

empower® Template Management

Release 10.0

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empower

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1. Introduction

This manual provides you with all the basic information about empower® and how it is structured, before going on to give you a detailed insight into each of the software add-ins in the Office applications in all the subsequent chapters.

With the help of the empower® Template Management, make it easy for users to stick to your brand – not to ignore it.



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® Template Management release in your Windows environment, your system will need to fulfill the requirements listed in the following sections.

Windows Version

- Windows 11

Office Version

- Microsoft Office 2024



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

Subscription Models

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

1.2. Telemetry Tracking in empower®

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

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

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



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

2. General Features

In the following chapter, you will learn more about the general empower® Template Management features and how to use them.

You will learn about features that are available in more than one Office application such as the empower® Library and empower® Designs.

2.1. 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.

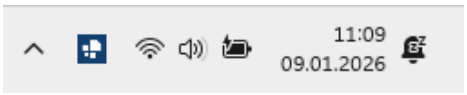


Figure 1. empower® Icon

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**).

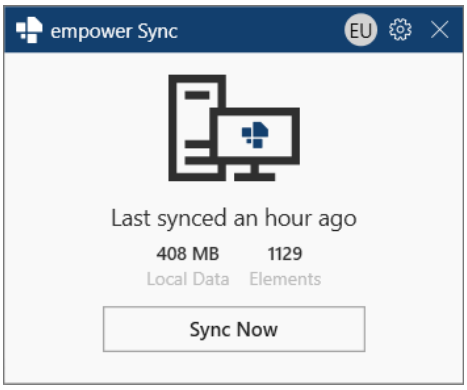


Figure 2. Main Window

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

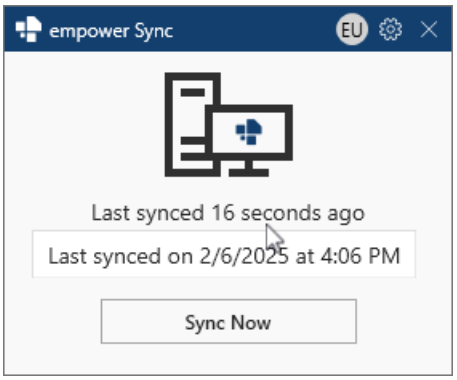


Figure 3. Mouse-Over **Last synced**

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.

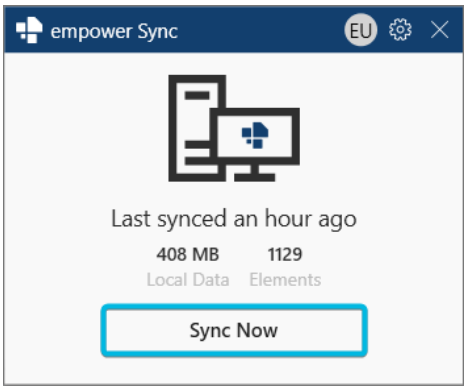


Figure 4. Button **Sync Now**

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.

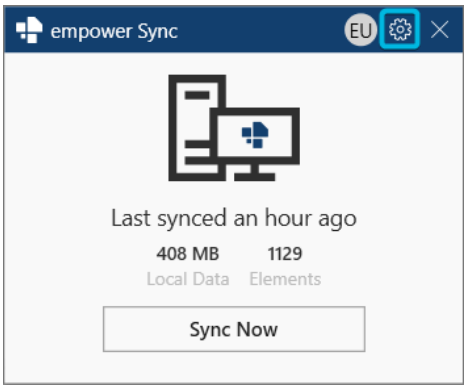


Figure 5. **Gear** Symbol

At 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.

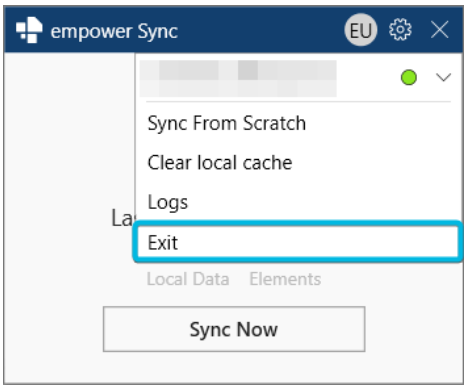


Figure 6. Option **Exit**

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

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

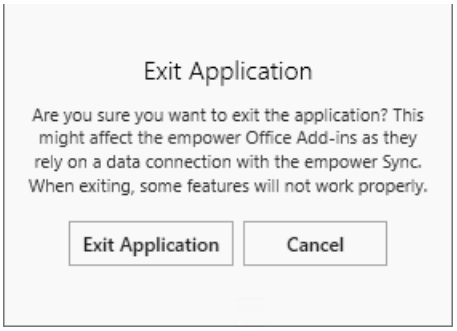


Figure 7. Message for Application Exit

Closing the empower® Sync via the option **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).

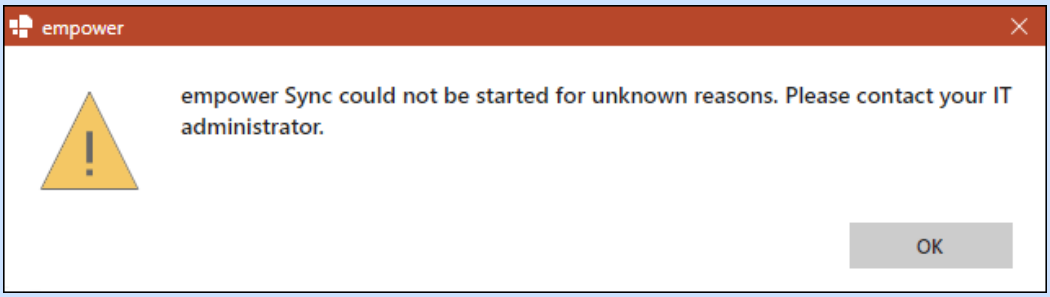


Figure 8. Error Message for Sync

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).

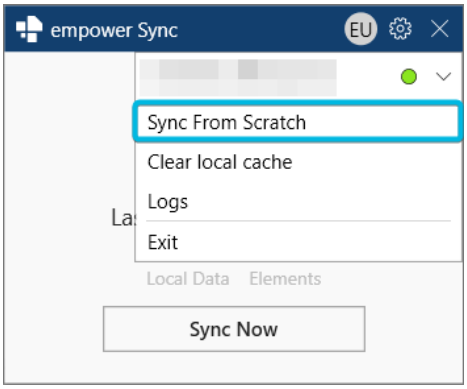


Figure 9. Option **Sync From Scratch**

As this option starts a complete synchronization, the login is also reset. Therefore, you need to log in 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).

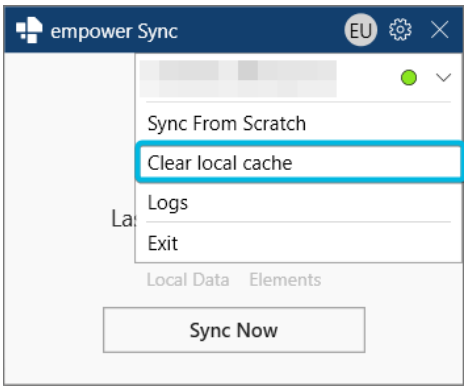


Figure 10. Option **Clear local cache**

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.

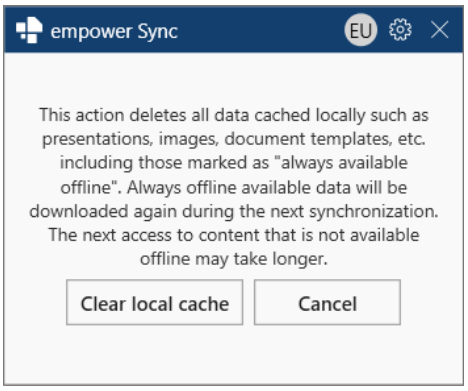


Figure 11. Message for **Clear local cache**

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.

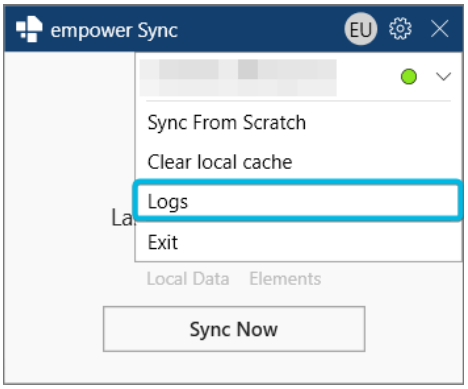


Figure 12. Option **Logs**

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).

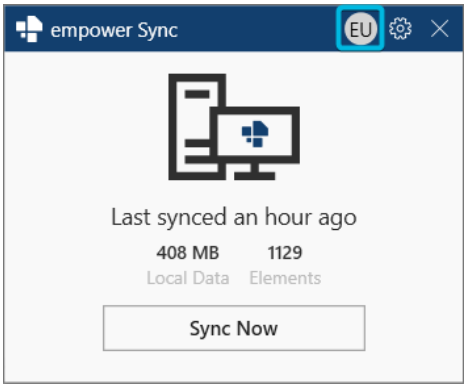


Figure 13. User Initials

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**.

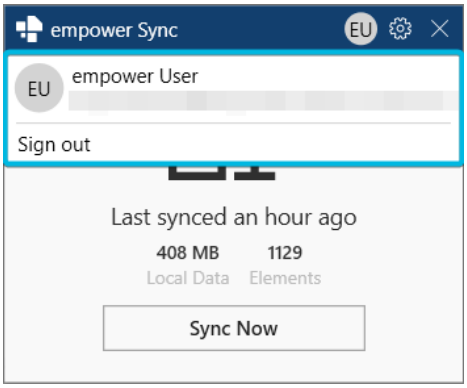


Figure 14. User Information

Synchronize a Specific Library Folder

If you only want to load changes in a specific library folder in PowerPoint, you can do so directly in the empower® Library.

This can be useful if a colleague has added or changed content and you know about these changes, but the next automatic synchronization has not been run yet.

To synchronize the content of a specific folder, follow the following steps:

1. Open the empower® Library.
2. Navigate to the folder that you want to synchronize.
3. Next to the path bar, click on the **refresh** symbol (Figure 15).
   The folder is reloaded and all changes made since the last synchronization are displayed.

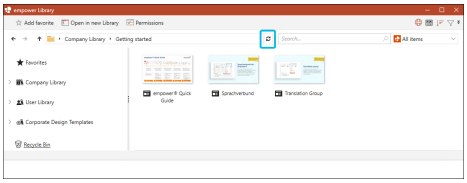


Figure 15. **Refresh** Symbol in Library

This manual partial synchronization only applies to the current folder. It does not synchronize other library content or background settings.

Individual folders can only be synchronized manually in the empower® Library in PowerPoint.

2.2. empower® Ribbon

In PowerPoint, Word and Excel, the empower® Ribbon can either be displayed as the classic ribbon or as the simplified ribbon.

The classic ribbon provides a more extensive version of the empower® Ribbon (**Figure 16**) while the simplified ribbon organizes the variety of empower® Features in more compact groups (**Figure 17**).



Figure 16. Classic Ribbon in PowerPoint



Figure 17. Simplified Ribbon in PowerPoint

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

Next to the empower® Features, the empower® Ribbon also includes some built-in Office features to ease the work in documents. These built-in features are not explicitly described in this manual.

For information regarding these built-in Office features, see **Microsoft 365 Support**.

The available features vary between the Office applications.

All references in the manual regarding navigation (available areas and buttons in the empower® Ribbon) refer to the simplified ribbon in empower®. The naming of features may differ slightly in the classic ribbon.

Switch Ribbon View

To switch between the classic and simplified ribbon, follow the following steps:

1. In the empower® Ribbon, click on the button **Help and Settings**.
2. Choose the option **User Settings**.
   The side pane opens.
3. Depending on which ribbon you want to use, switch the toggle button for **Use Simplified Ribbon** to *On* or *Off* (**Figure 18**).
   The ribbon changes to your preferred option.

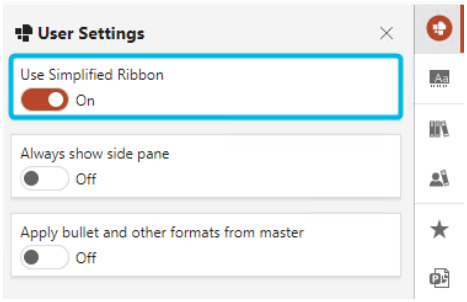


Figure 18. Option **Use Simplified Ribbon**

empower® Ribbon in Outlook

In Outlook, there is no standalone empower® Ribbon.

empower® integrates seamlessly into the Outlook ribbon.

It is located in the tab Home with its own group empower Mails (**Figure 19**).

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.

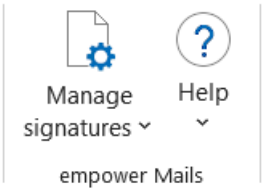


Figure 19. Group **empower Mails**

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

2.3. Office Theme Adaptation

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 20**).

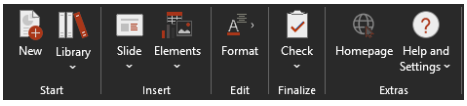


Figure 20. empower® Ribbon in Black Theme

In the same way, empower® adapts to the *white* or the *colorful* Office theme (**Figure 21**).

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

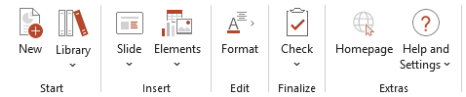


Figure 21. empower® Ribbon in White Theme

2.4. empower® Designs

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

In PowerPoint, there can be multiple designs. Master templates that are saved to the empower® Library are assigned to one of these designs.

Depending on your current master's design, only colors and formatting options that have been added to the design are available.

The empower® Corporate Design Check also depends on this design. It checks the settings for the master's design and the master settings themselves.

If enabled by your empower® Administrators, the section *Corporate Design Templates* in the empower® Library contains design folders which contain elements that comply with the design.

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

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

For further information regarding the *Corporate Design Check*, see **empower® Corporate Design Check**.

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**.

For further information regarding the assignment of masters to a design, see **Upload a Master Template**.

2.5. Edit Text

The group Edit in the empower® Ribbon is similar to the Office built-in groups Font and Alignment.

In the empower® Ribbon, however, the group Edit is linked to your corporate design. Therefore, it represents only the specifications that are in line with your company's corporate design.

The group will be expanded to the right, opening the subgroups Text and Color (**Figure 22**).

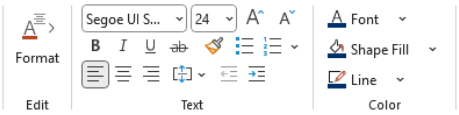


Figure 22. Groups Text and Color in PowerPoint

In Outlook, you can access the editing settings in the groups Text and Color (**Figure 23**). These groups are only available if you have opened an e-mail draft.



Figure 23. 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 the bullet options, you can choose from the predefined bullet styles from the master template in use.

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**.

2.6. empower® Help

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

In addition, you can access your user settings and view information about your installation.

The help section is located in the group Extras. To view your options, click on the button **Help and Settings** (**Figure 24**).

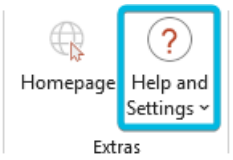


Figure 24. Button **Help and Settings**

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

To view your options here, click on the button **Help** (**Figure 25**).

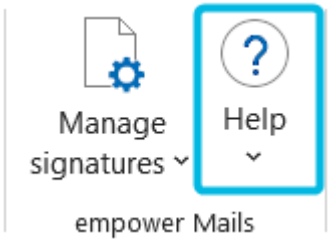


Figure 25. Button **Help** in Outlook

You can choose from the following options (**Figure 26**):

- Help Center
- Tutorial Videos
- Send Feedback
- Report a Bug
- User Settings
- Customizing Center
- About empower

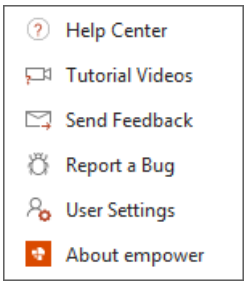


Figure 26. Drop-Down Menu for Button **Help and Settings**

In Word, Excel and Outlook, you can only access the options **Help Center**, **Send Feedback**, **Report a Bug** and **About empower**.

In Word and Excel, you can additionally access the option **User Settings**.

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

All user interface terms in the instructions refer to the empower® User Interface for PowerPoint. In Word and Excel, the user interface might differ slightly.

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 27**).

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.

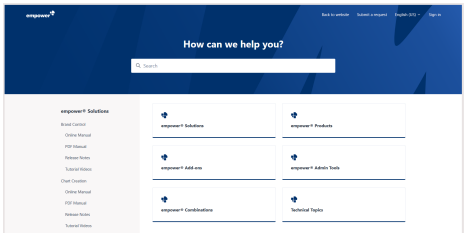


Figure 27. Help Center

Tutorial Videos

To check our tutorials, click on the button **Tutorial Videos**.

The *Help Center* will open in its respective section in your default browser.

If you have any questions on how to use empower®, you can watch tutorials on how to use single features.

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 Template Management*) (**Figure 28**). All feedback is welcome as we are always looking to improve our software.

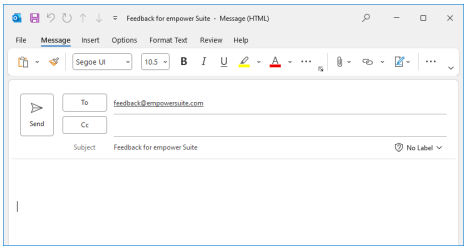


Figure 28. Feedback E-Mail

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 Template Management*) and is already addressed to the right recipient.
- Opening a new window in your default browser (Figure 29).
  In this window, you have to enter 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® replicate the error and analyze the case to conclusively deliver a near-term solution.

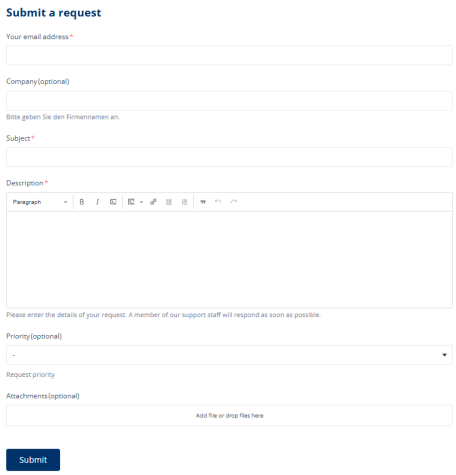


Figure 29. Report a Bug in Help Center

User Settings

If you click on the option **User Settings**, the side pane opens.

In the section **User Settings** in the side pane, you can set your personal preferences (Figure 30).

You can decide if you want to use the classic or simplified empower® Ribbon.

This option is also available in the section **User Settings** in the side pane in Word and Excel.

The setting applies across the Office applications.

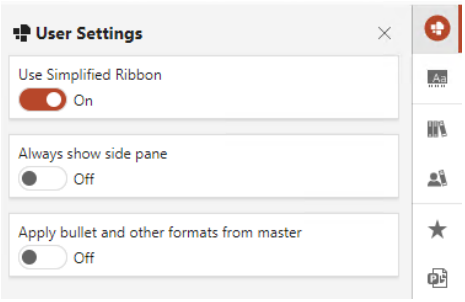


Figure 30. User Settings

Using the option **Always show side pane**, you can decide to display the side pane permanently.

If you do so, you can collapse and expand the side pane any time without selecting an element to insert beforehand.

This option is also available in the section **User Settings** in the side pane in Word and Excel.

The setting applies across the Office applications.

To collapse the side pane, click on the **X** symbol in the upper right corner of the side pane.

To open it again, either click on the bar **empower** next to the sidebar or click on one of the symbols in the sidebar (Figure 31).

If you open the side pane via the bar **empower**, the side pane opens in the section that you had opened beforehand.

If you have not yet opened the side pane, it opens in the first available library section.

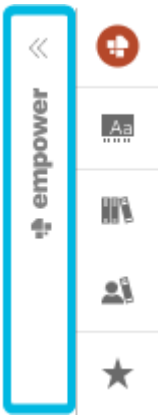


Figure 31. Expand Side Pane

In addition, you can decide if you want to apply bullets and other formats from your master template in PowerPoint.

If you enable the option **Apply bullet and other formats from master**, empower® will use the design defaults that have been specified by your administrators for the current slide master.

This includes the font formatting and alignment in bullet lists.

If you are an empower® Administrator and you are currently editing a signature template, you can access the *User Settings* via the button **Help and Settings** in Word.

For further information regarding the side pane, see **Side Pane**.

For further information regarding the empower® Ribbon, see **empower® Ribbon**.

About empower

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

Customizing Center

For Administrators

If you are a *Customizing Admin*, the option **Customizing Center** will be visible for you (**Figure 32**).

This option redirects you to 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.

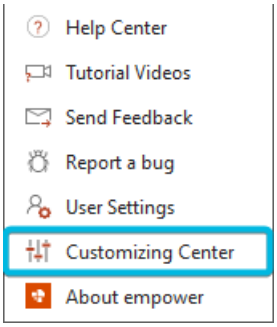


Figure 32. Option **Customizing Center**

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

2.7. Consult the AI Chatbot

The empower® AI Chatbot is integrated into empower®.

It helps you find information and complete tasks by answering questions.

You can enter a question or describe what you need.

The empower® AI Chatbot processes your request and provides a response based on the information available to it.

To consult the empower® AI Chatbot, follow the following steps:

1. Navigate to the group Extras in the empower® Ribbon.
2. Click on the button **Help and Settings** (Figure 33).
   A drop-down menu opens.

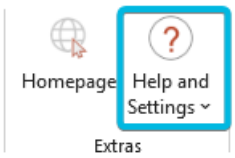


Figure 33. Button **Help and Settings**

3. In the drop-down menu, choose the option **AI Help** (Figure 34).
   The AI Chatbot opens in a new window.

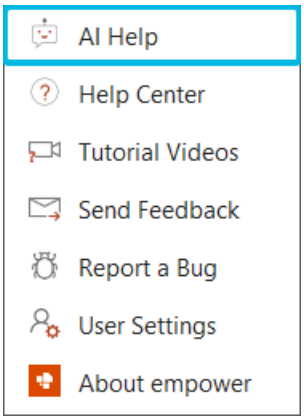


Figure 34. Option **AI Help**

4. Enter your question into the input field (Figure 35).

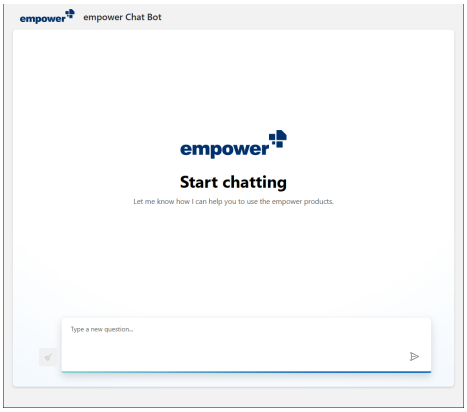


Figure 35. AI Chatbot

Depending on the setup of your empower® Environment, the AI Chatbot might not be available.

The empower® AI Chatbot can be accessed in PowerPoint, Word and Excel.

Enable the AI Chatbot

For Administrators

The AI Chatbot can be enabled and disabled in the empower® Admin Center.

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

2.8. Use the External Link

You can access an external website provided by your company by using the external link button.

This website can be set individually. It could be an intranet landing page or a learning platform with information regarding empower®.

The button can be customized by your administrators. Therefore, the icon and the label are chosen individually for your company.

If the external link has been configured, you can access the button in the group Extras (**Figure 36**).

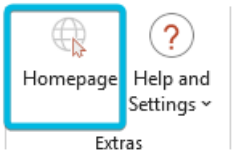


Figure 36. External Link Button

Depending on the configuration of your empower® Environment, the external link button might not be available.

Configure the External Link Button

For Administrators

The external link button can be configured in the empower® Admin Center.

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

2.9. empower® Library

The empower® Library contains all corporate design compliant content and is divided into multiple sections. It provides you with access to all files and folders you are allowed to view.

The empower® Library can be accessed via the group Start in the empower® Ribbon. To open the library, click on the button **Library** (Figure 37).
It opens in a new window.



Figure 37. Button **Library**

Alternatively, you can access the empower® Library content via the side pane.

In Outlook, neither the library nor the side pane is directly displayed and accessible via a button. You will access all library content via the signature management and the signature(s) you create for yourself.

All user interface terms in the instructions refer to the empower® User Interface for PowerPoint. In Word and Excel, the user interface might differ slightly.

For further information regarding the side pane, see Side Pane.
For further information regarding the permission concept, see Permission Concept.

Library Structure

In the empower® Library, you can see the folder arrangement of the library on the left. It has been constructed in congruence with Microsoft's Windows Explorer (Figure 38).

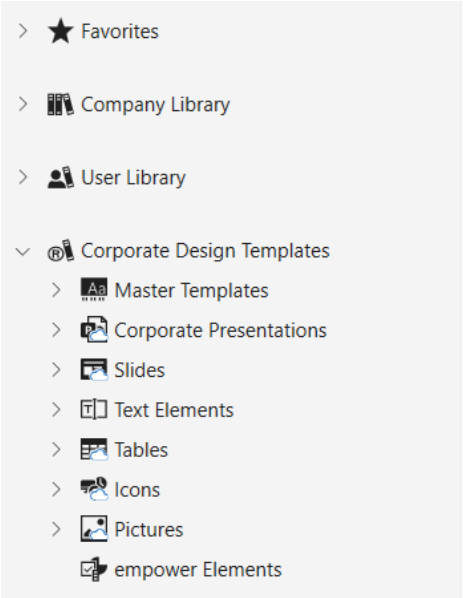


Figure 38. Library Structure

The empower® Library is divided into the following main sections:

- Favorites
- Company Library
- User Library
- Corporate Design Templates

If you select a folder from the folder tree on the left, you will see all the elements stored in this folder on the right (Figure 39).

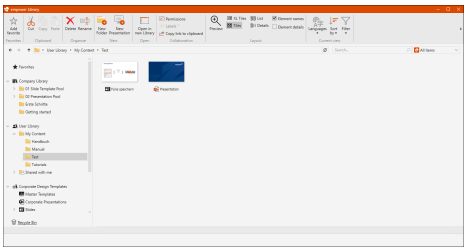


Figure 39. Library Window

You can tell what type of element it is by the icon in the bottom left corner of each element (Figure 40).

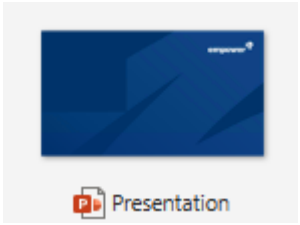


Figure 40. Presentation Icon

If there are two command buttons displayed in the empower® Library, a double-click will always execute the left button command (Figure 41).

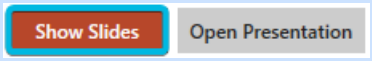


Figure 41. Two Command Buttons in Library

The section *Recycle Bin* is only available in PowerPoint. Depending on the setup of your empower® Environment, the recycle bin might not be available for you.

For further information regarding the recycle bin, see Use the Recycle Bin.

For each element, further meta information such as author, last modification date and size can also be viewed at the bottom of the library (Figure 42).

In the metadata section, you can also view how often the element has been used in your company. The count increases each time an element is inserted or opened by a user.

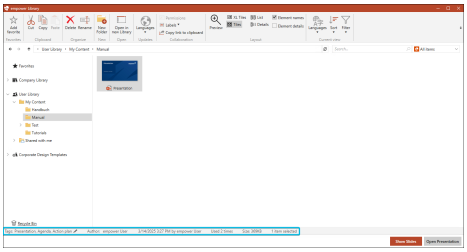


Figure 42. Metadata Display

Depending on the application in which you open the empower® Library, the displayed metadata may vary.

For files that originate from the SharePoint or Teams Integration, the usage metadata is not available.

Depending on the configuration of your empower® Environment, users who have left the company may be displayed anonymized in the metadata display.

Via the navigation bar, you can access all actions for the folder or element that you have currently selected.

These actions can also be accessed via the context menu of each folder or element.

For further information regarding the navigation bar, see **Navigation Bar**.

Favorites

You can mark folders and elements as favorites to add them to the section *Favorites*. This section can be used to provide quick access to your most frequently used folders and elements.

You can add content from all sections in the empower® Library.

To mark a folder or an element as favorite, navigate to the navigation bar and click on the button **Add favorite** (**Figure 43**).

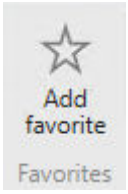


Figure 43. Button **Add favorite**

To remove a folder or an element from the section *Favorites*, navigate to the navigation bar and click on the button **Remove favorite** (**Figure 44**).

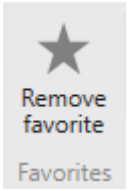


Figure 44. Button **Remove favorite**

Alternatively, you can add and remove folders and elements from the section *Favorites* via their context menu.

If you open a folder in the section *Favorites*, empower® automatically navigates to the original storage location of the folder.

The section *Favorites* is only available in PowerPoint.

Company Library

The *Company Library* contains folders and content that have been made available for all employees.

Those are final resources that can be used immediately.

Depending on the permission distribution, you might not be able to see all folders in the *Company Library*.

For further information regarding the permissions concept, see **Permission Concept**.

User Library

The *User Library* is your own space.

Here, you can create folders and content such as slides or presentations and store them until they are final.

Depending on the setup of your empower® Environment, the *User Library* might not be available.

Corporate Design Templates

Corporate Design Templates are available with different element types.

The section *Corporate Design Templates* contains, depending on the Office application you are working in, templates for, e.g., tables, slides, workbooks, charts or cells, and is intended to help all employees in the company to quickly and easily create new corporate design compliant documents.

Depending on the setup of your empower® Environment, the number of available *Corporate Design Templates* might vary.

2.9.1. Permission Concept

In the empower® Library, users and user groups have different permissions for individual folders.

These permissions decide on whether a user can see a folder and its content and to which extent the user is allowed to edit the content.

All user interface terms in the instructions refer to the empower® User Interface for PowerPoint. In Word and Excel, the user interface might differ slightly.

Permission Roles

The following four types of permission roles can be assigned in the empower® Library:

- ***Folder Administrator*** – Folder Administrators can add, delete and modify all folder content and the folder itself including user rights.
- ***Editor*** – Editors can add, delete and modify all folder content.
- ***Author*** – Authors can add, delete and modify all folder content they have created.
- ***Reader*** – Readers can read and use all folder content but cannot upload changes back to the folder.

In the *User Library*, you can also have the permission role *Folder Owner*. As a *Folder Owner*, you have the same permissions as a *Folder Administrator*.

Default Settings

By default, all users have the permission role *Reader* in the *Company Library* and are assigned to the technical user *All Users*.

In your *User Library*, you are the only one who has access permissions to the folders unless you actively change the folder permissions.

Some dedicated users have general admin permissions to manage the empower® Library as a whole.

The technical user *All Users* includes all empower® Users and User Groups in your company.

View Permission Roles

To view the permission distribution for a specific folder, follow the following steps:

1. Select the folder whose permission distribution you want to view.
2. Right-click on the folder.
   A context menu opens (**Figure 45**).

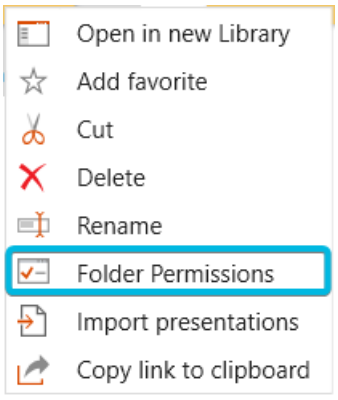


Figure 45. Option **Folder Permissions**

3. Click on the option **Folder Permissions**.
   In the dialog box **Folder Permission**, you can see all users or user groups that have been granted permissions for this folder (Figure 46).

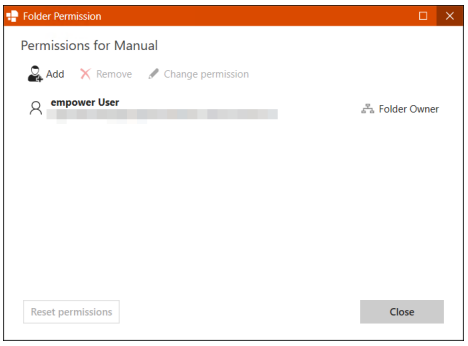


Figure 46. Dialog Box **Folder Permission**

All changes that you make in this dialog box are applied immediately.

Alternatively, you can select a folder and then click on the button **Permissions** in the library navigation bar to open the window **Folder Permission** (Figure 47).

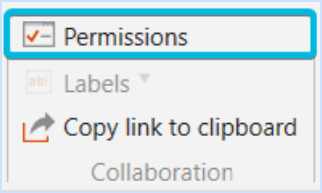


Figure 47. Button **Permissions**

Permission Inheritance

Permissions can only be assigned to folders. Therefore, all elements inside a folder inherit the permission distribution of the folder.

In addition, all subfolders inherit the folder's permission distribution.

You can identify an inherited permission role by the **inheritance** symbol next to the permission role.

Direct permissions do not have a symbol.

For further information regarding granting permissions, see Grant Permissions.

Change Permission Roles

To adjust the existing permission role assignment for a folder, follow the following steps:

1. In the dialog box **Folder Permission**, search for the user or group whose permission role you want to adjust.
2. On the right-hand side of the user's or group's name, click on the user's or group's current permission role (**Figure 48**).
   A drop-down menu opens.

