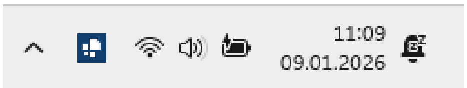


Figure 1. empower® Icon

After the installation, empower® will ask you to log in.

You only need to log in once. The empower® Sync will remember your login data.

For further information regarding the user information and the sign out option, see **User Information**.

Main Window

In the main window, you can see when the empower® Sync has executed the last synchronization. In addition, you can see how many files have been synchronized and what the size of this data has been (**Figure 2**).

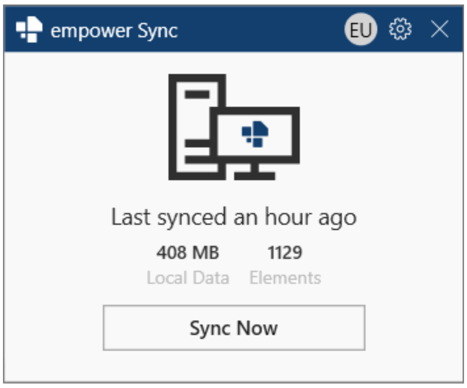


Figure 2. Main Window

To see the exact date and time of the latest synchronization, move your mouse cursor over the text *Last synced* ... (**Figure 3**).

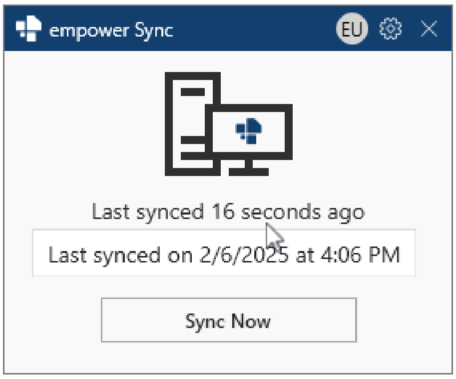


Figure 3. Mouse-Over **Last synced**

Start the Synchronization Manually

To manually initiate a synchronization, click on the button **Sync Now** (**Figure 4**).

The empower® Sync will then start the synchronization of any data that has changed or been added since the last synchronization and will also display a progress bar during this time.

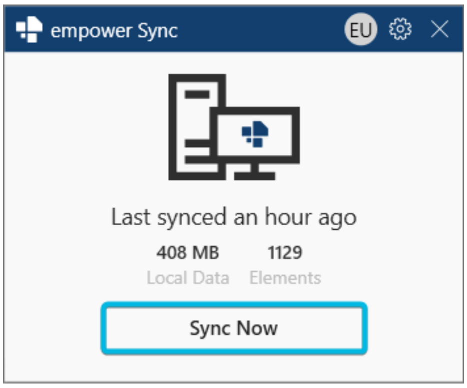


Figure 4. Button **Sync Now**

The button **Sync Now** can be used when you know that there has been a change which you cannot yet access because the interval for the next synchronization has not yet been reached.

Access the Sync Options

To open the empower® Sync options, click on the **gear** symbol in the top right corner of the main window (Figure 5).

A drop-down menu containing the available options opens.

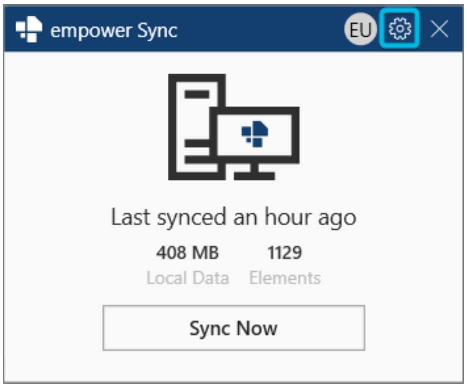


Figure 5. **Gear** Symbol

On the top of the drop-down menu, you can see which environment you are connected to. The green circle next to the environment shows if there is a connection to the empower® Backend.

If the empower® Sync cannot establish a connection, this circle will appear in red.

To close the empower® Sync and shut down empower®, click on the option **Exit** (Figure 6).

To minimize the empower® Sync window, click on the **X** symbol in the top right corner.

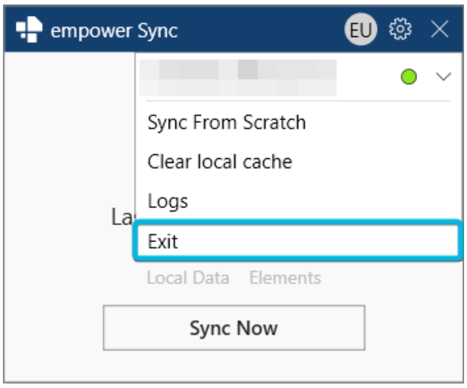


Figure 6. Option **Exit**

If you click on the button **Exit**, a message will appear in the window (Figure 7).

To confirm the process, click on the button **Exit Application**.

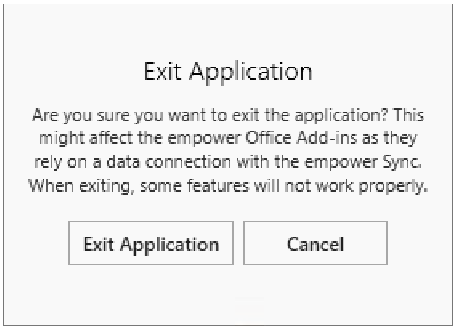


Figure 7. Message for Application Exit

Closing the empower® Sync via the button **Exit** will lead to the empower® Sync being shut down.

Some features need a connection to the empower® Sync to work properly.

If the empower® Sync is shut down, some features are still available but do not always work as expected.

If you open the Office application again, the empower® Sync will be restarted automatically.

If the empower® Sync crashes unexpectedly, empower® tries to restart it. If this restart is not successful, a dialog box opens (Figure 8).

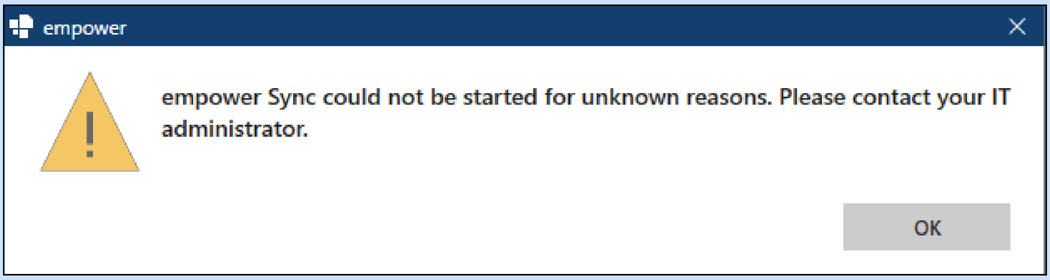


Figure 8. Error Message for Sync

Alternatively, you can access the options **Sync Now**, **Sync from Scratch**, **Logs** and **Exit** via the context menu. To do so, right-click on the empower® Icon in your task bar.

Execute a Sync from Scratch

The option **Sync From Scratch** can be used to delete the previous synchronization metadata. The empower® Sync will start a complete synchronization afterwards.

Content data will not be deleted.

To execute this process, click on the option **Sync from Scratch** (Figure 9).

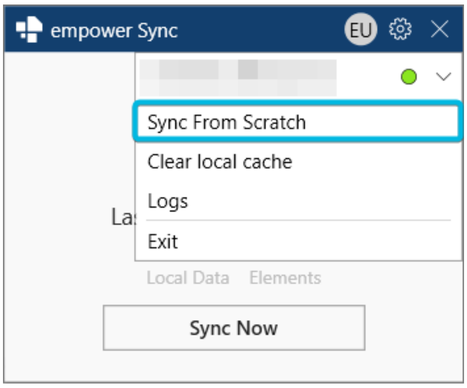


Figure 9. Option **Sync From Scratch**

As this option starts a complete synchronization, the login is also reset. Therefore, you need to login again after using this option.

This option can be used if problems occur despite synchronization or if the synchronization fails regularly.

In addition, the option can help to solve issues regarding user rights as the login data is also reset.

Clear the Local Cache

The option **Clear local cache** can be used to clear the cache for content data. It does not start a synchronization.

To execute this process, click on the option **Clear local cache** (Figure 10).

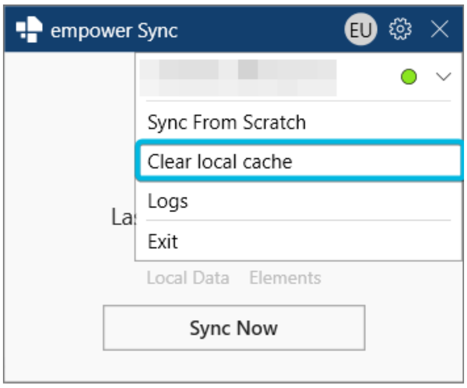


Figure 10. Option **Clear local cache**

A message appears. Read this message carefully.

To clear the cache, click on the button **Clear local cache** (**Figure 11**). The empower® Sync will then start clearing the cache.

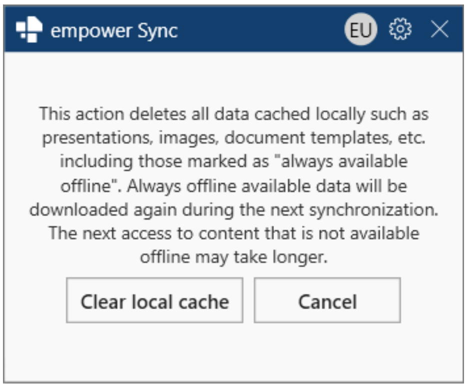


Figure 11. Message for **Clear local cache**

This option can be used to free up hard disk space after several weeks or months of working with empower®.

The next access to content that is not available offline may take longer than usual after clearing the cache, as the content must first be downloaded. This download requires a connection to the empower® Backend.

The next synchronization process can also take longer, as content data must be resynchronized.

Open the Log Files

The option **Logs** can be used to open the file directory in which the log files are stored.

To open the log file directory, click on the option **Logs** (**Figure 12**). The corresponding folder will be opened.

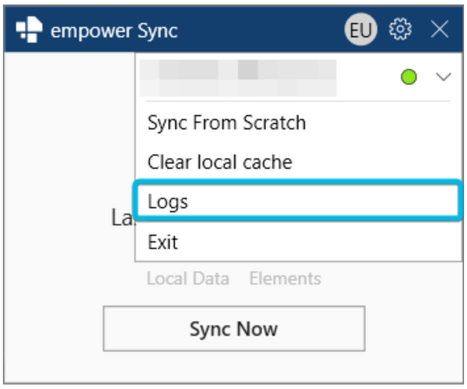


Figure 12. Option **Logs**

This option can be used if the empower® Support Team needs further information regarding the cause of unexpected problems.

User Information

Next to the **gear** symbol, you can see the user's initials (**Figure 13**).

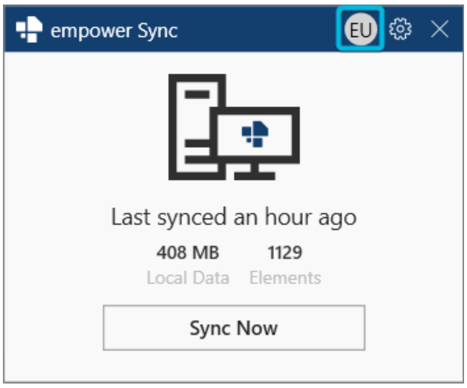


Figure 13. User Initials

To view the user information, click on the initials. The user's full name and the user's e-mail address will be displayed (**Figure 14**).

To log out, click on the option **Sign out**.

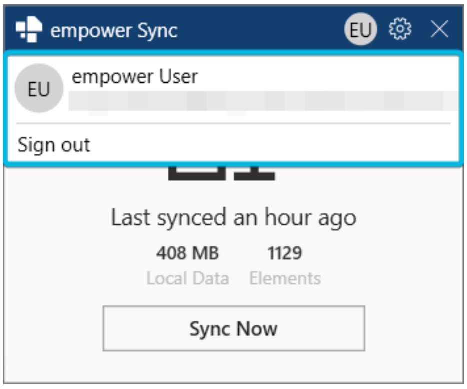


Figure 14. User Information

1.3. Office Theme Adaption

The empower® User Interface adapts to the Office theme set on your device.

If the Office theme is switched to *black*, empower® adapts to this change (**Figure 15**).

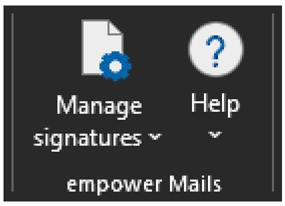


Figure 15. Group empower Mails in Black Theme

In the same way, empower® adapts to the *white* or the *colorful* Office theme (**Figure 16**).

If you change the Office theme, the user interface adapts immediately. You do not need to restart the Office applications.

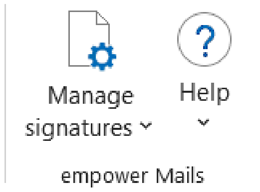


Figure 16. Group empower Mails in White Theme

1.4. empower® Ribbon

empower® integrates seamlessly into the Outlook ribbon.

It is located in the tab Home with its own group empower Mails (**Figure 17**).

In addition, the groups Text and Color which are integrated into the Outlook ribbon if you have opened an e-mail draft, only contain options that comply with your corporate design.

Expand each drop-down menu to view more features and buttons.

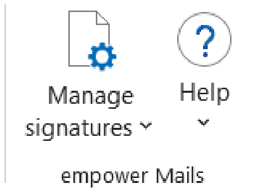


Figure 17. Group empower Mails in Outlook

For further information regarding the groups Text and Color, see **Edit Text**.

1.5. Edit Text

In Outlook, you can access the editing settings in the groups Text and Color (**Figure 18**). These groups are only available if you have opened an e-mail draft.

The editing options are linked to your corporate design. Therefore, it represents only the specifications that are in line with your company's corporate design.

Figure 18. Groups Text and Color in Outlook

If your empower® Administrators have not restricted the colors or fonts, all Office built-in formatting options are offered.

empower® does not affect the Office built-in right-click access to font and color information. All Office built-in formatting options, which do not necessarily coincide with your corporate design, are still available.

Text Settings

In the subgroup Text, you have access to all fonts and font sizes that match your company's corporate design.

In addition, you have all formatting options, including text alignment options.

For further information regarding empower® Designs, see **empower® Designs**.

Color Settings

In the subgroup Colors, you can choose from a predefined set of font colors, shape fill colors and line colors. All available colors match your company's corporate design.

For further information regarding empower® Designs, see **empower® Designs**.

1.6. empower® Designs

empower® Designs are created and managed by your empower® Administrators.

In Outlook, there is only one design. The settings in this design define which colors and formatting options are available for your e-mails.

For further information regarding the formatting and color options, see **Edit Text**.

Add and Edit Designs

For Administrators

Designs can be added and edited in the empower® Admin Center.

They can only be adjusted by *Customizing Admins*.

For further information regarding the creation and adjustment of designs, refer to our **empower® Admin Center manual**.

1.7. empower® Help

empower® offers different ways for you to receive help if you have any problems with the software.

In Outlook, the help section is located in the group empower Mails.

To view your options here, click on the button **Help** (**Figure 19**).

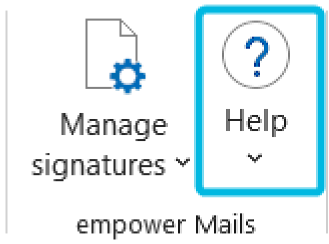


Figure 19. Button **Help** in Outlook

You can choose from the following options (**Figure 20**):

- Help Center
- Send Feedback
- Report a Bug
- Customizing Center
- About empower

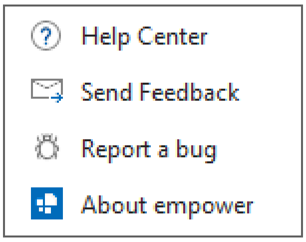


Figure 20. Help Options

The option **Customizing Center** is only available if you are an empower® Administrator.

