# empower mails

Version 9.2

# Contents

# Introduction

empower® Mails – the central signature management system for Microsoft Outlook® (in short Outlook). The add-in allows central curation and administration of your email signatures which ensures they are always correct and current – all while keeping in line with corporate design.

This Manual describes the first steps for handling and configuring empower® Mails for Windows (Desktop App).

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

**Windows Version**

- Windows 8, 8.1, 10 or 11

**Outlook Version**

- Microsoft Office 2013 or 2016, 2019, Office 365 Pro Plus and Enterprise E3 and E5

We offer support for the above-mentioned versions.

# Initial Setup

## 1.1 The Basics

empower® Mails integrates seamlessly into the Outlook ribbon in the Home tab with its own section empower® Mails (**Fehler! Verweisquelle konnte nicht gefunden werden.**).



**Figure 1**: empower® Mails in Outlook

In addition, information on your company's corporate design is reflected in the sections Text and Color in the open window for a new e-mail. With the help of this information, it can be ensured that all created emails correspond to the desired corporate design.

In the section Text, only corporate design compliant font colors, types and sizes are available (**Fehler! Verweisquelle konnte nicht gefunden werden.**).



**Figure 2**: Section Text

The color picker options in the section Color are also aligned with corporate design colors (**Fehler! Verweisquelle konnte nicht gefunden werden.**).
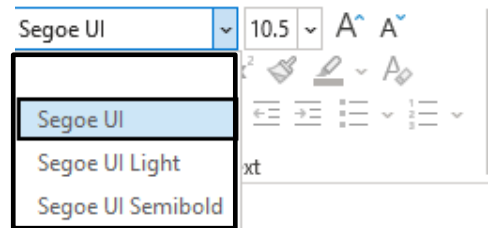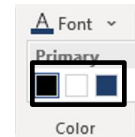


**Figure 3**: Section Color

> **Please note:**
> If the colors and fonts have not been restricted by your empower® administrators, all of the Outlook-native formatting options will be available in the Edit area (sections Text and Color).

> **Please note:**
> empower® Mails does not interfere with Outlook's native right-click access to font and color information. All native Outlook formatting options, which may not match your corporate design, are still available here.

## 1.2 First Steps

After first startup of Outlook, with the empower® Mails installed, you will be greeted by a welcome screen **(Figure 4)**. The welcome screen only appears once after having installed empower® Mails and guides through the first setup of your signature, which consists of the following components:

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

empower® Mails will automatically load or create your default profile.

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

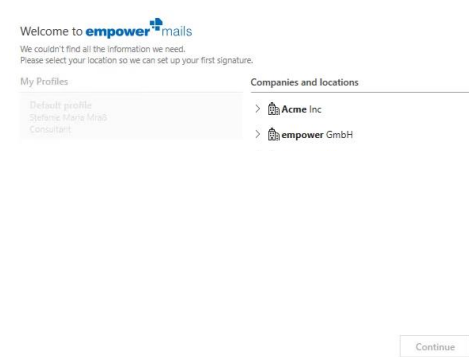For information on setting a signature, see chapter 1.5 Signature Setup)



**Figure 4**: Welcome screen after installation

## 1.3 Signature Setup

For information on setting a profile, see **chapter 1.4 Profile Setup.**

Signatures created in empower® Mails and used in Outlook are created dynamically so that, for example, information about the sender, company and location is automatically filled in the signature and manual editing is no longer necessary. The language settings can also be set and controlled centrally.

For information on setting the profile and location and company data as well as the language settings, see **chapter 1.5** Manage Default Values.