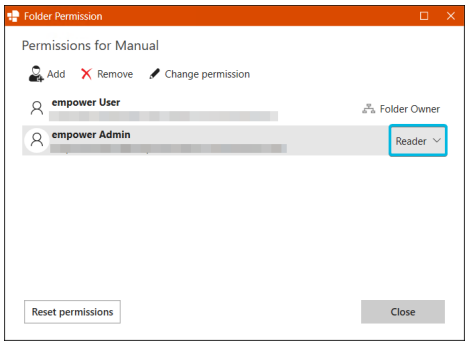


Figure 48. Permission Role Display

3. In the drop-down menu, choose the permission role you want to assign to the user or group (**Figure 49**).
4. If you have finished, click on the button **Close**.

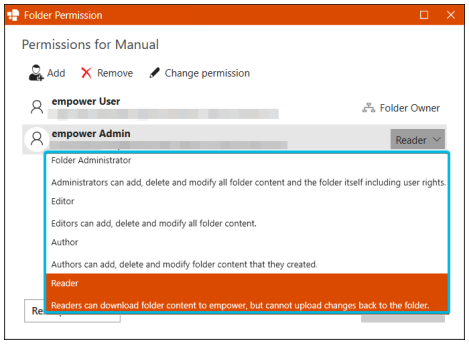


Figure 49. Permission Role Drop-Down Menu

Alternatively, you can select the user or group whose permission role you want to change and click on the button **Change permission** (Figure 50). Then, select a permission role from the list.

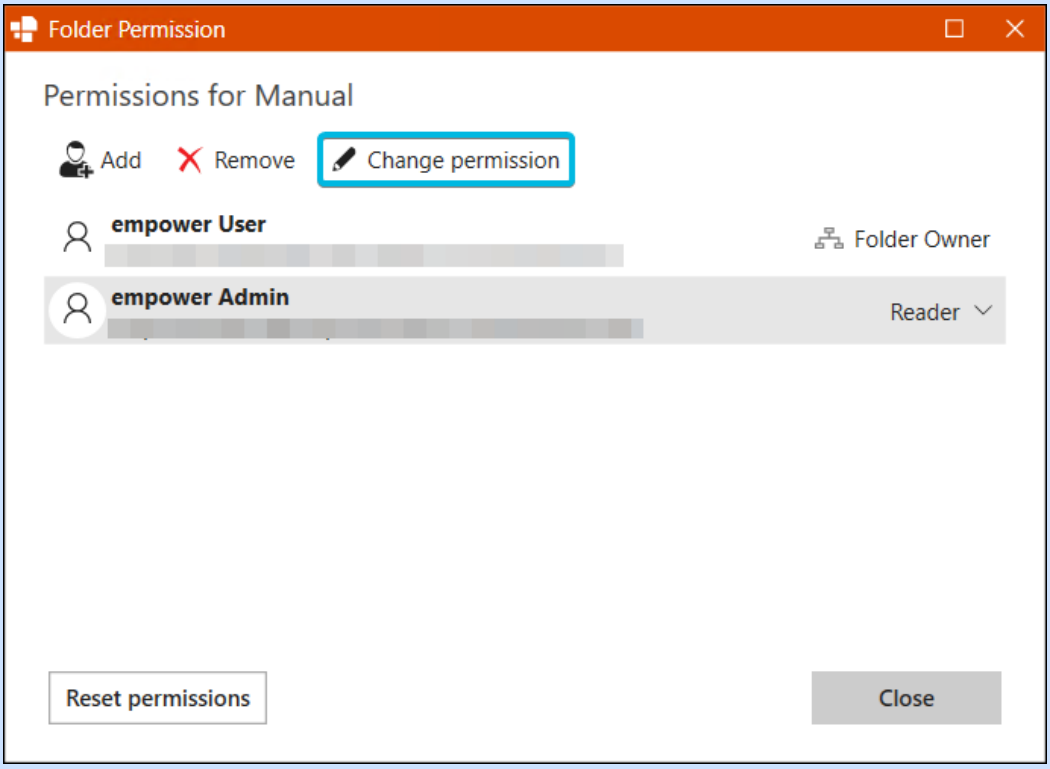


Figure 50. Button **Change permission**

You can only change a user's or a group's permission role if you are the *Folder Owner* or a *Folder Administrator*.

Grant Permissions

To assign a permission role to a user that has not yet been assigned a permission role for the selected folder, follow the following steps:

1. In the dialog box **Folder Permission**, click on the button **Add** (Figure 51).
2. Search for a user or group you want to grant access to this folder.
3. Select the respective user or group from the search results.

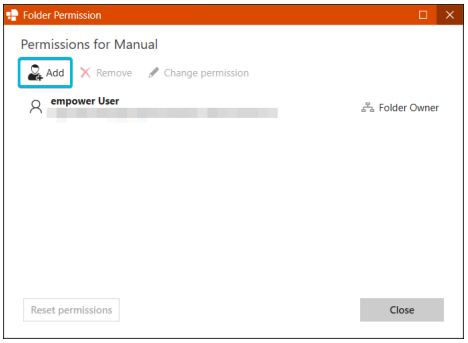


Figure 51. Button **Add** in Window **Folder Permission**

4. Click on the button **Add** (Figure 52).
   The user or group will automatically be added with the permission role *Reader*.
   a. If you want to change the permission role after adding the user or group, follow the steps under **Change Permission Roles**.

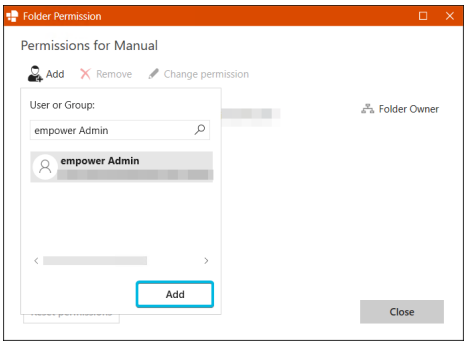


Figure 52. Button **Add**

You can only add a user or a group to the list if you are the *Folder Owner* or a *Folder Administrator*.

Remove Permissions

If you want to remove all permissions from a user or a group, follow the following steps:

1. Select the respective user or group.
2. Click on the button **Remove** (Figure 53).
   A dialog box opens.

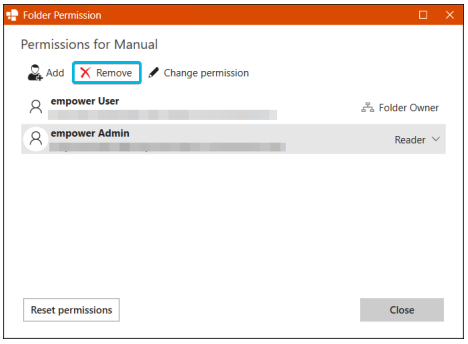


Figure 53. Button **Remove**

3. To remove the user or group from the list, click on the button **Yes** (Figure 54).

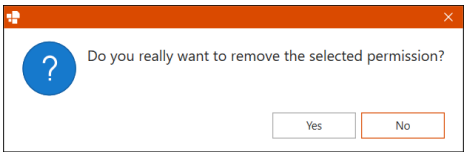


Figure 54. Dialog Box for Permission Removal

If you delete an inherited permission, you create an invisible break. This break can only be undone by resetting the permissions.

For further information regarding the reset of permissions, see **Reset Permissions**.

Reset Permissions

If you want to reset all changes that have been made to the permission distribution after the creation of the folder, click on the button **Reset permissions** (Figure 55).

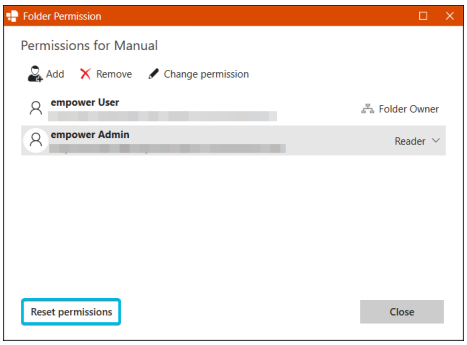


Figure 55. Button **Reset permissions**

A dialog box opens (Figure 56).

To reset the permissions, click on the button **Yes**.

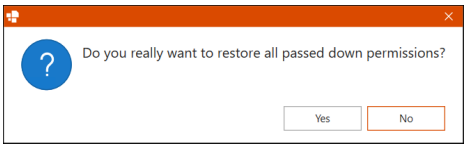


Figure 56. Dialog Box for Permission Reset

2.9.2. Online Availability of Library Content

When synchronization is performed via empower® Sync, both metadata and content data are synchronized. Content data can include, for example, the contents of presentations or slides. Content data is downloaded once accessed upon inserting the corresponding content from the empower® Library.

Content in library folders marked with a **cloud** symbol is only available online (Figure 57).



Figure 57. Online Folder

If folders in the library do not have a **cloud** symbol, the content stored here is also available offline (Figure 58).



Figure 58. Offline Folder

Online and offline synchronization is inherited by all subfolders: from the top folder of each library section to the entire library content, and from any other folder in the library to its subfolders.

You can make folders available offline for yourself, if temporarily required for your work without a stable internet connection.

To do so, follow the following steps:

1. Right-click the folder you want to make available offline.
   A context menu opens.
2. Click on the option **Offline** to expand the context menu (Figure 59 (**1**)).
3. Click on the option **Make Available Offline** (Figure 59 (**2**)).
4. Navigate to the empower® Sync and click on the button **Sync now**.
   Your folder is now available offline and no longer has a **cloud** symbol.

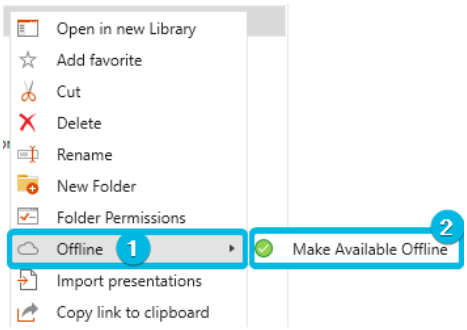


Figure 59. Option **Offline** and Button **Make Available Offline**

To change an offline folder back to an online folder, follow the following steps:

1. Right-click on the folder you want to make available online only.
   A context menu opens.
2. Click on the option **Offline** to expand the context menu (Figure 60 (**1**)).
3. Click on the option **Make Available Online Only** (Figure 60 (**2**)).
4. Navigate to the empower® Sync and click on the button **Sync now**.
   Your folder is now available online and does have a **cloud** symbol.

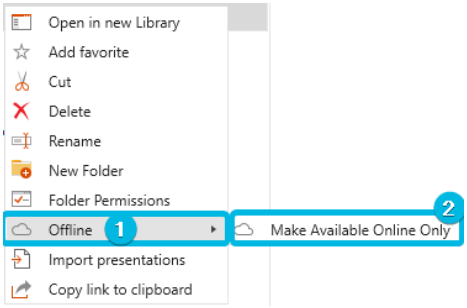


Figure 60. Option **Offline** and Button **Make Available Online Only**

Content data that you have downloaded or synchronized once will remain available offline. Even if the folder is later set to online-only again, the already synchronized content data will not be deleted from your device.

By default, a specific set of library sections and contents is available offline in your empower® Environment.

Depending on the configuration of your empower® Environment, the amount of offline available content might vary.

All user interface terms in the instructions refer to the empower® User Interface for PowerPoint. In Word and Excel, the user interface might differ slightly.

2.9.3. Navigation Bar

When you have opened the empower® Library, you can access the navigation bar.

If it is collapsed, you can see a selection of actions (Figure 61).

Figure 61. Collapsed Navigation Bar

To expand the navigation bar, click on the button **Expand** in the top right corner (Figure 62).

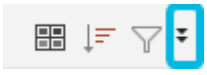


Figure 62. Button **Expand**

In the expanded navigation bar, you can access all available actions (**Figure 63**). If an action is not available for the currently selected element, it is grayed out.



Figure 63. Expanded Navigation Bar

All user interface terms in the instructions refer to the empower® User Interface for PowerPoint. In Word and Excel, the user interface might differ slightly.

Display Options

In the group Layout in the expanded navigation bar, you can choose how the library content should be displayed (**Figure 64**).

You can choose between normal tiles, XL tiles, a list view and a detailed view.

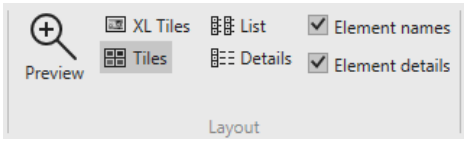


Figure 64. Group Layout

If you want to know what an element looks like in detail before inserting or opening it, you can use the option **Preview** (**Figure 65**).

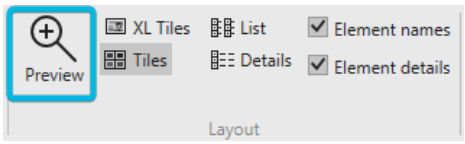


Figure 65. Button **Preview**

If you choose the option **Preview**, all elements will be displayed in a bigger size, so you are able to see the content and decide if you want to use it or not (**Figure 66**).

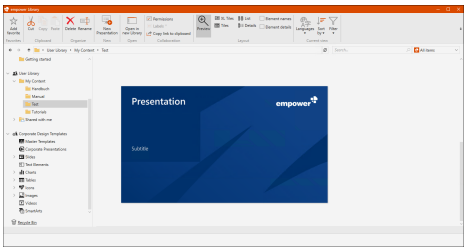


Figure 66. Library Window in Preview View

2.9.4. Create New Content in Library

In the empower® Library, you can create new content, such as folders, from scratch.

In addition, you can create new presentations in the empower® Library.

Depending on your permissions, the library sections in which you can create new content might vary.

For further information regarding the permission concept, see **Permission Concept**.

Create New Folder

To create a new folder in the empower® Library, navigate to the section in which you want to add a new folder. Then, navigate to the group New in the navigation bar and click on the button **New Folder** (Figure 67).

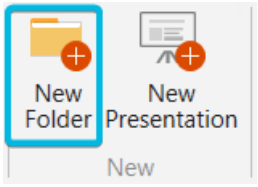


Figure 67. Button **New Folder** in Navigation Bar

You cannot create and save folders in the following library sections:

- Favorites
- Corporate Design Templates

However, you can create and save folders in the subfolders of the section *Corporate Design Templates*.

Alternatively, you can create a new folder by opening the parent folder's context menu in the folder tree or by opening the context menu in the empty item view and choosing the option **New Folder** (Figure 68).

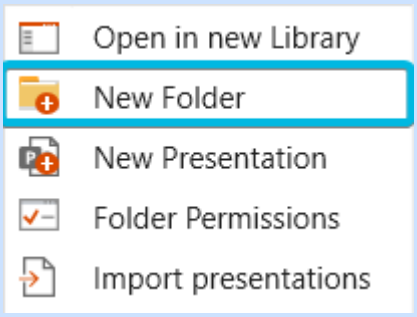


Figure 68. Option **New Folder** in Context Menu

If you create a new folder in the section *User Library* via the empower® Web App or via the Office Online applications, this folder will be automatically added under *My Content* to your *User Library* in the empower® Library for all desktop applications.

You cannot save folders in the library section *User Library*. If you create a folder in the *User Library*, it will automatically be saved to its subfolder *My Content*.

All user interface terms in the instructions refer to the empower® User Interface for PowerPoint. In Word and Excel, the user interface might differ slightly.

For further information regarding sorting the library content, see **Sort Library Content**.

Create New Presentation

To create a new presentation directly in the empower® Library, navigate to the section in which you want to add a new presentation. Then, navigate to the group New in the navigation bar and click on the button **New Presentation** (Figure 69).

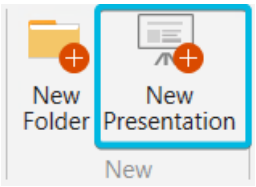


Figure 69. Button **New Presentation** in Navigation Bar

The presentation is added to the respective library section. By default, the presentation is named *New Presentation*.

After creation, the presentation is automatically added in edit mode. Therefore, you can change its name directly after creating the presentation. To do so, enter the name and press **Enter**.

After saving the presentation name, the library automatically reloads its content and sorts it according to your sorting preferences.

Alternatively, you can create a new presentation by opening the parent folder's context menu in the folder tree or by opening the context menu in the empty item view and choosing the option **New Presentation** (Figure 70).

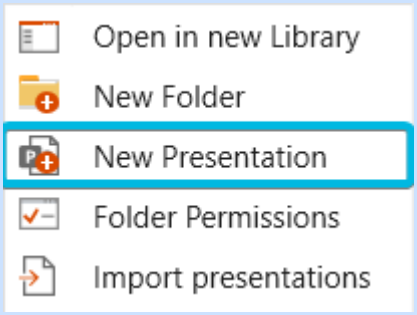


Figure 70. Button **New Presentation** in Context Menu

For further information regarding sorting the library content, see **Sort Library Content**.

After its creation, the presentation is empty. You can add slides to the presentation using copy & paste.

To do so, copy a slide from the library that you want to add to the presentation. Then navigate into the new presentation and paste the slide into the presentation.

You can also copy multiple slides contained in the same folder and paste them to the new presentation all at once.

2.9.5. Import Presentations

Use the *Presentation Importer* to bulk import individual presentations and slide template collections or entire folders of presentations to the empower® Library.

To do so, follow the following steps:

1. Right-click on the folder into which you want to import the presentation(s).
   A context menu opens.
2. Click on the option **Import presentations** (Figure 71).
   A dialog box opens.

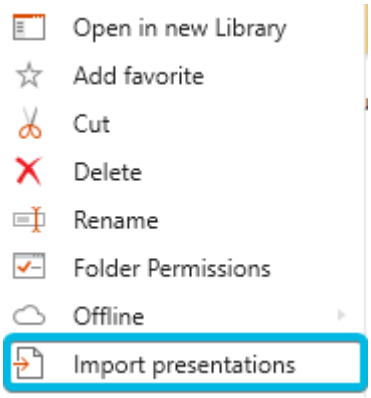


Figure 71. Option **Import presentations**

3. Choose your preferred option:
   a. Click on the option **Selected presentations** to import individual presentations to your selected folder (Figure 72 **(1)**).
   b. Click on the option **Whole folders** to import entire folders with presentations to your selected folder (Figure 72 **(2)**).
4. Browse to your individual files or folders with presentations on your device and confirm your selection to import the content to your selected library folder.

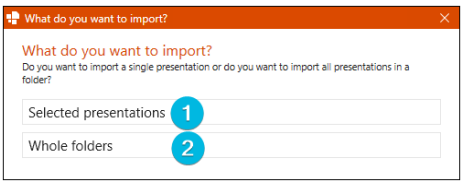


Figure 72. Dialog Box with Import Options

If you choose to import a whole folder, a dialog box opens (Figure 73).

Read the message carefully and decide if you want to include subfolders or not.

Then, click on the button **Start import of presentations**.

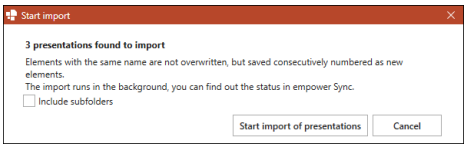


Figure 73. Dialog Box for Folder Import

The *Presentation Importer* is available in the following library sections:

- Company Library
- Corporate Design Templates – Corporate Presentations
- Corporate Design Templates – Slides

Usually, the *Presentation Importer* is used in the library section *Corporate Design Templates – Slides* to upload slide template collections. Slide template collections are sets of similar (e.g. variations of) slides or slide templates that are grouped in a presentation.

2.9.6. Manage Content in empower®

In empower®, you can manage your content in one location.

When you have created new content such as documents or presentations, you can save this content to the empower® Library.

Once you have saved content to the empower® Library, you can move the content by using the cut, copy and paste actions, rename the content or delete it from the library again.

You can execute these actions if you have the required permissions.

All user interface terms in the instructions refer to the empower® User Interface for PowerPoint. In Word and Excel, the user interface might differ slightly.

For further information regarding the permission concept, see **Permission Concept**.

For further information regarding the creation of content in the empower® Library, see **Create New Content in Library**.

For further information regarding the creation of new presentations, see **Create a New Presentation**.

For further information regarding the creation of new documents, see **Create a New Document**.

For further information regarding the creation of new workbooks, see **Create a New Workbook**.

Save Content to the Library

Once you have created new content in one of the Office applications, you can save it to the empower® Library.

To do so, follow the following steps:

1. Select the elements you want to save.
   If you want to save a single object, select the object.
   If you want to save a single slide or a slide set, select the respective slides.
   If you want to save the entire presentation, skip this step.
   If you want to save the entire document, skip this step.
2. Navigate to the group Start in the empower® Ribbon.
3. Click on the lower part of the split button **Library** (**Figure 74**).
4. In the drop-down menu, click on the option **Save** (**Figure 75**).
   A menu opens.



Figure 74. Button **Library**

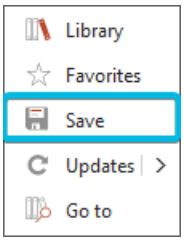


Figure 75. Option **Save**

5. In the menu, choose what element type you want to save.
6. Then, click on the button **Save as** (Figure 76).
   The library opens.

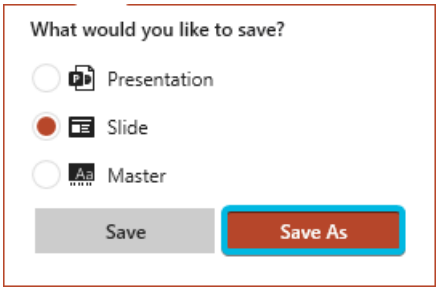


Figure 76. Button **Save as**

7. In the library, navigate to the folder in which you want to save the element.
8. Change the element name.
9. Click on the button **Save** (Figure 77).

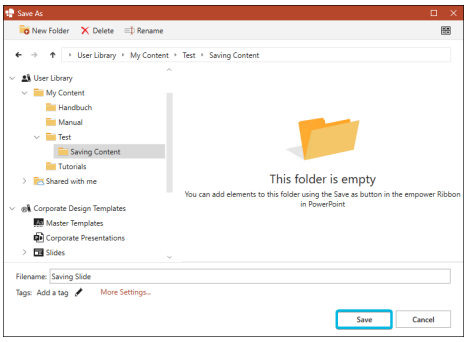


Figure 77. Button **Save** in Library

If enabled by your empower® Administrators, a *Corporate Design Check* will be executed automatically when you save an element from PowerPoint to the empower® Library.

For further information regarding the empower® Corporate Design Check, see **empower® Corporate Design Check**.

Document Templates with relative links cannot be saved in the empower® Library.

A dialog box opens (Figure 78).

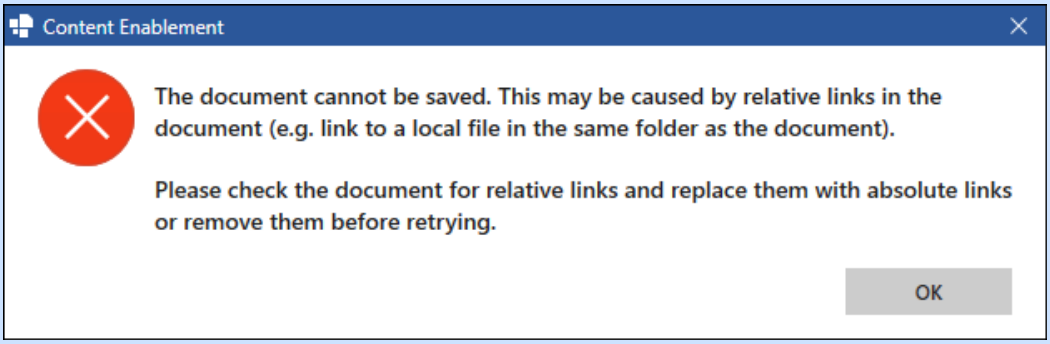


Figure 78. Document Template with Relative Links

Files that are bigger than 500MB cannot be saved to the empower® Library.

Files that are protected either by the Office built-in document protection or by Microsoft Purview Information Protection cannot be processed by empower®.

Files with Microsoft Purview Information Protection labels similar to *Public* can be processed.

For further information regarding Microsoft Purview Information Protection, see **Protect your sensitive data with Microsoft Purview**.

If you save a slide, you can navigate into a presentation to save the slide directly to the presentation.

If you use the button **Save as** to save single objects, the library always displays the library folders as being empty. However, the content has not been deleted, it is only hidden during the saving process.

The selection of element types varies in the Office applications.

Document Templates in which the built-in feature *Restrict Editing* in Word has been used can be saved but they cannot be downloaded from the empower® Library afterwards.

Therefore, make sure this feature has not been used on *Document Templates* that you save to the empower® Library.

Save and Edit Content Blocks

For Administrators

To save a content block to the empower® Library, select the content block you want to save and then follow steps 2 to 4 under **Save Content to the Library**.

Then, select the option **Content Block** (**Figure 79 (1)**) from the list and click on the button **Save as** (**Figure 79 (2)**).

Now, save the content block to the desired storage location.

If you have used text styles for the content block, these text styles are preserved when saving the content block.

When the content block is inserted into a document with a different design, the content block therefore adapts to the design and adheres to the respective text styles in this document.

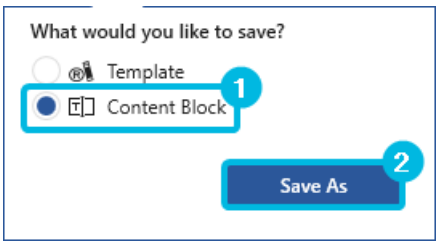


Figure 79. Save Content Block

The thumbnail in the empower® Library always shows the style the content block was saved in.

Overwrite Content Blocks

To be able to overwrite the content block, follow the following steps:

1. Insert the content block from the empower® Library.

2. If it is not already available in your ribbon tabs, add the tab Developer to your ribbon tabs.
   For further information, see **Show the Developer Tab in Word**.
3. Navigate to the tab Developer and click on the button **Design Mode** (Figure 80).
   You can now see the start and end markers for the rich text content control (Figure 81).

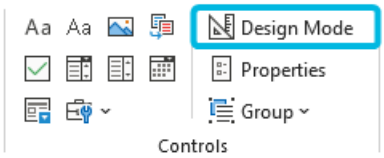


Figure 80. Enter Design Mode



Figure 81. Start and End Markers for Content Control

4. To delete the rich text content control, right-click on the start marker and choose the option **Remove Content Control** (Figure 82).
5. Click on the button **Design Mode** again to disable the *Design Mode*.
   If you do not leave the *Design Mode*, you will not be able to save the content block.
6. Now, make your changes to the content block.
7. Save the content block back to the empower® Library under the same storage location and under the same name.
   A dialog box opens.

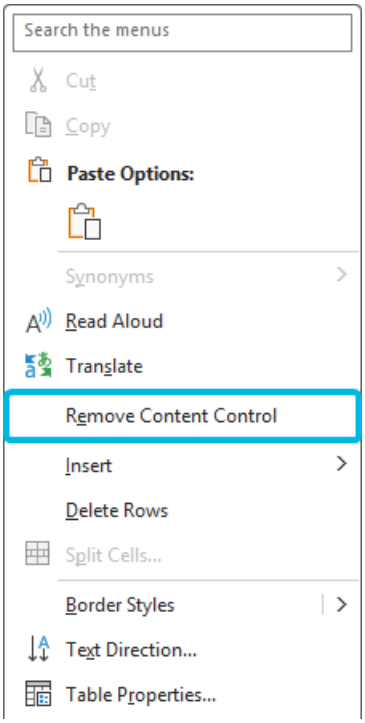


Figure 82. Option **Remove Content Control**

8. In this dialog box, confirm that you want to overwrite the content block by clicking on the button **Yes** (Figure 83).

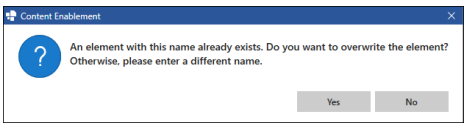


Figure 83. Dialog Box on Overwrite

If you do not delete the rich text content control, a dialog box opens when you try to overwrite the content block (Figure 84).
This is due to the fact that a content block cannot be saved if it is present in the currently open document.

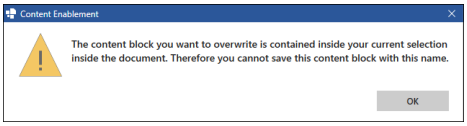


Figure 84. Dialog Box for Selected Content Block

If you are still in *Design Mode* while saving a content block, a dialog box opens (Figure 85).
Leave *Design Mode* to save the content block.

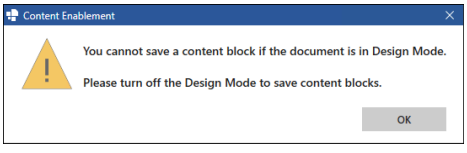


Figure 85. Dialog Box for Design Mode

The same method can be used if you have multiple content blocks in a document and want to compose a new content block out of existing content blocks and new text ranges.

Once you remove the start and end markers of the content block, the content block will not be updated anymore.

Save and Edit Table Sizes

For Administrators

If you have already defined a table (column widths, total width) within your workbook, select it to save it and follow the following steps:

1. Navigate to the group Start in the empower® Ribbon.
2. Click on the lower part of the split button **Library** (Figure 86).

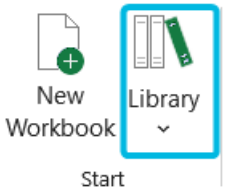


Figure 86. Button **Library**

3. Click on the option **Save** (Figure 87).

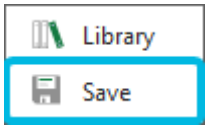


Figure 87. Option **Save**

4. Then click on the option **Table Size** (Figure 88 **(1)**).
5. Select the option **Save as** (Figure 88 **(2)**).
6. Navigate to the desired storage location, give the table size a name and confirm your selection.
   The table size is saved.

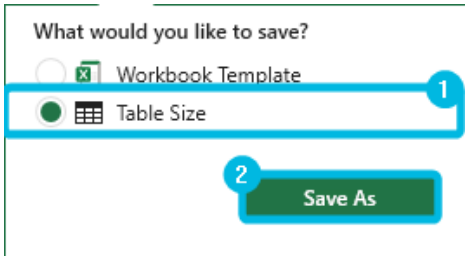


Figure 88. Save Table Size

If you have not yet defined a table, follow the following steps:

1. Navigate to the group Insert in the empower® Ribbon and click on the button **Elements** (Figure 89).

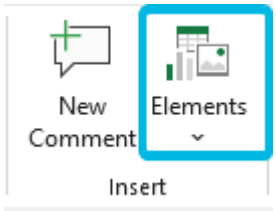


Figure 89. Button **Elements**

2. Select the option **Tables** (Figure 90).

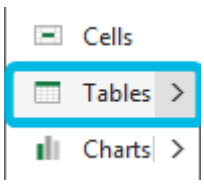


Figure 90. Option **Tables**

3. Then select the option **Table Size** (Figure 91 **(1)**).
4. Then select the option **Create Table Sizes** (Figure 91 **(2)**).
   A new workbook opens.

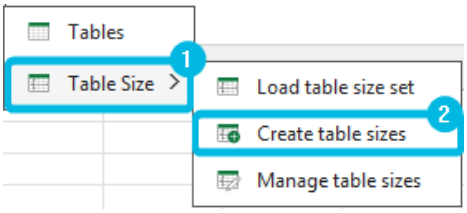


Figure 91. Options in **Table Sizes**

5. Apply your desired formatting to each column (Figure 92):
   a. Column A – Name of the table size set
   b. Column B – Name of the table size
   c. Column C – Total width of the table in centimeters (cm)
   d. Column D et sqq. – Individual fixed column widths

   You can define multiple table sizes from the table in the workbook that opens and then upload them as a set to the library.
6. Save the table size to the empower® Library.
   The workbook closes automatically.

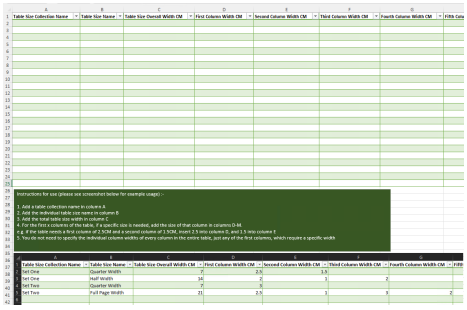


Figure 92. Workbook to Define Table Sizes

It is not necessary to manually set an individual column width for each column. The width of all columns that are not manually defined is automatically calculated and set to the total width of the table based on the remaining width.

A brief guide to the available settings can also be found in the workbook that opens.

To edit table sizes, follow the following steps:

1. Navigate to the group Insert in the empower® Ribbon and click on the button **Elements** (Figure 89).
2. Select the option **Tables** (Figure 90) and **Table size** (Figure 93 **(1)**).
3. Then select the option **Manage table sizes** (Figure 93 **(2)**).
   The library opens in the section *Table sizes*.
4. Select the table size you want to edit and double-click to open it.
   A new workbook opens.
5. Adjust the table sizes according to your requirements and save it back to the empower® Library.
   a. Keep the table size name to overwrite it.
   b. Change the table size name to create a new table size.

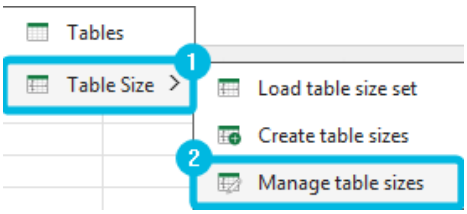


Figure 93. Option **Manage table sizes**

If the *User Library* is enabled in your empower® Environment, you can save table sizes to your *User Library*.