Help Center

If you have any questions while working with empower®, you can open the *Help Center*. This will take you to the empower® Support Website, where you will be able to find an answer either through the articles provided or through the tutorials.

The *Help Center* will open in your default browser (**Figure 21**).

If this does not help, you can contact the empower® Support directly by opening a new ticket at the top of the home page and describing your problem.

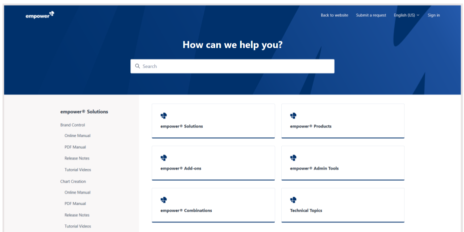


Figure 21. Help Center

Send Feedback

To reach out to us directly, click on the button **Send Feedback**.

A new window of your primary e-mail application will open, already addressed to the right recipient.

The e-mail has a preset subject line (e.g. *Feedback for Mails*) (**Figure 22**). All feedback is welcome as we are always looking to improve our software.

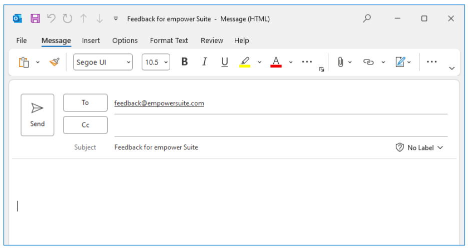


Figure 22. Feedback E-Mail

The e-mail draft can only be opened automatically if you use Outlook as your default e-mail client.

Report a Bug

If you encounter any issues that might be a bug, click on the button **Report a Bug**.

Depending on the configuration in your empower® Environment, clicking on the button **Report a Bug** will lead to:

- Creating a new e-mail via your primary e-mail application and automatically attaching a .zip file (*empowerInformation.zip*).
  The e-mail has a preset subject line (e.g. *Bug report for Mails*) and is already addressed to the right recipient.
- Opening a new window in your default browser (**Figure 23**).
  In this window, you have to enter various information about yourself, as well as the bug you want to report. This information is relevant for the empower® Support so that they can respond to it in the best possible way.

Your descriptions as well as the file attachment will help empower® replicating the error and analyzing the case to conclusively deliver a near-term solution.

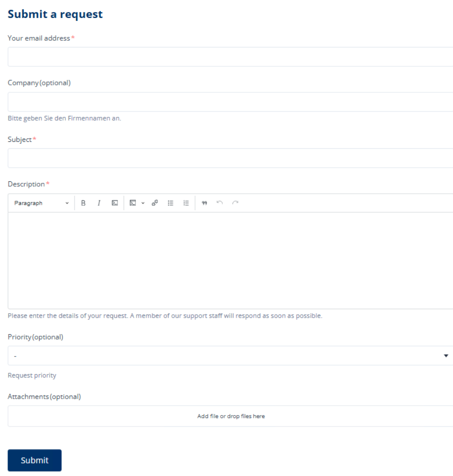


Figure 23. Report a Bug in Help Center

About empower

To view detailed information about your empower® Version and the activated empower® Products, click on the button **About empower**.

A dialog box opens. This dialog box contains information about the empower® Version and products in use (**Figure 24**).

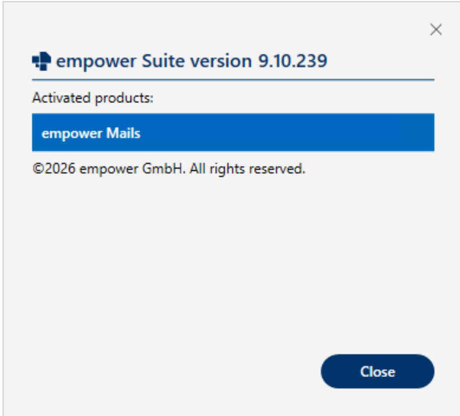


Figure 24. Dialog Box **About empower**

Customizing Center

For Administrators

If you are a *Customizing Admin*, the option **Customizing Center** will be visible for you (**Figure 25**).

This option redirects you the *Customizing Center* which is located in the empower® Admin Center.

Here, you can make changes to the general corporate design settings for your company.

The *Customizing Center* includes settings regarding your empower® Designs including color and font settings, as well as settings regarding the different checks in empower®, campaign management, languages in empower® and the available features.

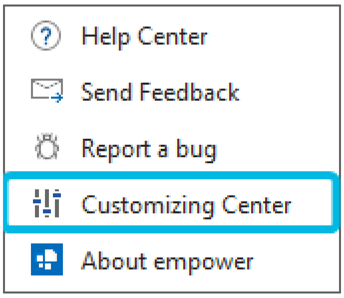


Figure 25. Option **Customizing Center**

For further information regarding the *Customizing Center* and the empower® Admin Center, refer to our **empower® Admin Center manual**.

1.8. 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 you Onboarding Specialist or Customer Success Manager.

2. Set up Profiles

When Outlook is started for the first time after the installation of empower®, the default profile is either automatically loaded or newly created in the background.

In Outlook, you will be guided through your first steps. For further information regarding these first steps, see **Initially Set up empower® in Outlook**.

If you want to make changes to your profile or add a new profile, see **Manage Profiles**.

Initially Set up empower® in Outlook

After first startup of Outlook, with empower® installed, you will be greeted by a welcome screen.

The welcome screen only appears once after having installed empower® and guides you through the first setup of your signature, which consists of the following components:

- Your profile data
- Your location and company data
- Your language
- The signature template

Your default profile will be loaded automatically.

In addition, you can select your company and location. In further steps, you can view your signature in the signature management window.

For further information regarding the signature management, see **Manage Signatures**.

Manage Profiles

To view your profile management in Outlook, navigate to the group empower Mails and click on the lower part of the split button **Manage Signatures** (**Figure 26**).

Figure 26. Split Button **Manage signatures**

A drop-down menu opens.
Choose the option **Profiles** (**Figure 27**).

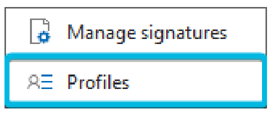


Figure 27. Button **Profiles**

A new window opens (**Figure 28**).

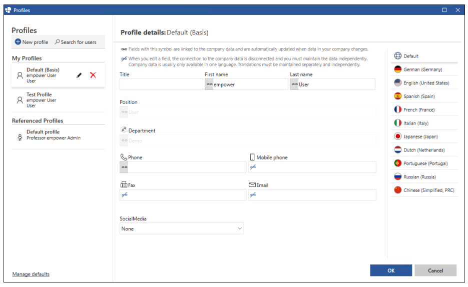


Figure 28. Profile Management Window

On the left, the window shows your default profile as well as all profiles you have created so far under *My Profiles*. Referenced profiles are listed under *Referenced Profiles*.

If you have selected one of the profiles, this profile is shown on the right.

Edit a Profile

To edit a profile, select it from the profile list. It will be displayed in edit mode on the right.

Basic information is automatically retrieved from your company's directory service and synchronized into fields in your profile. Fields that are filled this way are indicated by a **chain** symbol (**Figure 29**).

empower® frequently synchronizes the data from the directory service to ensure the data is always up to date.

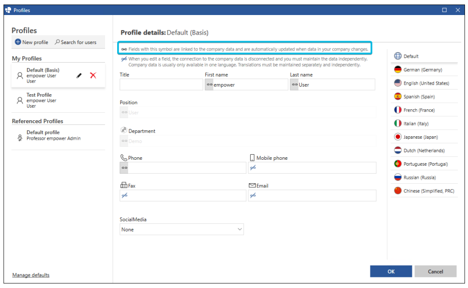


Figure 29. **Chain** Symbol for Automatically Synchronized Data

A **crossed-out chain** symbol (**Figure 30**) indicates that:

- No data is stored for you for this specific field in the directory service or
- You manually typed in (different) data and thus overruled the data stored in the directory service.

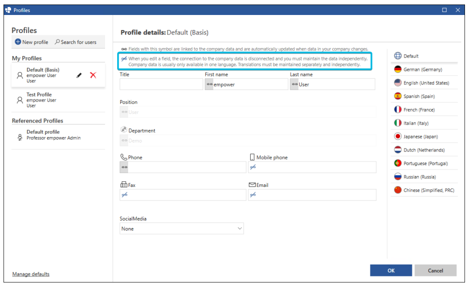


Figure 30. **Crossed-out Chain** Symbol for Not Automatically Synchronized Data

Fill in any missing data you want to add. Only temporarily change existing data if necessary.

To reset a specific profile field, click on the **crossed-out chain** symbol. This will lead to the field being filled by data synchronized from the directory service (if applicable) and thus delete the data you entered manually.

If you have finished entering your data, click on the button **OK** (Figure 31).

If you do not want to save your changes, click on the button **Cancel**.

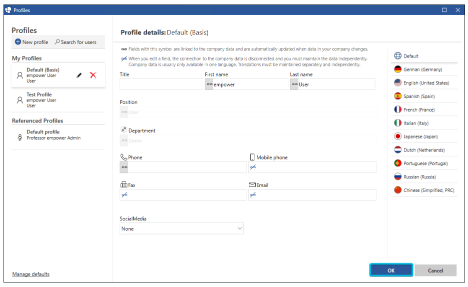


Figure 31. Button **OK** to Confirm Profile Data Changes

The directory service of your company should always contain up to date and correct data. If you find any of the synchronized information being incorrect or outdated, you can enter the correct information manually into your profile, but you should contact your IT administrator at the same time to have the data in the directory service corrected as well. Once the data synchronized from the directory service is up to date again, click the **crossed-out chain** symbol to reset the profile field(s) to be synchronized from your directory service again.

Rename a Profile

To rename a profile, click on the **pen** symbol next to the profile name in the list (Figure 32).

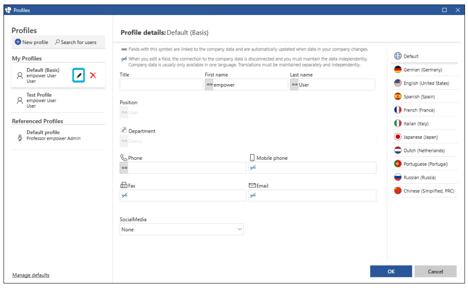


Figure 32. **Pen** Symbol to Rename a Profile

Enter the new name in the input field and click on the button **Apply** (Figure 33).

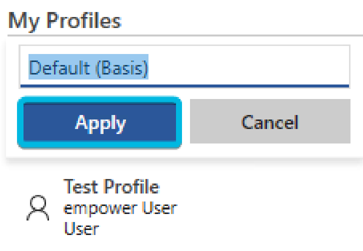


Figure 33. Button **Apply** to Confirm New Profile Name

Translate a Profile

To add a translation for a profile, select the language you want to add from the list on the right-hand side (**Figure 34**).

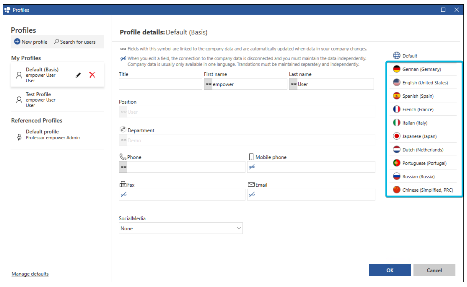


Figure 34. New Translation

As soon as you select the language, the translation opens.

The data will not be preloaded from the directory service. To add translations, enter the translated values into the input fields.

Alternatively, you can click on the crossed-out chain symbol to load data from the directory service, if there is any.

If you want to clear the translation completely to fill in values manually, click on the **X** symbol next to the profile name.

For further information regarding the editing mode, see **Edit a Profile**.

Add a Profile

To add a profile, click on the button **New Profile** (**Figure 35**).

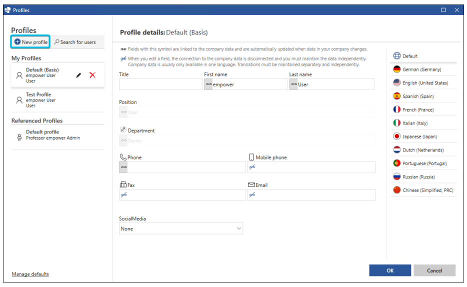


Figure 35. Button **New Profile**

Enter the profile name and click on the button **Add** (**Figure 36**).

The data from the directory service is preloaded. You can now make changes and add data to the profile.

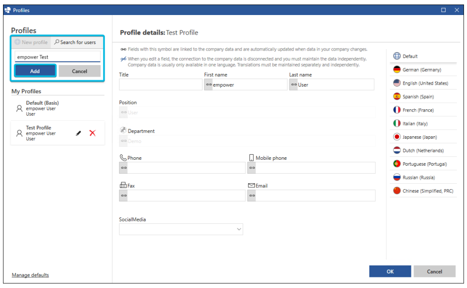


Figure 36. Add Profile

If you have finished entering your data, click on the button **OK** (**Figure 31**).

Work with Multiple Profiles

Once more than one profile has been created, any of your profiles can be set as the default profile. The first profile, which is created automatically, is first set as the default profile.

To manage your default profiles, click on the button **Manage defaults** (Figure 37).

A dialog box opens.

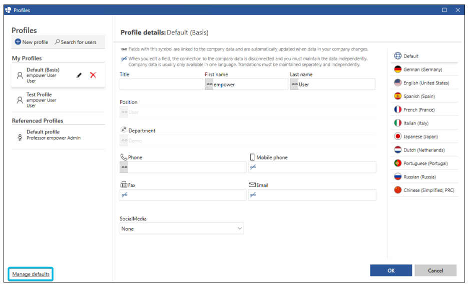


Figure 37. Button **Manage Defaults**

In this dialog box, you can set up to three default profiles which will be used to fill in your documents or to create your e-mail signature (Figure 38).

You can choose from all profiles listed in your profile management window under *My Profiles* and *Referenced Profiles*.

Adding additional default profiles can be useful if a document template includes multiple placeholders for data from multiple profiles.

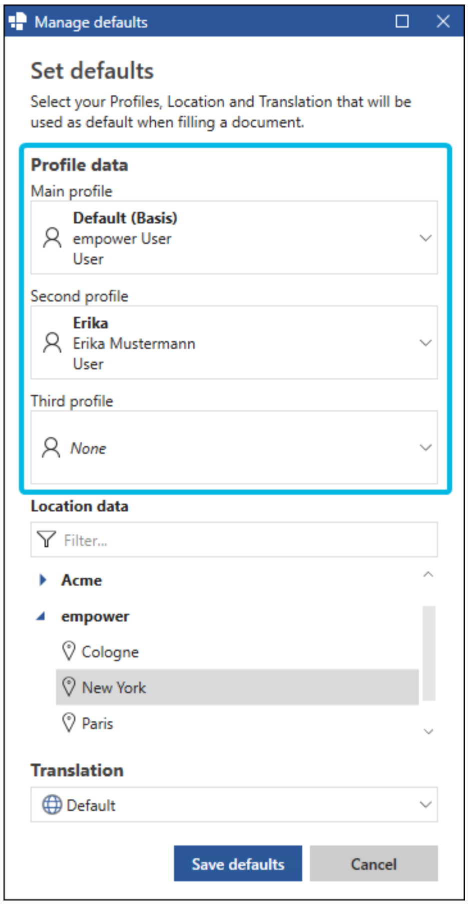


Figure 38. Set Default Profiles

In addition, you can set a default location and a default language to be used.

In the list under *Location data*, all available companies and their locations are listed (Figure 39). To add a default company location, choose one from the list.

If there is no default location, the document templates will not be filled automatically and empower® will prompt to select a location each time a document template is opened.