## 1.4 Profile Setup

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

The profile management can be accessed via the section <u>Mails</u> and the button **Manage Signatures** by clicking on the button **Profiles** (**Figure 5**).
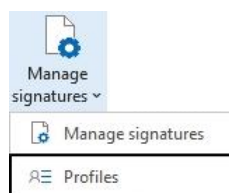


**Figure 5**: Button **Manage signatures** - **Profiles**

The **Default (Base)** profile, plus any other additionally created profiles you create for yourself, can be edited by clicking on the **pencil** (**Figure 6**).
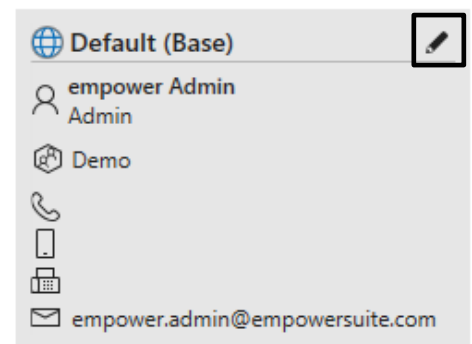


Figure 6: Edit profile data

The data that is automatically loaded into the profile fields is taken from the synchronized directory service of your company. All personal data that is administered in your directory service for you and synchronized into your profile is indicated by a chain symbol (**Figure 7**) **(1).** empower® Mails frequently synchronizes the data from the directory service to ensure the data is always up to date.

A **crossed-out chain symbol (2)** indicates that:

- no data is stored for you for this specific field in the directory service or
- you manually typed in (different) data (data is highlighted in bold) and thus overruled the data stored in the directory service

Click on the **crossed-out chain symbol** to set this specific profile field back to the personal data stored in the directory service (if applicable) and thus delete the data you manually typed in.
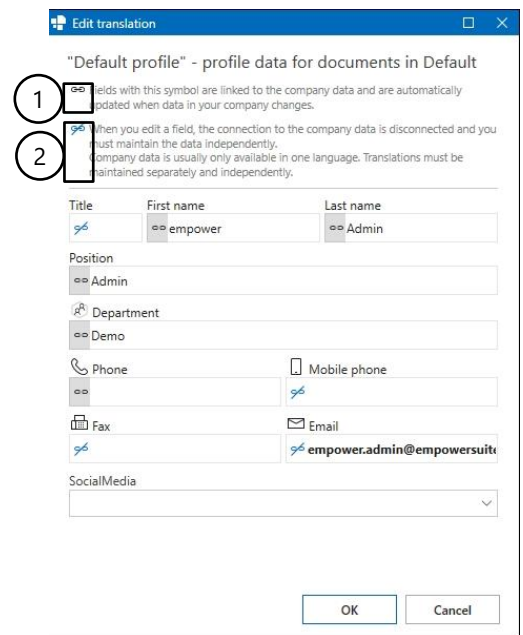


Figure 7: Profile data

**Please note:**
The aim should be that the directory service of your company always contains current and correct data. Therefore, you should contact your IT administrator to correct the data in the directory service. Once the data synchronized from the directory service is up to date again, click the **crossed-out chain symbol** to set back the profile field(s) to display the stored data from your directory service.

In addition to the standard profile, any number of additional profiles can be created if required.

A new profile can be created by clicking **New Profile** when the Profile Management is open (**Figure 8**).
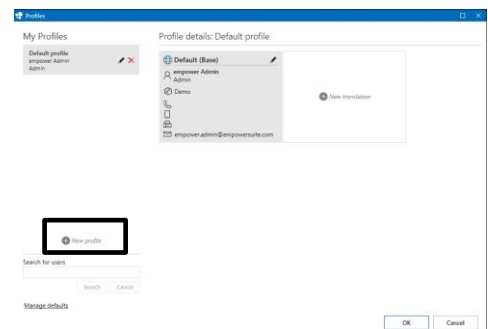


**Figure 8**: Create new profile

Once more than one profile has been created, any of your profiles can be set as the default profile. The default profile is automatically set as the default profile if no other profiles have been created.

For information on setting the default profile, see chapter 1.5 Manage Default Values.

In the event of sick leave or holiday cover, it can be helpful to be able to send emails on someone else's behalf using their signature. Therefore, empower® Mails offers the option to reference profiles other than your own.