Overwrite Content

To overwrite an element, follow the following steps:

1. Click on the lower part of the split button **Library**.
2. Click on the option **Save**.
3. In the menu, choose which element type you want to save.
4. Then, click on the button **Save** (Figure 94).

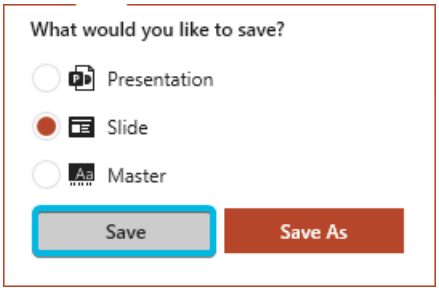


Figure 94. Button **Save**

If the content originates from the empower® Library, the element will be overwritten without opening the library.

If the content does not originate from the empower® Library, the library opens.

This means the content is saved to the library for the first time. To do so, follow the steps to save a new element.

If you overwrite an element which is part of an update group, a dialog box might open. In this dialog box, you can decide if you want to share, force or not distribute the update at all.

Depending on the setup of your empower® Environment, the dialog box might not open at all.

For further information regarding update groups, see **Update Groups**.

Advanced Settings

When you save an element in the empower® Library, you can make further adjustments using the advanced settings.

To do so, click on the button **More Settings...** (Figure 95).

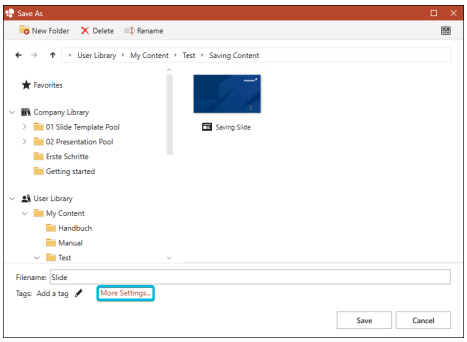


Figure 95. Button **More Settings...**

Here, you have the following options (**Figure 96**):

- **Change Detection** – To deactivate the automatic change detection, switch this toggle button to *Off*.
  The change detection checks if an element has really been changed since its last upload. If this is not the case, empower® will not create a new version of the element.
- **Version comment** – Type in a comment if you want to tell other users what has changed for this version.
  This comment will be shown in update notifications and in the version history.

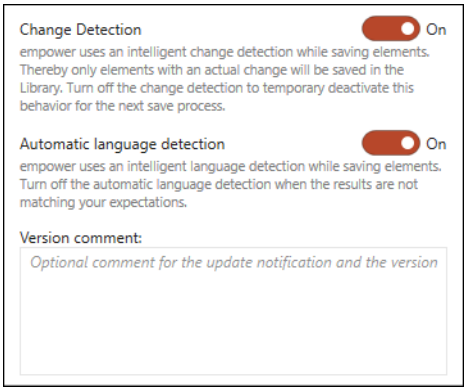


Figure 96. Advanced Settings

If empower® Template Management has been installed without empower® Slide Generation, the automatic language detection is not taken into consideration because the translation features are not available.

The advanced settings are only available in PowerPoint.

If you overwrite an element in the empower® Library, there are additional options for sharing updates.

The following options are available (**Figure 97**):

- **Updates** – To treat the element as an update, switch the toggle button to *On*. If this toggle button is switched to *On*, the default update mode is used to distribute updates.
- **Share Update** – To make sure updates are shared with other users when they open an element that is part of the same update group, select this option.
- **Force Update** – To force the update and update all elements in the same update group without asking for confirmation, select this option.

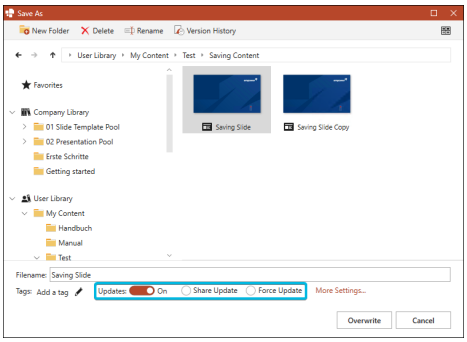


Figure 97. Update Settings

The settings **Share Update** and **Force Update** are only available for root elements of update groups.

For further information on update groups, see **Update Groups**.

Set Documents as Default

For Administrators

If you have been granted admin permissions, you can set a company default template in Word or Excel that will be used for the whole company. The saving process is the same in both Office applications and is explained based on empower® in Word.

To do so, follow the following steps:

1. Open the empower® Library.
2. In the section *Corporate Design Templates*, navigate to the required subsection *Document Templates*.
3. Right-click on the template you want to define as the company default.
   A context menu opens.
4. In the context menu, click on the option **Set as default** (Figure 98).
   A dialog box opens.

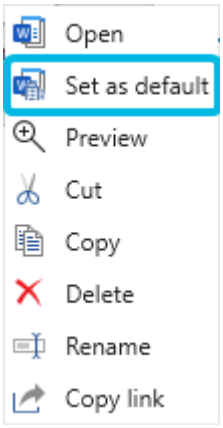


Figure 98. Option **Set as default**

5. Read the message carefully and make sure all users have permissions to access the template.
6. In the dialog box, confirm the new company-wide default by clicking on the button **Yes** (Figure 99).

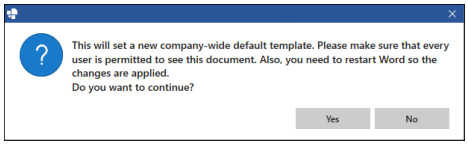


Figure 99. Dialog Box for New Company Default

The template will now be marked as the *Company's Default* (Figure 100).

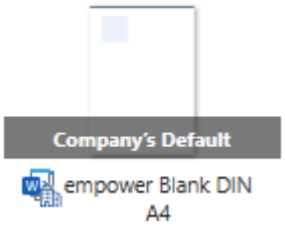


Figure 100. Document Template with Label

To revoke your choice for the company-wide default, right-click on the template and choose the option **Remove default** (Figure 101).
A dialog box opens.

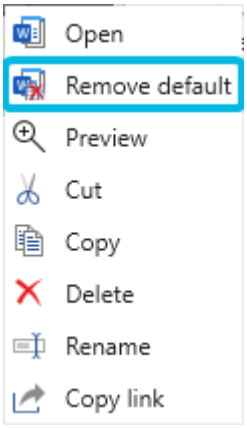


Figure 101. Option **Remove default**

To confirm the process, click on the button **Yes** (Figure 102).

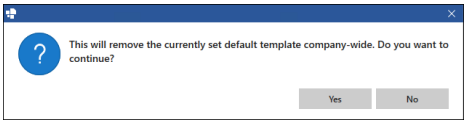


Figure 102. Dialog Box for Removal of Company Default

If you set or remove the company default, your changes take effect for all users after the next synchronization and after a restart of the Office application.

Alternatively, you can access the options **Set as default** and **Remove default** in the navigation bar via the group Selection.

For information regarding a company-wide default master in PowerPoint, see **Use Master Templates**.

Cut, Copy and Paste Content

You can use the cut, copy and paste actions to create duplicates or to move content from one location in the library to another.
You can cut and paste elements and folders but folders cannot be copied.
You can also select multiple elements at once. However, the selection of elements and folders at the same time is not possible.

To cut out an element, select the element and navigate to the group Clipboard. Then, click on the button **Cut** (Figure 103).

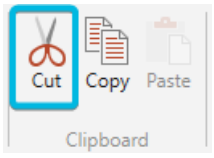


Figure 103. Button **Cut**

The element is marked as cut out until it is pasted again.

To copy an element, select the element and navigate to the group Clipboard. Then, click on the button **Copy** (Figure 104).

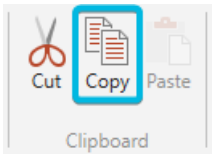


Figure 104. Button **Copy**

As soon as you have either used the cut or the copy action, the paste action becomes available.

To paste an element to a location in the empower® Library, navigate to this location. Then navigate to the group Clipboard in the navigation bar and click on the button **Paste** (Figure 105).

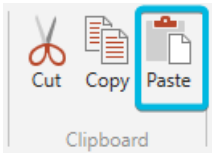


Figure 105. Button **Paste**

The element or the folder is pasted to the location.

Alternatively, you can access the options **Cut**, **Copy** and **Paste** via the context menu of elements or folders or use the following keyboard shortcuts for **Copy** and **Paste**:

Copy – **Ctrl + C**

Paste – **Ctrl + V**

If you paste an element to a folder in which another element with the same name is present, a number in brackets is added to your copy's name.

If you paste a folder to a location in which another folder with the same name is present, both folders keep this same name.

You cannot cut, copy or paste the subsections of the section *Corporate Design Templates* as a whole. However, you can copy and paste content from these locations to other locations.

Rename Content

To rename an element or a folder, select it in the library. Then, navigate to the group Organize in the navigation bar and click on the button **Rename** (Figure 106).

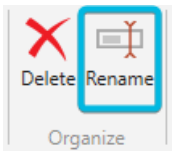


Figure 106. Button **Rename**

Type in the new element name (Figure 107).

To finish the renaming process and save the new name, either press **Enter** or select another element.



Figure 107. Rename Element

To cancel the renaming process, press **ESC**.

If you rename an element in a folder in which another element with the same name is present, a number in brackets is added to the element name.

If you rename a folder in a location in which another folder with the same name is present, both folders keep this same name.

Alternatively, you can access the option **Rename** via the context menu of elements or folders.

You cannot rename the content of integration folders such as Unsplash, Icons8 or SharePoint but you can rename the integration folder itself.

You cannot rename the subsections of the section *Corporate Design Templates*. However, you can rename content inside these subsections if you have the required permissions.

Delete Content

To delete content, select it in the library. Then, navigate to the group Organize and click on the button **Delete** (Figure 108).

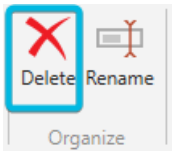


Figure 108. Button **Delete**

A dialog box opens.

If you have selected a folder, an automated template or a master template, you will not be asked about deletion updates.

To confirm the deletion process, click on the button **Yes** (Figure 109).

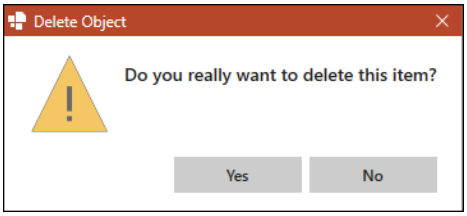


Figure 109. Dialog Box for Folder Deletion

If your selection contains elements that are part of an update group, a dialog box opens (Figure 110).

This dialog box informs you that these elements will be removed from the update group or, in case of a root element, the respective update group will be dissolved.

To delete the elements anyway, click on the button **Yes**.

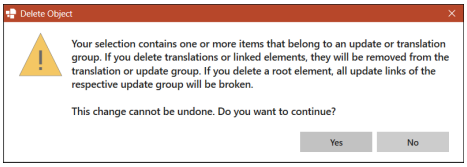


Figure 110. Dialog Box for Update Group Elements

If you delete an element that is the root element of an update group, you will be asked which update mode you want to use for the deleted element (Figure 111).

Select the option you want to use and then click on the button **Delete anyway**.

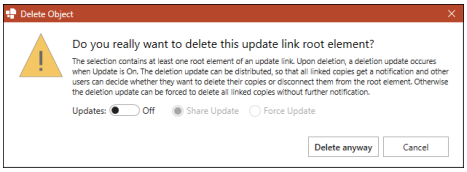


Figure 111. Dialog Box for Root Element Deletion

The element is deleted from the empower® Library.

If you delete a folder, all its content is deleted without deletion updates.

Alternatively, you can access the option **Delete** via the context menu of elements or folders.

If the feature *Recycle Bin* has been enabled by your empower® Administrators, you can find deleted content in the recycle bin.

For further information regarding the recycle bin, see **Use the Recycle Bin**.

For further information regarding update groups, see **Update Groups**.

You cannot delete integration folders such as Unsplash or Icons8 and their content.

You cannot delete the subsections of the section *Corporate Design Templates*.

2.9.7. Search in Library

With the library search, you can execute a targeted search which searches the entire library, including the properties of an element such as tags, text, notes and alternative text.

To execute a search, enter your search word in the search bar and press **Enter** (**Figure 112**).

The search is available online and offline.

If you want to broaden or specify your search, you can modify your search by defining the search scope and by using operators, wildcards and fields.

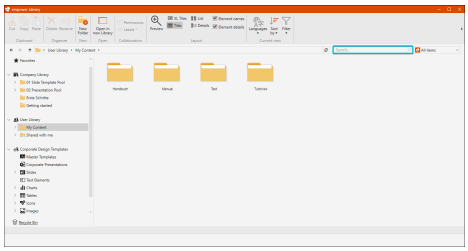


Figure 112. Search Bar

All user interface terms in the instructions refer to the empower® User Interface for PowerPoint. In Word and Excel, the user interface might differ slightly.

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

Search Scope

Before executing your search, you can define the scope of the search (**Figure 113**).

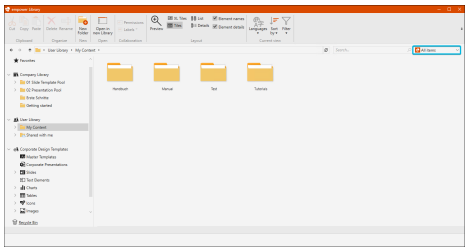


Figure 113. Search Scope

You can decide if you want to search in the entire library, in the current library, in the current folder or in the current folder and all its subfolders (**Figure 114**).

To do so, open the drop-down menu next to the search field and choose the preferred option.

If you execute a search now, empower® will only search for elements in the respective library section.

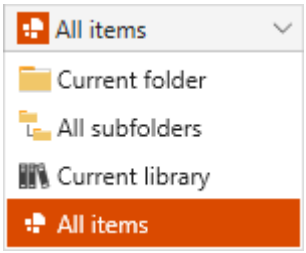


Figure 114. Search Scope Drop-Down Menu

By default, the option **All items** is set in empower®.

Wildcards and Operators

To broaden your search results, you can use the following wildcard characters:

- Question mark (?) for single character wildcards (**Figure 115**)
  - Use the question mark (?) to replace a character. The question mark can stand for any character. For example, if you search for *Te?t*, you will receive results for elements containing the words *Test* and *Text*.
- Asterisk (*) for multiple character wildcards (**Figure 116**)
  - Use the asterisk (*) to replace multiple characters. The asterisk can stand for any number of characters. For example, if you search for *Test**, you will receive results for elements containing the words *Test*, *Tester*, *Tests* and *Testing*.

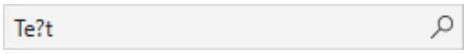


Figure 115. Question Mark

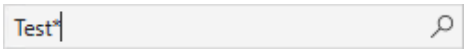


Figure 116. Asterisk

In addition, you can use the following operators to narrow down or to broaden your search results:

- AND: To combine two search terms (**Figure 117**)
  - Use the operator *AND* to search for two obligatory terms at once. For example, if you search for *Germany AND Switzerland*, you will only receive results for elements containing both terms.
- OR: To search for elements containing either of the search terms (**Figure 118**)
  - Use the operator *OR* to search for two optional terms at once. For example, if you search for *Germany OR Switzerland*, you will receive results for elements containing either one of the terms or both terms.
- NOT: To exclude elements containing a specific term (**Figure 119**)
  - Use the operator *NOT* to exclude terms from your search. For example, if you search for *Germany NOT Switzerland*, you will only receive results for elements containing the term *Germany* but not the term *Switzerland*.
- Plus (+): To make a term obligatory (**Figure 120**)
  - Use the plus (+) to make terms obligatory for your search. For example, if you search for *+Germany Switzerland*, you will receive results for elements definitely containing the term *Germany* and optionally containing the term *Switzerland*.
    Make sure to place the plus (+) directly in front of the search term. Otherwise the operator will not have the same effect.

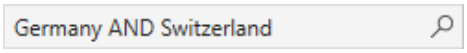


Figure 117. AND



Figure 118. OR

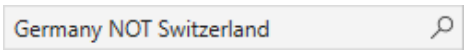


Figure 119. NOT



Figure 120. Plus

Fields

To specify your search, you can use fields. The following fields can be searched (**Figure 121**):

- Name
- Tags
- Author
- Editor
- Header
- Header (First Page)
- Footer
- Footer (First Page)
- Content
- Heading
- Body
- Notes

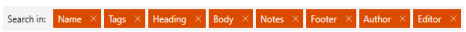


Figure 121. Available Fields in PowerPoint

To use the fields to specify your search, you must first execute a search. When the search results are displayed, the fields become visible and you can deselect fields that you do not want to search.

To do so, click on the respective field.

The empower® Library automatically carries out a new search each time a field is enabled or disabled.

By default, all fields are searched for the initial search.

Depending on the Office application in use, not all fields are available.

The field selection for the search does not apply to library content that comes from integrations such as Unsplash or Icons8.

For example, if you disable the field *Name*, you will still receive search results from the integration that contain the search term in the name.

Open Library Location

If you find an element you want to use, you can navigate to its actual location in the empower® Library.

To do so, click on the button **Open in Library** in the navigation bar. empower® will automatically jump to the element's location in the library (Figure 122).

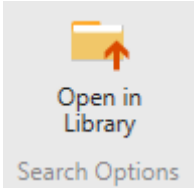


Figure 122. Button **Open in Library**

For slides that are part of a presentation, the button is called **Show in presentation** (Figure 123).

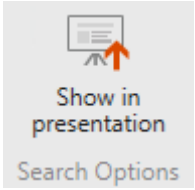


Figure 123. Button **Show in presentation**

Alternatively, you can open the context menu of the respective element and choose the option **Open in Library** or **Show in presentation**.

2.9.8. Element Tags

You can add so-called tags to an element if you want to add information to the element's metadata (Figure 124).

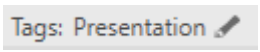


Figure 124. Tag *Presentation*

To do so, follow the following steps:

1. Select the respective element in the empower® Library.
2. At the bottom of the window, click on the **pen** symbol (Figure 125).
   A dialog box opens (Figure 126).

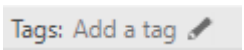


Figure 125. **Pen** Symbol

3. In the dialog box, choose one of the tags from the tag list or enter your own tag and press **Enter**.
   You can add as many tags as you want.
   a. To add multiple tags at once in the text field, separate your keywords with non-breaking spaces.
      To create a non-breaking space, hold the key **Alt** while typing **0160** with the number block.

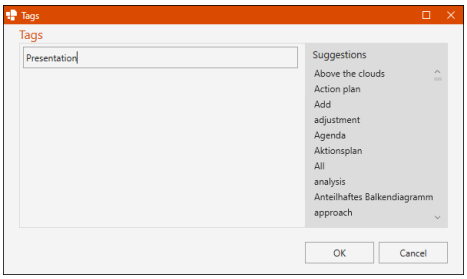


Figure 126. Window **Tags**

4. If you have finished, click on the button **OK** (Figure 127).
   Your tags will be added to the element. They are displayed along with the metadata at the bottom of the library window (Figure 128).
   a. If you have added multiple tags at once using non-breaking spaces, close the empower® Library and open it again to view the separate tags.
      After closing the tag editor, the tags will first be displayed as one single tag.

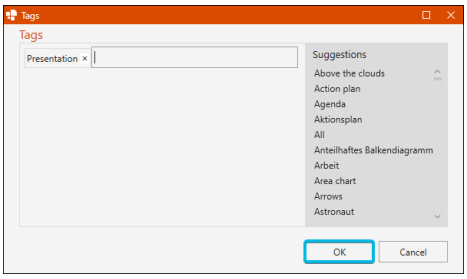


Figure 127. Button **OK**

Figure 128. Metadata Info Tags

If you want to add the same tag to multiple elements, select multiple elements at once by holding down the key **Ctrl** while clicking on the elements. Then, click on the **pen** symbol.

Now, follow the steps to add tags.

Tags can be used to find elements more easily when executing a library search.

Only users with the permission roles *Editor*, *Author* or *Folder Administrator* can add and edit tags.
For further information regarding the permission concept, see **Permission Concept**.

You cannot add tags to elements that are located in an integration folder such as Icons8 or Unsplash.

Tag List

The tag list consists of tags that are in use for at least one element (Figure 129). They are sorted in alphabetical order.

To remove a tag from the tag list, remove it from all elements it is used on.

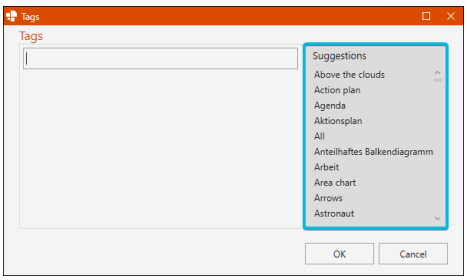


Figure 129. Tag List

To remove a tag from an element, follow the following steps:

1. Select the respective element in the empower® Library.
2. At the bottom of the window, click on the **pen** symbol.
   A dialog box opens. The currently added tags are displayed in the input field.
3. To remove one of the tags, click on the **X** symbol next to the tag (Figure 130).
4. If you have finished, click on the button **OK**.

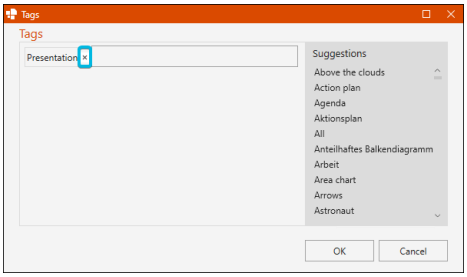


Figure 130. **Cross** Symbol

2.9.9. Filter by Element Type

You can filter the content in the empower® Library by element types.

To do so, follow the following steps:

1. In the empower® Library, navigate to the group Current view in the navigation bar.
2. Click on the button **Filter** (Figure 131).
   A drop-down menu opens.

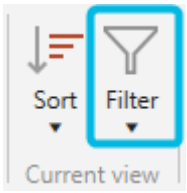


Figure 131. Button **Filter**

3. To select an element type you want to view, tick the checkbox next to the element type (Figure 132).
   As soon as you tick a checkbox, the library will reload the content and apply the filter immediately.

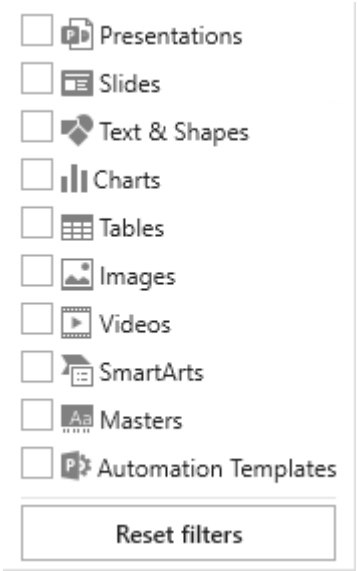


Figure 132. Available Filters

If you have selected any filters, empower® shows the number of applied filters next to the **filter** symbol (Figure 133).

You can select multiple element types at once.

Your selection applies to the whole library and will only be reset if you close the library.

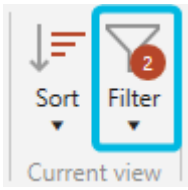


Figure 133. Number of Active Filters

To deselect all applied filters at once, click on the button **Reset filters** (Figure 134).

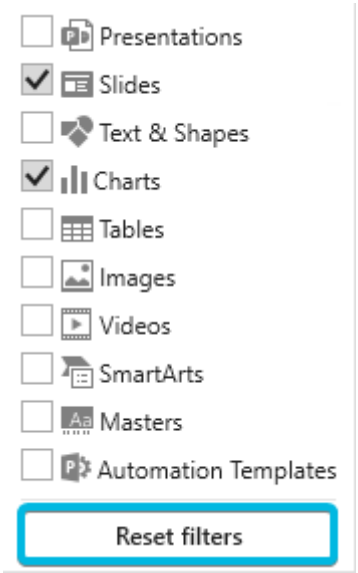


Figure 134. Button **Reset filters**

If you have chosen the display view **Details**, the button **Filter** is grayed out. In the display view **Details**, you can filter directly via the column *Type* in the item view.

The element type filter is only available in PowerPoint.

2.9.10. Use Integration Folders

If your company uses other integrations, these integrations can also be made available in the empower® Library.

Depending on your company's choice, integrations such as Icons8, Unsplash, SharePoint or OneDrive can be made available.

These integrations can be divided into two types:

- Integrations with fully functional folders – e.g. SharePoint, OneDrive
  This kind of integration is only available in PowerPoint.
- Integrations with searchable-only folders – e.g. Icons8, Unsplash

Integration folders may not be moved nor deleted because these changes would lead to the folders not working properly anymore.

Therefore, you have limited options in the folders' context menu.

However, you can edit the permissions to an integration folder if you have been assigned the required permission role.

In addition, integration folders can be renamed by folder administrators.

Due to technical reasons, empower® cannot synchronize the permission distribution for some integrations. That means that users can access all resources via the integration folder, regardless of their permissions.

For the integration folder for Unsplash, the folder permissions cannot be edited via the empower® Library.

For further information regarding the permission concept, see **Permission Concept**.

Some integration folders require a login to be used.

Therefore, you will be asked for your credentials for the integration when you first open the integration folder. If there are multiple folders for one integration, each folder requires a separate login.

If you use the library search, it might occur that multiple login windows open up because you access multiple integration folders at once.

If you have logged in once, you will not need to log in again.

Integration folders support the common file types for pictures and videos.

However, .mov files cannot be supported due to technical limitations in PowerPoint.

To use integration folders, an internet connection is required. Therefore, integration folders cannot be made available offline.

Depending on your empower® Setup, there might be no integration folders available.

Fully Functional Integration Folders

Integration folders that are fully functional can be used the same way as all other folders are used in the empower® Library with a few restrictions.

You can either navigate through the contained files and folders or search the folder content via the search bar.

If you only want to search in the integration folder, set the search scope to **Current Folder**.

Administrative tasks such as saving new content to integration folders might not be available via the library for all integrations.

These tasks must then be executed via the integration service itself.

While searching content in the integration folder, empower® Tags or filters that are available in the integration itself cannot be taken into consideration.

The search fields are also not taken into account for search results from integration folders.

For further information regarding the library search, see **Search in Library**.

For further information regarding tags, see **Element Tags**.

For further information regarding search fields, see **Fields**.

For further information regarding update groups, see **Update Groups**.

Searchable Integration Folders

Integration folders that are searchable appear to be empty when you open them (**Figure 135 (1)**).

That means that these integration folders do not have their own folder structure.

To view content, you need to search for content via the library search.

To do so, set the search scope to **Current Folder** (**Figure 135 (2)**).

Then, enter your search word into the search bar and execute the search.

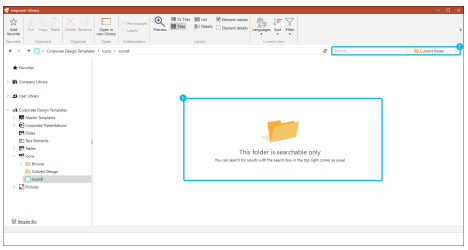


Figure 135. Search Integration Folder

In the search results, you will then be provided with all suitable contents from your integration folder (**Figure 136**).

If you select an element, you can also view the corresponding metadata at the bottom of the library window.

Alternatively, hover over an element to view its metadata.

You can now use the content as you use all other content from the empower® Library.

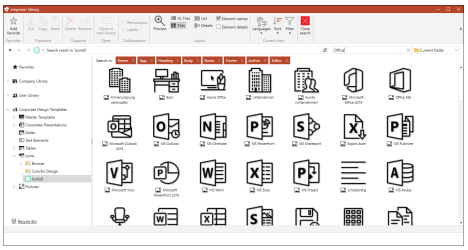


Figure 136. Integration Search Results

While searching content in the integration folder, empower® Tags or filters that are available in the integration itself cannot be taken into consideration.

The search fields are also not taken into account for search results from integration folders.

The number of search results is limited. This limit differs between integrations. Therefore, it might occur that not all content available in the integration can be displayed.

empower® does not have any impact on the displayed results. Therefore, make sure your search word is as precise as possible.

For further information regarding the library search, see **Search in Library**.

For further information regarding tags, see **Element Tags**.

For further information regarding search fields, see **Fields**.

Set up Integration Folders

For Administrators

If you are interested in installing an integration for your company, contact your Customer Success Manager or Onboarding Specialist.

For further information regarding available integrations, refer to our **homepage**.

Some integration folders can be renamed. However, there might be some integrations that do not allow renaming the folder.

Some integrations have their own icon instead of the folder icon in the empower® Library.
These icons cannot be changed.

2.9.11. Use Labels

In the empower® Library, you can add labels to content to give additional information about the element. These labels will then be visible in the element's thumbnail (**Figure 137**).



Figure 137. Presentation with Label

To add a label, follow the following steps:

1. Select an element.
2. Navigate to the group Collaboration in the navigation bar.
3. Click on the button **Labels** (**Figure 138**).
   A drop-down menu opens.

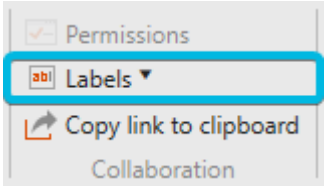


Figure 138. Button **Labels**

4. Choose the option **Custom label** (**Figure 139**).

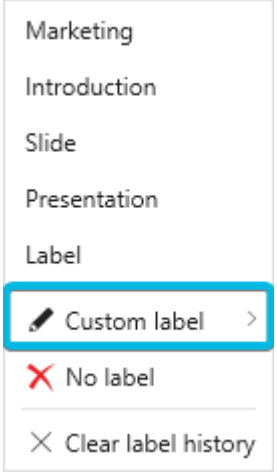


Figure 139. Option **Custom label**

5. In the input field, enter the label name.
6. Click on the button **Add** (Figure 140).
   The label will appear in the element's thumbnail.

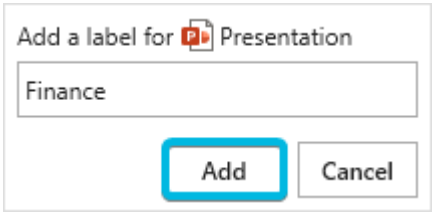


Figure 140. Button **Add** for New Label

One element can only have one label. To replace the label, follow the steps to add a new label.

The new label will replace the old one.

You can add the same label to multiple elements at once.

To do so, select the respective elements and then follow the steps to add a new label.

To remove a label, click on the option **No label** (Figure 141).

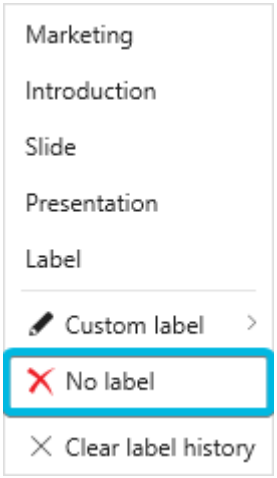


Figure 141. Option **No Label**

Only users with the permission roles *Editor*, *Author* or *Folder Administrator* can add labels and edit labels.

For further information regarding the permission concept, see **Permission Concept**.

Alternatively, you can access the button **Labels** via the context menu of the element.

Labels are only available in PowerPoint.

Label History

If you have used labels before, they will also appear in the drop-down menu as a label history (Figure 142). The label history is sorted by the last usage date of the labels. The most recently used label will appear on top of the label history.

You can use a label from the label history by choosing the label name instead of using the option **Custom Label**.

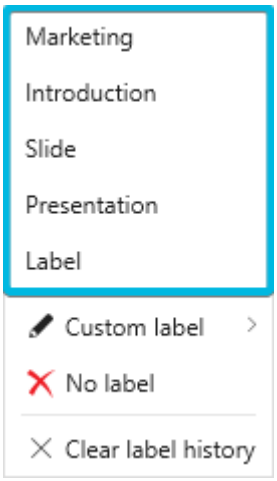


Figure 142. Label History

To delete all labels from the label history, click on the option **Clear label history** (Figure 143).

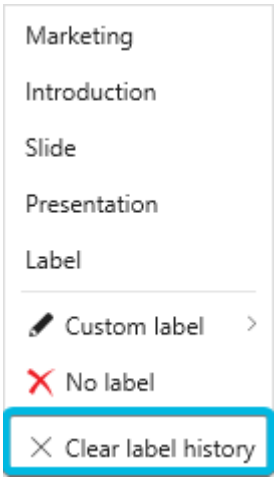


Figure 143. Option **Clear label history**

The label history can save up to ten labels. If the number of labels is exceeded, the oldest label will be deleted to add the new label to the label history.

2.9.12. Sort Library Content

You can sort the content in the empower® Library by different criteria.

The following sorting criteria are available:

- Name
- Last change
- Author
- Custom Sort

Most of the criteria can either be used for ascending or descending sorting. For the options **Name** and **Author**, empower® uses an alphabetical order. For the option **Last change**, the numerical order is used.

The display order for the option is defined in the background for the whole company. This setting is fixed and cannot be changed by users and administrators.

This display order either defines in which order the element types are displayed or it defines a specific order for the folders in a specific section.

To sort the library content, navigate to the group Current view in the navigation bar and click on the button **Sort** (Figure 144). Then, choose your preferred option.

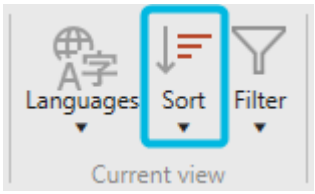


Figure 144. Button **Sort**

By default, the content is sorted by **Name (ascending)**. As soon as you select another option, the library resorts the folder content currently displayed.