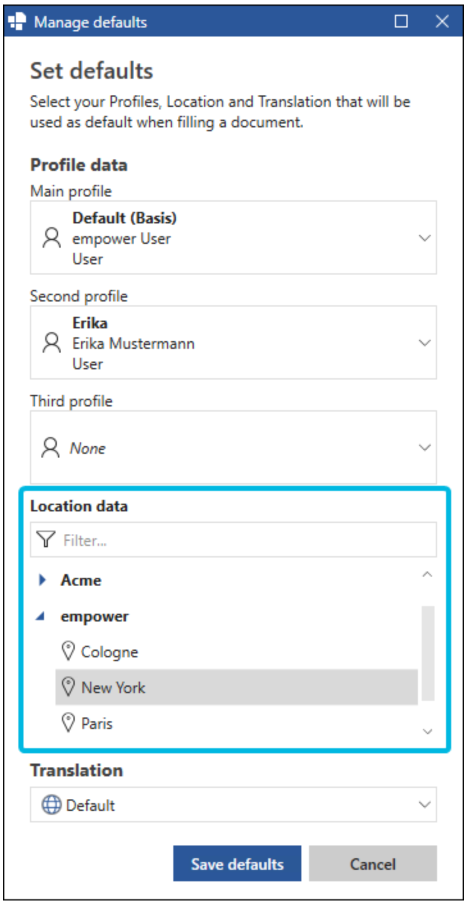


Figure 39. Location Data

Under *Location data*, you can search for the location you want to fill in.

To do so, type in the name of the location you are looking for into the input field (Figure 40).

The locations that match your search are listed under the companies they belong to.

Select the required location from the list.

Alternatively, you can browse through the locations and companies manually.

To do so, expand the sections for the companies using the little **arrow** symbol next to the company name.

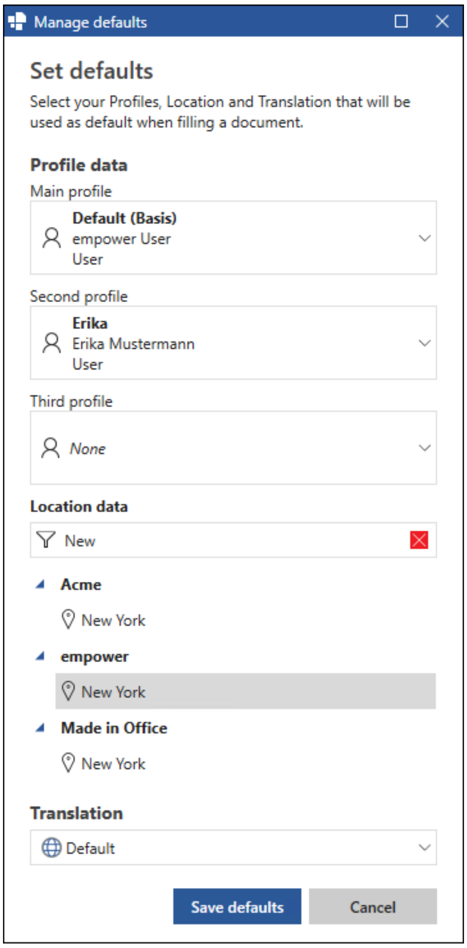


Figure 40. Search for Locations

If your search input does not lead to any result, a message is displayed in the dialog box (Figure 41).

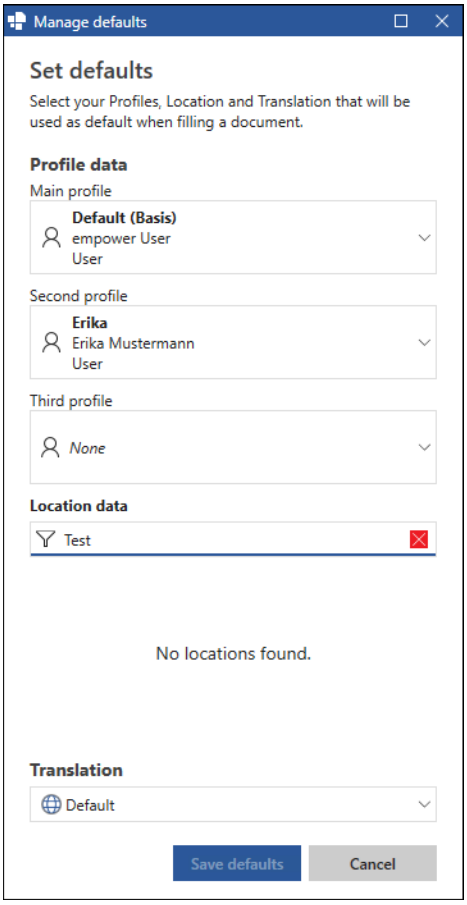


Figure 41. No Search Results

To abort the search, click on the **X** symbol in the input field (Figure 42).
All available locations will be listed again.

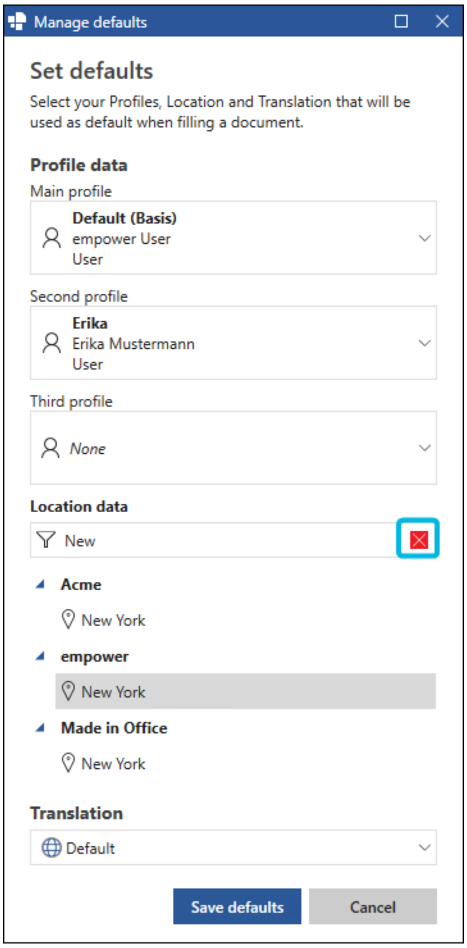


Figure 42. Abort Search

In the drop-down menu under *Translation*, all available languages are listed (Figure 43). To add a default translation, choose a language from the list.

The language setting is decisive for the display of the referenced profile and company data. Information that is maintained in empower® by your empower® Administrators in multiple languages is displayed according to the selected language. Also, signatures are created by completing signature templates with labels and data in the specified language, if available.

For example, a referenced country (e.g. Germany) from a location is mapped as *Germany* or *Deutschland*, depending on the language selection made.

In empower®, the translation labeled *Default* can be configured for language settings by your administrators. Typically, this default is set to English. If *Default* is selected, the document template is filled according to the set translation language labeled as default.

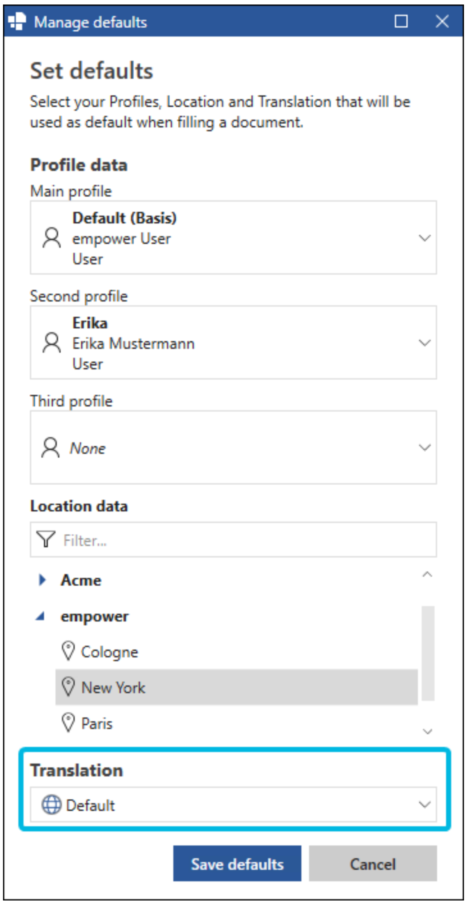


Figure 43. Translation

If you have finished, click on the button **Save defaults** (Figure 44).

Your settings are saved.

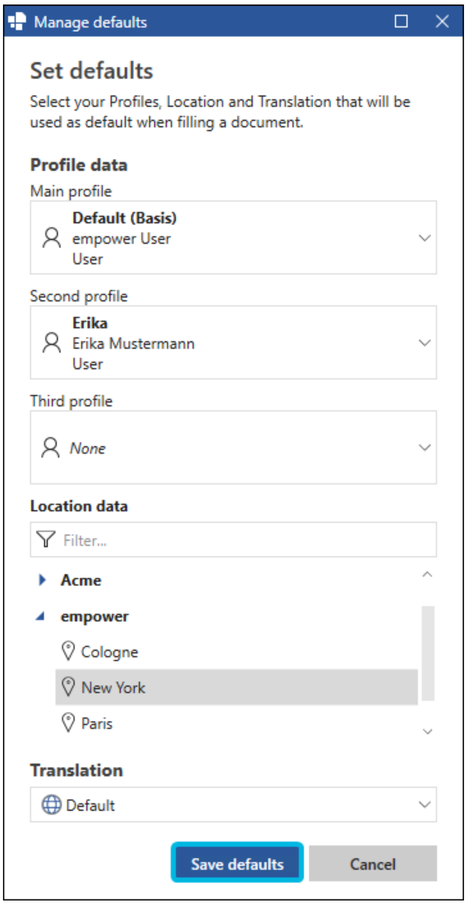


Figure 44. Button **Save defaults**

Depending on your permissions, you will not see all available locations and companies in the list. Therefore, you only see locations and companies that are relevant for your work.

Depending on the setup in your empower® Environment, the range of available languages you can choose from may vary.

Reference Profiles

When someone is out sick or on vacation, it can be helpful to be able to send e-mails on someone else's behalf using their signature. Therefore, empower® offers the option to reference profiles other than your own.

Once a user has set up a default profile, you can search for it via *Search for users* (Figure 45).

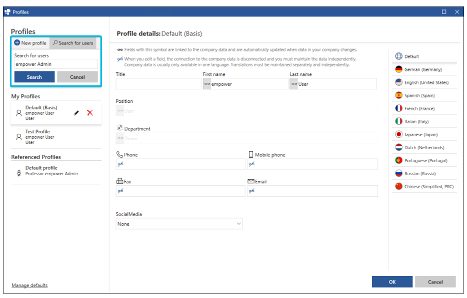


Figure 45. Option *Search for users* in Profile Management

To find their profile, type in the first and/or last name of your colleague and press **Enter** or click on the button **Search** (**Figure 46**).

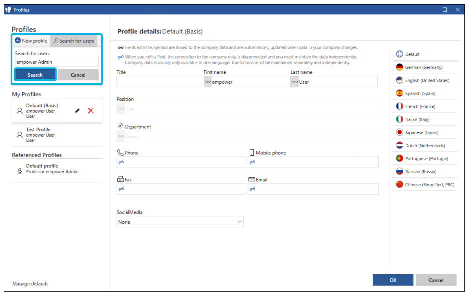


Figure 46. Button **Search**

You will receive suggestions that match your search. To add the user's profile to your reference profiles, click on the **plus** symbol next to the profile in the profile list (**Figure 47**).

Your colleague's profile will now appear under *Referenced Profiles* in the profile list.

Unlike your own profiles, you cannot edit your colleagues' profiles in the profile management window.

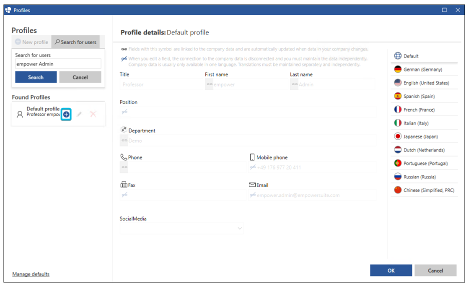


Figure 47. **Plus** Symbol to Add Profiles

The sender address displayed when an addressee receives an e-mail will always be the mailbox (e-mail address) you've been logged in to whilst creating a new e-mail. Using a signature that is based on a referenced profile does not affect from which mailbox the e-mail is sent.

The button **Search** is grayed out if there is no profile for the entered name.

If you have already added the user's profile to your reference profiles, a dialog box opens (**Figure 48**).

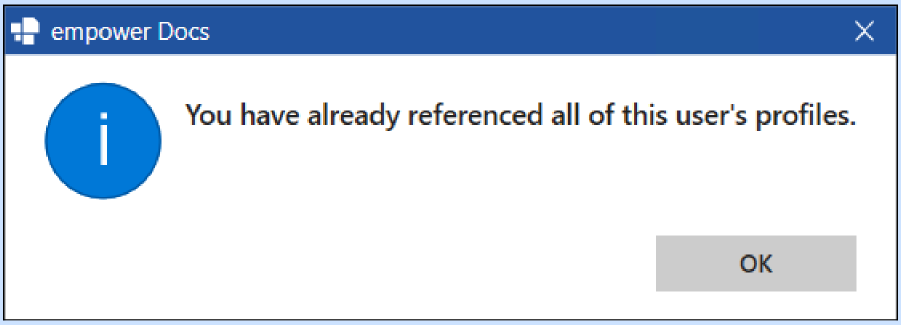


Figure 48. Dialog Box for Referenced Profiles

Delete a Profile

To delete a profile, click on the **X** symbol next to the profile in the profile list (**Figure 49**).

A dialog box opens.

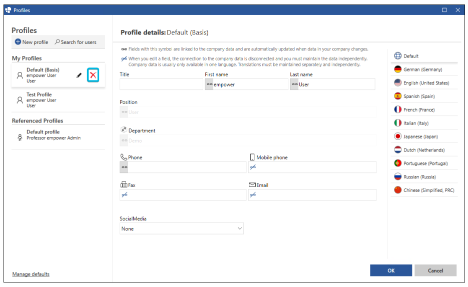


Figure 49. **Cross** Symbol to Delete a Profile

To confirm the deletion process, click on the button **Yes** (**Figure 50**).

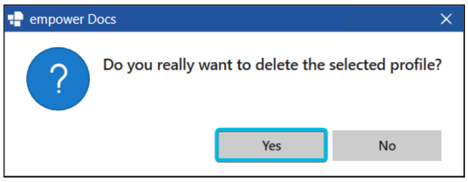


Figure 50. Button **Yes** to Confirm Deletion of a Profile

If you delete a profile from the list *My Profiles*, it will be deleted completely and cannot be restored.

If you delete a profile from the list *Referenced Profiles*, it will only be deleted from your list of referenced profiles. The profile can then be referenced again.

3. Company Management

For Administrators

As an empower® Administrator, you have access to the company and location management in empower® for Outlook.

The data from the company and location management is used to fill in documents and to create signatures.

In Outlook, you can access the option **Companies** by clicking on the lower part of the split button **Manage Signatures** (Figure 51).

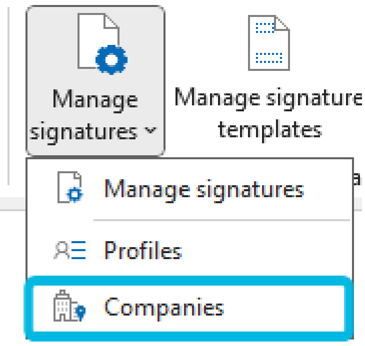


Figure 51. Option **Companies** in Outlook

If another user is currently working in the company management, a dialog box opens (Figure 52).