Once a user has set up a default profile, other users can search for it via *Search for users* (**Figure 9**). During the search, the following data is taken into account:

- First name and/or
- Last name



**Figure 9**: Search another user

After confirming with Enter or by clicking on **Search**, all matching search results are displayed and the found profile can be added to the profiles via the button **Add to my profiles** (**Figure 10**). Unlike own profiles, foreign profiles cannot be edited in the profile management.
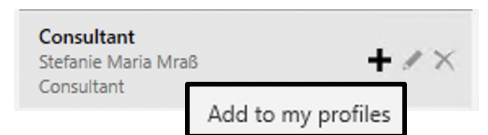


**Figure 10**: Add foreign profile to own profiles

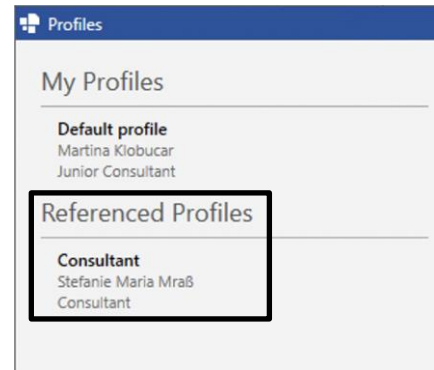The newly added profile is listed under one's own profiles as a *Referenced Profile* (**Figure 11**).



**Figure 11**: View *Referenced Profiles*

> **Please note:**
> The sender address displayed when an addressee receives an email will always be the mailbox (email address) you've been logged into whilst creating a new email. Thus. using a signature that is based on a referenced profile does not affect from which mailbox the email is sent.

## 1.5 Manage Default Values

In order for a signature in empower® Mails to be created and the selected signature template to be automatically filled with information, the setting of some default values is necessary:

- Profile data (e.g. your name, contact details and department)
- Location and company data (e.g. address, logo or registration)
- Translation/Language settings.

The default settings can be opened by clicking the link **Manage Defaults** in the Profile Management window (**Figure 12**
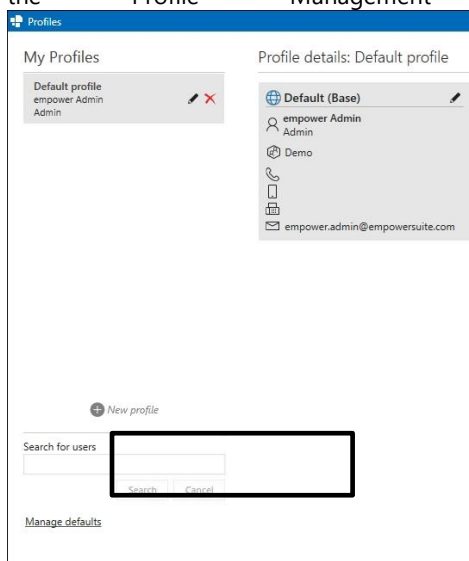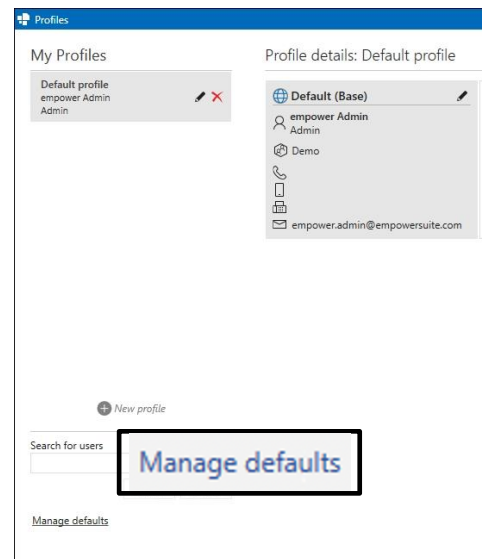


**Figure 12**).



**Figure 12**: Button **Manage defaults**

All set up profiles are listed in the *Profile Data - Main Profile* drop down menu (**Figure 13**). The desired profile that should be set as default profile can be selected by clicking on the listed name.
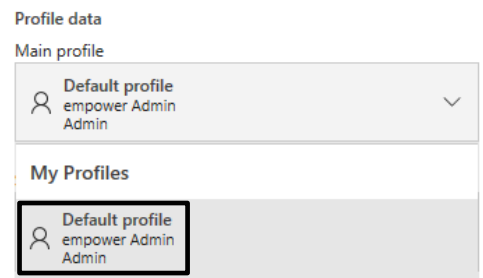