Your selection applies to the whole library and will only be reset if you close the library window.

If you have chosen the display view **Details**, the button **Sort** is grayed out. In the display view **Details**, you can sort the content directly in the item view.

All user interface terms in the instructions refer to the empower® User Interface for PowerPoint. In Word and Excel, the user interface might differ slightly.

2.9.13. Version History

Via the version history, you can view older versions of an element and restore them if required.

A new version of an element is saved to the version history each time a new version of the element is saved to the empower® Library.

If you copy and paste an element, the new version will have its own version history. It does not inherit the copied element's version history.

To view the version history of an element, right-click on the element. A context menu opens. In the context menu, click on the option **Version History** (Figure 145).

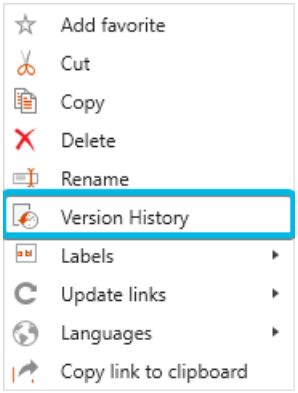


Figure 145. Option **Version History** in Element Context Menu

The version history opens in a new window (Figure 146).

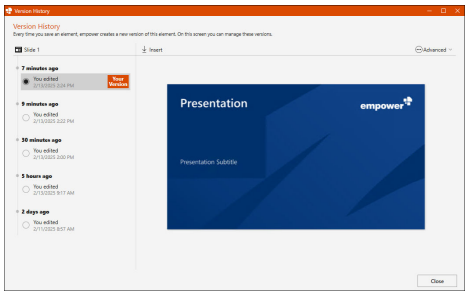


Figure 146. Window **Version History**

In the window **Version History**, you can see a timeline of all available versions on the left. You can also view the editor as well as the saving date and time for each version. The current version is highlighted (Figure 147).

On the right-hand side, you can see a preview of the element version.

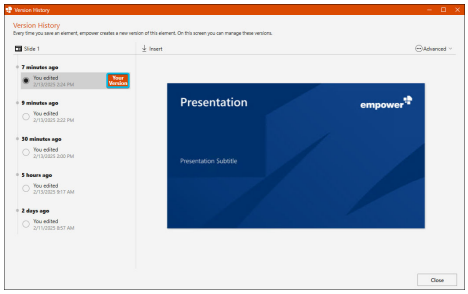


Figure 147. Highlight for Current Version

If the user who saved a version has left a version comment, this comment is displayed underneath the slide preview (Figure 148).

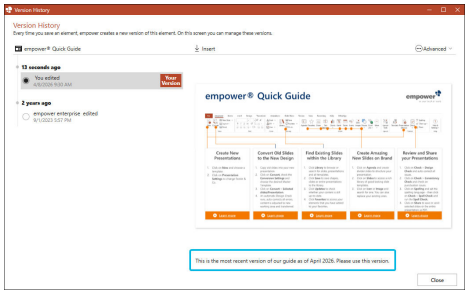


Figure 148. Version Comment

To insert the current version into your presentation, click on the button **Insert** (Figure 149).

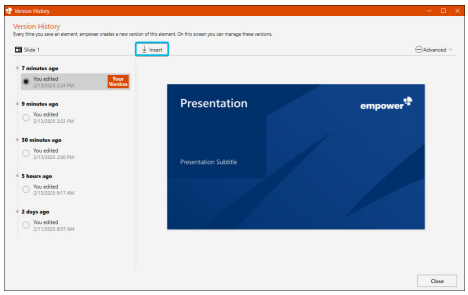


Figure 149. Button **Insert** for Current Version

To download the current version to your device, open the drop-down menu for the split button **Insert** and click on the option **Download**.

Alternatively, you can access the version history of an element via the navigation bar in the empower® Library.

To view the version history, the permission role *Reader* is sufficient. To restore a version, you need to have *Editor* or *Folder Administrator* permissions.

For further information regarding the permission concept, see Permission Concept.

The version history is available for single elements and slides but not for presentations.

The version history is not available for elements that originate from integrations such as Icons8 or Unsplash.

It is only available for PowerPoint.

Use and Restore Older Versions

If you select an older version of the element, you have further options.

Similar to the current version, click on the button **Insert** to insert the older version into your open presentation (**Figure 150**).

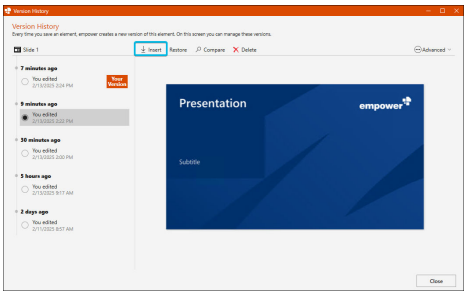


Figure 150. Button **Insert** for Old Version

To restore the selected version, click on the button **Restore** (**Figure 151**).

The older version will be restored and replace the current version in the empower® Library. The current version is not deleted but will still be displayed in the timeline and can be restored if required.

Afterwards, you can insert this version into your presentation from the library.

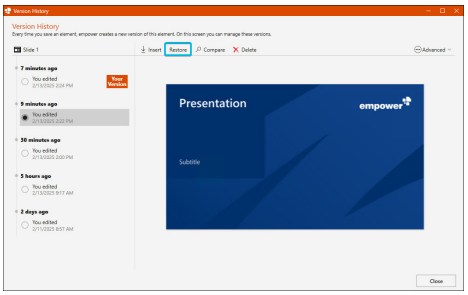


Figure 151. Button **Restore**

Compare Versions

To compare one of the older versions with the current version, select the older version and click on the button **Compare** (**Figure 152**).

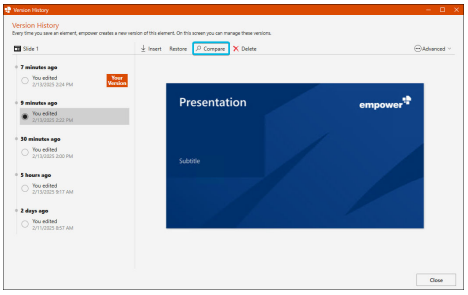


Figure 152. Button **Compare**

The older version is shown on the left and the current version is shown on the right (**Figure 153**).

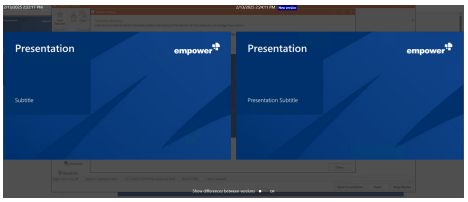


Figure 153. Comparison

In the comparing view, you can also show the differences between the two versions. To do so, switch the toggle button **Show differences between versions** to *On* (Figure 154).

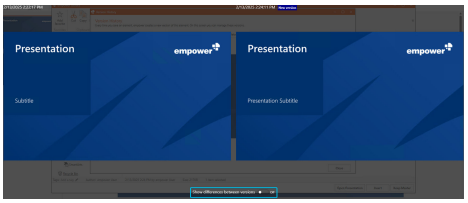


Figure 154. Toggle Button **Show differences between versions**

The differences will be highlighted in yellow (Figure 155).

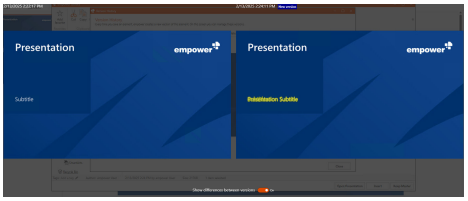


Figure 155. Comparison with Highlights

Delete Version

To delete an older version from the timeline, select the version and click on the button **Delete** (Figure 156).

A dialog box opens.

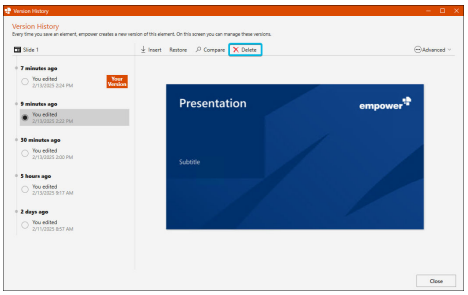


Figure 156. Button **Delete**

To confirm the deletion, click on the button **Yes** (Figure 157).

The selected version will be removed from the timeline.

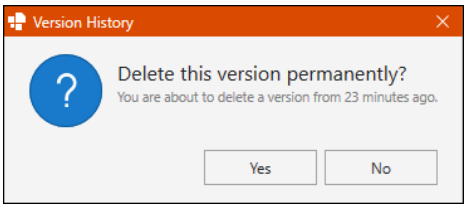


Figure 157. Dialog Box for Deletion

Advanced Settings in Version History

To open advanced settings for the version history, click on the button **Advanced** (Figure 158).

A drop-down menu opens.

The button is available for the current version as well as for the older versions.

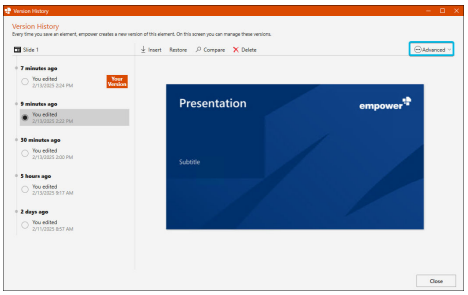


Figure 158. Button **Advanced**

In the drop-down menu, you have two additional options (Figure 159).



Figure 159. Drop-Down Menu for Button **Advanced** for Unlocked Version

1. Lock the currently selected version so it cannot be deleted from the timeline.
   To do so, click on the option **Lock version**. A dialog box opens. To confirm the process, click on the button **Yes** (Figure 160).
   The version will be locked. A **lock** symbol appears next to the version in the timeline (Figure 161) and the button **Delete** is removed if the respective version is selected.
   To unlock the version, click on the button **Advanced** again and then click on the option **Unlock** (Figure 162).

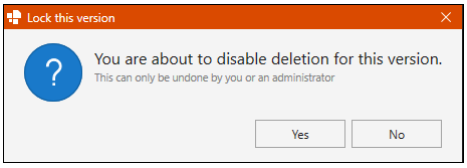


Figure 160. Dialog Box for Locking

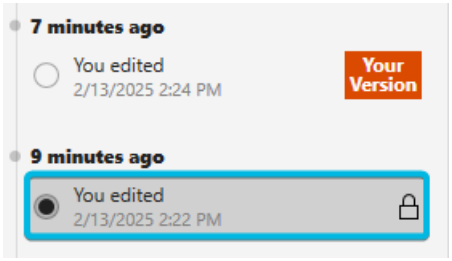


Figure 161. Locked Version

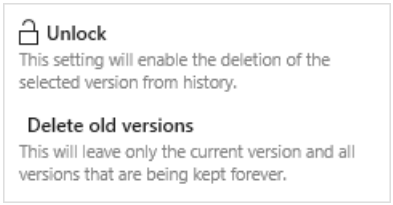


Figure 162. Drop-Down Menu for Button **Advanced** for Locked Version

2. Delete all versions except the current one.
   To do so, click on the option **Delete old versions**. A dialog box opens. To confirm the deletion process, click on the button **Yes** (Figure 163).
   If you have locked versions before using the option **Delete old versions**, the locked versions will not be deleted.

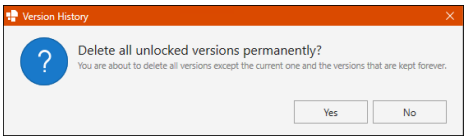


Figure 163. Dialog Box for Bulk Deletion

2.9.14. Use empower® Links

With the help of empower® Links, you can share links to elements or whole folders with other users.

Via the empower® Link, other users can view the content, download the content or directly open it in their corresponding desktop app.

empower® Links can be created by all users, regardless of their permission for the respective folder.

If you share a link to an element or folder with a user who does not have the required permissions to view the element, a message appears when the user opens the empower® Link (Figure 164).

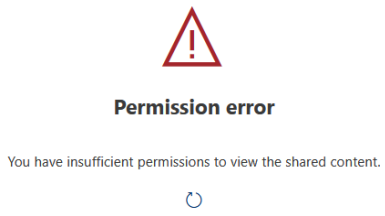


Figure 164. Message for Missing Permissions

Depending on the configuration of your empower® Environment, the feature might not be available.

For further information regarding the permission concept, see **Permission Concept**.

All user interface terms in the instructions refer to the empower® User Interface for PowerPoint. In Word and Excel, the user interface might differ slightly.

Enable empower® Links

For Administrators

The empower® Link feature can be enabled in the empower® Admin Center.

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

Create empower® Links

To create an empower® Link, follow the following steps:

1. In the empower® Library, navigate to the element or folder you want to share.
2. Select the element or folder.
   You can also select multiple elements and folders at once.
3. In the navigation bar, navigate to the group Collaboration and click on the button **Copy link to clipboard** (Figure 165).
   The empower® Link is automatically copied to your clipboard.

You can now send the link that has been copied to your clipboard via your preferred messaging or e-mail application.

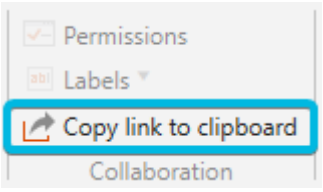


Figure 165. Button **Copy link to clipboard**

Integration folders such as Unsplash or Icons8 and their content cannot be made available via empower® Links.

If you select elements in the empower® Library that cannot be made available via empower® Links, a dialog box opens (Figure 166). You can then decide to exclude them from the link.

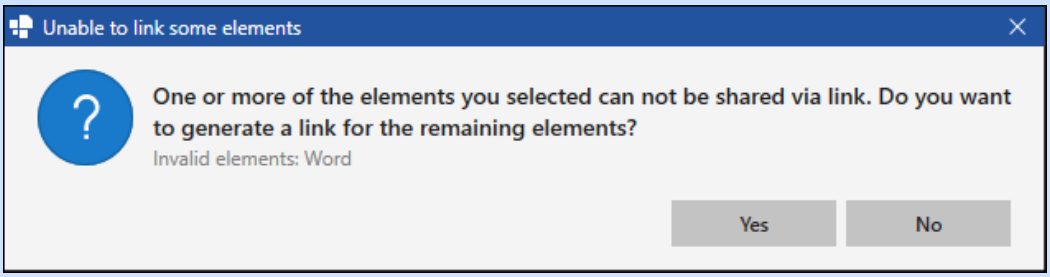


Figure 166. Dialog Box for Invalid Elements

In PowerPoint, there is no dialog box. The option is hidden if you have selected unsupported elements.

You can select up to 30 elements in total. Folders and elements can be shared with the same empower® Link.

Open empower® Links

If you have received an empower® Link, you can open it in your browser.

Here, you can see the elements that have been shared with you. If multiple elements have been shared via this link, each element and/or folder is displayed separately (Figure 167).

In addition, the metadata such as editor or file size details for each element is displayed.

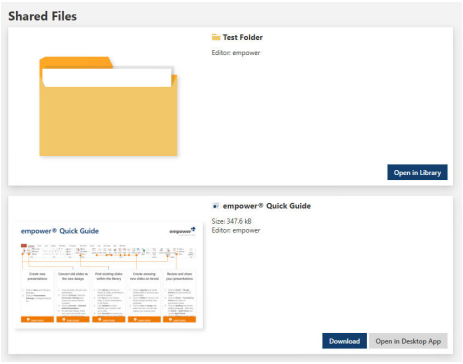


Figure 167. Shared Files

You can now choose between the following options:

- Download elements to your device by clicking on the button **Download** (Figure 168 **(1)**).
- Open elements directly on your device by clicking on the button **Open in Desktop App** (Figure 168 **(2)**).

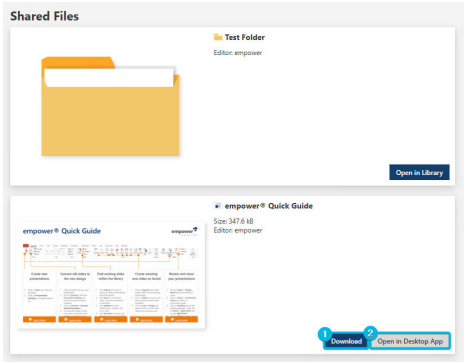


Figure 168. Buttons **Download** and **Open in Desktop App**

- Open folders directly in the empower® Web App by clicking on the button **Open in Library** (Figure 169).
  This option is only available for folders.

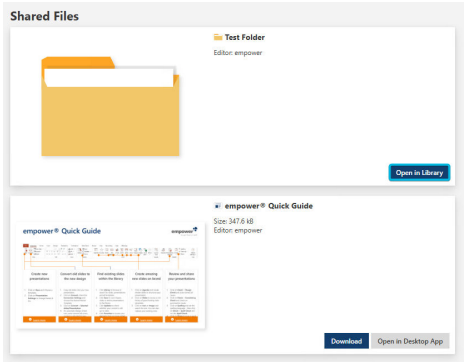


Figure 169. Button **Open in Library**

For further information regarding the empower® Web App, refer to our **empower® Web Components manual**.

The following element types can be included in an empower® Link but they cannot be downloaded:

- Content blocks
- Table style sets
- Table sizes
- Cell style sets
- Images that do not originate from the library in PowerPoint

As a recipient, you can view the content online via the link but you cannot use it (**Figure 170**).

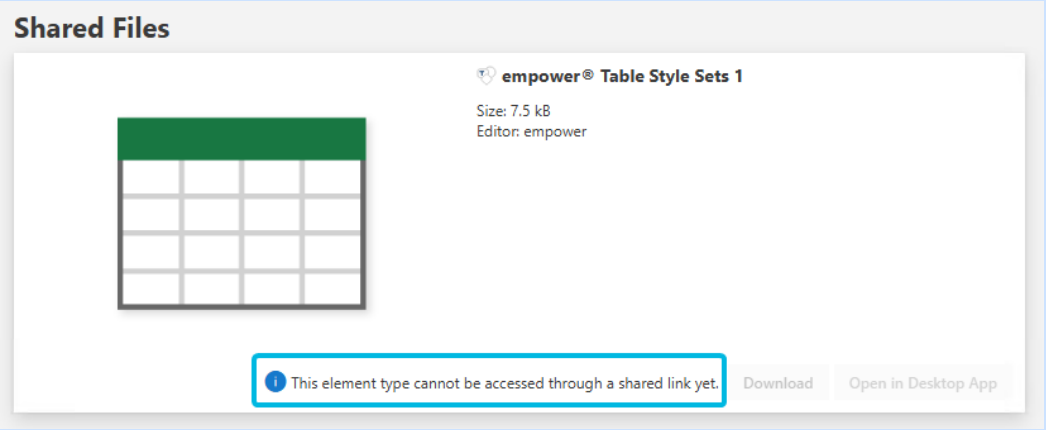


Figure 170. Message in Browser

Use empower® Links in Presentation

You can use empower® Links to link slides or presentations inside a presentation and open them directly while presenting your slides.

The linked slide or presentation is opened in presentation mode when you click on the link.

To use an empower® Link in a presentation, follow the following steps:

1. Create an empower® Link for the slide or presentation you want to link.
   To do so, follow the instructions under **Create empower® Links**.
2. Make sure the folder in which this slide or presentation is included is available offline.
3. Set the empower® Link that has been copied to your clipboard as a hyperlink on a text or a shape in the presentation in which you want to link the content.
4. Enter presentation mode to present your slides.
5. To open the linked slide or presentation, click on the hyperlink in the presentation.
   The linked slide or presentation opens in presentation mode.
   a. To come back to the main presentation, either click through the linked presentation or press **ESC**.
      If you click through the entire linked presentation, you jump back to the main presentation after the black PowerPoint screen.

You can only use slides or presentations that are included in folders that are available offline.
For further information regarding offline availability, see **Online Availability of Library Content**.

If you link a slide which is part of a presentation, all slides in this presentation are opened when clicking the link in presentation mode.

2.9.15. Use the Recycle Bin

You can access the recycle bin via the empower® Library in PowerPoint.

To do so, open the empower® Library and click on the button **Recycle Bin** on the lower left-hand side of the library window (**Figure 171**).

empower® opens the section *Recycle Bin* in the empower® Web App in your default browser.

The empower® Permission Concept also applies to the recycle bin. Therefore, users can only see content that they have been granted permissions for. If you are the only one with permissions for an element, you are the only one who can see the element in the recycle bin.

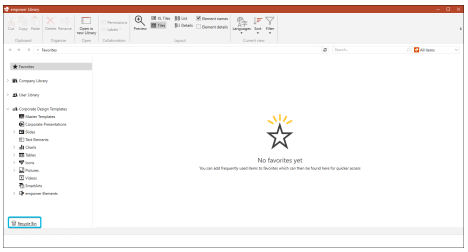


Figure 171. Button **Recycle Bin**

The button **Recycle Bin** is not available in the empower® Library in Word and Excel. However, deleted content from Word and Excel is added to the recycle bin. You can access this content by following the instructions above.

In the empower® Web App, the recycle bin displays all element types regardless of the Office application.

Depending on the setup of your empower® Environment, the recycle bin might not be available.

For further information regarding the permission concept, see **Permission Concept**.
For further information regarding the empower® Web Components, refer to our **empower® Web Components manual**.

Enable the Recycle Bin

For Administrators

The recycle bin feature can be enabled and disabled in the empower® Admin Center.
For further information regarding the empower® Admin Center and enabling features, refer to our **empower® Admin Center manual**.

View and Restore Content

To open a preview of an element, click on the button **Preview** (Figure 172).



Figure 172. Button **Preview**

To restore an element from the recycle bin, follow the following steps:

1. Select the respective element.
2. If you have selected a presentation, click on the **arrow** symbol next to the button **Open** (Figure 173).
   If you have selected a slide, the button **Download** can be accessed directly.
3. Then, click on the option **Download** (Figure 174).
   The file will automatically be downloaded to your download folder.
4. Open the file on your device.
5. Then, save the element back to the empower® Library.



Figure 173. **Arrow** Symbol

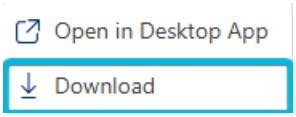


Figure 174. Option **Download**

Deleted elements are available to be manually restored in the recycle bin for twelve months after deletion. Please note:

- Complete folders cannot be restored.
- Metadata cannot be reset.
- Update groups cannot be restored.

After twelve months, the files may be deleted either by empower® Support or by your IT department.

Directly restoring content from the recycle bin back into the folder the element was deleted from is not possible.

2.9.16. Side Pane

The side pane is available in PowerPoint, Word and Excel.

It is located on the right-hand side of your Office application window and provides quicker access to the empower® Library content.

To open the side pane, click on the button **Help and Settings** and then choose the option **User Settings**.

The side pane opens its respective section.

The side pane can be displayed permanently. If it is displayed permanently, you can collapse and expand it any time.

For further information regarding this setting, see **empower® Help**.

Available Elements

In all Office applications, you can access the section *User Settings*.

You can access the sections *User Settings*, *Company Library* and *User Library*.

Further sections to be displayed depend on the Office application.

The icons in the sidebar are indicators for the element types.

In addition, you can hover over the icons to view a tooltip. The tooltip explains which element type you can access via the icon.

Available Elements in PowerPoint

In PowerPoint, you can access the following additional sections via the sidebar (**Figure 175**):

- Master Templates
- Favorites
- Presentations
- Slides
- Text Elements
- Charts
- Tables
- Icons
- Pictures
- Videos
- SmartArts

In addition to those sections, you can access the *Corporate Design Check* and the *Consistency Check*.



Figure 175. Sidebar in PowerPoint

Depending on the setup of your empower® Environment, not all sections mentioned above will be visible.

For further information regarding the *Corporate Design Check*, see **empower® Corporate Design Check**.

For further information regarding the *Consistency Check*, see **empower® Consistency Check**.

Available Elements in Word

In Word, you can access the following additional sections via the sidebar:

- Content blocks
- Pictures

In addition, you can access the *Document Check*.

Document Templates do not have their own icon in the side pane but they can be accessed via the library sections.

For further information regarding the *Document Check*, see **empower® Document Check**.

Template Assistant

For Administrators

If you are a *Customizing Admin*, the *Template Assistant* will also be visible in the side pane (**Figure 176**).



Figure 176. *Template Assistant* Icon in Sidebar

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

Available Elements in Excel

In Excel, you can access the following additional sections via the sidebar:

- Cell Style Sets
- Table Style Sets
- Table Sizes
- Chart Styles
- References

Workbook Templates do not have their own icon in the sidebar but they can be accessed via the library sections.

2.10. Content Updates

In PowerPoint, you can be notified about changes that have been made to single slides.

In Word, you can be notified about changes that have been made to content such as content blocks and elements or profile and company data in use.

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

First, a message appears informing you that there have been changes and that your signature is being updated (**Figure 177**).

After the update has been completed, you are informed again.

Depending on the settings made by your empower® Administrators, this message either closes automatically again or it appears as a dialog box.

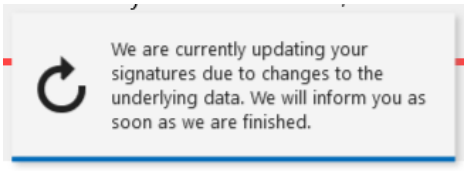


Figure 177. Update Notification in Outlook

If the dialog box opens, close it manually.

To do so, click on the button **OK** (**Figure 178**).

If your signature has been updated and you are currently not using the default signature from empower®, update your signature manually in Outlook.

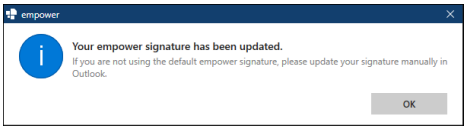


Figure 178. Dialog Box for Signature Updates

In Excel, there are no update notifications.

For Administrators

The default notification mode for signature updates can be set by *Customizing Admins* via the section *Configuration* in the empower® Admin Center.

For further information regarding update groups, see **Update Groups**.

Updates in PowerPoint

In PowerPoint, empower® offers a comprehensive update function that can be adjusted to your individual needs and the needs of your company.

The update function does not only apply to elements in the empower® Library but also to locally stored elements that originate from the empower® Library.

There are three actions that are taken into account for this update function:

- Adjusting content such as text on a slide
- Deleting an element
- Changing master templates

If there are updates to elements in the empower® Library, you will be notified.

The notification mode has been defined by your empower® Administrators. However, you can change your default notification mode.

To do so, follow the following steps:

1. Navigate to the group Start in the empower® Ribbon.
2. Click on the lower part of the split button **Library** (Figure 179).



Figure 179. Button **Library**

3. Click on the arrow next to the option **Updates** (Figure 180).

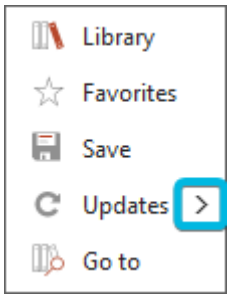


Figure 180. **Arrow** Symbol for Option **Updates**

4. Choose one of the notification modes (Figure 181):
   Show Update Wizard – The update wizard opens if you insert or open an element that has been updated.
   Show Notification Bar – A notification bar appears in the PowerPoint window after you insert or open an element that has been updated.
   Change Ribbon Icon Only – A red dot appears next to the option **Updates** under the split button **Library**.
   No Update Notification – You are not notified about updates at all.



Figure 181. Update Notification Modes

The chosen notification mode will be used for future updates.

In addition, a red dot is displayed in the thumbnail of elements with open updates in the empower® Library (Figure 182).



Figure 182. Thumbnail for Updated Element

The notification mode **Show Update Wizard** should always be preferred.

If you add a slide to a presentation, this update is only shown for presentations that have been saved to your device, OneDrive or SharePoint. In the empower® Library, updates are only checked on slide level.

For further information regarding the presentation mode of the *Update Wizard*, see **Update Presentations Saved on Your Device**.

For presentations that are opened from OneDrive or SharePoint, empower® does not automatically check for updates. Here, a notification bar is displayed and you can execute an update check manually.

To check your presentation for updates manually, click on the option **Updates** under the split button **Library** (Figure 183).

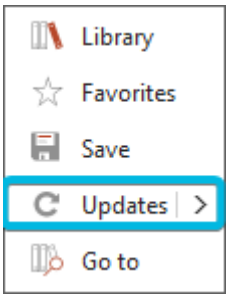


Figure 183. Option **Updates**

empower® checks your presentation for updates. If there are updates in your presentation, the *Update Wizard* opens.

If a single object such as a shape which has been used on your slide is deleted from the empower® Library, you will not be notified automatically.

To check a slide or presentation for deletion updates for single objects, check for updates manually.

Update Wizard

In the *Update Wizard*, you can manually decide how to deal with an update.

If you have selected the option **Show Update Wizard**, the *Update Wizard* opens automatically if you insert or open an element.

If you have selected the option **Show Notification bar**, click on the button **Show updates** in the notification bar to open the *Update Wizard* (Figure 184).

Figure 184. Notification Bar

If you have selected the option **Change Ribbon Icon Only**, check the presentation for updates manually (Figure 185). If there are updates, the *Update Wizard* opens.

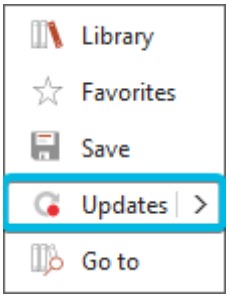


Figure 185. Changed Ribbon Icon

In the *Update Wizard*, you can see an overview of all elements that are part of an update group as well as their respective versions (Figure 186).

Here, you can manage the updates for the whole presentation in bulk or individually.

On the left-hand side, you can see all slides contained in your presentation for which there are available updates.

On the right-hand side, you can see the updated versions of the respective slide.

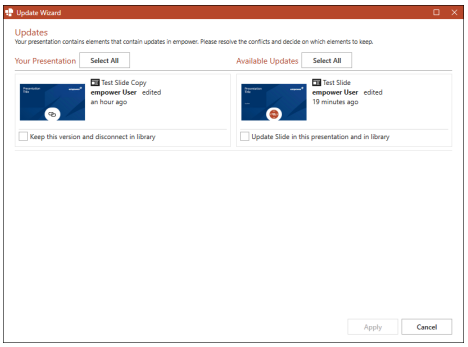


Figure 186. Update Wizard

If the user who saved a version has left a version comment, this comment is displayed next to the slide preview (Figure 187).

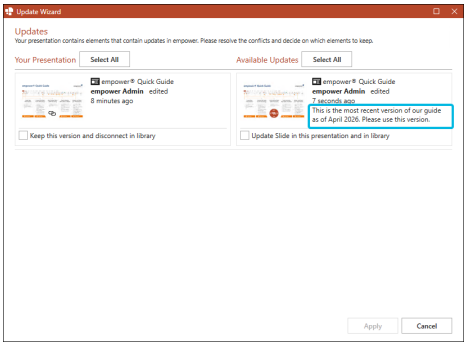


Figure 187. Version Comment

To compare the versions, hover over the thumbnail of one of the versions and click on the **magnifying glass** symbol (Figure 188).

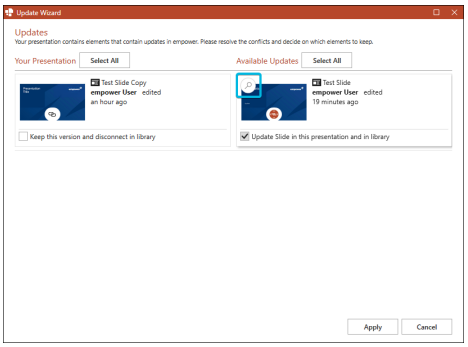


Figure 188. **Magnifying Glass** Symbol

The older version is displayed on the left and the updated version is displayed on the right (Figure 189).

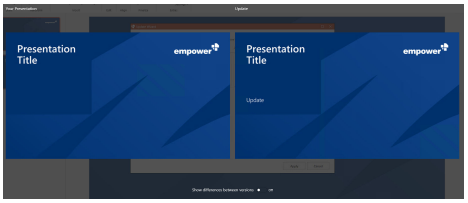


Figure 189. Comparison

To highlight the differences, switch the toggle button for **Show differences between versions** to *On* (Figure 190).

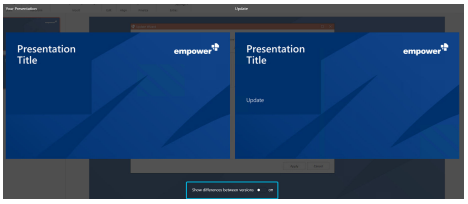


Figure 190. Toggle Button **Show differences between versions**

The differences between the versions are highlighted in yellow (Figure 191).

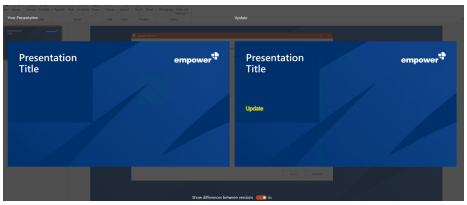


Figure 191. Comparison with Highlight

Select Preferred Version

In the *Update Wizard*, you can decide which of the two versions of a slide you want to keep.

You can either make your decision for each slide individually or for all slides at once.

To keep the older version of an individual slide, tick the checkbox next to **Keep this version and disconnect in library** for the respective slide (Figure 192 **(1)**).

To update the older version of an individual slide to the newer version, tick the checkbox for **Update Slide in this presentation and in library** for the respective slide (Figure 192 **(2)**).