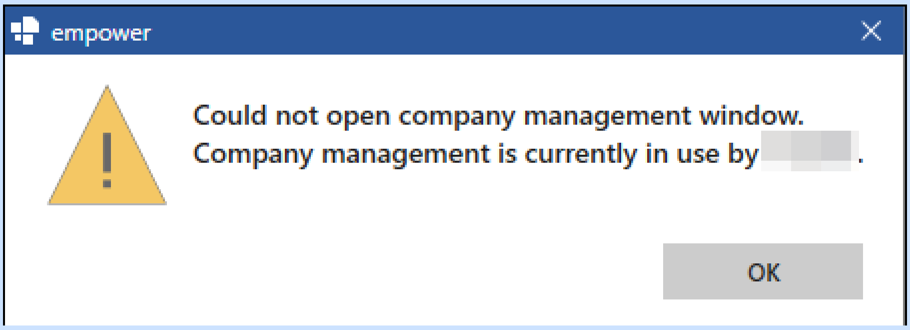


Figure 52. Dialog Box for Simultaneous Work

You cannot work in the company management simultaneously.

Manage Companies

In the company management, you can see all existing companies on the left-hand side.

If you have selected a company from the list, the company data is displayed on the right-hand side.

Create a New Company

To create a new company, follow the following steps:

1. Click on the button **Create Company** (Figure 53).

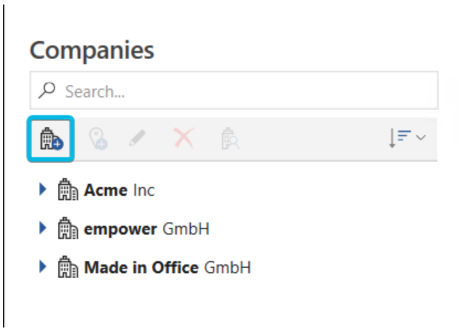


Figure 53. Button **Create Company**

2. Enter the display name for the company (Figure 54 **(1)**).
3. Select the legal entity type (Figure 54 **(2)**).
4. Click on the button **Apply** (Figure 54 **(3)**).
   On the right-hand side, the empty company fields appear.

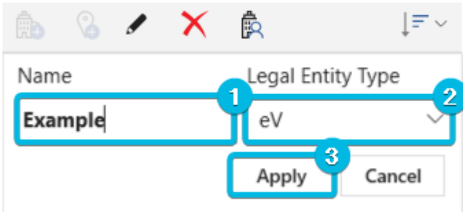


Figure 54. Add Company

5. To add a logo, click on the button **Select logo** (Figure 55 **(1)**).
6. Select the logo you want to use.
7. Then, fill in all company fields (Figure 55 **(2 + 3)**).
   The company fields vary depending on the legal entity type you have chosen.

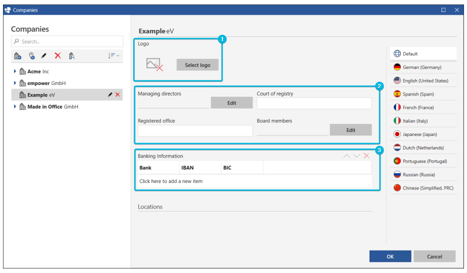


Figure 55. Company Fields

8. Depending on the field type, either click on the button **Edit** or type directly into the input fields.
   If you click on the button **Edit**, a dialog box opens (Figure 56).
   a. Here, click into the field *Click here to add a new item*.
   b. Type in the value you want to add and press **Enter**.
      If you add multiple values, you can change the display order using the two **arrow** symbols.
   c. Then, click on the button **OK**.

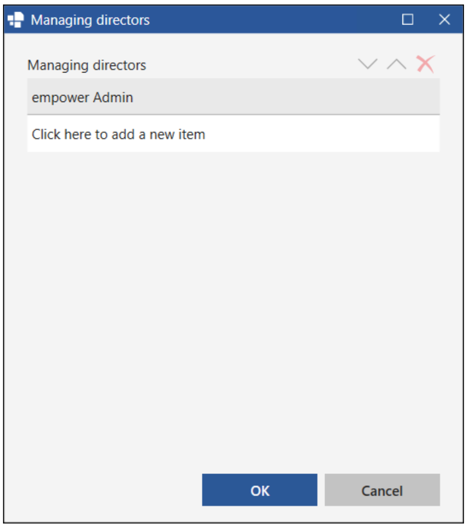


Figure 56. Add Values

9. To enter the company's banking information, click into the field *Click here to add a new item* (**Figure 55** (**3**)).
   The fields to fill in vary depending on the legal entity type you have chosen.
10. To save the new company, click on the button **OK**.
   Alternatively, you can proceed and add a location to the company.

If any required fields are not filled in, you cannot save the company. The respective fields will be highlighted.

A company requires at least one location. If a company does not have any locations, it will not be visible for the users and they cannot choose this location when filling in a document.

The available company fields are predefined in the data scheme according to legal entity type and location and can only be modified via the EAV editor.

For further information regarding the setup of the document template, see **Template Assistant**.

Edit and Delete Companies

To edit an existing company's name or legal entity type, select the company and click on the **pen** symbol (**Figure 57**).

To save you changes, click on the button **Apply**.

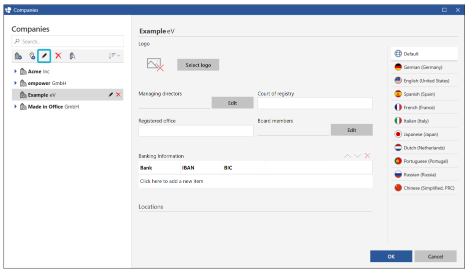


Figure 57. **Pen** Symbol for Company

If you change the legal entity type of a company, a dialog box opens (**Figure 58**).

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

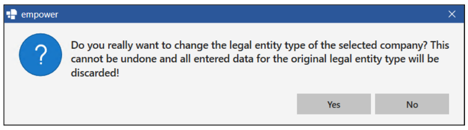


Figure 58. Dialog Box for Legal Entity Type Change

To edit the company data, select the company from the list.

On the right-hand side, you can edit the logo, the company fields and the banking information.

To delete a company, select it from the list and click on the **X** symbol (**Figure 59**).

A dialog box opens.

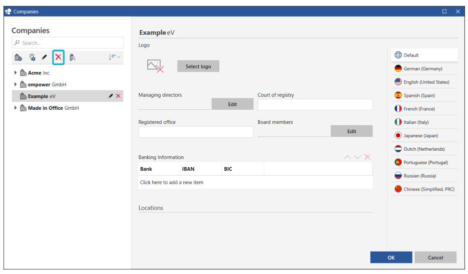


Figure 59. **Cross** Symbol for Company

To confirm the process, click on the button **Yes** (Figure 60).

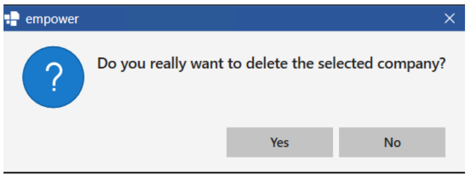


Figure 60. Dialog Box for Company Deletion

To edit the permissions for the company, click on the button **Edit permissions for selected company** (Figure 61).

A dialog box opens.

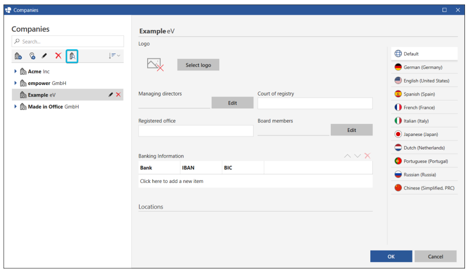


Figure 61. Button **Edit permissions for selected company**

In this dialog box, you can grant permissions to other users, remove permissions from users or change the permissions for users (Figure 62).

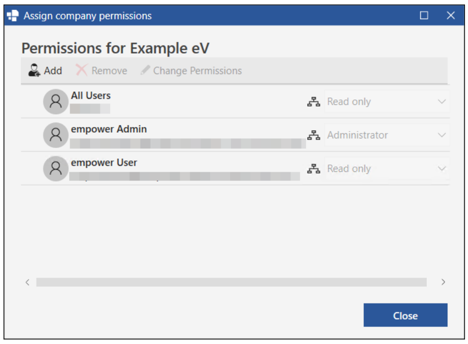


Figure 62. Permissions

If the **inheritance** symbol is displayed next to a user, this user has been granted permissions via the database (Figure 63). These permissions cannot be changed via the user interface.

Therefore, the permissions and the drop-down menu are grayed out.

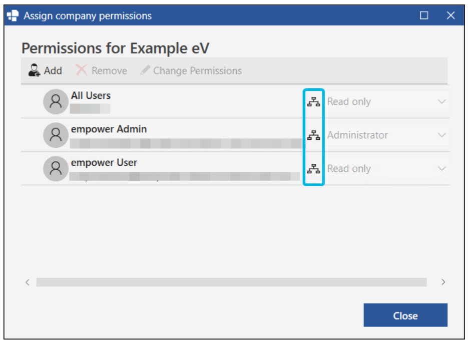


Figure 63. **Inheritance** Symbol

To add a user to the list, follow the following steps:

1. Click on the button **Add** (Figure 64).

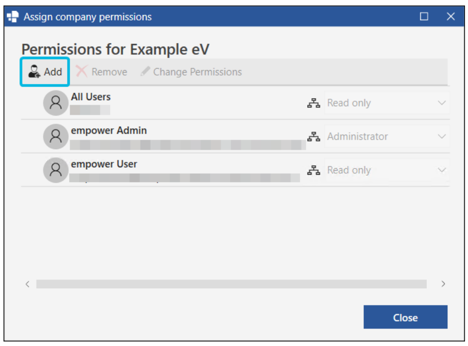


Figure 64. Button **Add**

2. Enter the name of the user or the group into the search bar and press **Enter**.
3. Select the respective user or group.
4. Click on the button **Add** (Figure 65).
   The user will be added with the permission *Read only*.

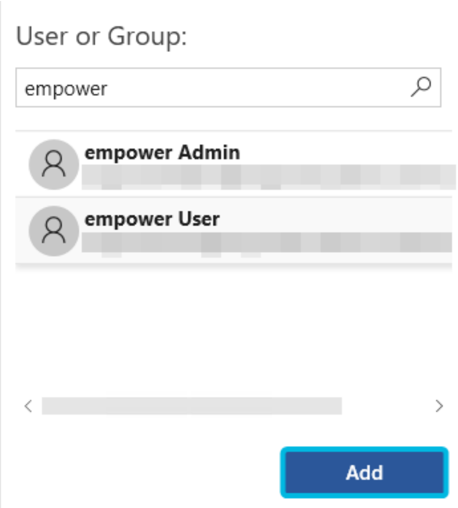


Figure 65. Add User

To change the permission, expand the drop-down menu and select the permissions you want to grant to the user or group.

To remove a user or a group from the list and therefore remove their permissions, select the user or group and then click on the button **Remove**.

The user or group is removed from the list. No confirmation is necessary.

If you have finished, click on the button **Close**.

If you grant the permissions *Author* or *Administrator* to a user, the user must have been assigned the role *EAV Company Admin* via the database.

If you delete a company or a location, users who have set this company or location as their default will be notified.

They can then choose another company as their default.

Manage Locations

To expand the company entry and show all locations of the company, click on the **arrow** symbol next to the company.

If you have selected a location, the location data is displayed on the right-hand side.

Create a New Location

To create a new location, follow the following steps:

1. Select the company for which you want to add a location.
2. Then, click on the button **Create location** (Figure 66).

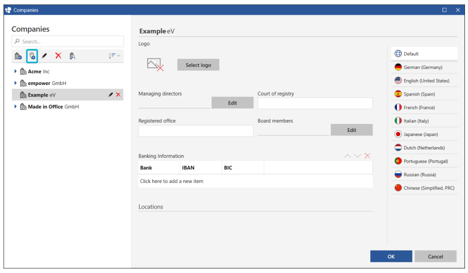


Figure 66. Button **Create location**

3. Enter the display name for the location (Figure 67 **(1)**).
4. Click on the button **Apply** (Figure 67 **(2)**).
   On the right-hand side, the empty location fields appear.

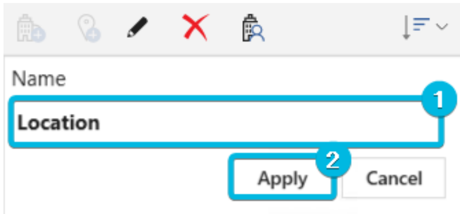


Figure 67. Add Location

5. To add a logo, click on the button **Select logo** (Figure 68 **(1)**).
6. Select the logo you want to use.
7. Then, fill in all location fields (Figure 68 **(2)**).

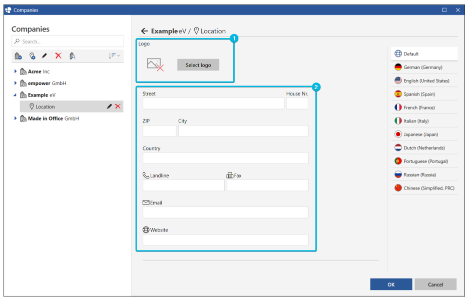


Figure 68. Location Fields

8. To save the new location, click on the button **OK**.

If any required fields are not filled in, you cannot save the location. The respective fields will be highlighted.

Edit and Delete Locations

To edit an existing location's name, select the location and click on the **pen** symbol (Figure 69).

To save you changes, click on the button **Apply**.

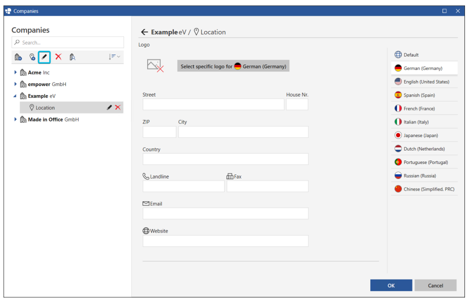


Figure 69. **Pen** Symbol for Location

To edit the location data, select the location from the list.

On the right-hand side, you can edit the logo and the location fields.

To delete a location, select it from the list and click on the **X** symbol (Figure 70).

A dialog box opens.

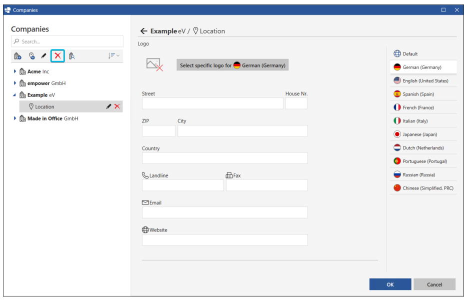


Figure 70. **Cross** Symbol for Location

To confirm the process, click on the button **Yes** (Figure 71).

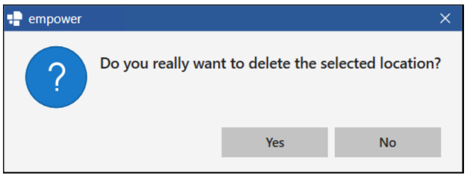


Figure 71. Dialog Box for Location Deletion

Translate Companies and Locations

To add a translation for a company or a location, follow the following steps:

1. Select the company or location from the list on the left-hand side.
2. Then, choose the language you want to add a translation for (Figure 72).

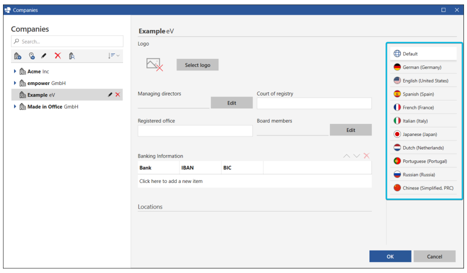


Figure 72. Languages

3. To add a logo, click on the button **Select specific logo for [language]** (Figure 73).
4. Select the logo you want to use.
5. Then, fill in all fields.

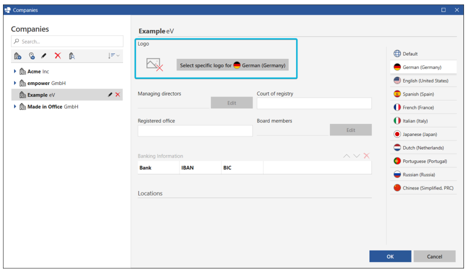


Figure 73. Logo for Translation

6. To save the translation, click on the button **OK**.

You can add separate logos for all languages.