Figure 13: Set profile data

Depending on the configuration of the template, information from more than one profile can be referenced. For this purpose, any number of additional profiles can be selected in addition to a main profile (**Figure 14**).
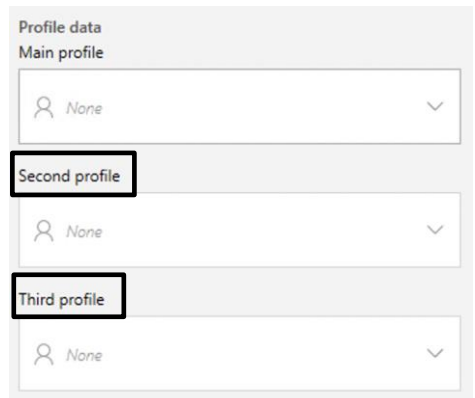


Figure 14: Set multiple default profiles

In the drop-down menu under *Location data*, all available companies and their locations are listed (**Figure 15**). The desired default location can be selected by clicking on the listed name. If there is no default location, the signature cannot be created.
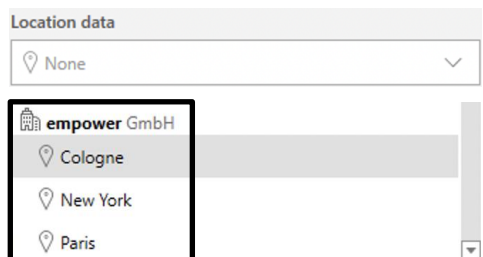


Figure 15: Set location data

In the drop-down menu under *Translation*, all available languages are listed (**Figure 16**). The desired language can be selected by clicking on the listed name. 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.
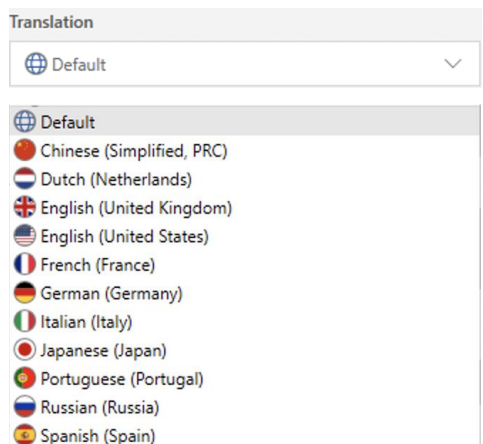
In empower® Mails, the translation labeled **Default** can be configured for language settings. Typically, this default is set to English. If **Default** is selected, the signature template is filled according to the set translation language labeled as default.
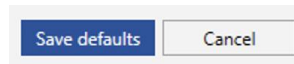


Figure 16: Set standard language

The selection of default values can be confirmed by clicking the button **Save defaults** (**Figure 17**).



Figure 17: Save defaults

## 1.6 Signature Setup

empower® Mails supports you in setting up one or more signatures by selecting a signature template and adding a profile, a location and a language if required. When you create a new email in Outlook, you can use these signatures.

Click on the button **Manage Signatures** to open the signature management.



**Figure 18**: Signature management window

Click on the button **Add new signature** (**Figure 19**) to create and configure a new signature.



**Figure 19**: Button **Add new signature**

You can edit the signature by specifying name, profile, location and company, template and language (Figure 20).
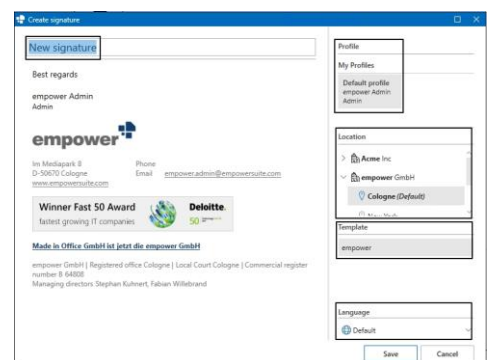


Figure 20: Overview Create Signature

Enter a name or title so that it can be identified better when it is to be used in an email (**Figure 21**).