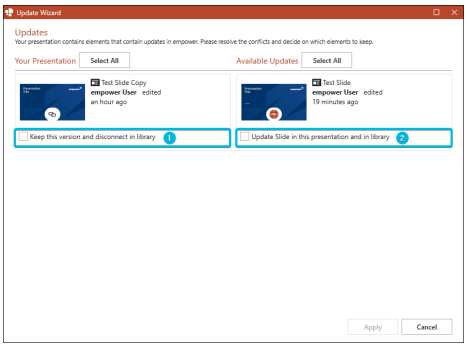


Figure 192. Options for Updated Slides

To keep all older versions in the presentation, click on the button **Select All** next to *Your Presentation* (Figure 193 **(1)**).

To update all slides in the presentation to the newer versions, click on the button **Select All** next to *Available Updates* (Figure 193 **(2)**).

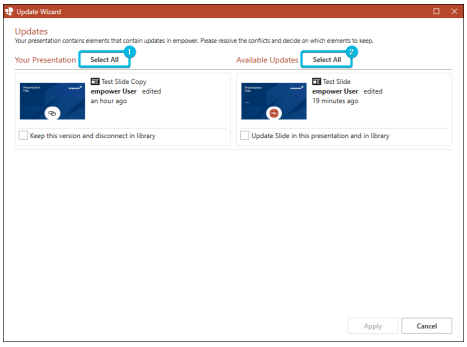


Figure 193. Buttons **Select All**

When you have finished, click on the button **Apply** (Figure 194).

Your changes are applied to the presentation.

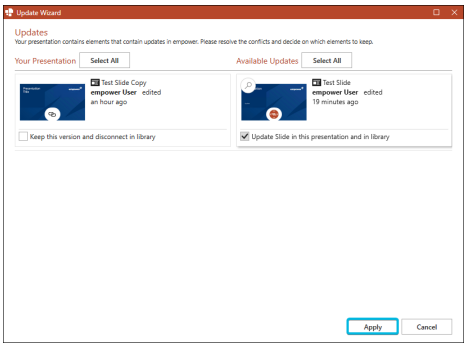


Figure 194. Button **Apply**

If you choose to keep the older version, the slide is removed from the update group and will therefore no longer receive any updates.

Automatic update notifications no longer apply to a SharePoint presentation you have opened, rejected the update for and saved back to SharePoint. You will not receive any update notifications when you open this presentation afterwards.

To make sure you are aware of content updates, check the presentation for updates manually.

Deletion Updates

If an element that is used in your presentation is deleted from the empower® Library, you can also decide whether to keep the element or to delete it.

If an element is deleted, you have the option to keep the element on your slide or to remove it.

To keep the element on your slide, tick the checkbox for **Keep this version (no more updates)** for the respective version (**Figure 195 (1)**).

To delete the element from the slide, tick the checkbox for **Delete Object** for the respective version (**Figure 195 (2)**).

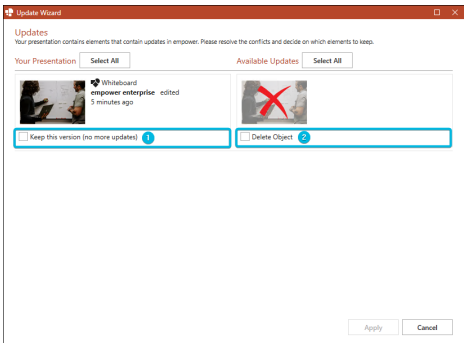


Figure 195. Options for Deleted Object

If a slide is deleted, you have the option to keep the slide or to remove it from your presentation and the library.

To keep the slide, tick the checkbox for **Keep this version and disconnect in library** for the respective version (**Figure 196 (1)**).

To delete the slide from the presentation and from the library, tick the checkbox for **Delete Slide in this presentation and in library** for the respective version (**Figure 196 (2)**).

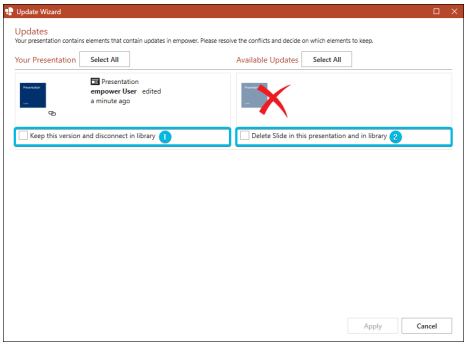


Figure 196. Options for Deleted Slides

Update Presentations Saved on Your Device

If you have saved a presentation that has been created with empower® on your device or in the cloud, you also receive update notifications.

For presentations in the cloud, the notification bar is displayed.

For presentations on your device, the default notification mode is used.

If you open a presentation that has been saved on your device, the *Update Wizard* opens in presentation mode.

Here, you can decide if you want to apply all updates in the presentation or if you want to keep the older version of the presentation.

To keep the older version of your presentation, tick the checkbox for **Keep this version (no more updates)** (Figure 197 **(1)**).

To update your presentation, tick the checkbox for **Update presentation** (Figure 197 **(2)**).

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

If you choose to keep the older version of your presentation, you can still open the *Update Wizard* again to view the updates for the individual slides and objects.

Here, you can select your preferred version for each slide individually.

For further information regarding the *Update Wizard*, see Select Preferred Version.

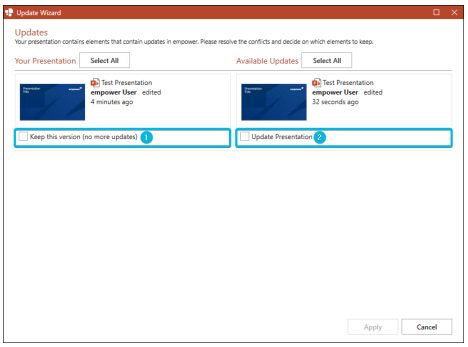


Figure 197. Options in Presentation Mode

If you accept an update for a presentation stored on your device, the presentation stored on your device is closed and the new version of the presentation opens from the empower® Library or from SharePoint.

If you want to overwrite the presentation stored on your device with this new version, overwrite the presentation manually.

Updates in Word

In Word, you are notified about changes that have been made to your profile or company data.

In addition, you are notified if there have been changes to content blocks or pictures you are using in a document.

Updates of Profile and Company Data

If there have been changes to your profiles or to the company data, you will be notified by empower®.

If you open a *Document Template* and your profile or company data that you have set as a default has been deleted, a dialog box opens.

empower® prompts you to select another profile and/or location for the current document template.

If you want to set new default values, click on the button **Manage defaults**.

You are only notified if your default profile or company data is missing because it has been removed.

If there have been changes to the data for a profile or a company or if your default has been changed, there is no notification. The changes are synchronized in the background.

If you have already filled in the template and your profile data changes in the meantime, a dialog box opens (Figure 198).

In this dialog box, you can decide if you want to apply the changes.

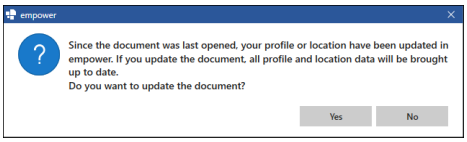


Figure 198. Changed Profile Data

Updates of Content Blocks And Pictures

If you open a *Document Template* which contains content blocks or pictures that have been updated in the meantime, a dialog box opens.

In this dialog box, you can decide if you want to update the content blocks and pictures in your *Document Template* or not (Figure 199).

To update all content blocks and pictures in the document, click on the button **Yes**.

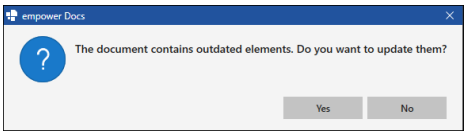


Figure 199. Update Notification for Elements

If you have opened a *Document Template* or a document that has been created with empower®, you can also check manually if there are outdated elements.

To do so, click on the lower part of the split button **Library** and then choose the option **Update elements** (Figure 200).

If there are outdated elements, the same dialog box opens.

To update all elements in the document, click on the button **Yes**.

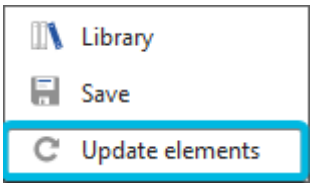


Figure 200. Option **Update elements**

You can only decide to accept all updates that are available for your document at once. It is not possible to select individual updates to be applied.

2.10.1. Update Groups

In empower®, update groups are automatically created if you reuse an existing slide from the library or if you copy and paste a slide inside of the empower® Library.

If you copy a presentation, all the slides contained will become part of individual update groups.

You can also create update groups manually in the user interface if you store copies of slides in different locations and want to keep the slides up to date.

As soon as a slide is added to an update group, a link to the other slides in the update group is created. If one of the slides in an update group is changed, updates can be shared with all other slides in the update group.

The slide that is inserted into a presentation or the slide that is copied initially becomes the root element of the update group.

All other slides in the group are linked copies.

If a slide is the root element of an update group, a colored **link** symbol is displayed in its thumbnail (Figure 201).



Figure 201. Colored **Link** Symbol

If a slide is a linked copy of a root element, a colorless **link** symbol is displayed in its thumbnail (Figure 202).

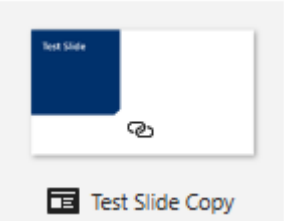


Figure 202. Colorless **Link** Symbol

If there is an open update for a slide in the update group, a red dot is displayed next to the **link** symbol (Figure 203).



Figure 203. Updated Element

If you copy an element from the folder *Corporate Design Templates – Slides* or *Corporate Design Templates – Corporate Presentations*, no update group is created.

Update groups and update links have an impact on the update notification behavior and saving behavior in empower®.

For example, if you save a slide that is part of an update group, you can decide if you want to share the update or not or if you want to force the update without asking other users if they accept the update (Figure 204).

Depending on how you decide, users will receive an update notification if they open another slide that is part of the update group.

In these update notifications, users can decide if they want to accept the updates or not.

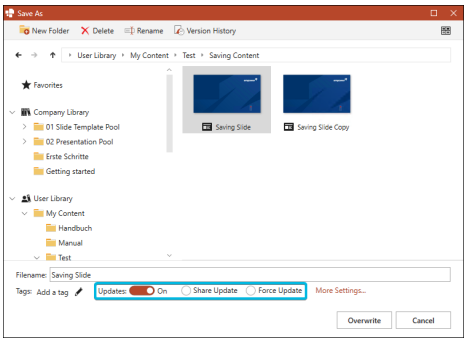


Figure 204. Settings on Save for Root Element

If you update a slide which is part of an update group, make sure to leave the notes section empty. If you leave the notes section empty, existing notes in linked copies will not be overwritten.

If you do not leave the notes section empty, the existing notes will be overwritten and the content is lost.

Update groups can only be created for elements in PowerPoint.

Depending on your permissions for the library folders, the available options to edit and create update groups might vary.
For further information regarding the permissions concept, see **Permission Concept**.

For further information regarding the saving behavior, see **Manage Content in empower®**.
For further information regarding the update behavior and notifications in empower®, see **Content Updates**.

Create Update Groups Manually

To create an update group manually, follow the following steps:

1. Select a slide that you want to add to the update group.
2. In the navigation bar, navigate to the group Updates.
3. Click on the button **Update links** (Figure 205).
   A drop-down menu opens.



Figure 205. Button **Update links**

4. In the drop-down menu, click on the option **Mark for new root slide** (Figure 206).

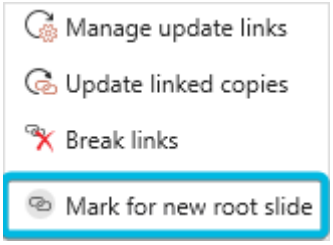


Figure 206. Option **Mark for new root slide**

5. Then, navigate to a slide that you want to make the root element of your update group.
6. Click on the button **Update links** in the navigation bar again.
7. In the drop-down menu, click on the option **Create update link to this root or update group** (Figure 207).
8. Repeat these steps for all slides that you want to add to the update group.

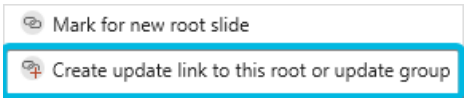


Figure 207. Option to Create Update Link

If you link one update group to another update group, the update groups are combined into one update group.

Manage Update Groups

To view all slides in an update group, follow the following steps:

1. Select one slide that is part of the update group you want to view.
2. Click on the button **Update links** in the navigation bar.
3. In the drop-down menu, click on the option **Manage update links** (Figure 208).
   A dialog box opens.

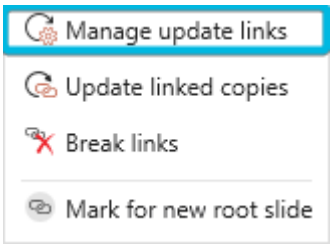


Figure 208. Option **Manage update links**

In this dialog box, you can see all slides that are part of the respective update group (Figure 209).

The root element is listed under *Root*.

All its linked copies are listed under *Linked copies*.

For all slides, the file path, the update status, the modification date and the editor are displayed in the dialog box.

You can also filter the list by the update status, the modification date and the editor.

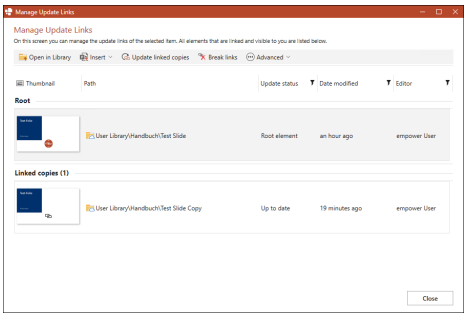


Figure 209. Window **Manage Update Links**

If you want to open one of the slides of the update group in the library, click on the button **Open in Library** (Figure 210).

The library opens in the respective folder.

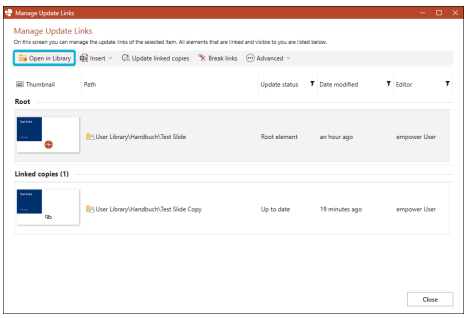


Figure 210. Button **Open in Library**

If you want to insert one of the slides into your current presentation, select the slide from the list and click on the button **Insert** (Figure 211).

A drop-down menu opens.

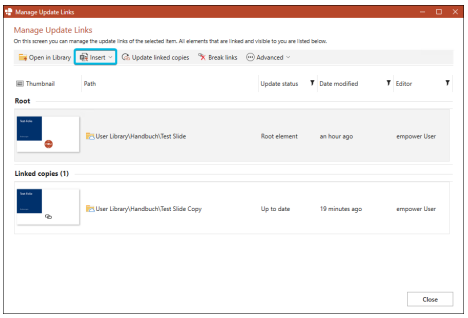


Figure 211. Button **Insert**

In the drop-down, you can choose if you want to insert the slide with the current master used in the presentation or with its original master it has been saved with (Figure 212).

To use the presentation master, click on the option **Insert and use destination theme**.

To use the master the slide has been saved with, click on the option **Insert and keep source formatting**.

The slide is inserted into your presentation using the corresponding setting.

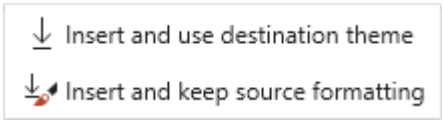


Figure 212. Drop-Down Menu for Button **Insert**

Alternatively, the option **Manage update links** can also be accessed via the context menu of an element.

Update Slides in Update Group

In the dialog box, you have different options for root elements and linked copies.

If you have selected the root element, you can update all linked copies at once.

To update all linked copies to the root element version, click on the button **Update linked copies** (Figure 213).

A dialog box opens.

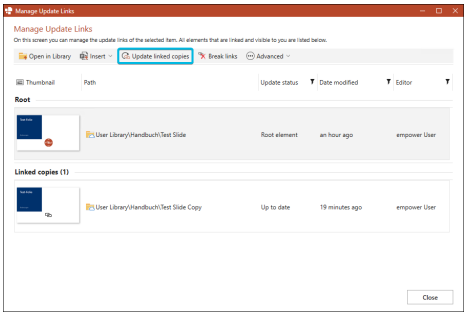


Figure 213. Button **Update linked copies**

In this dialog box, you can choose if you want to share the update or if you want to force the update (Figure 214).

If you share the update, update notifications will be issued for the linked copies.

If you force the update, the update will be applied without any update notification.

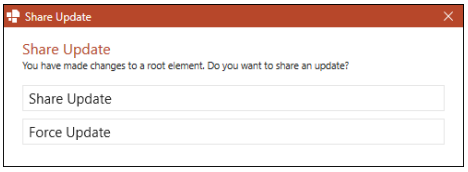


Figure 214. Dialog Box on Linked Copy Update

If you have selected a linked copy, you can update this linked copy to the root element version.

To update the linked copy to the root element version, click on the button **Update to root version** (Figure 215).

The slide will be updated immediately.

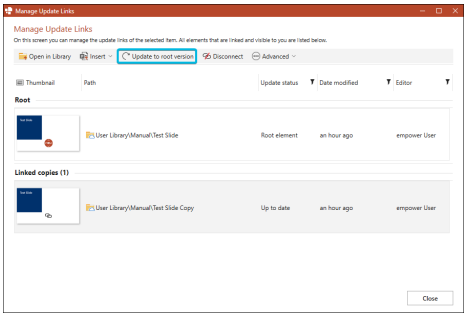


Figure 215. Button **Update to root version**

Alternatively, these options can also be accessed via the context menu of a root element or a linked copy.

Break Links in Update Group

In the dialog box, you have different options for root elements and linked copies.

If you have selected the root element, you can dissolve the update group as a whole.

To dissolve the update group as a whole, click on the button **Break links** (Figure 216).

A dialog box opens.

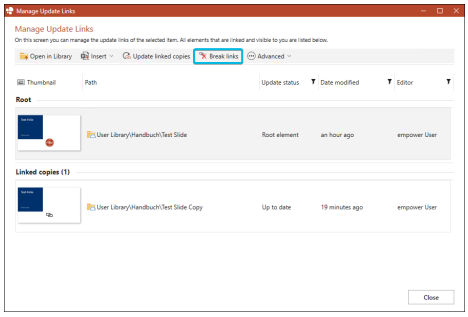


Figure 216. Button **Break links**

To confirm the process, click on the button **Yes** (Figure 217).

All update links will be broken.

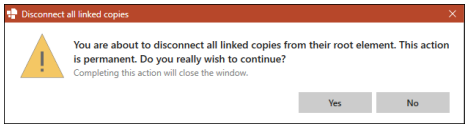


Figure 217. Dialog Box on Breaking Links

If you have selected a linked copy, you can disconnect this linked copy from the update group.

To break the link between the linked copy and the root element, click on the button **Disconnect** (Figure 218).

A dialog box opens.

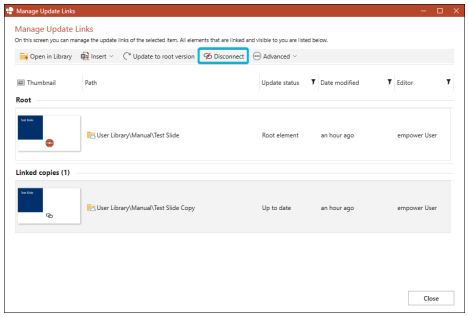


Figure 218. Button **Disconnect**

To confirm the process, click on the button **Yes** (Figure 219).

If you disconnect the last linked copy, the update group is dissolved as a whole.

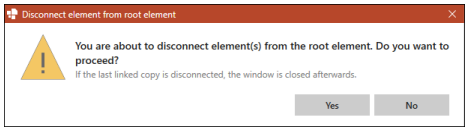


Figure 219. Dialog Box on Disconnecting

Alternatively, these options can also be accessed via the context menu of a root element or a linked copy.

Advanced Settings

If you have selected the root element, you can mark it for a new root element or delete it in the advanced settings (Figure 220).

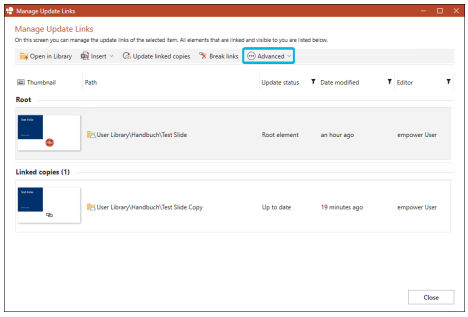


Figure 220. Button **Advanced**

To mark the root element for a new root element, click on the button **Mark for new root slide** (Figure 221).

Then, minimize the dialog box and continue in the library.

Here, follow the steps 5 to 8 under Create Update Groups Manually.

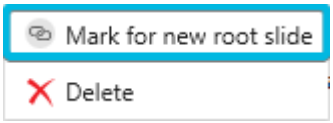


Figure 221. Option **Mark for new root slide** under **Advanced** for Root Element

To delete the root element, follow the following steps:

1. Select the root element from the list.
2. Click on the button **Advanced**.
   A drop-down menu opens.
3. In the drop-down menu, click on the option **Delete** (Figure 222).
   A dialog box opens.

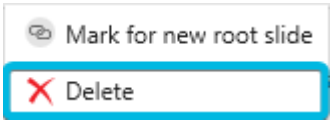


Figure 222. Option **Delete** for Root Element

4. In this dialog box, decide if you want to share the deletion update at all or if you want to force the deletion update.
5. Then, click on the button **Delete anyway** (Figure 223).

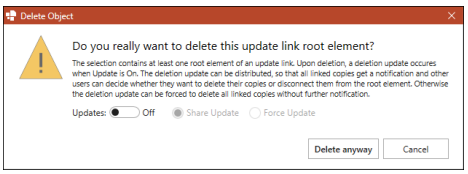


Figure 223. Dialog Box on Deleting Root Element

If you force the deletion update, all linked copies in the update group will be deleted without any update notification.

If you have selected a linked copy, you have the following options:

- Make the selected linked copy the root element
- Update the root element to match the selected linked copy
- Mark the selected linked copy for a new root element
- Delete the linked copy

To make the selected slide the root element of the update group, click on the option **Make this element the root** (Figure 224).

The changes become visible in the dialog box.

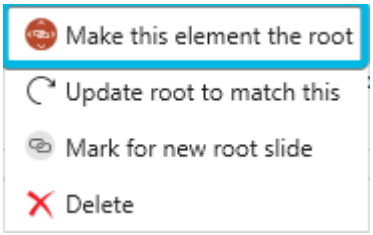


Figure 224. Option **Make this element the root**

To update the current root element to match the selected linked copy, click on the button **Update root to match this** (Figure 225).

A dialog box opens.

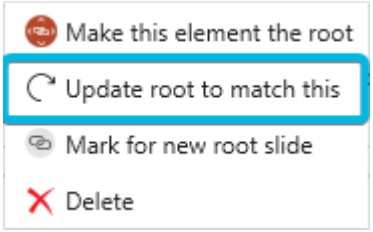


Figure 225. Option **Update root to match this**

In this dialog box, you can choose if you want to share the update or if you want to force the update (Figure 226). Alternatively, you can decide not to share any update.

If you share the update, update notifications will be issued for the linked copies.

If you force the update, the update will be applied without any update notification.

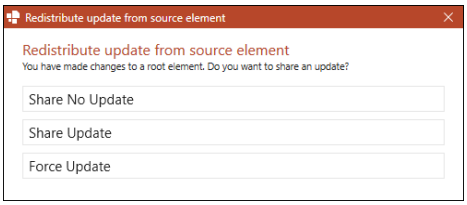


Figure 226. Dialog Box on Updating Root Element

To mark the linked copy for a new root element, click on the button **Mark for new root slide** (Figure 227).

Then, minimize the dialog box and continue in the library.

Here, follow the steps 5 to 8 under Create Update Groups Manually.

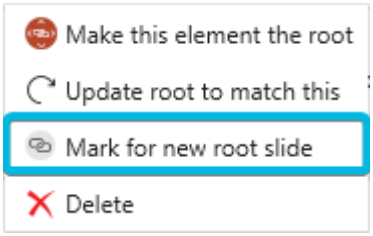


Figure 227. Option **Mark for new root slide** under **Advanced** for Linked Copy

To delete a linked copy, follow the following steps:

1. Select the linked copy from the list.
2. Click on the button **Advanced**.
   A drop-down menu opens.
3. In the drop-down menu, click on the option **Delete** (Figure 228).
   A dialog box opens.

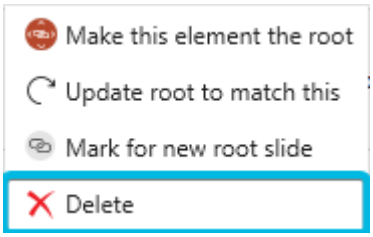


Figure 228. Option **Delete** for Linked Copy

4. In this dialog box, tick the checkbox if you want to share the deletion update (Figure 229).
5. Then, click on the button **Yes**.

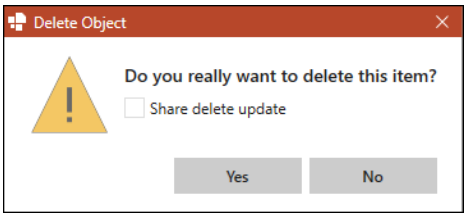


Figure 229. Dialog Box on Deleting Linked Copy

If you delete a linked copy, the deletion update is only shared with presentations that contain this linked copy itself and have been saved to your device locally.

If you have used the linked copy in a presentation and then uploaded this presentation to the empower® Library again, a new slide is created which is only another linked copy in the update group. Therefore, the deletion update is not shared with this new slide.

If you want to share a deletion update for the entire update group, delete the root element instead.

Alternatively, these options can also be accessed via the context menu of a root element or a linked copy.

2.11. Set up Profiles

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

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

You can access your profile management via Outlook or Word.

To view your profile management in Word, navigate to the group Insert and click the lower part of the split button **Fill in document** (**Figure 230**).

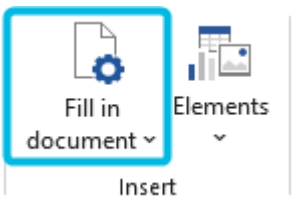


Figure 230. Split **Button Fill in document**

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 231**).

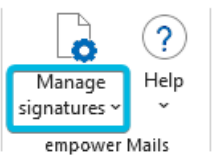


Figure 231. Split Button **Manage signatures**

A drop-down menu opens.

Choose the option **Profiles** (Figure 232).

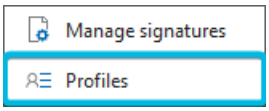


Figure 232. Button **Profiles**

A new window opens (Figure 233).

The window offers the same settings in both applications.

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.

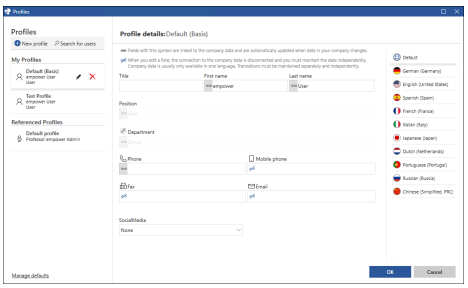


Figure 233. Profile Management Window

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 234).

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

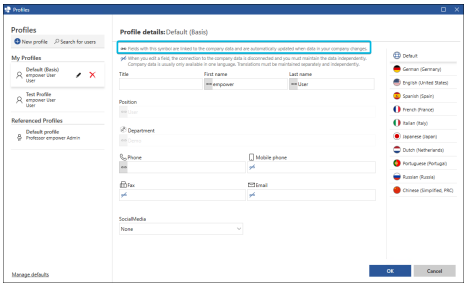


Figure 234. **Chain** Symbol for Automatically Synchronized Data

A **crossed-out chain** symbol (Figure 235) 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.

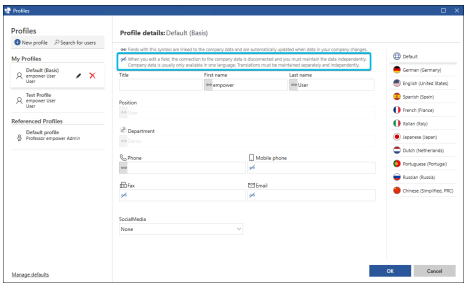


Figure 235. **Crossed-out Chain** Symbol for Not Automatically Synchronized Data

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

If you have changed data, the input is displayed in bold formatting (**Figure 236**).

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.

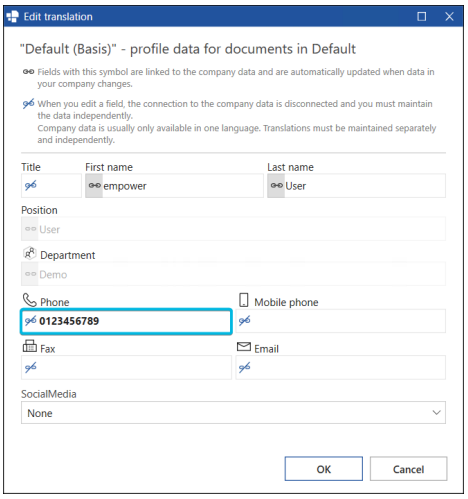


Figure 236. Bold Formatting for Manually Changed Profile Data

When you have finished entering your data, click on the button **OK** (**Figure 237**).

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

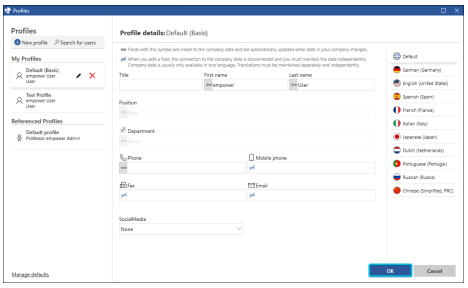


Figure 237. Button **OK** to Confirm Profile Data Changes

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 238**).

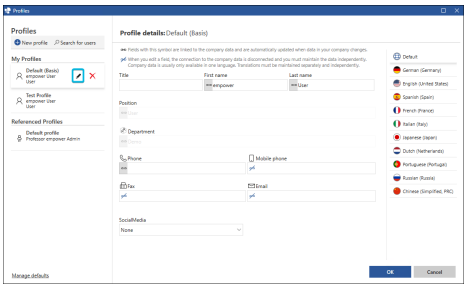


Figure 238. **Pen** Symbol to Rename a Profile

Enter the new name in the input field and click on the button **Apply** (Figure 239).

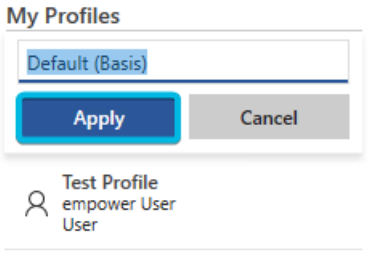


Figure 239. Button **Apply** to Confirm New Profile Name

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 240).

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.

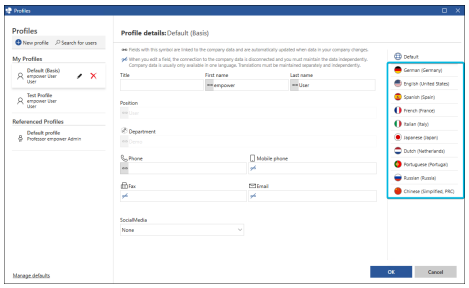


Figure 240. New Translation

For further information regarding the default language behavior, see **Default Language Behavior**.

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 241).

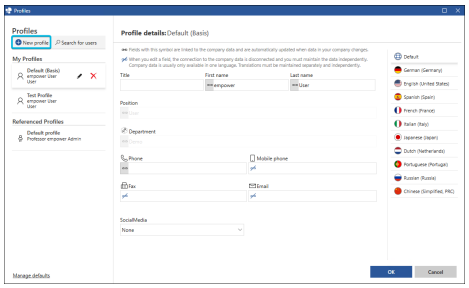


Figure 241. Button **New Profile**

Enter the profile name and click on the button **Add** (Figure 242).

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

When you have finished entering your data, click on the button **OK** (Figure 237).

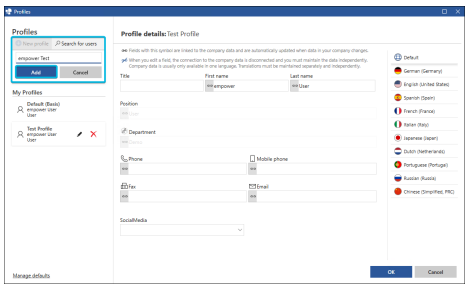


Figure 242. Add Profile

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 243).

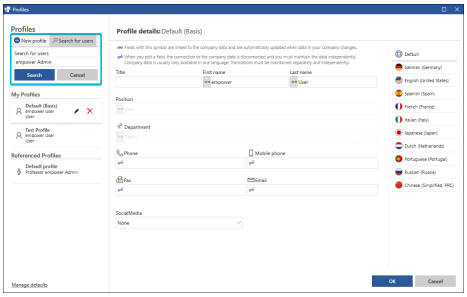


Figure 243. Option *Search for users* in Profile Management

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 244).

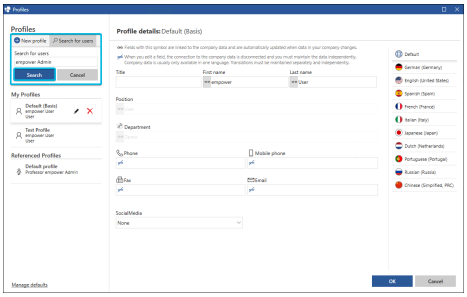


Figure 244. Button **Search**

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 245).