Some fields are not editable in translations. They have the same values (e.g. names) in all languages.

4. Manage Signatures

empower® helps you set up one or more signatures by enabling you to choose a signature template that complies with your corporate design and includes options for adding a profile, location and language.

To access the signature management, navigate to the group empower Mails in the Outlook ribbon and click on the upper part of the split button **Manage signatures** (**Figure 74**).

A dialog box opens.

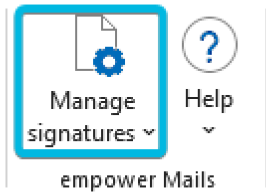


Figure 74. Button **Manage signatures**

In this dialog box, you can see all signatures that you have already created so far. In addition, you can see which values you have chosen to create the signature and when you have last edited them (**Figure 75**).

Here, you can edit your existing signatures or create new ones.

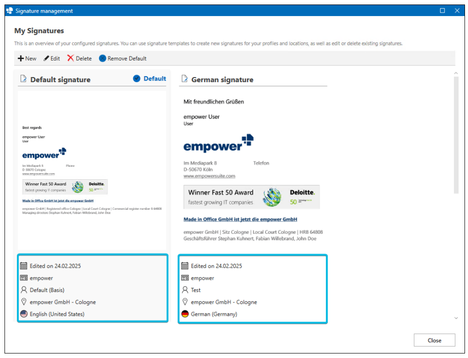


Figure 75. Metadata for Signatures

> The signature management only shows signatures that have been created with empower®.
>
> If enabled by your administrators, all Outlook signatures are archived as soon as you start Outlook and empower® is active to ensure that only corporate design compliant signatures are used within the company.
>
> If you need to restore an Outlook signature that has been archived automatically, you can find it under the following path:
>
> **%appdata%\Microsoft\Signatures\Archive**

> For further information regarding the requirements for the creation of signatures, see **empower® Signatures in Outlook**.
>
> For further information regarding the setup of your signature for mobile devices, see **Set up Signatures for Mobile Devices**.
>
> For further information regarding the creation of new e-mails and switching your signature, see **Create a New E-Mail**.

Edit a Signature

To edit a signature, select the signature and click on the button **Edit** (Figure 76).
A dialog box opens.

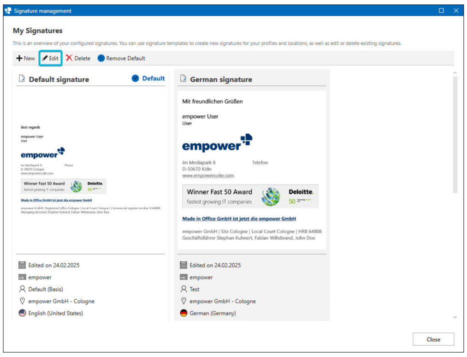


Figure 76. Button **Edit**

In the dialog box, you can change the signature name. To do so, navigate to the title input field and enter the new name (Figure 77).

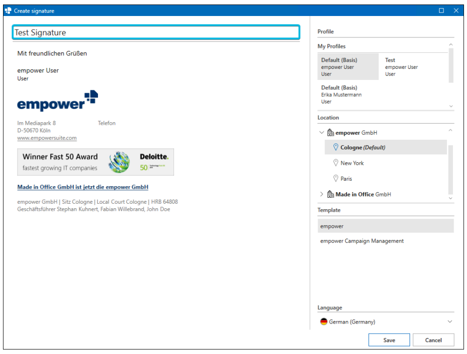


Figure 77. Title Input Field

To change the values for the signature, follow the following steps:

1. On the right side of the dialog box, choose the profile you want to use for the signature (Figure 78 **(1)**).
2. Then, select the company and location you want to display in your signature (Figure 78 **(2)**).
3. Choose the signature template you want to use (Figure 78 **(3)**).
4. To choose the language for the signature, open the drop-down menu under *Language* and select your preferred language (Figure 78 **(4)**).

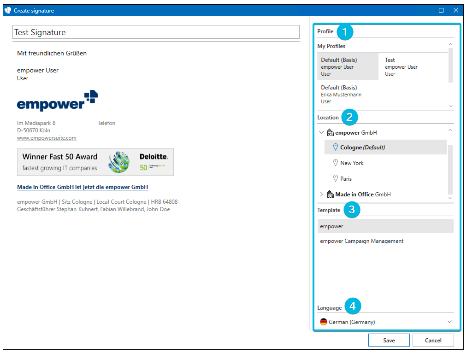


Figure 78. Signature Values

5. Click on the button **Save** (Figure 79).
   The window closes automatically and empower® starts changing your signature.

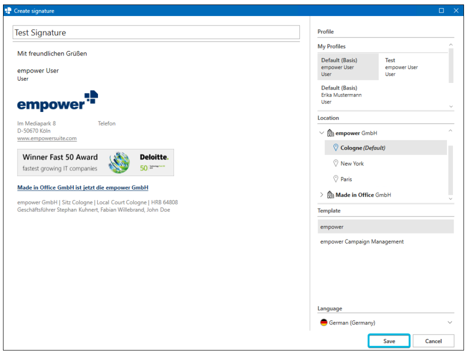


Figure 79. Button **Save**

Your personal data – e.g. your name, contact details and department – is taken from your profile information.

The location data, including company data – e.g. address, logo or registration – is taken from the location you select.

Depending on the setup in your empower® Environment, the range of available languages you can choose from under *Language* might vary.

If you choose your preferred language and certain texts in your signature preview are still displayed in the default language, your empower® Administrators have not added a translation for these texts.

For further information regarding the profile setup, see **Set up Profiles**.

Set as Default

To set one of your signatures as your default signature, select it from the dialog box and click on the button **Set as Default** (**Figure 80**).

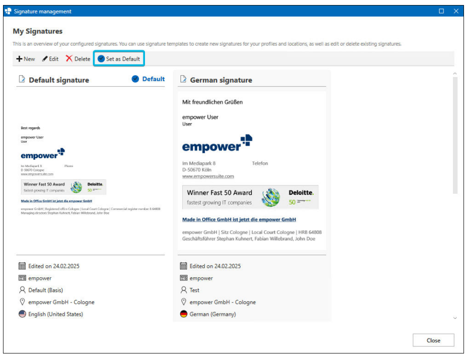


Figure 80. Button **Set as Default**

The signature will be marked as default and is the first one to appear in the dialog box (**Figure 81**).

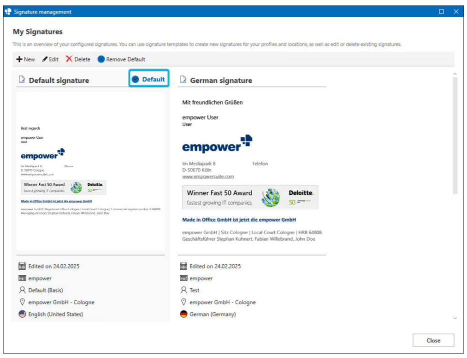


Figure 81. Default Marker

To remove the default marker from a signature, select it from the dialog box and click on the button **Remove Default** (Figure 82).

If no signature is marked as default, the first signature that has been created when first starting Outlook will be used as default.

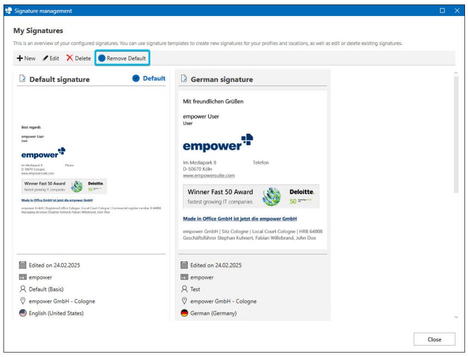


Figure 82. Button **Remove Default**

> If you set a default in empower®, this default also overwrites your default settings in Outlook. The new default is automatically set for new e-mails and replies in Outlook.

Add a Signature

To add a signature, click on the button **New** (Figure 83).

A dialog box opens.

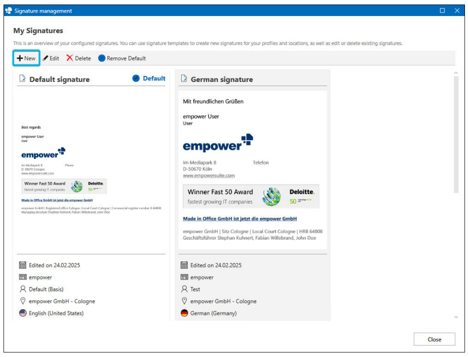


Figure 83. Button **New**

The dialog box is the same as the dialog box for editing a signature. Before you edit the signature, all fields will be filled in with default values. To change these values, follow the following steps:

1. Enter a unique name into the title input field (Figure 77).
2. On the right side of the dialog box, choose the profile you want to use for the signature (Figure 78 **(1)**).
3. Then, select the company and location you want to display in your signature (Figure 78 **(2)**).
4. Choose the signature template you want to use (Figure 78 **(3)**).
5. To choose the language for the signature, open the drop-down menu under *Language* and select your preferred language (Figure 78 **(4)**).
6. Click on the button **Save** (Figure 79).
   The window closes automatically and empower® starts creating your new signature.

Your personal data – e.g. your name, contact details and department – is taken from your profile information.

The location data, including company data – e.g. address, logo or registration – is taken from the location you select.

Depending on the setup in your empower® Environment, the range of available languages you can choose from under *Language* might vary.

For further information regarding the management of your defaults, see **Add a Profile**.

For further information regarding the profile setup, see **Set up Profiles**.

Delete a Signature

To delete a signature, select the signature from the dialog box and click on the button **Delete** (**Figure 84**).

A dialog box opens.

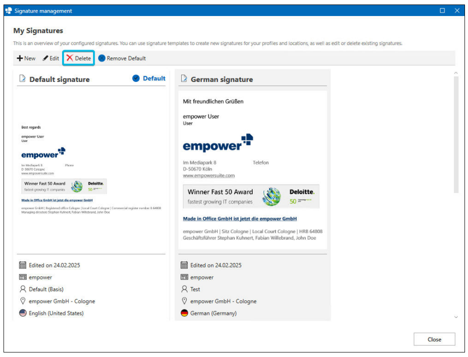


Figure 84. Button **Delete**

To confirm the deletion process, click on the button **Yes** (**Figure 85**).

The signature will be deleted.

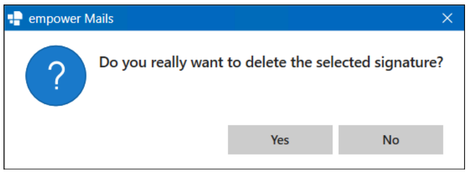


Figure 85. Deletion Dialog Box

4.1. Set up Signatures for Mobile Devices

If your company uses the empower® Web Component for Outlook, you can also set up your signatures for mobile devices.

To do so, you need to set up your signatures on your mobile device, either via a QR code or via a link.

You will then be able to use your signature as a default signature in your e-mail application.

To be able to set up your signature for mobile devices, the empower® Web Component for Outlook must be installed.

For Administrators

For further information regarding the requirements for empower® Mails Online, see **Technical Requirements for empower® Mails Online**.

For further information regarding the preparations for empower® Mails Online, see **Preparations for empower® Mails Online**.

For further information regarding the setup of empower® Mails Online, see **Adjust App Registration for empower® Mails Online**.

Set up Signature

To set up your signatures for mobile devices via Outlook, follow the following steps:

1. Navigate to the group empower Mails.
2. Click on the upper part of the split button **Manage signatures** (Figure 86).
   A dialog box opens.

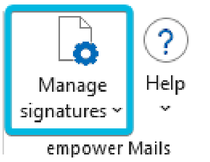


Figure 86. Button **Manage signatures**

3. In the upper right corner of this dialog box, click on the button **Set up on Mobile** (Figure 87).
   A dialog box opens.

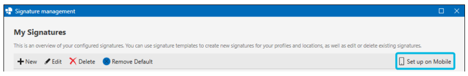


Figure 87. Button **Set up on Mobile**

4. Scan the QR code in this dialog box with your mobile device (Figure 88 **(1)**).
   The signature management opens in your default browser on your mobile device.
   a. If your company does not allow the usage of QR codes or you cannot scan the QR code, copy the link at the bottom of the dialog box (Figure 88 **(2)**).
      You can then send this link to your mobile device and open the signature management via this link.

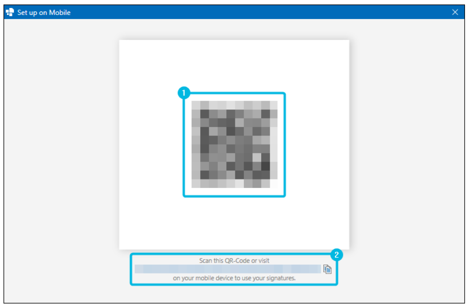


Figure 88. Access Signature Management

5. In the signature management, click on the signature you want to use (Figure 89).
   The signature is then copied to your clipboard. A confirmation message appears on your screen.
6. Now, switch to your e-mail application on your mobile device.
7. Here, navigate to the signature management of your application and create a new signature.
8. Paste the signature you have copied into this new signature and save it as your default signature.
   The signature will now be used for future e-mails.

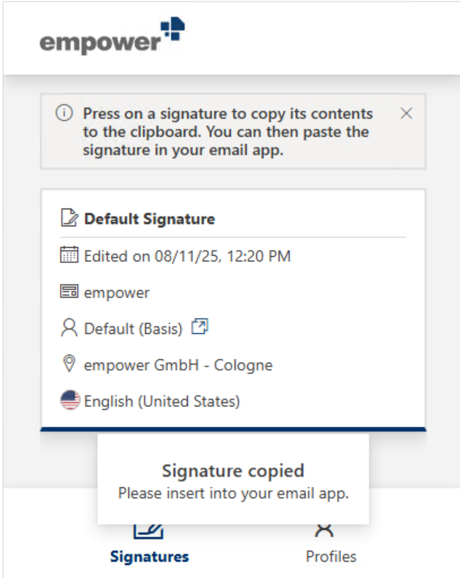


Figure 89. Signature Management on Mobile Device

If you do not have the option to set up your signature for mobile devices, contact your IT administrator.

Signatures cannot be used in iOS version 17.6. All other versions are compatible.

Signatures which include pictures cannot be copied on iOS devices.

If scanning the QR code with your iPhone leads to opening an integrated browser in your camera application, click on the **globe** symbol in the lower right corner to open your browser.

The signature management uses your default browser language while Outlook uses your default Microsoft Office language.

If you have set different languages, the languages in the signature management and in Outlook might differ.

5. Signature Template Management

For Administrators

As an administrator, you can create and manage your company's signature templates.

The creation of signature templates takes place in Word.

Here, you can create a template that complies with your corporate design.

In addition, you can add campaign fields to a template.

For further information regarding the campaign management, see **Create and Manage Campaigns**.

Manage Signature Templates

You can access the signature template management via the button **Manage Signature Templates** in Outlook (**Figure 90**).
Click on this button to open the empower® Library.

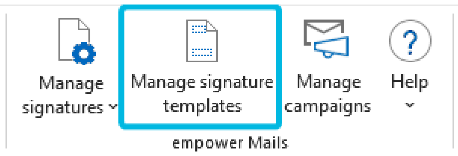


Figure 90. Button **Manage signature templates**

In Outlook, the empower® Library only contains signature templates.
You can organize them according to your needs, e.g. place the templates in different folders and rename the template as required.

If you are currently editing a campaign, you can also access the campaign images in the subsection *Pictures* below the section *Corporate Design Templates*.

In the navigation bar, you can use the different options to manage your templates.
Here, you can copy, cut and paste a template, delete templates or change the library view and sorting method.