**Figure 21**: Name your signature

Essentially, data used in signatures stem from two sources: the location data and your personal data.

Your personal data – e.g. your name, contact details and department – is taken from your profile information. In order for the signature to display the required data, you can select your profile. To do so, click on any of your given profiles (**Figure 22**).
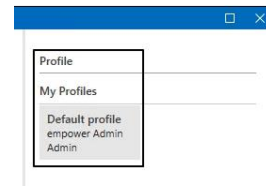


**Figure 22**: Select your profile

The location data, including company data – e.g. address, logo or registration – is taken from the location you select. Click on any of the listed locations to select your location (**Figure 23**).
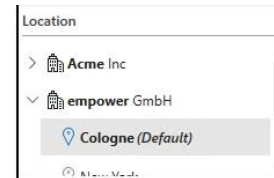


**Figure 23**: Select your company and location

From the list of templates available for the company to which the selected location belongs, a signature template can be chosen **(3)**.



**Figure 24**: Available signature templates

If your signature template supports multiple languages, you can select them from the corresponding drop-down menu **(4)**. A template may contain certain elements, such as a salutation or disclaimer, that will be displayed in one language only. If this is the case, your administrator may have set up the template to be only available for this particular language.
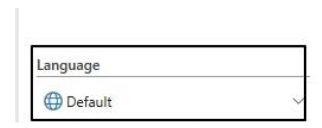


**Figure 25**: Drop-down menu languages

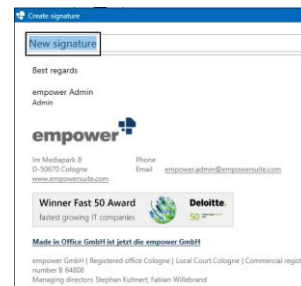You will then see a preview of your signature to the right and can check if all displayed data is correct.



**Figure 26**: Preview signature

Click on the button **Save** to save your new signature (**Figure 27**).



**Figure 27**: Button **Save**

Click on the button **Set as default** (**Figure 28**) to set one of your signatures as a default signature.
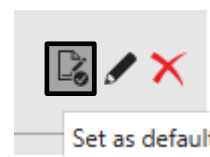


**Figure 28**: Set a signature as default

A small **check mark icon** (**Figure 29**) indicates the default signature.

This signature will be inserted automatically into a new email.



**Figure 29**: Signature tagged as default

You can revoke your settings with clicking the button **Reset default signature** (**Figure 30**).



Figure 30:Reset default signature

Click on the edit the signature with a click on the **pencil** or delete a signature with a click on the cross (**Figure 31**).



**Figure 31**: Edit or delete a signature

Close the signature management with a click on the button **Close** (**Figure 32**).



**Figure 32**: Close the signature management

# Working with empower® Mails

## 2.1 Creating a New Email

If a default signature has been set, the signature will be inserted into the new email automatically.

For more information on signatures see **chapter 1.6 Signature Setup.**

If you have more than one signature set up, you can switch to a different signature by right-clicking on the signature in the email or using the Outlook signature selection drop-down in the ribbon (section <u>Insert</u>) (**Figure 33**).



**Figure 33**: Access empower® Mails signature

## 2.2 empower® Help

**Help Center**, **Switch empower language** and **About empower** are available via the section <u>Help</u> and the button **Help** (**Figure 34**).

The **Help Center** contains useful product information about empower®.

Via **Switch empower language** the display language in the empower® ribbon can be adjusted. By default, the empower® language is based on the Office display language.

The button **About empower** provides information about the currently used empower® Mails version as well as the logged in person.
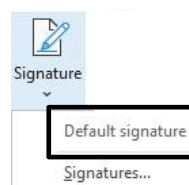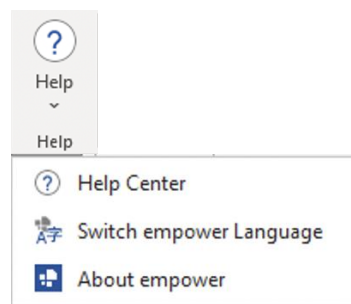


**Figure 34**: Contents under the **Help** button