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.

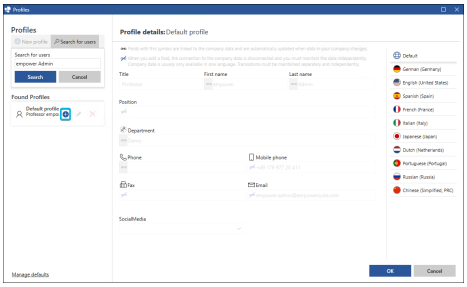


Figure 245. **Plus** Symbol to Add Profiles

The sender address displayed when an addressee receives an e-mail will always be the mailbox (e-mail address) you have 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 246).

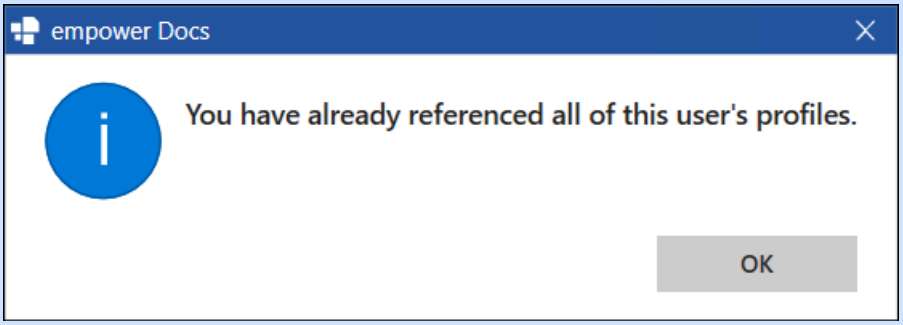


Figure 246. Dialog Box for Referenced Profiles

Manage Your Default Values

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 247).

A dialog box opens.

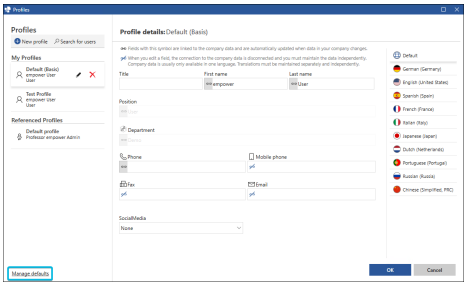


Figure 247. Button **Manage Defaults**

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 248).

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.

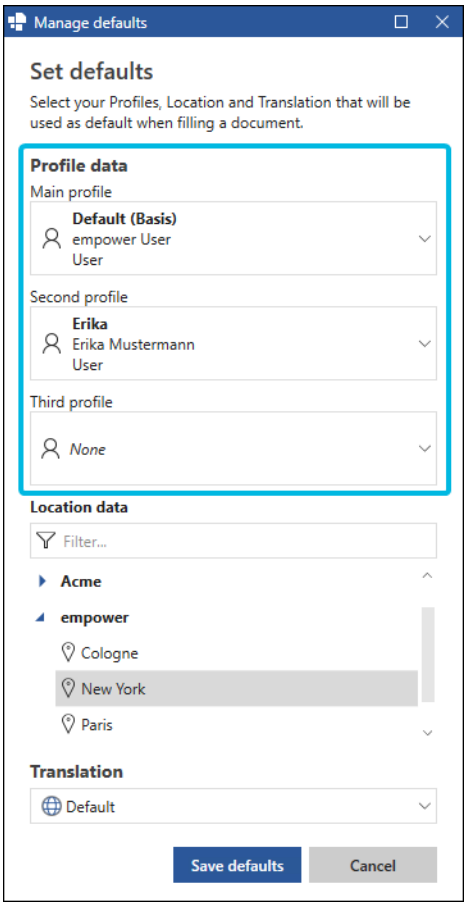


Figure 248. Set Default Profiles

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 249**). 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 you to select a location each time a document template is opened.

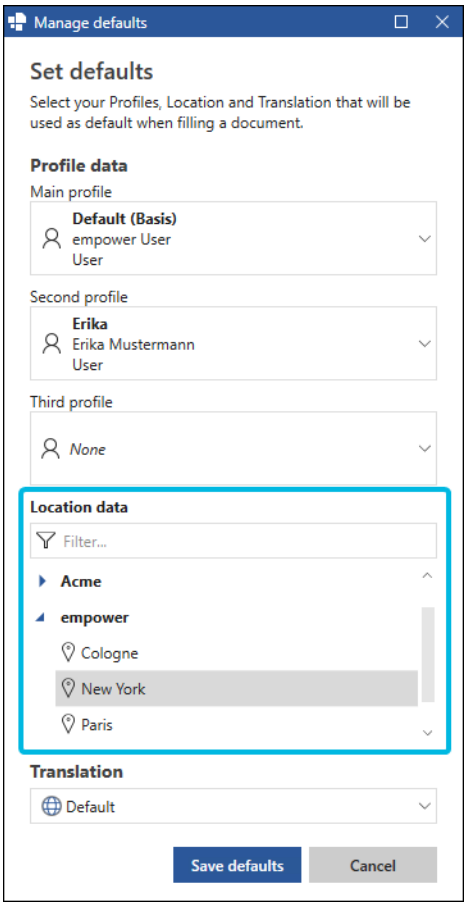


Figure 249. Location Data

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 250**).

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.

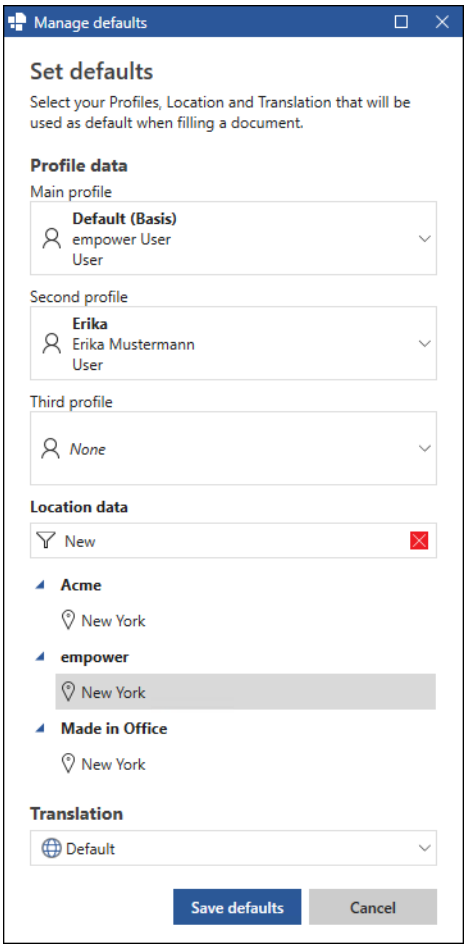


Figure 250. Search for Locations

If your search input does not lead to any result, a message is displayed in the dialog box (Figure 251).

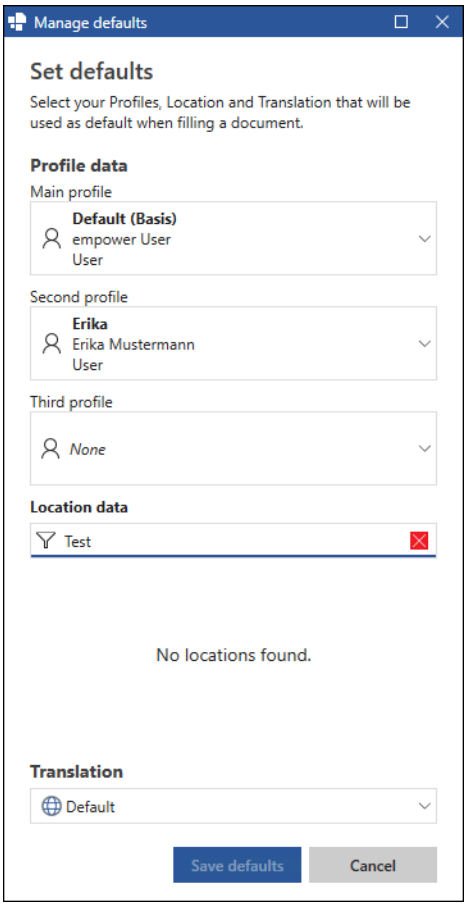


Figure 251. No Search Results

To abort the search, click on the **X** symbol in the input field (Figure 252).

All available locations will be listed again.

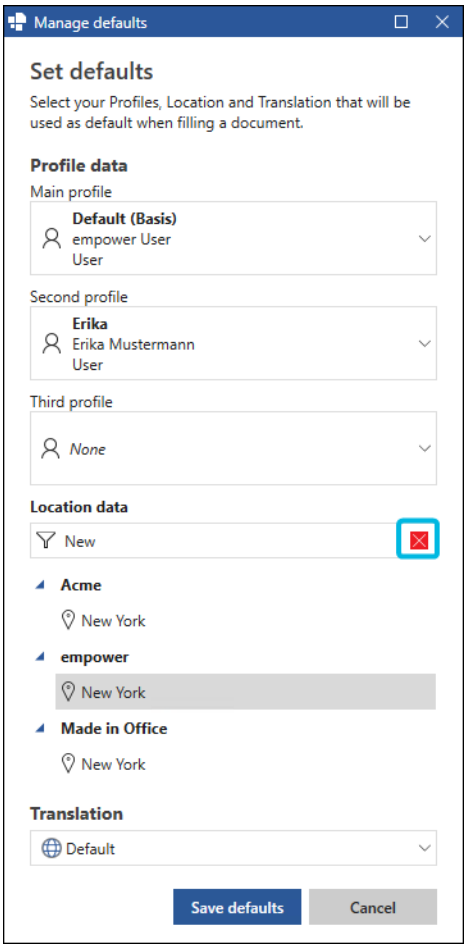


Figure 252. Abort Search

In the drop-down menu under *Translation*, all available languages are listed (**Figure 253**). 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.

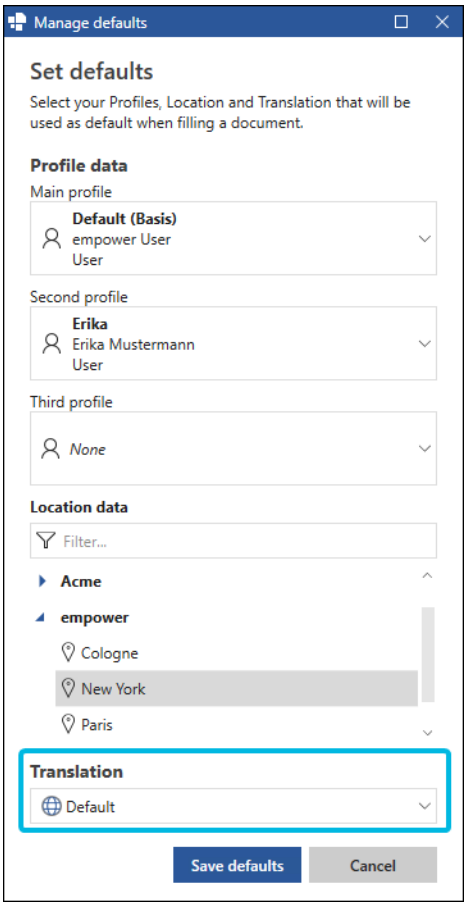


Figure 253. Translation

When you have finished, click on the button **Save defaults** (Figure 254).
Your settings are saved.

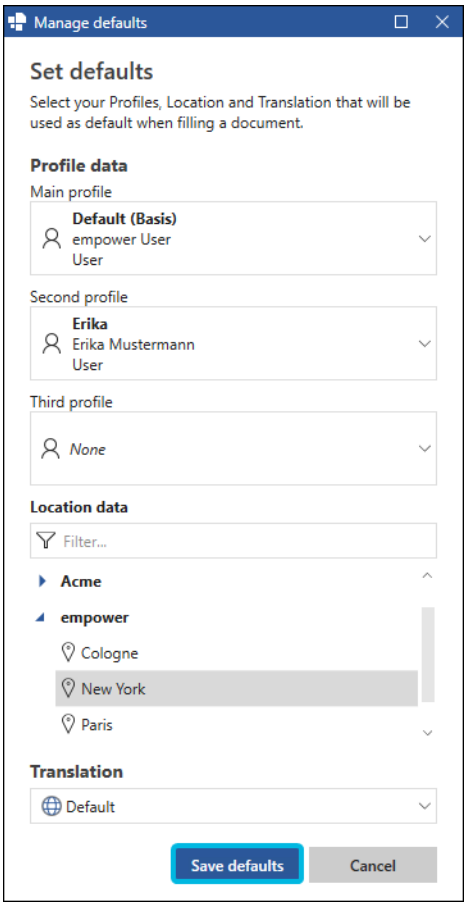


Figure 254. Button **Save defaults**

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.

Default Language Behavior

The selected default language affects the following elements of templates:

- **Logo selection:**
  The logo associated with the selected language is used.
- **Profile information:**
  The language-specific values stored in the selected user profile are inserted.
- **Location and company information:**
  The language-specific values stored for the selected location and the associated company information are inserted based on the selected default language.

If the user selects the option *Default*, there are three possible scenarios, depending on the user's settings and the configuration in empower®:

- **The Office language is supported by empower®:**
  If a user's Microsoft Office language is also configured in empower®, that language is automatically selected as the default language.
  Example: The user has Microsoft Office set to *English*, and *English* is also configured in empower®. *English* is automatically selected as the default language.
- **The Office language is not supported by empower®:**
  If a user's Microsoft Office language is not configured in empower®, it cannot be selected as the default language. In this case, empower® automatically uses the values and logos defined in the *Default* column during the initial configuration of empower®.
  Example: The user has Microsoft Office set to *Spanish*, but empower® is only configured for German and English. In this case, the values and logos stored in the *Default* column are used.
- **An administrator defines a fixed default language for empower®:**
  Regardless of the user's Microsoft Office language, an administrator can specify a fixed default language through a global setting in empower®.
  This setting overrides the automatic language selection and applies to all users.
  Example: An administrator sets *English* as the global default language. Even if a user has Microsoft Office set to *German*, *English* will be selected as the default language.



For Administrators

To influence which language is used for the option *Default* in the language selection, empower® Administrators can set the default language in the empower® Admin Center.

To do so, navigate to the setting **Default Language Code** in the section *Configuration* within the empower® Admin Center.

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

Delete a Profile

To delete a profile, click on the **X** symbol next to the profile in the profile list (Figure 255).

A dialog box opens.

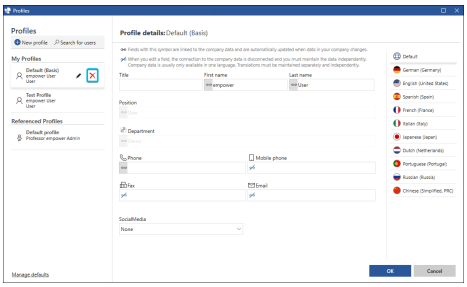


Figure 255. **Cross** Symbol to Delete a Profile

To confirm the deletion process, click on the button **Yes** (Figure 256).

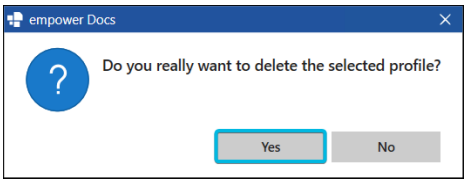


Figure 256. Button **Yes** to Confirm Deletion of a Profile

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.

2.12. Company Management

For Administrators

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

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

In Word, you can access the company management via the group Insert.

Here, click on the lower part of the split button **Fill in document** (Figure 257).

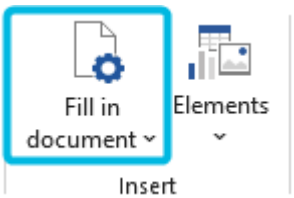


Figure 257. Split Button **Fill in document**

Choose the option **Companies** (Figure 258).
A dialog box opens.

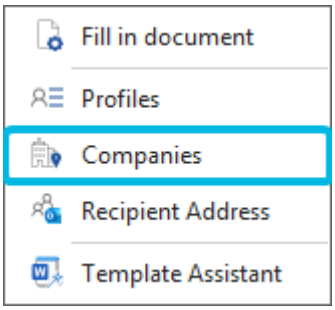


Figure 258. Option **Companies** in Word

In Outlook, you can access the option **Companies** by clicking on the lower part of the split button **Manage Signatures** (Figure 259).

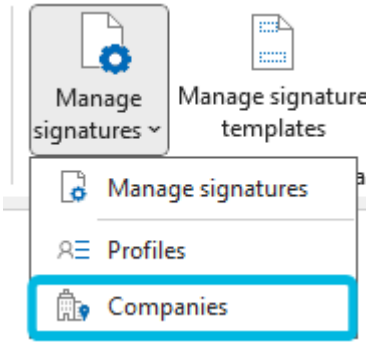


Figure 259. Option **Companies** in Outlook

If another user is currently working in the company management, a dialog box opens (Figure 260).

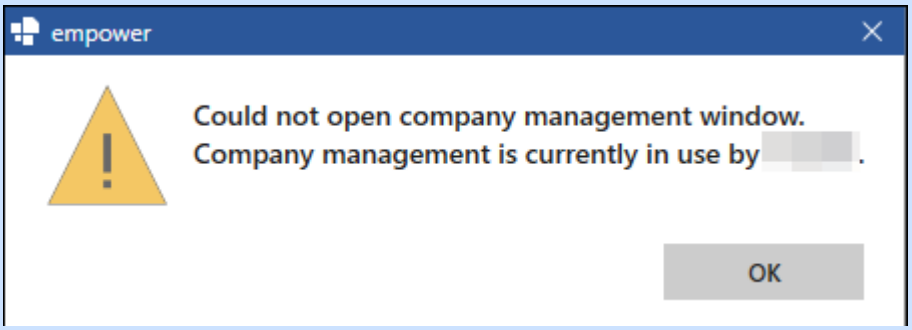


Figure 260. Dialog Box for Simultaneous Work

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 261).

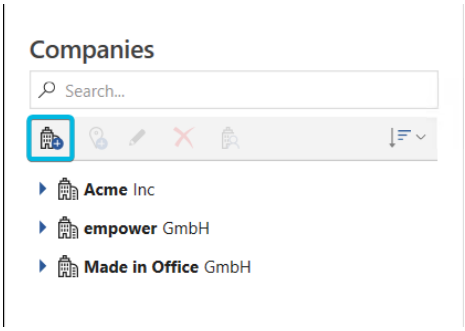


Figure 261. Button **Create Company**

2. Enter the display name for the company (Figure 262 **(1)**).
3. Select the legal entity type (Figure 262 **(2)**).
4. Click on the button **Apply** (Figure 262 **(3)**).
   On the right-hand side, the empty company fields appear.

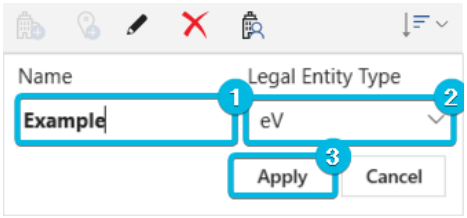


Figure 262. Add Company

5. To add a logo, click on the button **Select logo** (Figure 263 **(1)**).
6. Select the logo you want to use.
7. Then, fill in all company fields (Figure 263 **(2 + 3)**).
   The company fields vary depending on the legal entity type you have chosen.

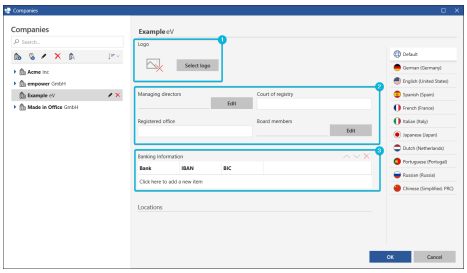


Figure 263. Company Fields

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 264).
   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**.
9. To enter the company's banking information, click into the field *Click here to add a new item* (Figure 263 **(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.

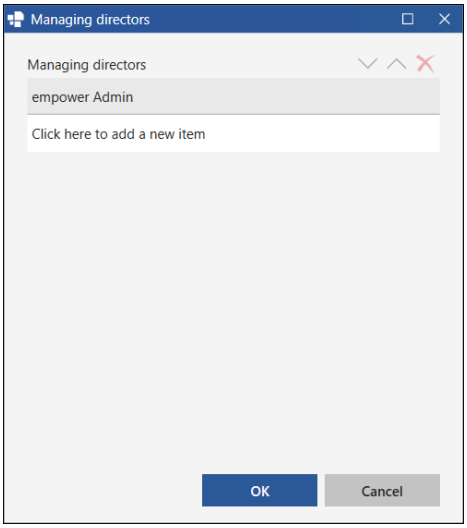


Figure 264. Add Values

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, no locations will be visible for the users and they cannot choose any 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 work with logos, see **Work with Logos in Templates**.
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 265**).
To save your changes, click on the button **Apply**.

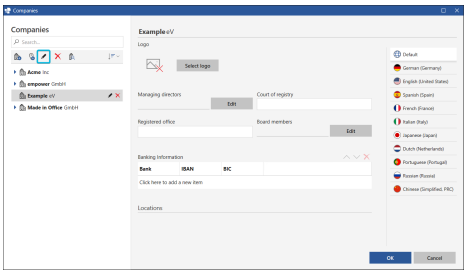


Figure 265. **Pen** Symbol for Company

If you change the legal entity type of a company, a dialog box opens (**Figure 266**).
To confirm the process, click on the button **Yes**.
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.

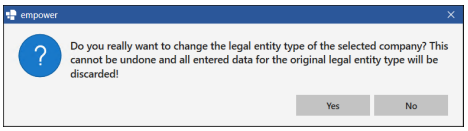


Figure 266. Dialog Box for Legal Entity Type Change

To delete a company, select it from the list and click on the **X** symbol (**Figure 267**).
A dialog box opens.

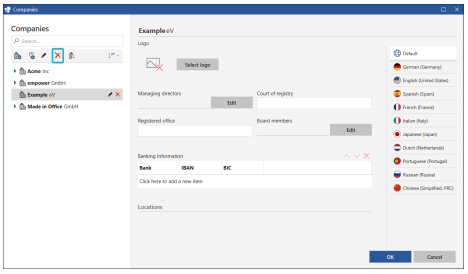


Figure 267. **Cross** Symbol for Company

To confirm the process, click on the button **Yes** (**Figure 268**).

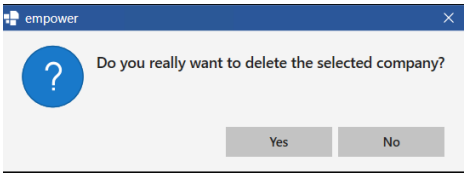


Figure 268. Dialog Box for Company Deletion

To edit the permissions for the company, click on the button **Edit permissions for selected company** (Figure 269).

A dialog box opens.

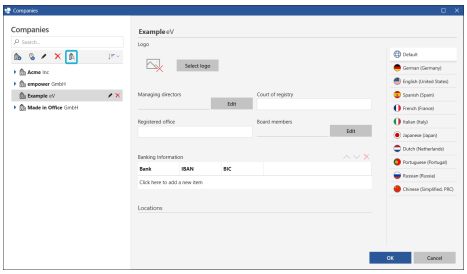


Figure 269. Button **Edit permissions for selected company**

In this dialog box, you can grant permissions to other users, remove permissions from users or change the permissions for users (Figure 270).

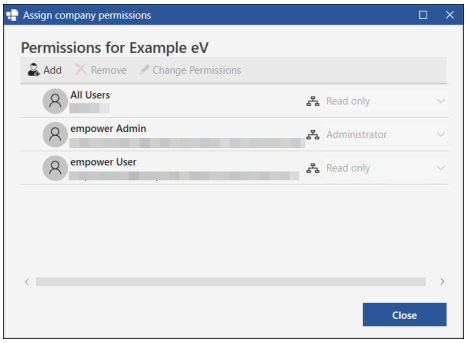


Figure 270. Permissions

If the **inheritance** symbol is displayed next to a user, this user has been granted permissions via the database (Figure 271). These permissions cannot be changed via the user interface.

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

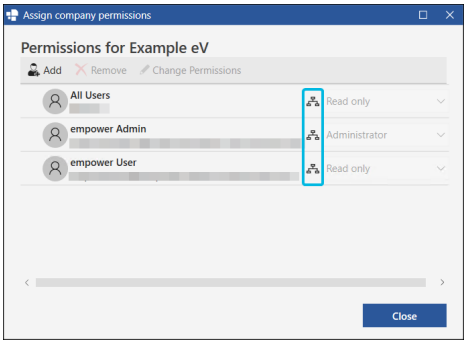


Figure 271. **Inheritance** Symbol

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

1. Click on the button **Add** (Figure 272).

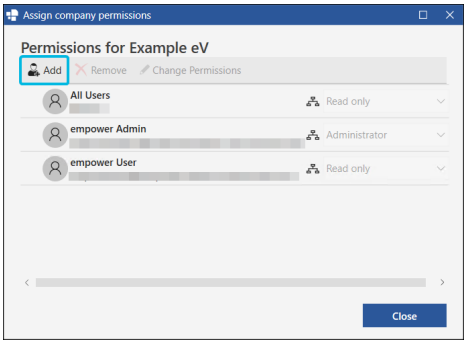


Figure 272. Button **Add**

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 273).
   The user will be added with the permission *Read only*.

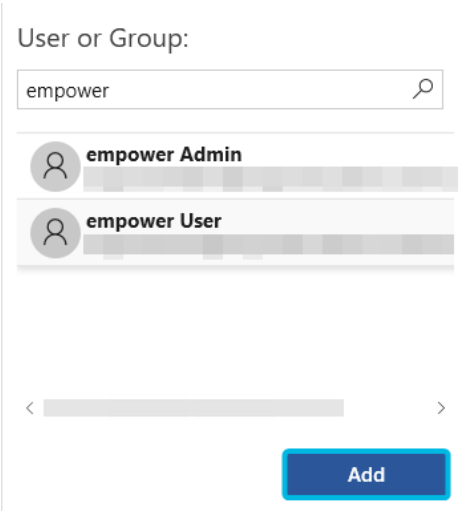


Figure 273. Add User

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 274).

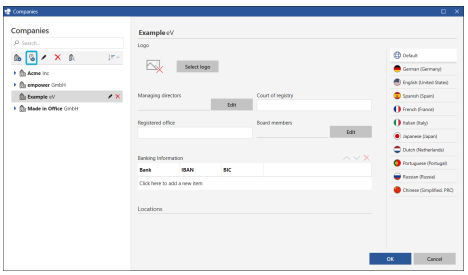


Figure 274. Button **Create location**

3. Enter the display name for the location (Figure 275 **(1)**).
4. Click on the button **Apply** (Figure 275 **(2)**).
   On the right-hand side, the empty location fields appear.

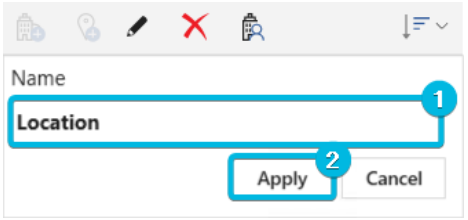


Figure 275. Add Location

5. To add a logo, click on the button **Select logo** (Figure 276 **(1)**).
6. Select the logo you want to use.
7. Then, fill in all location fields (Figure 276 **(2)**).
8. To save the new location, click on the button **OK**.

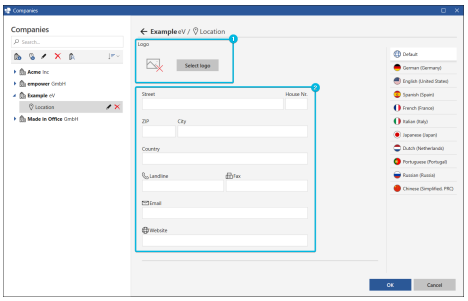


Figure 276. Location Fields

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 277).

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

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.

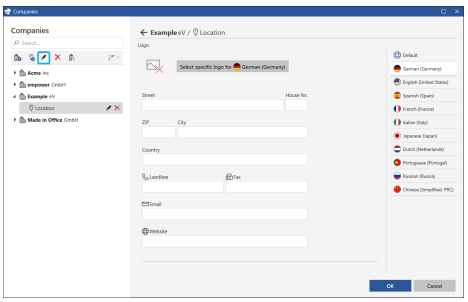


Figure 277. **Pen** Symbol for Location

To delete a location, select it from the list and click on the **X** symbol (**Figure 278**).
A dialog box opens.

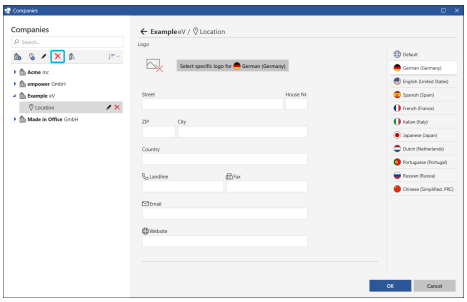


Figure 278. **Cross** Symbol for Location

To confirm the process, click on the button **Yes** (**Figure 279**).

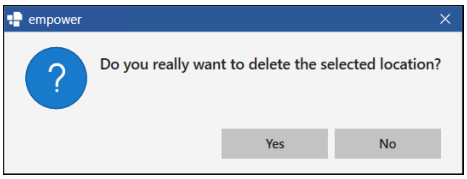


Figure 279. Dialog Box for Location Deletion

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 280**).

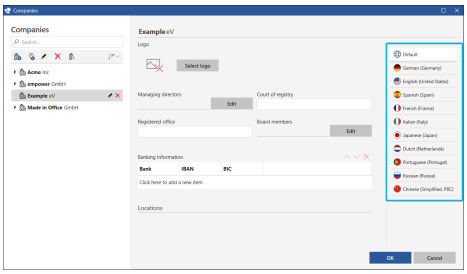


Figure 280. Languages

3. To add a logo, click on the button **Select specific logo for [language]** (**Figure 281**).
4. Select the logo you want to use.
5. Then, fill in all fields.
6. To save the translation, click on the button **OK**.

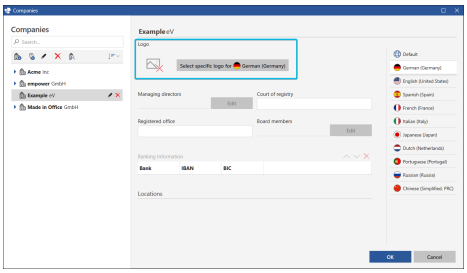


Figure 281. Logo for Translation

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.

Default Language Behavior

The selected default language affects the following elements of templates:

- **Logo selection:**
  The logo associated with the selected language is used.
- **Profile information:**
  The language-specific values stored in the selected user profile are inserted.
- **Location and company information:**
  The language-specific values stored for the selected location and the associated company information are inserted based on the selected default language.

If the user selects the option *Default*, there are three possible scenarios, depending on the user's settings and the configuration in empower®:

- **The Office language is supported by empower®:**
  If a user's Microsoft Office language is also configured in empower®, that language is automatically selected as the default language.
  Example: The user has Microsoft Office set to *English*, and *English* is also configured in empower®. *English* is automatically selected as the default language.
- **The Office language is not supported by empower®:**
  If a user's Microsoft Office language is not configured in empower®, it cannot be selected as the default language. In this case, empower® automatically uses the values and logos defined in the *Default* column during the initial configuration of empower®.
  Example: The user has Microsoft Office set to *Spanish*, but empower® is only configured for German and English. In this case, the values and logos stored in the *Default* column are used.
- **An administrator defines a fixed default language for empower®:**
  Regardless of the user's Microsoft Office language, an administrator can specify a fixed default language through a global setting in empower®.
  This setting overrides the automatic language selection and applies to all users.
  Example: An administrator sets *English* as the global default language. Even if a user has Microsoft Office set to *German*, *English* will be selected as the default language.

For Administrators

To influence which language is used for the option *Default* in the language selection, empower® Administrators can set the default language in the empower® Admin Center.

To do so, navigate to the setting **Default Language Code** in the section *Configuration* within the empower® Admin Center.

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

2.13. Access Document Properties

If you want to view the document properties in one of the Office applications, you can access the Office built-in feature via the empower® Ribbon.

To do so, navigate to the group Finalize and click on the button **Check** (Figure 282).



Figure 282. Button **Check**

In the drop-down menu, choose the option **View Document Properties...** (Figure 283).

A dialog box opens.

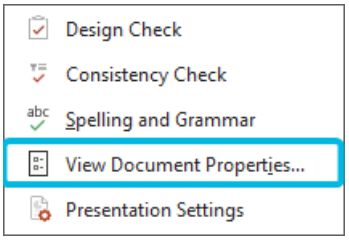


Figure 283. Option **View Document Properties...**

For further information regarding the Office built-in feature, see **Microsoft 365**.

All user interface terms in the instructions refer to the empower® User Interface for PowerPoint. In Word and Excel, the user interface might differ slightly.

3. PowerPoint

Make enterprise-wide unified PowerPoint content available in your corporate design (in short CD) – our PowerPoint add-in provides an intelligent slide management system, combined with corporate design tools and efficiency-enhancing features.

In the following chapter, you will learn more about our PowerPoint features and how to use them.

3.1. Create a New Presentation

You can create new presentations either by opening a new PowerPoint window or via the empower® Ribbon.

If you open a new PowerPoint window, your personal default master or the company default master is inserted automatically.

If no default has been defined, a blank PowerPoint master opens.

To create a new presentation from the empower® Ribbon, navigate to the group Start and click on the button **New** (**Figure 284**).