Edit Signature Templates

You can either create a new template in Word or open an existing template via the signature template management in Outlook.

If you want to edit an existing signature template, select it in the library and then click on the button **Edit in Word** in the navigation bar (Figure 91).

Word opens automatically.

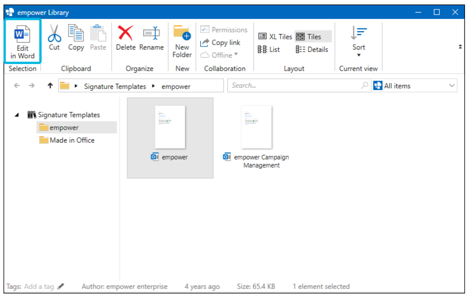


Figure 91. Button **Edit in Word**

In the Word document, you can then make the required changes.

To arrange your signature elements correctly, use a table. For this table, remember the following:

- The table alignment must be set to **Left**.
- The text wrapping must be set to **None**.

In order to create the template more easily, enable formatting characters and gridlines.

Make sure the fonts, font sizes and colors match your corporate design.

To insert placeholders for profile and company data into your template, use the *Template Assistant*.

Do not use theme fonts or accent colors! In Outlook, these and colors might be displayed differently.

In Word, you also have access to some empower® Features via the empower® Ribbon (Figure 92).

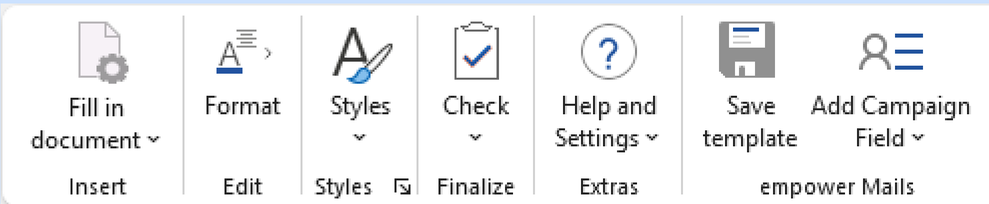


Figure 92. empower® Ribbon in Word

For further information regarding these features, refer to our empower® Docs manual.

For further information regarding the *Template Assistant*, see Template Assistant.

If you have opened an existing signature template, the group empower Mails appears in the empower® Ribbon.

Here, you can find the buttons to add campaign fields and to save the template directly to the library.

To insert a campaign field into an existing signature template, make sure your cursor is at the right position.

Then, click on the button **Add Campaign Field** in the empower® Ribbon (Figure 93).

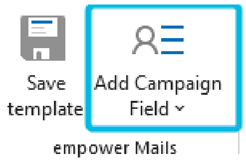


Figure 93. Button **Add Campaign Field**

A drop-down menu opens (Figure 94).

In this drop-down menu, choose the campaign field you want to use.

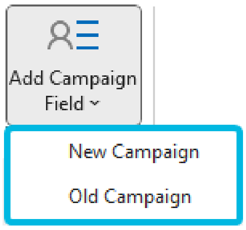


Figure 94. Campaign Field Drop-Down Menu

The campaign field is inserted into the signature template at your current cursor position.

> If you want to insert a campaign field to a new template, first save the template to the empower® Library and then open it from the library.
>
> For further information regarding the saving process, see **Save a Signature Template**.

> For further information regarding the management of campaign fields and campaign groups, refer to our **empower® Admin Center manual**.
>
> For further information regarding the setup of a campaign, see **Create and Manage Campaigns**.

Save a Signature Template

To save a new signature template to the empower® Library, edit the template in Word and then save the file to your device.

Then, open Outlook and click on the button **Manage Signature Templates**.

In the empower® Library, select the folder you want to save the template in.

Then, click on the button **Create template** in the navigation bar (Figure 95).

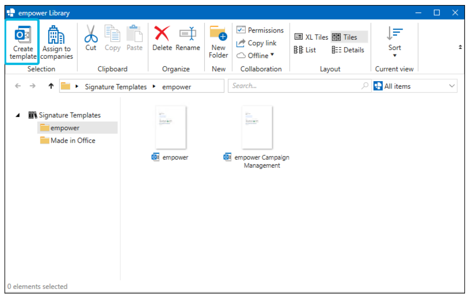


Figure 95. Button **Create template**

Your file explorer opens.

Navigate to the respective Word file and select it.

The Word file opens in a new Word window.

Here, check the signature template again. If required, add a campaign field.

Then, click on the button **Save template** to save the template to the empower® Library (Figure 96).

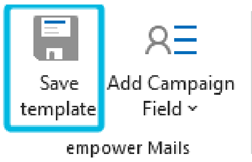


Figure 96. Button **Save template**

The empower® Library opens.

The template is automatically uploaded to the first folder in the library. It is named after the original file name.

To move the file to another folder, cut out the file and paste it into the other folder.

Rename the file if required.

The Word file is then uploaded as a signature template to the empower® Library.

If you have opened an existing template in Word, you can overwrite it in the empower® Library.

To overwrite an existing signature template, click on the button **Save Template** in the empower® Ribbon in Word.

The empower® Library opens.

The existing template is automatically overwritten.

To delete a template, select it and then click on the button **Delete** in the navigation bar (Figure 97).

A dialog box opens.

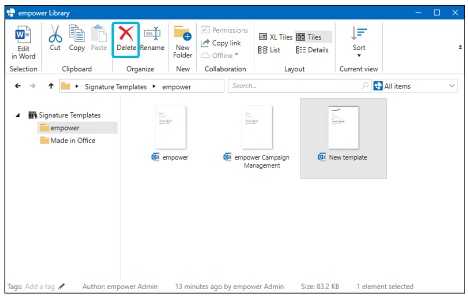


Figure 97. Button **Delete**

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

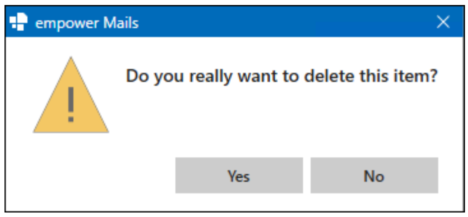


Figure 98. Dialog Box for Deletion

If you delete a signature template from the library, users who were using this signature template will be notified.

They then need to select a new signature template for their signatures.

The file name you enter for the template in the empower® Library is also the display name that is displayed for the users.

If you edit an existing signature template, you cannot save this template to another location on your device or in the library.

To create a new template based on an existing one, copy the content and create a new Word file.

Users do not have access to the empower® Library in Outlook directly. They can only choose from the templates that have been saved by you as an administrator.

Assign Signature Templates to Companies

Folders in the empower® Library can be assigned to different companies.

The assignment is mandatory. If a template is not assigned to a company, the template is not displayed in the users' signature management.

If you assign a folder to a company, the signature template is only offered to employees that choose the respective company in their signature management.

To do so, click on the button **Assign to companies** (Figure 99).

A dialog box opens.

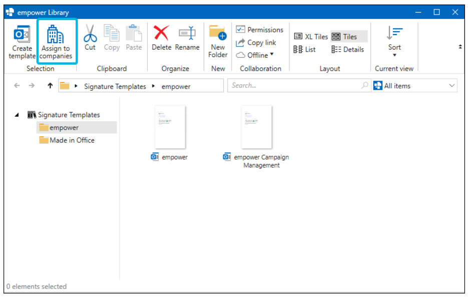


Figure 99. Button **Assign to companies**

In this dialog box, choose the companies you want to assign the folder to.

To select all companies at once, click on the button **Check all** (Figure 100 **(1)**).

If you want to deselect all companies, click on the button **Uncheck all** (Figure 100 **(2)**).

Alternative, tick the checkboxes for the individual entries.

Then, click on the button **OK** (Figure 100 **(3)**).

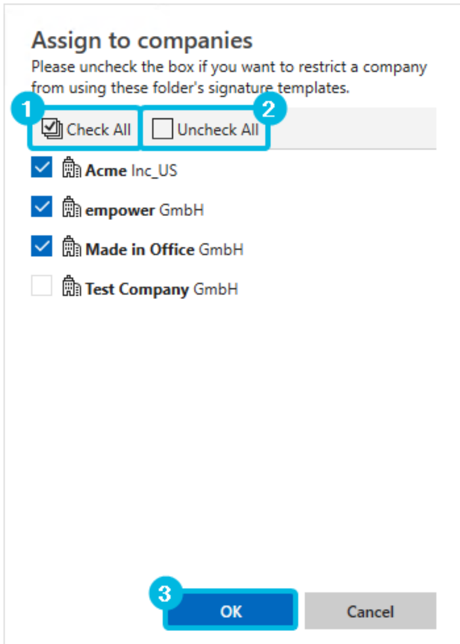


Figure 100. Dialog Box for Template Assignment

You can only assign entire folders to companies. Assigning single templates to a company is not possible.

For further information regarding the company management, see Company Management.

For further information regarding the signature management, see Manage Signatures.

5.1. Template Assistant

For Administrators

For empower® Administrators, the option **Template Assistant** is accessible via the split button **Fill in document** in Word.

To open the *Template Assistant* in the side pane, click on the lower part of the split button **Fill in document** (Figure 101).

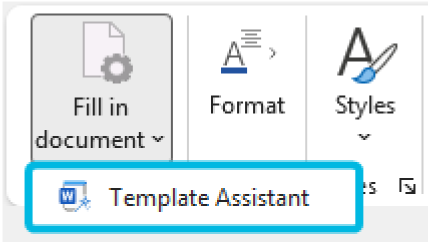


Figure 101. Access *Template Assistant*

It allows you to create placeholders that can be filled in with data from the EAV (Entity-Attribute-Value) model.

This is done using an .xml structure that accesses data from the EAV model. The placeholders are filled in with profile, company and location data when a user uses the *Document Template*.

The EAV Editor is a separate tool which allows to configure the user interface for data input.

This includes the data entry fields, their translations, and additional data fields for technical information.

To understand how to work with the EAV Editor and EAV model, the following terms need to be defined:

- **Property** – Complete data field with a *label*, originating from the EAV Editor, and a *value* input field in the company or profile management.
- **Value** – Content entered into the input fields in the user interface which is used to fill in templates.
- **Label** – Display name for a property in the user interface or in filled-in templates.
- **Entity** – Collection of properties for a single data group.

To display data within a document, the *Template Assistant* uses *Rich Text Content Controls*. These serve as placeholders for the content.

The *Template Assistant* opens in the side pane and is divided into three sections:

- **Custom XML Editor** – Enables users to edit the user-specific .xml section and to test the configuration directly in Word.
  Usually, this section has an informational character and is not manually changed.
- **Document Metadata** – Enables users to edit the user-specific .xml section. The *Template Assistant* supports the user entering the syntax.
- **Document Variables** – Displays all document data, e.g. last modification date, editor and placeholder sizes.
  Usually, this section has an informational character and is not manually changed.

Use the Template Assistant

With the help of the *Template Assistant*, you can add text and picture placeholders to the template.
You can use the *Template Assistant* to add a logo placeholder or to add data placeholders that will be filled in with profile and company data.

Add Text to a Template

To add data placeholders to a template using the *Template Assistant*, follow the following steps:

1. In the empower® Ribbon, click on the lower part of the split button **Fill in document**.
2. Choose the option **Template Assistant**.
The *Template Assistant* opens in the side pane on the right-hand side of your Word window. It opens in the section *Document Metadata*.
3. Under *Content Controls*, click on the **plus** sign next to *Filter* (**Figure 102** (**1**)).
A drop-down menu opens.
4. Choose the option **Rich Text Content Control** (**Figure 102** (**2**)).
A rich text content control is inserted at your current cursor position.
5. Under *Document Properties*, click on the button **Set to current database ID** (Figure 103).
The database ID cannot be set individually.

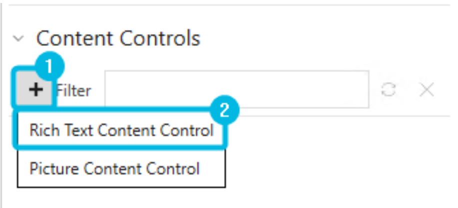


Figure 102. Add Rich Text Content Control

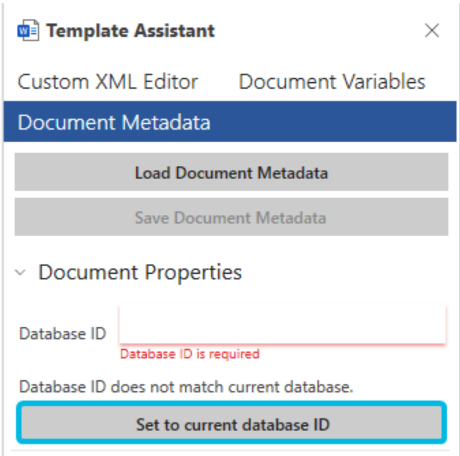


Figure 103. Button **Set to current database ID**

6. Under *Content Controls*, you can see the content control you have just added to your document.
   Enter a unique name for this content control in the input field *Title* (Figure 104 (**1**)).
7. To assign a valid GUID to the content control, click on the button **GUID** next to the input field *Tag* (Figure 104 (**2**)).
   An automatically generated and unique ID is assigned to the content control.
8. Assign the required group to the content control (Figure 104 (**3**)).
   For further information, see Placeholder Groups.
9. If you want to enable users to hide the content control for printing processes, tick the checkbox for **Stationery** (Figure 104 (**4**)).

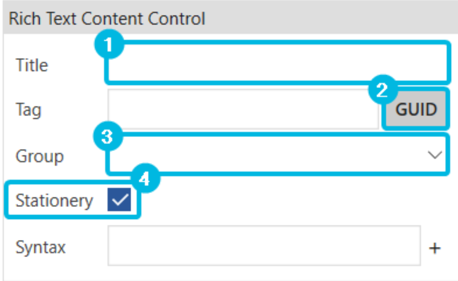


Figure 104. Rich Text Content Control Fields

10. The input field *Syntax* provides access to the EAV model structure.
    To add the required placeholders, follow the following steps:
    a. Click on the **plus** symbol next to the input field (Figure 105).
       A drop-down menu opens.
    b. Choose an entity to expand the properties.
    c. Choose the required property.
    d. Then, define if you want to add the value or the label to the placeholder.
       The placeholder will now be filled in with the corresponding syntax.

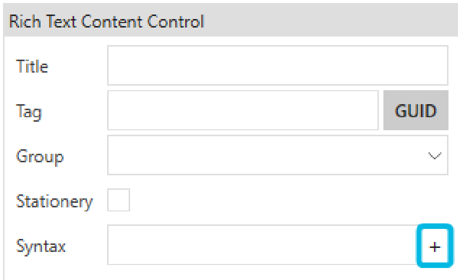


Figure 105. Insert Syntax Elements

11. To save the values, click on the button **Save Document Metadata** (Figure 106).

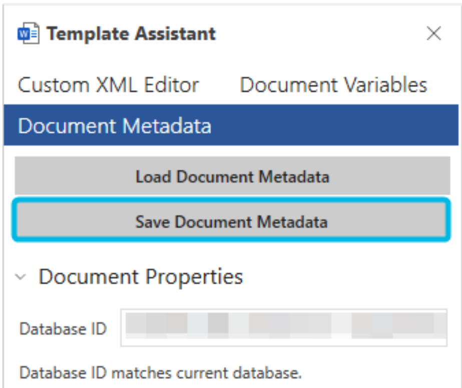


Figure 106. Button **Save Document Metadata**

The *Template Assistant* provides a quick access to the basic EAV model categories via the drop-down menu. All entities that have been added manually to the EAV model need to be entered manually.

Additional entries are usually added by empower during your onboarding process.

For further information regarding the manual composition of variables, see Compose Variables Manually.

In the drop-down menu, you can hover over the label or value to display a preview for your current default profile and company or location.

It shows the values which would be displayed in the document for the current profile (Figure 107).