Figure 284. Button **New**

The empower® Library opens in the section *Master Templates* (**Figure 285**).

Here, choose your preferred master template.

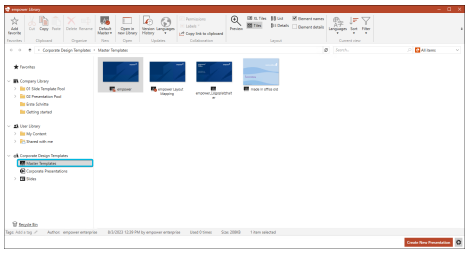


Figure 285. Master Templates

Then, click on the button **Create New Presentation** (**Figure 286**).

The new presentation opens in a new window and will be created based on the selected master template.

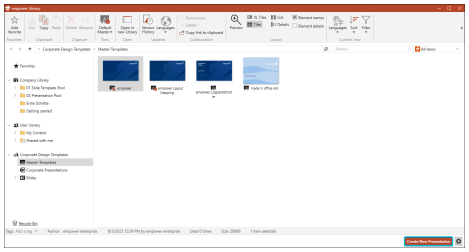


Figure 286. Button **Create New Presentation**

For further information regarding the default masters, see **Use Master Templates**.

Design Your Presentation

If you have opened a presentation, you can design this presentation individually using the empower® Features. You can make the following changes to design your presentation according to your needs:

1. Create new slides using corporate design compliant elements such as images, charts or tables.
2. Insert slide templates or ready-to-use slides from the empower® Library.
3. Format your content.
4. Adjust the layout of your slides.
5. Check your slides for corporate design compliance and consistency.

For further information regarding the use of these features, refer to the respective chapters.

3.2. Use Master Templates

Depending on the presets that have been defined by your empower® Administrators, the following scenarios can happen when you open a new PowerPoint window:

- A blank PowerPoint master opens.
- The empower® Default Master opens.
- The section *Master Templates* in the empower® Library opens.



For further information regarding the creation of a new presentation from the empower® Ribbon, see **Create a New Presentation**.

For further information regarding the creation of a new presentation directly from the empower® Library, see **Create New Content in Library**.

Define Default Master

There are two types of default masters:

- Company default master
- Personal default master

The company default master is set by your empower® Administrators to avoid selecting a master template each time you open PowerPoint.

If a company default has been set, the master will automatically be inserted into your new presentation and you will not be asked to select a master template.

If a master has been defined as company default, the label *Company's Default* is displayed in its thumbnail (Figure 287).
In addition, the icon next to the file name changes.
In addition, you can set your personal default master via the user interface.



Figure 287. Label for Company Default

To do so, follow the following steps:

1. Open the empower® Library.
2. In the section *Corporate Design Templates*, navigate to the subsection *Master Templates* (Figure 288).
3. Right-click on the master template you want to define as your default.
   A context menu opens.

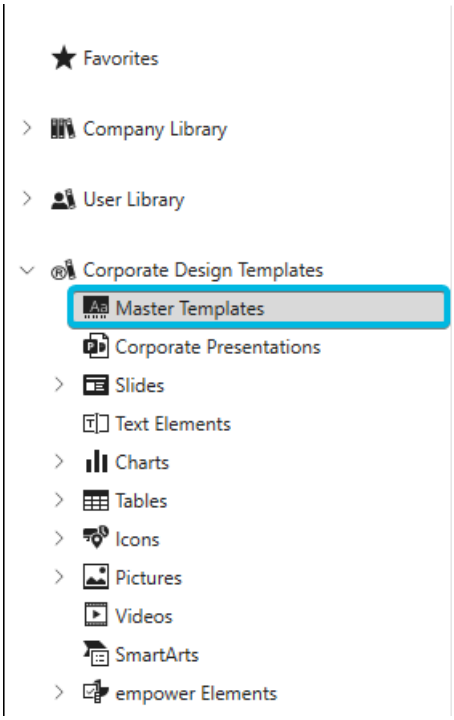


Figure 288. Section *Master Templates*

4. In the context menu, click on the option **Set as Default Master** (Figure 289).

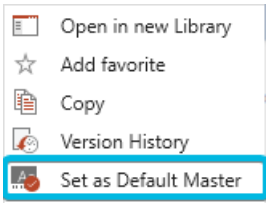


Figure 289. Option **Set as Default Master**

If you have defined a master template as your personal default, the label *Default Master* is displayed in its thumbnail (Figure 290).
In addition, the icon next to the file name changes.
If you now open a new PowerPoint window, your personal default master will automatically be inserted into your new presentation.

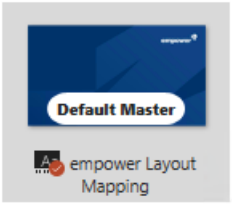


Figure 290. Label for Personal Default

To reset your changes and use the company default again, follow the following steps:

1. Open the empower® Library.
2. In the section *Corporate Design Templates*, navigate to the subsection *Master Templates*.
3. Right-click on the company default master template.
   A context menu opens.

4. In the context menu, click on the option **Set as Default Master**.

Alternatively, you can access the option **Set as Default Master** in the navigation bar via the group New.

empower® always uses the template that was last set as the default template for you. If your empower® Administrators set a master template as the company default and you then select your own default master, your own default master will be used.

Set Company Default

For Administrators

If you have been granted admin permissions, you can set a company default master template that will be used for the whole company.

To do so, follow the following steps:

1. Open the empower® Library.
2. In the section *Corporate Design Templates*, navigate to the subsection *Master Templates*.
3. Right-click on the master template you want to define as the company default.
   A context menu opens.
4. In the context menu, click on the option **Set as Company's Default Master** (Figure 291).

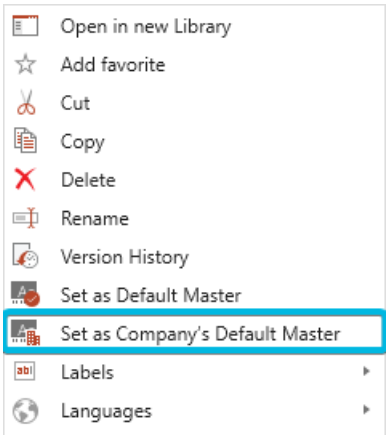


Figure 291. Option **Set as Company's Default Master**

If you set a company master, make sure all users have permissions to access the master template.

If a user does not have permissions for the default company master, a blank presentation based on a default PowerPoint template opens when they start PowerPoint.

If you set the company default, your changes take effect for all users after the next synchronization and after a restart of PowerPoint.

Alternatively, you can access the option **Set as Company's Default Master** in the navigation bar via the group New.

Change Master

If you want to change the master that is used for the current slide or for the whole presentation you are working on, follow the following steps:

1. Select the slides whose master you want to change.
   If you want to change the master for the whole presentation, skip this step.
2. Open the empower® Library.
3. In the section *Corporate Design Templates*, navigate to the subsection *Master Templates*.
4. Select the master template you want to apply.
5. Choose your preferred option:
   a. To apply the new master to the whole presentation, click on the button **Presentation** (**Figure 292 (1)**).
   b. To apply the master to the selected slides, click on the button **Slide(s)** (**Figure 292 (2)**).



Figure 292. Buttons **Presentation** and **Slide(s)**

Master Settings

To open the master settings, select the master template you want to use and click on the **gear** symbol (**Figure 293**).



Figure 293. **Gear** Symbol

Here, you can decide if you want to keep the current slide transitions.
To do so, tick the checkbox for **Apply slide transitions** (**Figure 294**).

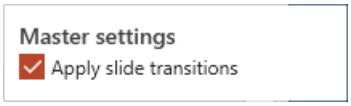


Figure 294. Master Settings

3.3. Upload a Master Template

For Administrators

If you have created a new master template, you can upload this master template to the empower® Library.
While doing so, you can also make further settings for the master template.

Master templates can only be uploaded by empower® Administrators.

During the upload, you can also assign the master template to one of your designs.

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

Save a Master Template

To upload the master template, you need to save it to the library.

To do so, follow the following steps:

1. Make sure to leave the slide master view.
2. Navigate to the group Home in the empower® Ribbon.
3. Click on the lower part of the split button **Library**.
4. Choose the option **Save** (**Figure 295**).

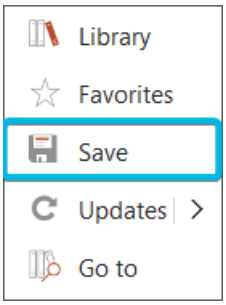


Figure 295. Option **Save**

5. Choose the option **Master** (**Figure 296 (1)**).
6. Then, click on the button **Save as** (**Figure 296 (2)**).
   The empower® Library opens in the section *Master Templates*.
7. Click on the button **Save** to save the master template.

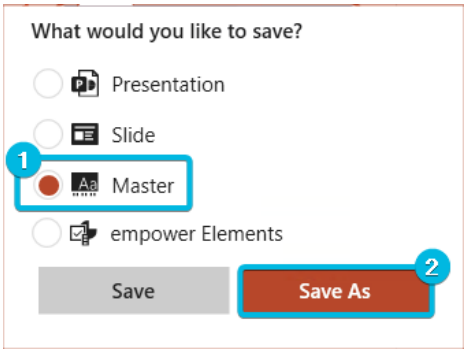


Figure 296. Save Master Template

After you click on the button **Save**, the dialog box **Master Information** opens (Figure 297). Here, you can make further settings for the master template.

Choose which layout in the new master should be chosen automatically during slide conversion if no suitable layout is found for a slide in the old master (Figure 297 **(1)**).

Switch the toggle buttons to *On* to determine whether a footer should be displayed and, if so, whether a date and page number should be included in the footer (Figure 297 **(2)**).

Switch the toggle button **Skip Blank Layout** to *On* for empty layouts to be skipped upon mapping during conversion (Figure 297 **(3)**). Instead of mapping these layouts to the most similar one in the new master, the standard fallback layout defined in **(1)** will be used during the slide conversion.

Switch the toggle button **Layout Protection** to *On* to have the *Design Check* display all elements as errors that are on a slide outside of the drawing area (Figure 297 **(4)**).

It is required that areas for layout protection have been defined in the master for this to work.

Switch the toggle button **Embed Fonts** to *On* to embed and register the fonts used in the new master (Figure 297 **(5)**).

Switch the toggle button **Color Scheme Matching** to *On*, to have the design colors matched so that the color of elements does not change, or changes only slightly, if the colors have a different order in the new master (Figure 297 **(6)**).

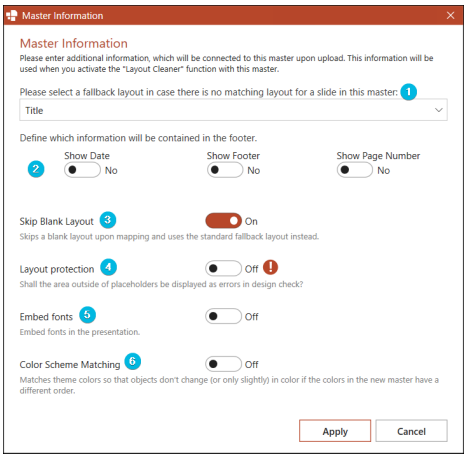


Figure 297. Dialog Box **Master Information**

If empower® Template Management is installed without empower® Slide Generation, the options **Skip Blank Layout** and **Color Scheme Matching** are not taken into consideration because the conversion feature is not available.

Once you have checked all settings, follow the following steps to finish the upload of the master template:

1. In the window **Master Information**, click on the button **Apply**.
   The dialog box **Assign to design** opens (Figure 298).
2. Use either of the following two options:
   a. Click on the **arrow down** symbol to expand the drop-down menu and choose the design you want to assign the master to (Figure 298 **(1)**).
   b. Click on the **plus** symbol to create a new design from scratch.
      Type in the design name in the input field *Design name* (Figure 299 **(1)**) and switch the toggle buttons to *On* to use the defined color scheme, used font and font sizes in the master template (Figure 299 **(2)**).
      Click on the button **OK** to confirm your settings (Figure 299 **(3)**) and choose the newly added design from the drop-down menu to assign the master to it.
3. Click on the button **Assign** (Figure 298 **(2)**).

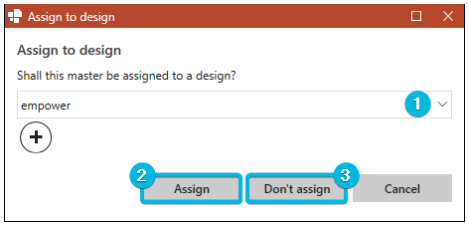


Figure 298. Dialog Box **Assign to Design**

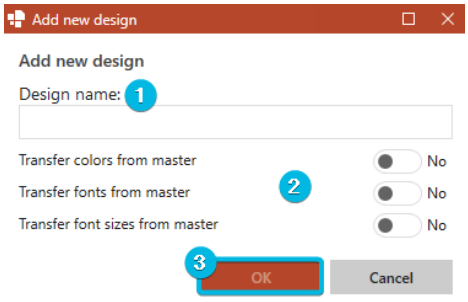


Figure 299. Dialog Box **Add New Design**

If you do not want to assign the master to a design, skip steps 2 and 3 and click on the button **Don't assign** (Figure 298 **(3)**).

The master template is saved to the library.

If you use Microsoft Purview Information Protection in your company, the master template must be uploaded with a label similar to *Public*.

Otherwise, users will not be able to use the master template.

Make sure to upload the master template in .pptx format.

Master templates in .pptm format containing macros should not be uploaded.

Overwrite a Master Template

If you have adjusted an existing master template, you can overwrite this master template in the empower® Library and distribute an update.

To do so, follow the following steps:

1. Make sure to leave the slide master view.
2. Navigate to the group Home in the empower® Ribbon.
3. Click on the lower part of the split button **Library**.
4. Choose the option **Save** (Figure 295).

5. Choose the option **Master**.
6. Then, click on the button **Save as**.
   The empower® Library opens in the section *Master Templates*.
7. Select the master template you would like to overwrite with your new version of the master template.
   Switch the toggle button **Updates** to *On* to distribute an update for the master template (**Figure 300**).
8. Click on the button **Save** to save the master template.

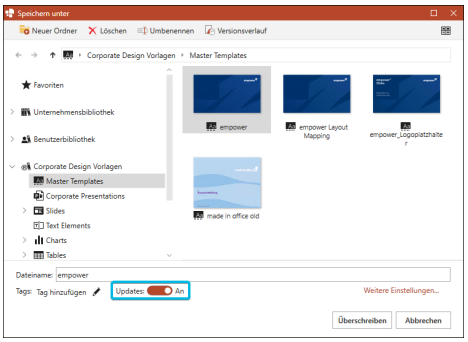


Figure 300. Updates Enabled

After you click on the button **Save**, the dialog box **Master Information** opens with the settings previously selected for this master template (**Figure 297**). Check the settings and adjust them, if required.

The settings **Color Scheme Matching** and **Embed Fonts** are disabled by default. Therefore, the previous settings are not maintained.

If you want to enable these settings while overwriting the master template, actively switch the toggle buttons to *On*.

Once you have checked all settings, follow the following steps to finish the upload of the master template:

1. Click on the button **Apply**.
   The window **Assign to design** opens (**Figure 298**).
2. Use either of the following two options:
   a. Click on the **arrow down** symbol to expand the drop-down menu and choose the design you want to assign the master to (**Figure 298 (1)**).
   b. Click on the **plus** symbol to create a new design from scratch.
      Type in the design name in the input field *Design name* (**Figure 299 (1)**) and switch the toggle buttons to *On* to use the defined color scheme, used font and font sizes in the master template (**Figure 299 (2)**).
      Click on the button **OK** to confirm your settings (**Figure 299 (3)**) and choose the newly added design from the drop-down menu to assign the master to it.
3. Click on the button **Assign** (**Figure 298 (2)**).

If you decide to distribute a master template update, all users who used this master template to create a presentation will receive a *Design Check* error with the category *Master*. This indicates that the slides or presentation have to be converted to the updated master template via the feature *Convert*.

For further information regarding the empower® Design Check, see **empower® Corporate Design Check**.

3.3.1. Layout Protection

For Administrators

The layout protection can be used to ensure that users only use the provided placeholders to insert elements on a slide layout.

On blank layouts or title-only layouts, it can be used to define a working area that the users may use to place elements on the slide.

If the layout protection is enabled, the empower® Corporate Design Check checks if there are any elements on the slide which are located outside of the provided placeholders.

If this is the case, an error entry will be included in the check results.

The layout protection can be enabled globally during the master upload.

In addition, individual layouts can be edited to fulfill your requirements.



For further information regarding the empower® Corporate Design Check, see **empower® Corporate Design Check**.

Enable Layout Protection

The layout protection can be enabled upon the master upload.

If you want to enable layout protection for a new master, follow the instruction to save master templates under **Save a Master Template**.

If you want to enable layout protection for an existing master, follow the instructions to overwrite a master template under **Overwrite a Master Template**.

When you save or overwrite a master template, a dialog box opens.

In this dialog box, switch the toggle button for **Layout Protection** to *On* (**Figure 301**).

Then, click on the button **Apply**.

Follow the process to assign the master to a design and finish the upload.

Layout protection is now enabled for the respective master template.

If a user places elements outside of placeholders, the *Corporate Design Check* will show error entries for these elements.

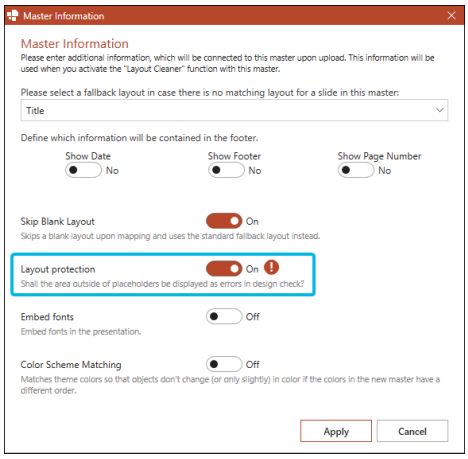


Figure 301. Enable Layout Protection for Master

The empower® Corporate Design Check does only check for layout protection violations if the respective option has been enabled in the empower® Customizing Center. The settings must be set for the design that the master template is assigned to during the upload.

For further information regarding the access to the empower® Customizing Center, see **empower® Help**.

For further information regarding the *Corporate Design Check* settings in the empower® Customizing Center, refer to our **empower® Admin Center manual**.

Adjust Individual Slide Layouts for Layout Protection

Most master templates include *Blank* or *Title Only* layouts.

On these layouts, there are either no placeholders or only title placeholders.

As a consequence, any elements placed on these layouts that are not placed inside the title placeholder would trigger an error entry in the *Corporate Design Check*.

To avoid superfluous error entries and to not restrict the creative freedom that these layouts are supposed to provide, you can edit these slide layouts before uploading the master template.

To do so, follow the following steps:

1. Open the master template.
2. Navigate to the tab View.
3. Click on the button **Slide Master** (Figure 302).

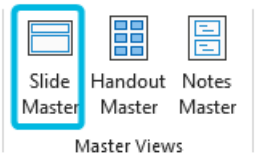


Figure 302. Button **Slide Master**

4. In the slide master view, navigate to the slide layout you want to edit and select it.
5. Now, insert a shape into this slide layout.
   In most cases, a rectangle is the most suitable option.
6. Adjust the shape to the area in which you want to allow users to insert elements.
7. Right-click on this shape.
   A context menu opens.
8. In this context menu, choose the option **Enable Layout Protection** (Figure 303).
   The shape now defines the working area of the slide layout in which elements can be placed without triggering error entries.

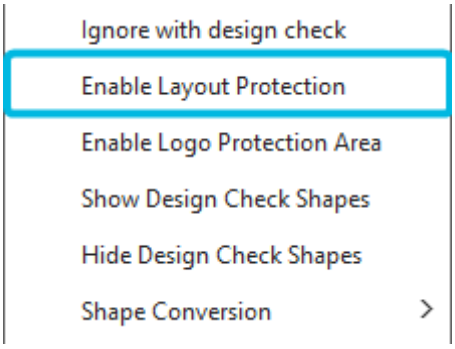


Figure 303. Option **Enable Layout Protection**

9. Then, press **Alt** + **F10** to open the selection pane for your current slide.
10. Here, select the shape you have added and rename it to *Layout Protection* (Figure 304).
    This will help you to find shapes that you have defined for the layout protection if further changes are required.

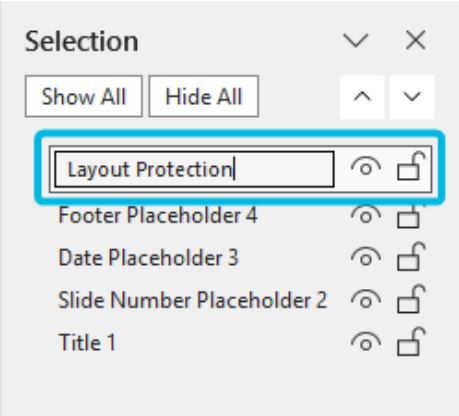


Figure 304. Selection Pane with Layout Protection Shape

11. To hide the shape for users, right-click on the shape again.
    A context menu opens.
12. Choose the option **Hide Design Check Shapes** (Figure 305).
13. Now, leave the slide master view and save the master template back to the empower® Library.
    Make sure to enable the layout protection when uploading the master template and make sure all required settings in the empower® Admin Center are set accordingly.

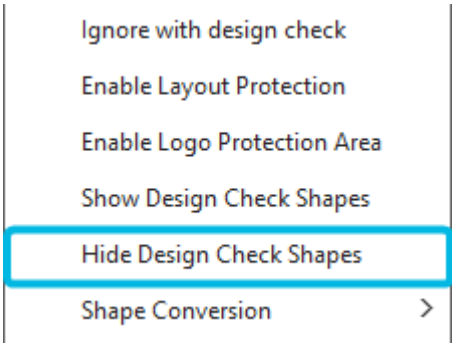


Figure 305. Option **Hide Design Check Shapes**

If you want to edit the layout protection shape, you can make it visible again.

To do so, right-click on the slide in the slide pane.

A context menu opens.

Here, choose the option **Show Design Check Shapes** (Figure 306).

All shapes that you have hidden via the option **Hide Design Check Shapes** are now displayed on the slide again.

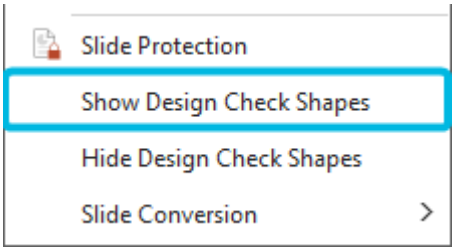


Figure 306. Option **Show Design Check Shapes**

If a shape has been set up for layout protection, a **checkmark** symbol is displayed next to the option in the context menu.

Alternatively, you can use the **eye** symbol in the selection pane to hide and show single shapes or placeholders.

For further information regarding the master upload, see Upload a Master Template.

3.4. Incorporate Multiple Logos

For Administrators

The logo feature of empower® allows you to insert and even change a logo in a fixed location on the master. This way, you can, for example, work with a single master for the whole company, even though you have multiple subsidiaries using different logos in their presentations.

To enable the logo feature, the following requirements must be met:

- **Folder *Logos*** – All desired logos have to be saved in a dedicated *Logos* folder placed in the section *Corporate Design Templates – Pictures* of the empower® Library. If required, the folder can be added to a design folder.
  The folder has to be specifically mapped on the database.
- **Logo graphics** – Are saved to the folder *Logos* and named in accordance with a specific naming pattern.
- **Logo placeholder** – Is defined in the master template.

One *Logos* folder can be defined on a database for the logo feature.

It is not possible to add content to any subfolder in the *Logos* folder since it will not be taken into account via the logo feature.

If your empower® Environment is hosted in the empower® Cloud, the mapping on the database for the folder *Logos* will be performed by empower® Support.

If your empower® Environment is hosted in your own Corporate Cloud or on-premises, reach out to your IT department.

If you have questions regarding this setup, contact your Onboarding Specialist or Customer Success Manager.

Once the mapping of this folder on the database has been set up, renaming this folder via the empower® Library does not affect the functionality of the logo feature.

For further information regarding the presentation settings, see **Use Presentation Settings**.

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

For further information regarding logo protection, see **Logo Protection**.

Set up Logo Placeholders in Master Template

In the master template, you can either set up one logo placeholder on the primary slide to define that the same logo should be used on all layout slides, or you can set up logo placeholders on each layout slide that should contain a logo and therewith define which logo variant should be used on which layout slide.

To set up the logo placeholder in the master template, follow the following steps:

1. Navigate to the tab View and click on the button **Slide Master**.
2. Add any shape, most preferably a rectangle, onto the primary slide.
3. Select the inserted shape and navigate to the group Presentation Settings in the tab Slide Master (**Figure 307**).

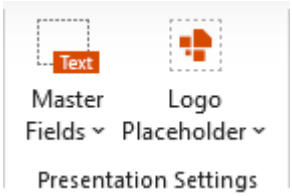


Figure 307. Group *Presentation Settings*

4. Click on the button **Logo Placeholder** to expand the drop-down menu and choose the option **Define logo** (**Figure 308**).
   To confirm the shape as a logo placeholder, a message box appears and confirms the change (**Figure 309**).
   The shape is now defined as a logo placeholder and the master is set up for the logo feature.



Figure 308. Option **Define logo**

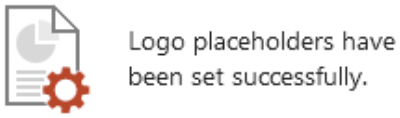


Figure 309. Message Box Successful Setup of Logo Placeholder

5. Navigate to the selection pane by pressing the keys **Alt** + **F10** and check if the logo placeholder has been renamed correctly (Figure 310).
   The placeholder should now be named **MIO_LOGOPLACEHOLDER#**.
6. If you only have one main logo without variants and this logo should be visible on all layout slides, skip step 7 and continue with step 8.
   If you only have one main logo but this logo should only be visible on specific layout slides, repeat steps 2 to 5 for each layout slide and then continue with step 8.
   If you have variants of a logo, e.g. because your main logo is dark and you have a light variant for dark slide backgrounds, continue with step 7.
7. For each layout slide of the current master template that should use a specific logo variant instead of the main logo, follow steps 2 to 5.
   a. Then, rename the placeholder.
      To do so, add the variant name after the #, e.g. use **MIO_LOGOPLACEHOLDER#white**.
      The part from # onwards should be reflected in the logo variant's file name, so the variant can be mapped to the correct slide layouts.
      For further information, see **Upload and Name Logos**.
   b. If at least one layout slide under the primary slide has been configured to use a logo variant, set up the logo placeholder on all layout slides that should contain a logo.
      Otherwise, layout slides without logo placeholders will not have logos.
8. Click on the button **Hide logo** to hide the shape on the layout slides (Figure 311).
   The **eye** symbol for this shape is struck through now in the selection pane.
   Click on the button **Show logo** to reveal the shape at any time.
9. Save the master template to the library.
   For further information regarding the master upload, see **Upload a Master Template**.

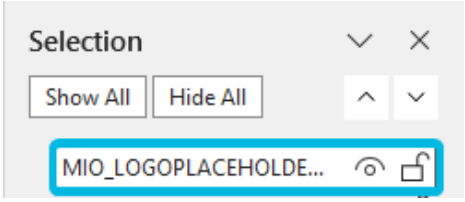


Figure 310. Shape in Selection Pane

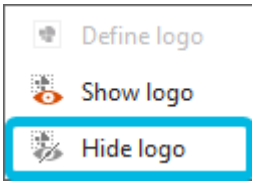


Figure 311. Option **Hide logo**

The position of the logo on a slide is **not** defined by the position of the logo placeholder in the master template.

The position is defined by the logo's position during the upload to the logo folder in the empower® Library.

For further information, see **Upload and Name Logos**.

Insert Logos as Placeholders

If the logo placeholder is set up as described above, the logo is displayed as a fixed part of the slide.

It can therefore not be edited or moved by the user.

However, this also means that the logo can be overlapped or hidden by other elements on the slide.

If you want to prevent the logo from being overlapped or hidden by other elements, you can define that the logo should be inserted as a placeholder instead of a fixed graphic on the slide layout.

To do so, change the name of the logo placeholder in the master template to match the following pattern:

MIO_LOGOPLACEHOLDER#USE_PLACEHOLDER#[VARIANT NAME]

Logos will then be inserted as editable and movable placeholders.

> If the logo placeholder is set up using the extension **#USE_PLACEHOLDER**, the logo will be scaled. This may cause the logo to be distorted.
>
> Therefore, this extension should only be used if it is strictly required.

Upload and Name Logos

The logo graphics must be uploaded to the empower® Library and named according to a specific pattern.

You can upload main logos and variants of logos, e.g. by adding a dark logo as the default and a white logo as a fallback for slides with a dark background.

When uploading the logo files, make sure the following is taken into account:

- The logo must be placed at the position in which it should be inserted on the slide.
  The position will be the same across all master template layouts.
- When naming a logo in the empower® Library, the main logo can be named as you wish, e.g. *empower* (Figure 312 **(1)**).
  - If you add a variant of this logo, add **#[VARIANT NAME]** to the main logo name, e.g. *empower#white* (Figure 312 **(2)**).
    The variant name after # must be reflected in the logo placeholder name in the master template.
  - You can add multiple different main logos, e.g. individual ones for each company unit. For each main logo, you can add multiple logo variants.



Figure 312. Main Logos (1) and Logo Variants (2) in Library

If you have added a main logo with different variants to the logo folder, only the main logo is displayed in the logo selection of the *Presentation Settings* (**Figure 313**).

If a user chooses the main logo, the logo variants are used for slides which have been set up accordingly in the master template.

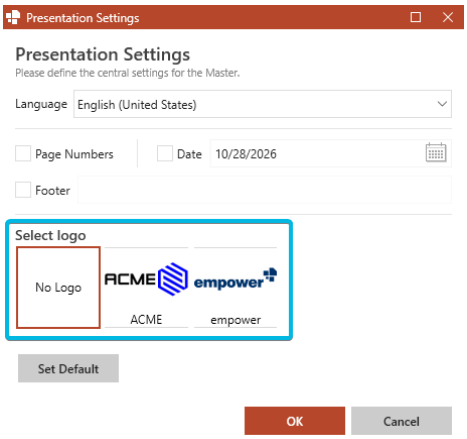


Figure 313. Main Logos in *Presentation Settings*

3.4.1. Logo Protection

For Administrators

If you have set up logo placeholders or fixed logo graphics on a master template, you might want to make sure that users do not place other elements above the logo.

To make sure users do not do that, you can set up the logo protection.

If logo protection is enabled for the logo, the empower® Corporate Design Check checks if there are any elements on the slide which are overlapping with the logo.

If this is the case, an error entry will be included in the check results.

The logo protection needs to be enabled in the slide master view.

The empower® Corporate Design Check does only check for logo protection violations if the respective option has been enabled in the empower® Customizing Center. The settings must be set for the design that the master template is assigned to during the upload.

For further information regarding the access to the empower® Customizing Center, see **empower® Help**.

For further information regarding the *Corporate Design Check* settings in the empower® Customizing Center, refer to our **empower® Admin Center manual**.

Enable Logo Protection

To set up the logo protection, follow the following steps:

1. Open the master template.
2. Navigate to the tab View.
3. Click on the button **Slide Master** (Figure 314).

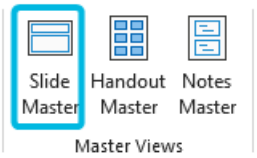


Figure 314. Button **Slide Master**

4. In the slide master view, navigate to the slide that contains the logo placeholder or logo graphic.
   a. If a logo placeholder has been used during the setup, press **Alt + F10** to view the selection pane.
   b. If the placeholder has been hidden, click on the **eye** symbol next to the logo placeholder to show the placeholder on the slide (Figure 315).

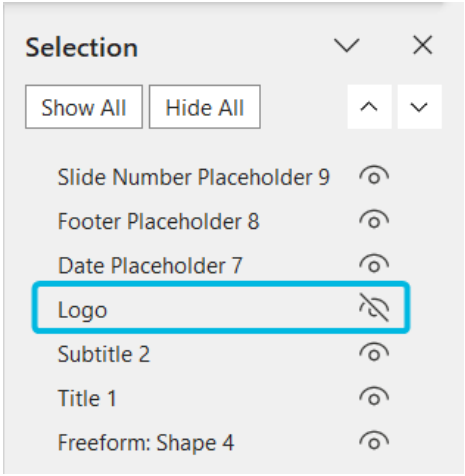


Figure 315. Logo in Selection Pane

5. Right-click on the logo placeholder or on the logo graphic.
   A context menu opens.
6. Here, choose the option **Enable Logo Protection Area** (Figure 316).
   The placeholder or graphic now defines the area in which no other elements must be placed.
   If users use elements that overlap with the logo, an error entry is triggered in the *Corporate Design Check*.
7. To hide the placeholder again, click on the **eye** symbol in the selection pane again.
8. If you have set up your master with multiple logo placeholders or multiple logo graphics, repeat steps 4 to 7 for all logo placeholders or graphics in the master that you want to protect.
9. Now, leave the slide master view and save the master template back to the empower® Library.
   Make sure all required settings in the empower® Admin Center are set accordingly.