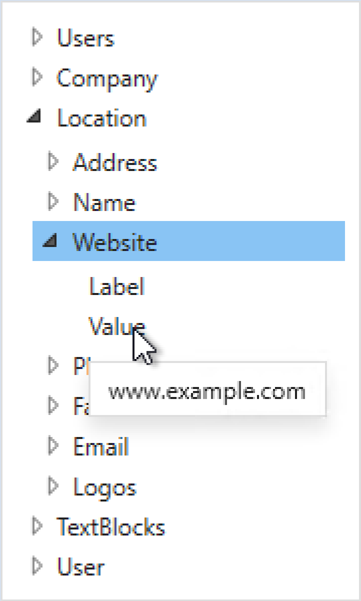


Figure 107. Mouse-Over for Values

If you choose to hide the content control when printing, the content control and its content might still be visible if you are currently displaying the formatting symbols.

However, it will not be included in the printed version.

You can also add custom text blocks to your template.

These can be used for recurring text such as greeting and farewell formulas. These texts stay the same regardless of the subject or addressee of the document or signature.

Custom text blocks are created in the EAV Editor and can then be added to a template using a content control.

The pattern for custom text blocks is as follows:

```
{{TextBlocks.[Property_Name].Value}}
```

In addition, you can create custom placeholders via the EAV Editor and then use them in your template.

These can be used to simplify using multiple fields in one placeholder.

Custom placeholders themselves can be reused inside of other custom placeholders. There is a maximum of 50 levels for this recursion.

The pattern for custom placeholders is as follows:

```
{{CustomPlaceholders.
[Property_Name].Value}}
```

The following is an example for the use of custom placeholders:

Example	

The following placeholder is shortened using a custom placeholder:
`{{User.First_Name.Value}} {{User.Last_Name.Value}}`
The custom placeholder would be the following:
`{{CustomPlaceholders.UserDisplayName.Value}}`
This placeholder contains both the value for the first name and the value for the last name.
	The outcome for a user called *empower Admin* would be the following:
	empower Admin

Placeholder Groups

In the *Template Assistant*, you can assign each content control to a group.
The placeholder groups are necessary for the workflows to work in the correct order.

There are two available groups (Figure 108):

- **Empty** – Used for profile, company and location data
- **Recipient Address** – Used for Outlook data of a chosen Outlook contact

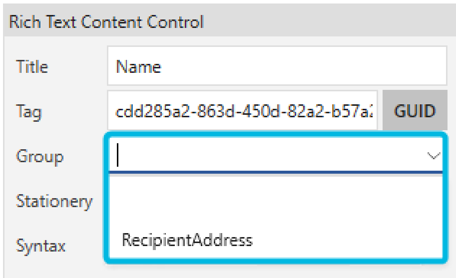


Figure 108. Placeholder Groups Drop-Down Menu

The placeholder groups are used to distinguish the two types of placeholders.
Content controls which are assigned to the empty placeholder group are filled in with profile, company and location data for the current user.
Content controls which are assigned to the placeholder group *RecipientAddress* can be filled in with data for a choosable Outlook contact.

Therefore, the profile, company and location data for the current user is filled in first. Then, the template is filled in with the missing data from Outlook.

If the content controls are assigned to the placeholder group *Recipient Address* by mistake, they might be filled in with the wrong profile or contact data.

If there is no content control for the recipient address, the user will be asked if they want to insert the data at their current mouse cursor position (**Figure 109**).

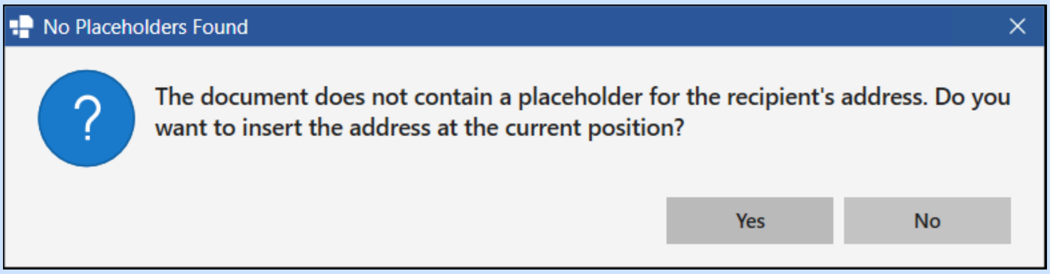


Figure 109. Dialog Box *No Placeholder Found*

For further information regarding the user perspective for the recipient address, see **Add the Recipient Address**.

Compose Variables Manually

In the syntax in the *Template Assistant*, variables are used to reflect the EAV data scheme that is managed in the EAV Editor.

These variables can be composed manually.

To do so, follow the following steps:

1. Place the variable inside double curved brackets (**Figure 110**).

{{Location.Website.Label}}

Figure 110. Curved Brackets

2. Inside these brackets, first enter the entity (**Figure 111**).
   a. To do so, navigate to the entity and its property in the EAV Editor you want to use.
   b. Then, enter the respective entity's name.

{{Location.Website.Label}}

Figure 111. Example for Entity

3. Add a full stop after the entity.
4. Now, enter the property right afterwards (**Figure 112**).
   a. To do so, navigate to the property inside the entered entity.
   b. Then, enter the respective property's name.
   Make sure you use the exact same spelling as in the EAV Editor.

{{Location.Website.Label}}

Figure 112. Example for Property

5. Add a full stop after the property.
6. Then, either enter *Label* or *Value*, depending on what part of the property you want to display.
   Enter *Label* to display the title of the field (**Figure 113**).
   Enter *Value* to display the content of the field (**Figure 114**).

{{Location.Website.Label}}

Figure 113. Label

{{Location.Website.Value}}

Figure 114. Value

7. Check if your variable contains all required parts.

The following is an example for the use of variables:

Example

A variable is composed to result in the following text:

Website: empowersuite.com

For this text, the following variable can be used:

```
{{Location.Website.Label}}: {{Location.Website.Value}}
```

Location is the entity name.

Website is the property name.

For the basic EAV model, you do not need to compose the variables manually. Here, you can use the **plus** symbol next to the field *Syntax* in the *Template Assistant* to access the EAV data scheme and add new variables.

For further information, see Use the Template Assistant.

Advanced Formatting and Syntax

The basic functionalities of the *Template Assistant* provide you with a rather static template.

To make the syntax more variable, you can use if conditions and formatting tags.

Apply Text Styles

You can also assign text styles to *Rich Text Content Controls* to always format them accordingly.

To do so, follow the following steps:

1. Select the *Rich Text Content Control*.
2. In the tab Developer, click on the button **Properties** (Figure 115).

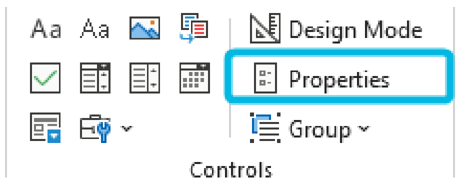


Figure 115. Button **Properties**

3. Tick the checkbox for **Use a style to format text typed into the empty control** (Figure 116).
4. Then, select the text style you want to apply. Alternatively, create a new text style from scratch by clicking on the button **New Style…**.

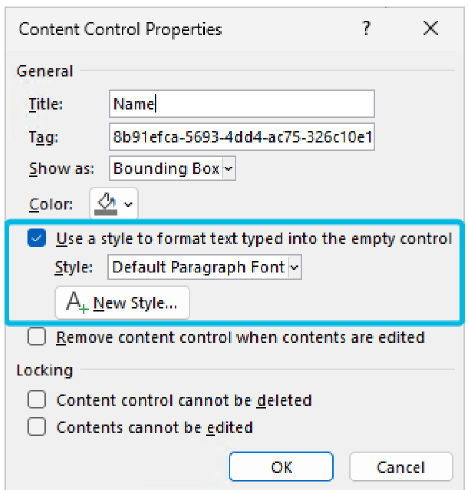


Figure 116. Text Style Options

It is not possible to use different font sizes, text styles or font colors to format content within one *Rich Text Content Control*. All contents within the *Rich Text Content Control* have to be formatted with one style only.

For further information on how to manipulate the formatting of single contents within one *Rich Text Content Control*, see Add Formatting Tags.

For further information regarding the tab Developer and how to make it available, see Show the Developer tab.

Add Formatting Tags

The following table provides an overview of formatting tags that can be used to adjust the document output via the *Template Assistant*:

<table>
<tr><th>Format</th><th>Tag</th><th>Example</th></tr>
<tr><td>Line Break</td><td>[n/]</td><td>Text[n/]Text</td></tr>
<tr><td>Bold</td><td>[b] … [/b]</td><td>[b]Text[/b]</td></tr>
<tr><td>Underlined</td><td>[u] … [/u]</td><td>[u]Text[/u]</td></tr>
<tr><td>Italics</td><td>[i] … [/i]</td><td>[i]Text[/i]</td></tr>
<tr><td>Tab Stop</td><td>[t/]</td><td></td></tr>
<tr><td>Centered</td><td>[hcenter] … [/hcenter]</td><td>[hcenter] Text Text [/hcenter]</td></tr>
<tr><td>Align Right</td><td>[hend] … [/hend]</td><td>[hend] Text Text [/hend]</td></tr>
<tr><td>Justified</td><td>[hdistribute] … [/hend]</td><td>[hdistribute] Text Text [/hdistribute]</td></tr>
<tr><td>Uppercase</td><td>| Upcase</td><td>{{Text | Upcase }}</td></tr>
<tr><td>Hyperlink</td><td>[a target="linkTargetUri"] … [/a]</td><td>For normal hyperlinks:

[a target="https://{{Entity.Property.Value}}";]
{{Entity.Property.Label}}[/a]

For e-mails:

[a target="mailto:
{{Entity.Property.Value}}"]
{{Entity.Property.Value}}[/a]</td></tr>
</table>

The following is an example for a use case of formatting tags:

Example

The labels in the following code excerpt are written in uppercase letters and displayed in bold.

The values, on the other hand, are written in standard formatting without uppercase letters.

Additionally, the data set is divided into three lines using line breaks.

```
{{User.First_Name.Value}}
{{User.Last_Name.Value}}[n/][b]
{{User.Phone.Label | Upcase }}:[/b]
{{User.Phone.Value}}[n/][b]{{User.Email.Label
| Upcase }}:[/b]
{{User.Email.Value}}
```

The outcome for a user called *empower Admin* would be the following:

empower Admin
PHONE: +49 221 99 37 85 – 78
E-MAIL: empower-admin@empowersuite.com

Apply If Conditions

If conditions can be used to make the display of values more flexible.
For example, you can define that the label for *mobile_phone* is only shown if a mobile phone number is entered in the profile.
If conditions always consist of an opening and a closing tag, each enclosed in a pair of curly brackets.
The pattern is as follows:

```
{% if <CONDITION> %} … {% endif %}
```

The following table provides an overview of possible comparison operators:

Type	Operator
Equal	==
Not Equal	!=
Greater Than	>
Less Than	<
Greater Than or Equal to	>=
Less Than or Equal to	<=

In addition, you can use the operators *AND* and *OR*.

The following is an example for a use case of if conditions:

Example

If no value is entered for a property in the selected profile, you can use an if condition to ensure that the property is not displayed in the document either.

The following code excerpt shows an example of such an if condition, where the label for *mobile_phone* is not displayed if no mobile phone number is entered in the profile:

```
{% if User.Mobile_Phone.Value != null %}{{User.Mobile_Phone.Label}}:
{{User.Mobile_Phone.Value}}{% endif %}
```

Apply Else If Conditions

Else if conditions can be used within if conditions. If the if condition does not apply, the else if condition within the if block is evaluated.

There is no limitation on the number of else if conditions that can be included.

The pattern for an else if condition is as follows:

```
{% if <CONDITION> %} … {% elseif %} … {%
endif %}
```

The following is an example for a use case of if conditions:

Example

If the primary option is not available or not entered, an alternative is selected. If neither of the two values is available, the label is omitted.

The following code excerpt shows the else if condition for this example.

In this example, the else branch has been left empty. If a value is specified here, that value will be used.

```
{% if User.Mobile_Phone.Value != null %}{{User.Mobile_Phone.Label}}:
{{User.Mobile_Phone.Value}}{% elseif
User.Phone.Value != null %}{{User.Phone.Label}}: {{User.Phone.Value}}{% else %}{%
endif %}
```

Apply For Loops

For lists that contain multiple entries of the same type (e. g., Managing Directors), for loops can be used. For loops consist of an opening and a closing tag enclosed in a pair of curly brackets.

Within the for loop, enter a variable that represents the values from your list. This variable is placed between two pairs of curly brackets.

The pattern for such a for loop is as follows:

```
{% for [VAR] in <ENTITY_VARIABLE> %}
{{VAR}}{% endfor %}
```

Typically, for loops are used for the properties of the type *Array*, which usually display the following company information:

- Managing Directors
- Board of Managers
- Banking Information (if more than one bank is added to the company)

The following is an example for the use of such for loops:

Example	
A list of entries for *Managing Directors* is created. It is introduced by a label and is separated by line breaks. The following code excerpt shows the configuration for this example: `{{Company.Managing_Directors.Label}}:[n/]{% for MD in Company.Managing_Directors.Value %}{{MD}}[n/]{% endfor %}`	The outcome for a company whose managing directory are *empower Admin* and *empower User* would be the following: Managing directors: empower Admin empower User

If the entries in the list consist of multiple properties per value, first enter the variable followed by a period. Then specify the property and the type (label or value):

```
{% for [VAR] in <ENTITY
VARIABLE> -%} {{VAR.PROPERTY.Label}}:
{{VAR.PROPERTY.Value}}, {% endfor %}
```

The following is an example for the use of such for loops:

Example	
A list of entries for bank information is to be created, where each entry consists of three properties. The following code excerpt shows the configuration for this example: `{% for BI in Company.Banking_Information.Value %}{{BI.Name.Value}}: {{BI.IBAN.Label}}: {{BI.IBAN.Value}}, {{BI.BIC.Label}}: {{BI.BIC.Value}}{% endfor %}`	The outcome for a company's banking information could be the following: Sparkasse KölnBonn: IBAN: DE74 3705 0198 1930 4482 69, BIC COLSDE33XXX

List entries can be separated by line breaks, delimiters, commas, etc.

You can use formatting tags to change the formatting of each property.

For example, the name of a bank can be displayed in bold, while the rest of the entries remain unformatted.

Use an unless tag to apply an alternative formatting, for example, when the last list entry is being processed.

The pattern for this configuration is as follows:

```
{% for [VAR] in %}{{VAR}}{% unless %} ...
{% endunless %}{% endfor %}
```

The following is an example for the use of such for loops:

Example	
A comma should be inserted after each list entry to separate the entries from one another. A comma should not be inserted after the last entry in the list. The following code excerpt shows the configuration for this example: `{{Company.Managing_Directors.Label}}: {% for MD in Company.Managing_Directors.Value -%}{{MD}}{% unless forloop.last %},{% endunless %}{% endfor %}`	The outcome for a company whose managing directory are *empower Admin* and *empower User* would be the following: Managing directors: empower Admin, empower User

Apply Filters

Filters are special functions used to adjust and format data from templates.

Filters are implemented as follows:

```
{{ Variable_name | Filter_name:
Argument }}
```

The following table provides an overview of filters that are usually used with empower®:

Name	Function	Syntax
Capitalize	The first character in a string is capitalized.	`{{ [Property_Name]	Capitalize }}`
Upcase	All characters in a string are written in uppercase.	`{{ [Property_Name]	Upcase }}`
Downcase	All characters in a string are written in lowercase.	`{{ [Property_Name]	Downcase }}`
Replace	Substrings are replaced by another substring.	`{{ [Property_Name]	Replace: "cats", "dogs" }}`
Size	Defines the number of characters in a string or array.	`{{ [Property_Name]	Size }}`
Strip	Whitespaces prior to or after a string are removed.	`{{ [Property_Name]	Strip }}`

In front of the **pipe** symbol, enter the property name and type (label or value) of the property you want to filter.

You can use multiple filters at once if you separate them with a **pipe** symbol.

The pattern for such a filter is as follows:

```
{{ Variable_name | Filter1 | Filter2 }}
```

The following are examples for the use of filters:

Example

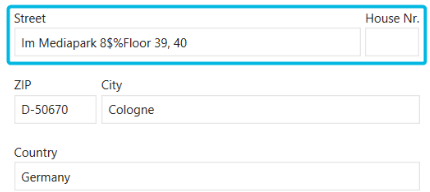
A filter is to be applied to ensure that the characters *$%* are used as a line break.

This filter can be used, for example, when a string contains multiple values that should be split across multiple lines.

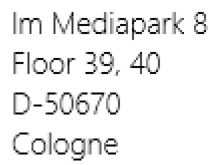
The following code excerpt shows the configuration for this example:

```
{{Location.Address.Value.Street.Value | Replace:
"\$\%", "[n/]"}}
```

The string for *Street* in the company management window would look as follows:



The outcome in the template would be the following:



Example

You want to create a custom variable that adds the number of characters of two values and determines whether they fit into a single cell or need to be separated by line breaks.

The following code excerpt shows the configuration for this example:

```
{% assign charLength
= Location.Website.Value.size |
Plus: Location.Email.Value.size %}
{{Location.Website.Value}}{% if charLength >46 %}
[n/]{% else %},
{% endif %}{{Location.Email.Value}}
```

The outcome for a combination with less than or equal to 46 characters would be the following:

The outcome for a combination with more than 46 characters would be the following:

Filters can be used with regular expressions. Therefore, make sure to escape special characters correctly.

Add Logos to a Template

To add a logo placeholder to a template using the *Template Assistant*, follow the following steps:

1. In the empower® Ribbon, click on the lower part of the split button **Fill in document**.
2. Choose the option **Template Assistant**.
   The *Template Assistant* opens in the side pane on the right-hand side of your Word window. It opens in the section *Document Metadata*.

3. Under *Content Controls*, click on the **plus** symbol next to *Filter* (Figure 117 **(1)**).
   A context menu opens.
4. Choose the option **Picture Content Control** (Figure 117 **(2)**).
   A picture content control is inserted at your current cursor position.
5. Adjust the size of the content control via the option **Size and Position...** in the content control's context menu.
   a. Ensure that the checkbox *Lock aspect ratio* is not ticked.
   b. Format the content control with *In line with text*.
6. Click on the button **Load Document Metadata** (Figure 118).

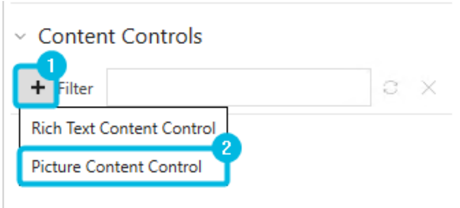


Figure 117. Add Picture Content Control

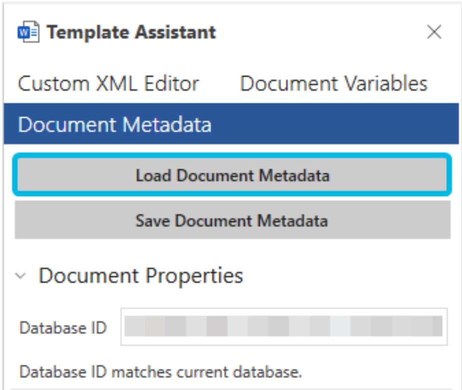


Figure 118. Button **Load Document Metadata**

7. Under *Content Controls*, you can see the content control you have just added to your document.
   Enter a unique title for this content control in the input field *Title* (Figure 119 **(1)**).
8. To assign a valid GUID to the content control, click on the button **GUID** next to the input field *Tag* (Figure 119 **(2)**).
   An automatically generated and unique ID is assigned to the content control.
9. Assign the required group to the content control (Figure 119 **(3)**).
   For further information, see Placeholder Groups.
10. If you want to enable users to hide the content control for printing processes, tick the checkbox for **Stationery** (Figure 119 **(4)**).
    This usually makes sense if you work with pre-printed paper.
11. To save the values, click on the button **Save Document Metadata**.

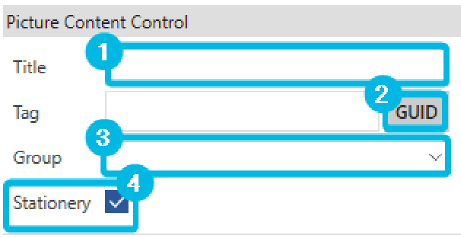


Figure 119. Picture Content Control Fields

The logo placeholder will automatically be filled in with the correct logo according to your company and location data.

Therefore, make sure to add logos to your company and location data.

For further information regarding the company and location management, see **Company Management**.

The logo will never be displayed distorted. It will be displayed as large as possible in the placeholder.

For further information regarding the logo selection, see **Company Management**.

For further information regarding the work with logos, see **Work with Logos in Templates**.

If you choose the hide the content control when printing, the content control and its content might still be visible if you are currently displaying the formatting symbols.

However, it will not be included in the printed version.

6. Create and Manage Campaigns

For Administrators

With the campaign feature, you can create an automatic use of relevant campaigns for each user and automatic adjustment of the signature. You can define and administer campaign groups, assign targets and define both duration and campaign information for each campaign.

To set up a campaign, follow the following steps:

1. Set up a basic structure.
2. Prepare the signature template.
3. Add a new campaign.

When it comes to the campaigns, the following applies:

- Directory service groups or user groups are assigned to campaign targets.
- Campaigns are activated for selected campaign targets.

As a result, the campaign is displayed in the signature via the assigned directory service groups or user groups and through the signature template that contains the campaign field.

If a signature template is assigned to all available locations via the company, and if the directory service user group for the location *Location 1* also includes individual users from the location *Location 2*, these users will also receive a campaign in their signature. This campaign is set for the *Location 1* campaign group because the signature template is always assigned to the entire company. This means that it does not matter whether users select the location *Location 2* when creating the signature.

Set Up Basic Structure for Campaigns

For empower® Users to be able to receive campaign information in their signature, they have to be part of the campaign targets assigned to the current campaign and a campaign field has to be present.

Open the empower® Admin Center by inserting your company's individual URL into the browser of your choice.

You are redirected to the empower® Admin Center.

Navigate to the section *Customizing Center*, where you can define campaign fields, set up a campaign group tree and assign users and user groups to a campaign.

For further information regarding the *Customizing Center*, refer to our **empower® Admin Center manual**.

Prepare Signature Template for Campaigns

Once the campaign field has been set up, you can prepare the signature template.

To include the defined campaign field in the signature template, follow the following steps:

1. Navigate to the tab Home and click on the button **Manage signature templates** in the group empower Mails to access the empower® Library (Figure 120).
2. Select your signature template and double-click it to open the template in Word.

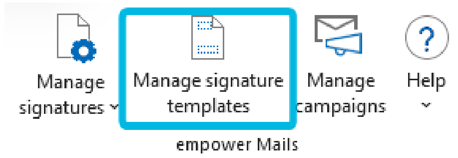


Figure 120. Button **Manage signature templates**

3. Place the cursor at the position in your template where you would like to add the image placeholder for the image of the campaign to be inserted in.
4. Click on the button **Add Campaign Field** and select your campaign field to insert it into the template (Figure 121).

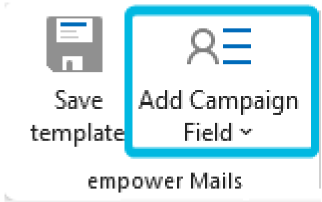


Figure 121. Button **Add Campaign Field**

5. Set both size and position of the campaign field via the context menu options of the image placeholder (size and position) and save the signature template with a click on the button **Save template** (Figure 122).

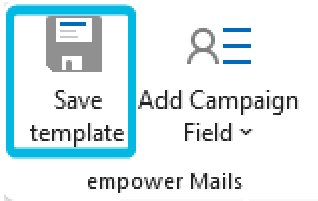


Figure 122. Button **Save template**

It is required to use an additional image placeholder for the campaign. It is not possible to use the same image placeholder that is used for your company logo.

Add a Campaign

To complete the preparations for a campaign, an active or scheduled campaigns needs to be present that includes the following information:

- Campaign name
- Duration
- Target groups

To add a campaign, follow the following steps:

1. Navigate to the tab Home and click on the button **Manage campaigns** (Figure 123).
   A dialog box opens.

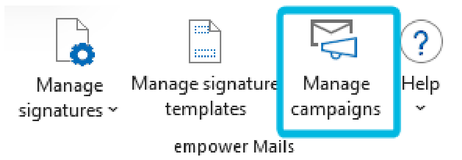


Figure 123. Button **Manage campaigns**

2. Click on the button **New Campaign** (Figure 124).
   A dialog box opens.

Figure 124. Button **New Campaign**

3. Insert a campaign name into the input field *Name* (**Figure 125** **(1)**).
4. Click on the **arrow** symbol in the field *Duration* to access the calendar (**Figure 125** **(2)**).
5. Pick the start and end date for the campaign (**Figure 126**).
   The selected time frame is now displayed in the field *Duration*.
6. Click on the **arrow** symbol in the field *Target Group* to access the campaign group tree you have set up previously (**Figure 125** **(3)**).
   Tick the checkboxes for all user groups you want to assign the campaign to.
7. To select a campaign banner for your campaign, follow the following steps:
   a. Click on the button **Upload image** to browse through your device and select your desired image (and thus, upload it into the empower® Library) (**Figure 125** **(4)**).
   b. Click on the button **Select image** to use an image that is already stored in the empower® Library (**Figure 125** **(5)**).
8. Set a hyperlink via the input field *Hyperlink* that can be accessed with a click on the previously selected image (**Figure 125** **(6)**).
9. Click on the button **Preview** to check how your campaign will look like (**Figure 125** **(7)**).
10. Click on the button **Save** to confirm the information added to your campaign (**Figure 125** **(8)**).

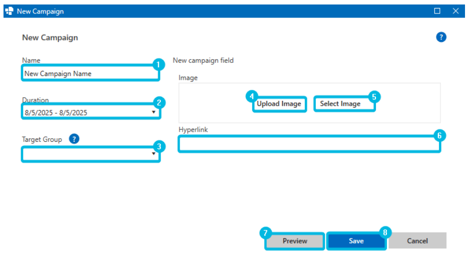


Figure 125. Dialog Box New Campaign

Figure 126. Date Picker in Input Field *Duration*

Manage a Campaign

Once a campaign has been set up, the campaign is listed in an overview that can be accessed via the button **Manage campaigns** in the tab Home (**Figure 123**).

Information on the status is included and campaigns can be edited or put on hold. Campaigns that are expired are archived.

In total, the following statuses are available (**Figure 127**):

- **Active** – Currently active campaign
- **Planned** – Campaign with defined start date in the future
- **On hold** – Campaign with defined duration in present, but put on hold
- **Archived** – Campaign with defined duration in the past (an archived campaign can be used again)
- **Problem** – Campaign with internal issue, e.g. a deleted campaign picture

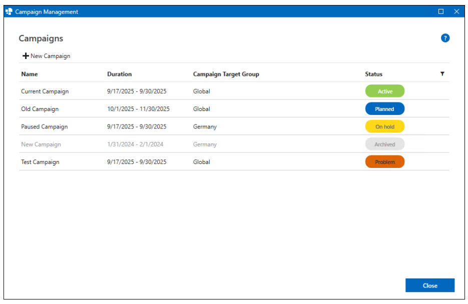


Figure 127. Campaign Management Status

To edit a campaign, follow the following steps:

1. Navigate to the tab Home and click on the button **Manage campaigns** (**Figure 123**).
2. Select a campaign from the list and click on the button **Edit** (**Figure 128**).
   A dialog box opens.
3. Perform all necessary changes and click on the button **Save** to confirm the changes.

Figure 128. Button **Edit**

To delete a campaign, navigate to the tab Home and click on the button **Manage campaigns** (**Figure 123**).

Then, click on the button **Delete** (**Figure 129**).

A dialog box opens.

Figure 129. Button **Delete**

Click on the button **Yes** to confirm the deletion of the campaign (**Figure 130**).

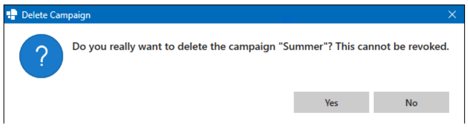


Figure 130. Dialog Box **Delete Campaign**

Once the set duration of a campaign is over, the campaign is automatically archived. To reactivate an archived campaign, select the campaign from the list, click on the button **Edit** and change the duration in the input field *Duration*.

A campaign that is put on hold can be reactivated. To do so, select the campaign and click on the button **Set to active** in the navigation bar (**Figure 131**).

Figure 131. Button **Set to active**

If a picture you have used in an existing campaign has been deleted, you are notified. A dialog box opens (**Figure 132**).

In addition, the campaign has the status *Problem* in the campaign management.

Open the campaign management to adjust your existing campaigns.

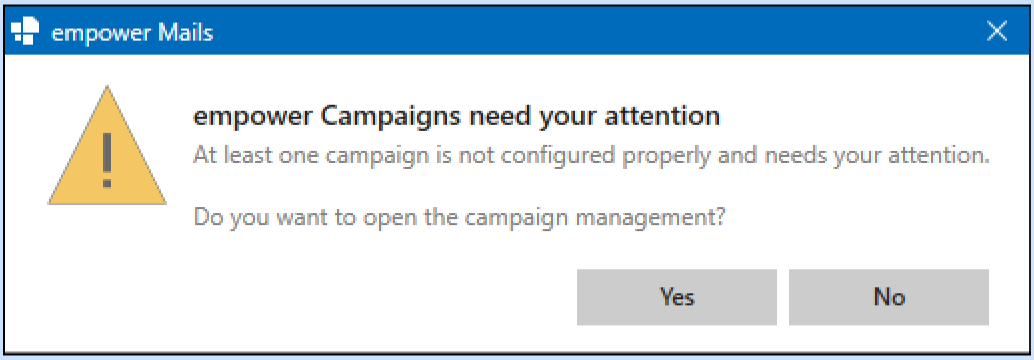


Figure 132. Dialog Box for Deleted Campaign Image

7. Content Updates

In Outlook, you receive a notification on your screen if there have been changes to the profile or company data contained in your signature (**Figure 133**).

After the data has been loaded successfully, the screen disappears.

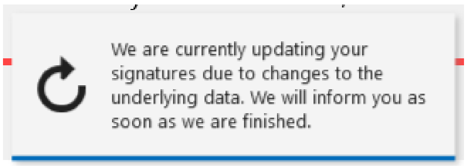


Figure 133. Update Notification in Outlook

8. Create a New E-Mail

If you have set a default signature, this signature will be inserted into a new e-mail automatically.

If you have more than one signature set up, you can switch to a different signature.

To do so, navigate to the group Include in the Outlook ribbon and click on the button **Signature** (**Figure 134**).

A drop-down menu opens.

Figure 134. Button **Signature**

In the drop-down menu, click on your preferred option (**Figure 135**).

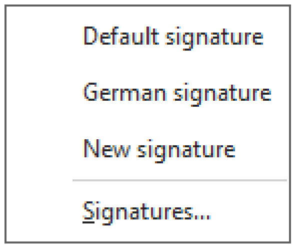


Figure 135. Drop-Down Menu with Signatures

If you click on the option **Signatures...**, the Outlook built-in signature management opens.

Alternatively, you can right-click on the signature in the e-mail. A context menu with the same options opens.

If your signature templates have been synchronized, you can also use them offline to create e-mail drafts.

For further information regarding the signature management, see **Manage Signatures**.

Be your best at work.

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