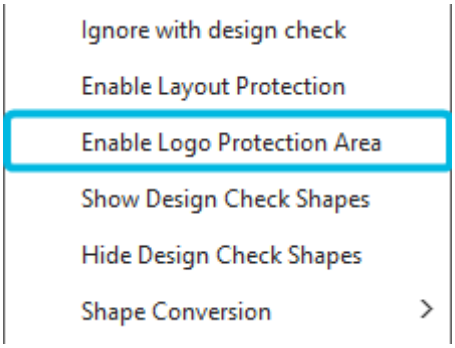


Figure 316. Option **Enable Logo Protection Area**

If you have decided to display the logo on all slide layouts, you have probably only set up one logo placeholder on the primary slide of the master template. This placeholder is then used for all other slide layouts.

If you have decided to display the logo only on specific slides, multiple logo placeholders have been set up on individual slide layouts. If required, make sure to enable logo protection for all logo placeholders.

For further information regarding the setup of logo placeholders, see **Incorporate Multiple Logos**.

The name of the logo placeholder or graphic displayed in the selection pane depends on the master's setup.

If a placeholder has been set up for logo protection, a **checkmark** symbol is displayed next to the option in the context menu.

For further information regarding the master upload, see **Upload a Master Template**.

3.5. Use Presentation Settings

Before you start adding content to your presentation, you can make global settings for the presentation.

If your empower® Administrators have made it mandatory to fill in the fields in the *Presentation Settings*, the dialog box opens automatically when you open a new presentation.

In the *Presentation Settings*, you can set your preferences for the following aspects (**Figure 317**):

- Language
- Slide numbers
- Date
- Footer text
- Master fields
  - Confidentiality
  - Label
  - Watermark
- Logo

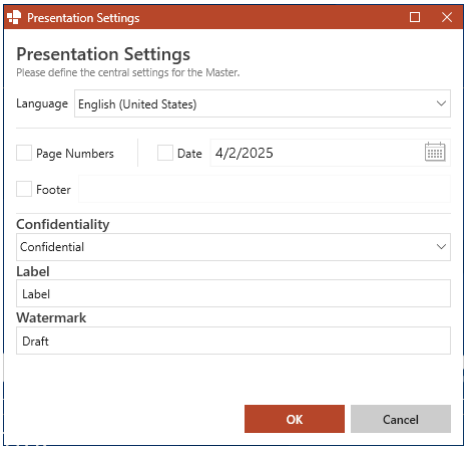


Figure 317. Presentation Settings

If you apply the *Presentation Settings* to a presentation, the values are saved in the background and can be applied to your next presentation.

The values are not applied automatically to the next presentation but are automatically prefilled in the dialog box.

Depending on the setup of your empower® Environment, the number of available settings might vary.

If you want to change the fields or if they have not been made mandatory, you can access them manually.

To access the *Presentation Settings*, navigate to the group Finalize and click on the button **Check** (Figure 318).



Figure 318. Button **Check**

In the drop-down menu, click on the button **Presentation Settings** (Figure 319).

A dialog box opens.

Under *Language*, you can set a global language for the presentation.

To do so, open the drop-down menu and choose your preferred language.

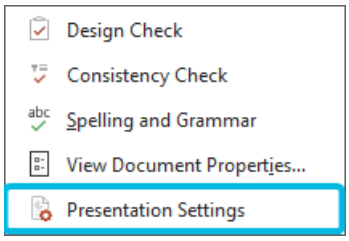


Figure 319. Option **Presentation Settings**

To add slide numbers to the footer on each slide, tick the checkbox for **Page Numbers**.

Slide numbers will be added to all slides they have been configured for (Figure 320).



Figure 320. Slide Number (Example)

To add a date to the footer on each slide, tick the checkbox next to **Date**.

Then, click into the input field.

A menu opens.

If you want to always display the current date, choose the option **Update automatically** (Figure 321).

Then, open the drop-down menu under *Format* to choose a date format.

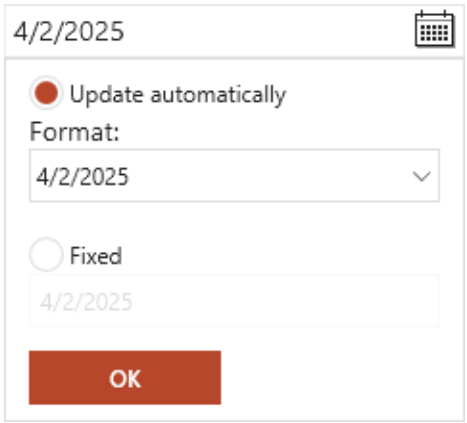


Figure 321. Update Date Automatically

If you want to display a fixed date in a custom format, choose the option **Fixed** and type in the date (Figure 322).

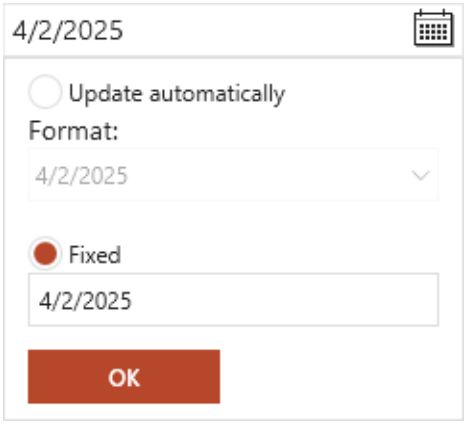


Figure 322. Fixed Date

The date will be added to your slide (Figure 323).



Figure 323. Date (Example)

Depending on the setup of the master template in use, slide numbers might not be placed on certain slides on purpose.

If the settings do not meet your requirements, contact your empower® Administrators.

If you want to add custom text to the presentation footer, tick the checkbox for **Footer**.

Then, enter your text in the input field.

The text will be displayed in the footer of your slides (Figure 324).



Figure 324. Footer (Example)

If your empower® Administrators have added custom master fields to the master template in use, the master fields are displayed to be filled in in the *Presentation Settings*.

The position of the master fields depends on the setup that has been done by your empower® Administrators.

Depending on how the master field has been set up, you can either enter your own text, choose from a predefined set of texts or enable and disable the master field via a checkbox.

For example, master fields are often used to insert a confidentiality label into your slides (**Figure 325**).



Figure 325. Confidentiality Master Field (Example)

They can also be used to insert a label (**Figure 326**).



Figure 326. Label Master Field (Example)

A watermark can also be configured as a master field (**Figure 327**).



Figure 327. Watermark Master Field (Example)

If you want to switch to a different logo to be displayed, select it from the available options (**Figure 328**).

You can also choose not to display any logo.

To make a logo the default logo to be used, select the logo and click on the button **Set Default**.

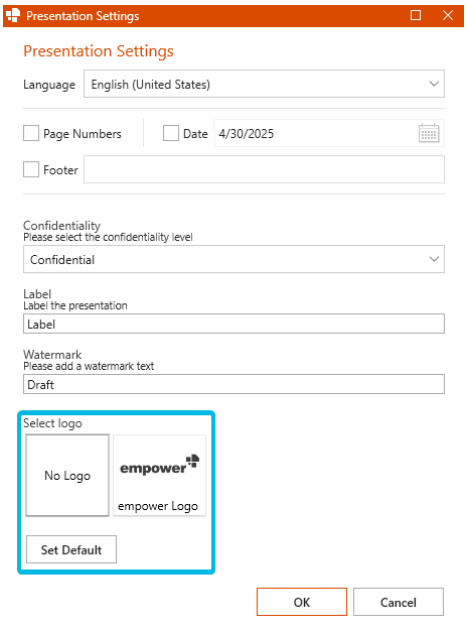


Figure 328. Logo Options

For you to be able to switch between different logos, your empower® Administrators must have added multiple logos to choose from in your empower® Environment.
If this is not the case, you cannot switch between logos.
For further information for administrators, see **Incorporate Multiple Logos**.

To confirm all settings, click on the button **OK**.
All changes will be applied to the presentation and a footer will be added.

If you want to make changes to the footer, always use the *Presentation Settings*.
Changing the footer manually may lead to formatting issues.

3.5.1. Set up Master Fields

For Administrators

As an empower® Administrator, you can set up different master fields for your master templates.
These master fields are then filled in via the presentation settings by the user when they use the respective master.

For further information regarding the *Presentation Settings*, see **Use Presentation Settings**.
For further information regarding the setup of logo placeholders, see **Incorporate Multiple Logos**.

You can define three different types of master fields:

- **Text Master Fields** – Users can type in any text to be inserted into the master field via the *Presentation Settings*.
- **Options Master Fields** – Users can choose from a drop-down menu which text is to be inserted into the master field via the *Presentation Settings*.
  Users can only choose from the respective options. They cannot edit them.
- **Fixed Master Fields** – You define a fixed text that is inserted into the master field.
  Users cannot edit this master field.

In addition, you can name the master field and enter a description which will be displayed in the *Presentation Settings*.
You can also set the master field to be mandatory.
If you set a master field to be mandatory, the *Presentation Settings* open each time a user uses the master template.

To set up a master field, follow the following steps:

1. Open the master you want to edit.
2. Navigate to the tab View in PowerPoint.
3. Here, click on the button **Slide Master** (Figure 329).

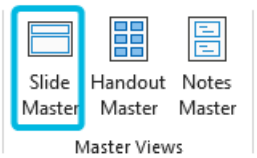


Figure 329. Button **Slide Master**

4. In the slide master view, either select an existing shape that you want to use for the master field or create a new one and select it.
   You only need to insert the master field once on the first slide of the master. If it is filled in via the *Presentation Settings*, it will be inserted on all slide layouts used in the respective presentation.
   Therefore, make sure the master fields do not overlap with any shape or placeholder within the master template.
5. Then, navigate to the group Presentation Settings.
6. Click on the button **Master Fields** (Figure 330 **(1)**).
   A drop-down menu opens.
7. In this drop-down menu, select the option **Define Master Fields** (Figure 330 **(2)**).
   A dialog box opens.

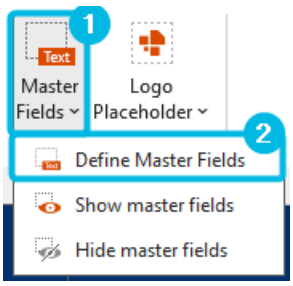


Figure 330. Option **Define Master Fields**

8. In this dialog box, choose which type of master field you want to create (Figure 331 **(1)**).
9. Enter a name and a description for the master field which will be displayed for the users (Figure 331 **(2)**).
10. To make a master field available for a specific language, open the drop-down menu under *Language* and choose the respective language (Figure 331 **(3)**).
    This setting refers to your set PowerPoint language.
11. To make it mandatory to fill in the master field in the *Presentation Settings*, switch the toggle button for **This Master Field is mandatory** to *On* (Figure 331 **(4)**).

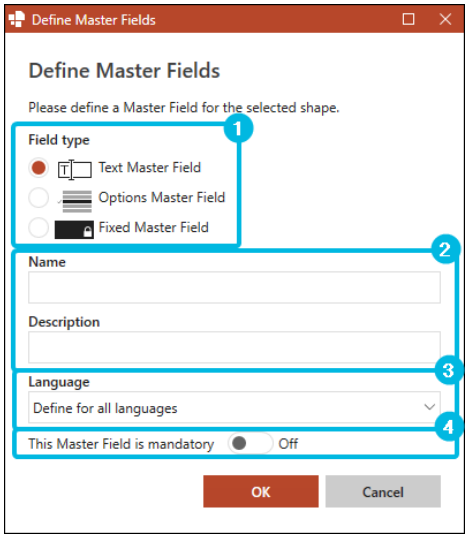


Figure 331. Define Master Field

12. If you have chosen the *Options Master Field*, add options.
    a. To do so, click on the button **Add** (Figure 332 **(1)**).
    b. Then, type in the option text.
    c. Repeat this process for all options you want to add.
    To remove an option, click on the button **Remove** (Figure 332 **(2)**).
    d. To change the display order of the options, use the buttons **Up** and **Down** (Figure 332 **(3)**).
13. If you have finished, click on the button **OK**.

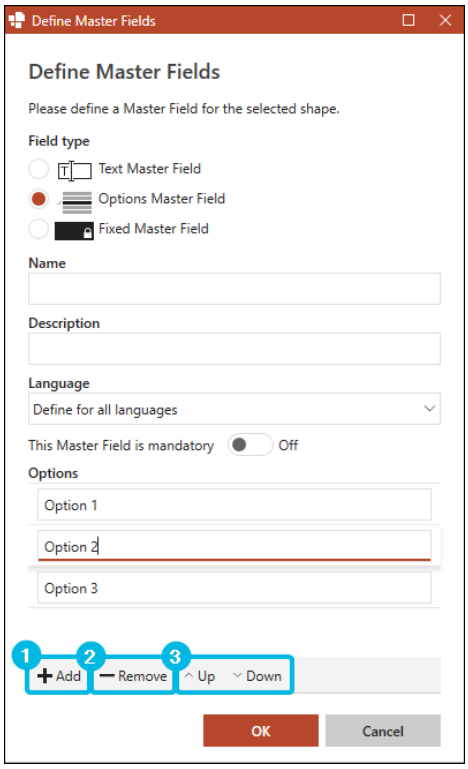


Figure 332. Add Options

You can only use shapes to create master fields. Placeholders are not supported.
If you select a placeholder and try to define it as a master field, a dialog box opens.

Usually, master fields are set on the first slide of a slide master.
Placeholders always overlap shapes. Therefore, make sure there are no placeholders that would overlap with the shape in any of the master's slide layouts.

The shapes you use for master fields should not be displayed on the master's layout slides if they are not filled in.

To hide the master fields on the layout slides, click on the button **Master Fields** and then choose the option **Hide master fields** (Figure 333).

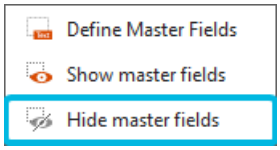


Figure 333. Option **Hide master fields**

When editing the master template, you can always make them visible again via the button **Show master fields** (Figure 334).

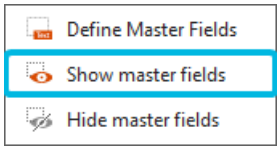


Figure 334. Option **Show master fields**

To edit an existing master field, select the respective shape and click on the button **Define Master Fields**.

To view all shapes and placeholders including hidden ones, press **Alt** + **F10**. The selection pane opens on the right-hand side of your PowerPoint window.
Hidden shapes and placeholders are marked by a crossed-out **eye** symbol.

3.6. Design Your Slides

To fill your presentation with content, you can design your own slides or use slide templates and fill them with content.

If you design your slides manually, you can choose which slide layout you want to use, you can insert elements from the empower® Library and format your text as you need it.

Files that are protected either by the Office built-in document protection or by Microsoft Purview Information Protection cannot be processed by empower®.

Files with Microsoft Purview Information Protection labels similar to *Public* can be processed.

For further information regarding Microsoft Purview Information Protection, see **Protect your sensitive data with Microsoft Purview**.

Design Your Slide Manually

If you design your slides manually, there are several options you can use.

First, select a slide layout that you want to use.

To do so, follow the following steps:

1. Navigate to the group Insert and click on the button **Slide** (Figure 335).
   A drop-down menu opens.

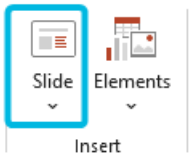


Figure 335. Button **Slide**

2. In this drop-down menu, choose if you want to insert a new slide or change the layout of the current slide (Figure 336).
   a. If you insert a new slide, click on the **arrow** symbol next to the option **New Slide** to open the slide layout selection.

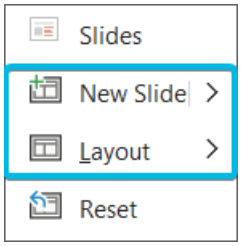


Figure 336. Options **New Slide** and **Layout**

3. Then, choose a slide layout you want to use (Figure 337).

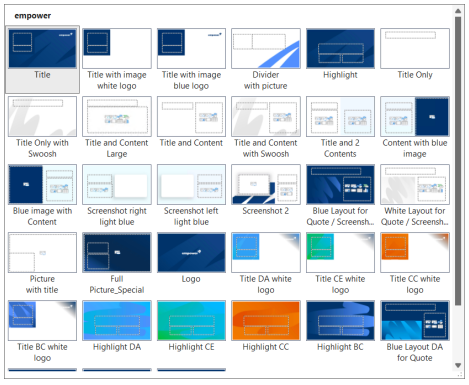


Figure 337. Slide Layout Selection

Now, you can use the content placeholders to insert your text, pictures, tables, charts or other content.

The content types you can insert depend on the placeholder type.

To do so, click on the button **Elements** in the group Insert and choose the element type that you want to insert (Figure 338).

Alternatively, click on the individual icons inside of a placeholder.

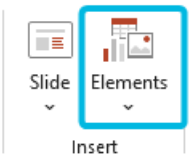


Figure 338. Button **Elements**

Depending on the settings made by your empower® Administrators, either the empower® Library opens in the side pane or the Office built-in options open.

If the side pane opens, it opens in the respective element folder.

Here, you can find corporate design compliant pictures, tables or charts that can be used right away (Figure 339).

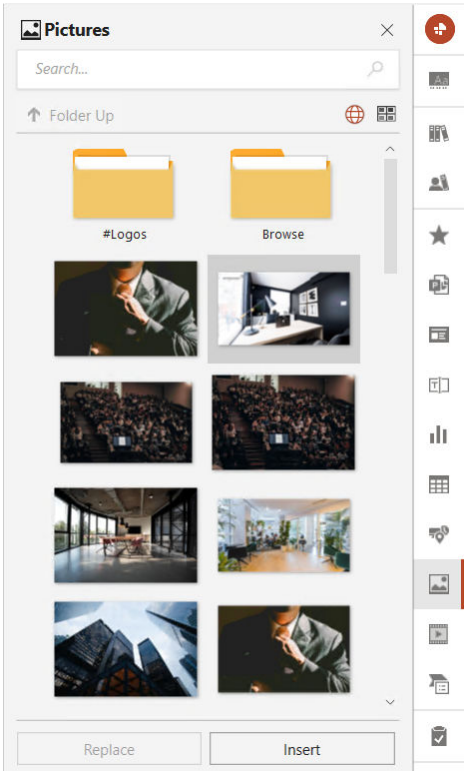


Figure 339. Section *Pictures*

Some placeholder elements might be disabled by your company.

If this is the case, a dialog box opens (Figure 340).

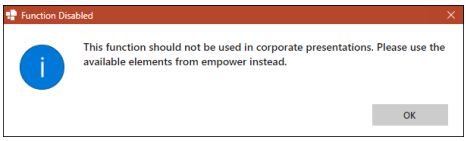


Figure 340. Dialog Box for Disabled Placeholder Function

Depending on the setup of your empower® Environment, there might not be folders for all element types.

Available Elements

Under the button **Elements**, you can find elements of different types that can be inserted into your presentation.

The following elements are available:

- Presentations
- Text Elements
- Tables
- Icons
- Pictures
- Videos
- SmartArts
- Shapes

Depending on your company's settings, you can either choose from the PowerPoint built-in options or from elements that have been saved to the empower® Library.

Use Slide Templates and Slide Template Collections

Alternatively, you can use slide templates from the empower® Library.

These slide templates and slide template collections have been created in compliance with your corporate design and contain placeholder texts and images that can be replaced with your content.

To use a slide template, follow the following steps:

1. Navigate to the group Insert and click on the button **Slide**.
   A drop-down menu opens.
2. In the drop-down menu, choose the option **Slides** (**Figure 341**).
   The side pane opens in the subsection *Slides* of the section *Corporate Design Templates*.

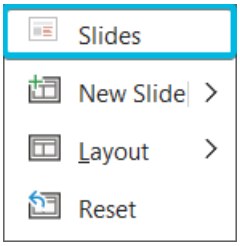


Figure 341. Option **Slides**

3. Here, select the template you want to use.
4. Either double-click on it or click on the button **Insert** (Figure 342 **(1)**).
   The slide will be inserted into the presentation, adapting to the current master used in the presentation.
   a. If you want to insert it with its original master, click on the button **Keep Master** (Figure 342 **(2)**).

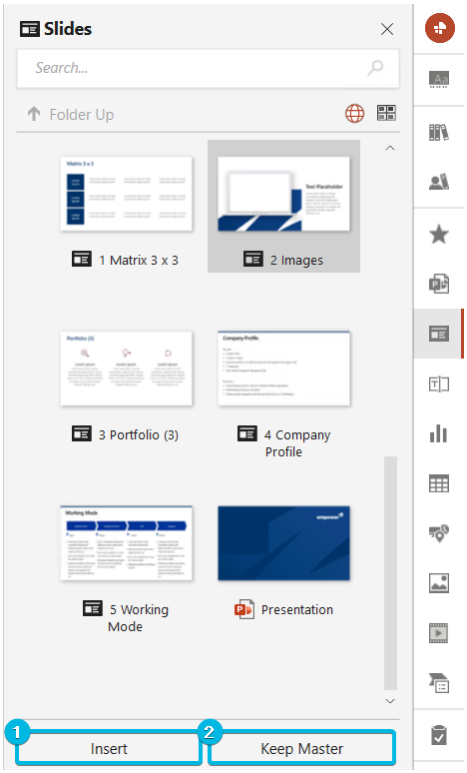


Figure 342. Buttons **Insert** and **Keep Master**

5. Now, you can replace all texts and images with the content you want to use for your presentation (Figure 343).

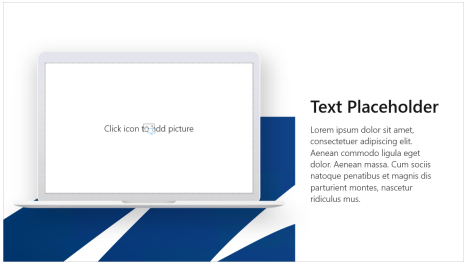


Figure 343. Slide Template – Example

Depending on your empower® Environment, the library section *Corporate Design Templates – Slides* may also contain slide template collections, saved in .pptx format.

To choose a slide template from a slide template collection, select the slide template collection and double-click on it to navigate into the collection. Then, select the slide template you want to use.

Depending on your empower® Environment, the library section *Corporate Design Templates – Slides* may also contain automated templates for empower® Document Automation saved in .pptx format.

For further information regarding the use of automated templates, refer to our **empower® Document Automation manual**.

3.7. Use Presentation Tools

Under the button **Check** in the group Finalize, you can find the option **Embed Fonts** (Figure 344).

The option **Embed Fonts** embeds the font in your presentation and ensures that the fonts are always displayed correctly for other users.

To use this option, click on the button **Check** and then choose the option **Embed Fonts**.

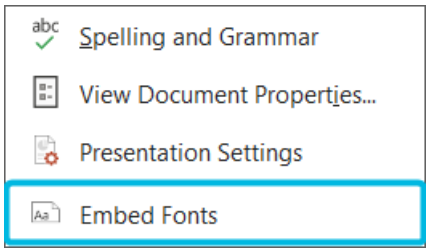


Figure 344. Option **Embed Fonts**

For Administrators

As an empower® Administrator, you can also embed fonts during the master upload.

For further information, see **Upload a Master Template**.

The option **Embed Fonts** only offers the PowerPoint built-in functionalities.

3.8. empower® Consistency Check

You can use the empower® Consistency Check to check your presentation for issues regarding the following aspects:

- Wording
- Hyphenation
- Spaces
- Brackets
- Punctuation (for bullet lists)

To execute the *Consistency Check*, navigate to the group Finalize in the empower® Ribbon and click on the button **Check** (Figure 345).

A drop-down menu opens.



Figure 345. Button **Check**

Then, choose the option **Consistency Check** (Figure 346).

The *Consistency Check* opens in the side pane on the right-hand side of your PowerPoint window.

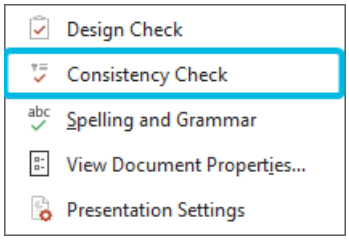


Figure 346. Option **Consistency Check**

Alternatively, you can open the section *Consistency Check* directly in the side pane.

For further information regarding the side pane, see **Side Pane**.

The *Consistency Check* is only available in PowerPoint.
For further information regarding the empower® Document Check for Word, see **empower® Document Check**.

Depending on the *Consistency Check* configuration in your empower® Environment, not all of the above-mentioned categories are available.
The available categories are defined and can be changed by your empower® Administrators.

Process Consistency Check Results

The results from the *Consistency Check* are listed per category (**Figure 347**).
For each instance, the slide the error was found on and the affected element are listed.
If you select an error entry, the corresponding text or element is automatically selected.

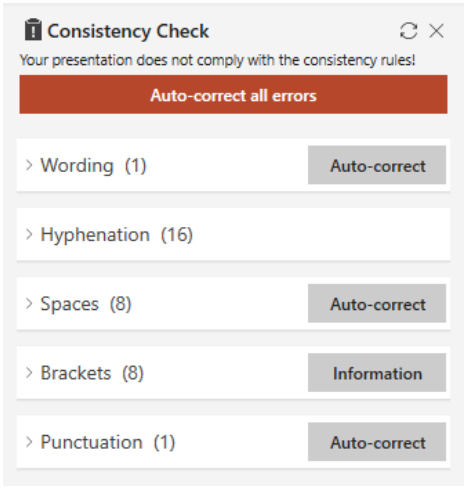


Figure 347. Consistency Check Overview

To correct an error, follow the following steps:

1. Select the respective entry from the list.
2. If there is a drop-down menu for the error category, choose which predefined correction option you want to apply (**Figure 348**).
   If there is no drop-down menu, skip this step.

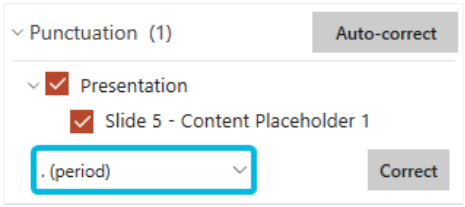


Figure 348. Drop-Down Menu with Correction Options

3. Then, click on the button **Correct** (**Figure 349**).

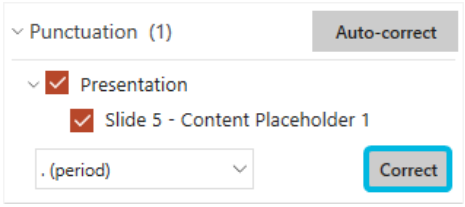


Figure 349. Button **Correct**

To correct multiple errors at once with the same correction option, select all the respective entries and click on the button **Correct**.

If you want to correct all errors of a category with a specific correction option, tick the checkbox next to the respective category. All errors in this category will be selected.
Now, click on the button **Correct**.

Auto-Correct Errors

If you do not want to process all errors separately, you can auto-correct them either per category or all together.

To auto-correct all errors in one category, click on the button **Auto-correct** next to the respective category (Figure 350).

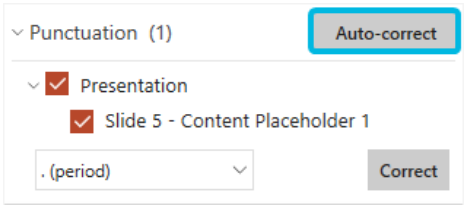


Figure 350. Button **Auto-correct**

If you want to auto-correct all errors in the presentation, click on the button **Auto-correct all errors** (Figure 351).

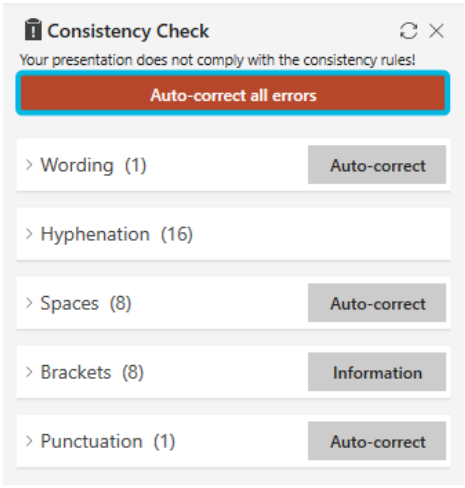


Figure 351. Button **Auto-correct all errors**

Errors in the error category *Brackets* cannot be auto-corrected.

For further information on the issue, click on the button **Information** (Figure 352).

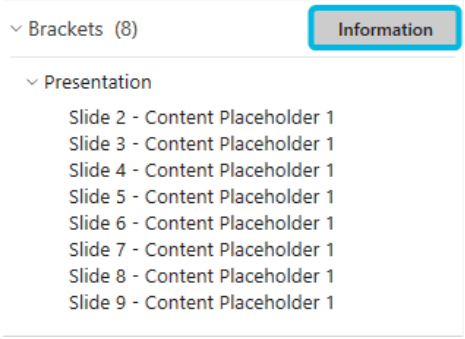


Figure 352. Button **Information** for Bracket Errors

A dialog box opens telling you how to correct the errors. Follow the instructions to correct all errors (Figure 353).

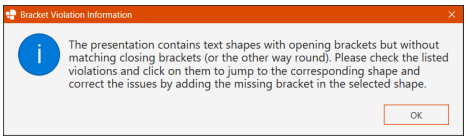


Figure 353. Dialog Box for Bracket Errors

If you have finished the correction, reload the check results to be sure all errors have been resolved by clicking on the **refresh** symbol (Figure 354).

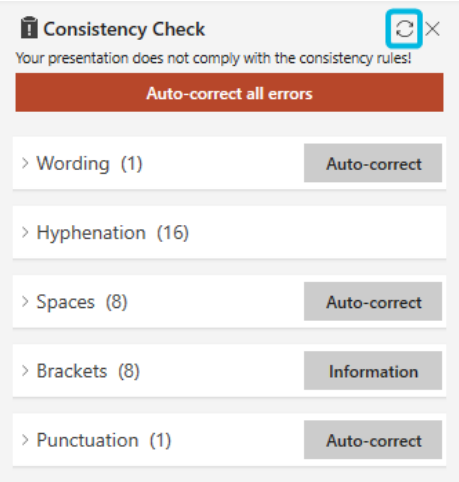


Figure 354. **Refresh** Symbol

If all errors have been resolved, a message appears in the side pane (Figure 355).

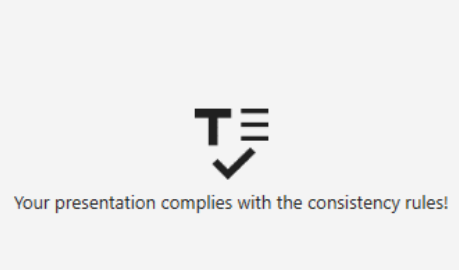


Figure 355. Consistency Check Completed

For the category *Wording*, auto-correction is available. However, it is recommended to review these error instances individually before auto-correcting the errors.

Depending on the error category, auto-correcting the error is not possible and you need to manually select the most fitting option to correct the error or correct the error manually. In this case, the button **Auto-correct** is not available.

3.9. empower® Corporate Design Check

You can use the empower® Corporate Design Check to check your presentation in regards to corporate design compliance.

To do so, it checks if your presentation complies with the empower® Design that the master in use has been assigned to.

If your master has not been assigned to any design, no design errors are displayed. However, error entries concerning aspects that do not depend on the design such as logo protection, layout protection, bullet style and placeholders are displayed.

During the check, aspects such as colors, fonts, font sizes, bullet styles and placeholders are taken into consideration.

If content on slides extends into the logo protection area or outside of a placeholder, these errors will also be listed.

Regarding the master presets, the *Corporate Design Check* inspects title placeholders separately to check if their color, font, font size and position comply with the presets from the master template.

Charts that have been created with empower® Chart Creation are not taken into consideration during the *Corporate Design Check*.

For further information regarding the setup of layout protection, see **Layout Protection**.

For further information regarding the setup of logo protection, see **Logo Protection**.

To execute the *Corporate Design Check*, navigate to the group Finalize in the empower® Ribbon and click on the button **Check** (**Figure 356**).

A drop-down menu opens.



Figure 356. Button **Check**

Then, choose the option **Design Check** (**Figure 357**).

The *Corporate Design Check* opens in the side pane on the right-hand side of your PowerPoint window.

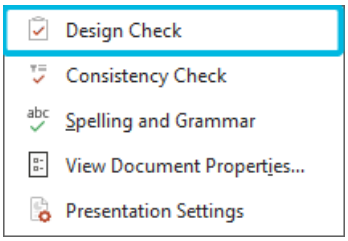


Figure 357. Option **Design Check**

Designs are created by your empower® Administrators. They are also responsible for assigning masters to those designs.

Alternatively, you can open the section *Design Check* directly in the side pane.
For further information regarding the side pane, see **Side Pane**.

The *Corporate Design Check* is only available in PowerPoint.
For further information regarding the empower® Document Check for Word, see **empower® Document Check**.

Depending on the *Corporate Design Check* configuration in your empower® Environment, not all of the above-mentioned categories are available.

If the presentation has either been marked as final or if it is opened in read-only mode, the *Corporate Design Check* cannot be executed.
A message appears.

Set up Corporate Design Check

For Administrators

As an empower® Administrator, you can make global settings for the *Corporate Design Check*.
You can decide which aspects are taken into account for the check and when the *Corporate Design Check* is triggered automatically.
These settings can be done in the empower® Admin Center.
For further information regarding the empower® Admin Center, refer to our **empower® Admin Center manual**.

Automatic Corporate Design Check

If it has been set up accordingly by your empower® Administrators, the *Corporate Design Check* can be triggered automatically.
If so, the *Corporate Design Check* is either executed automatically if you save slides or presentations to the empower® Library or if you open a slide or a presentation.

Process Corporate Design Check Results

The results from the *Corporate Design Check* are listed per category (Figure 358). Each category can have one or multiple subcategories.

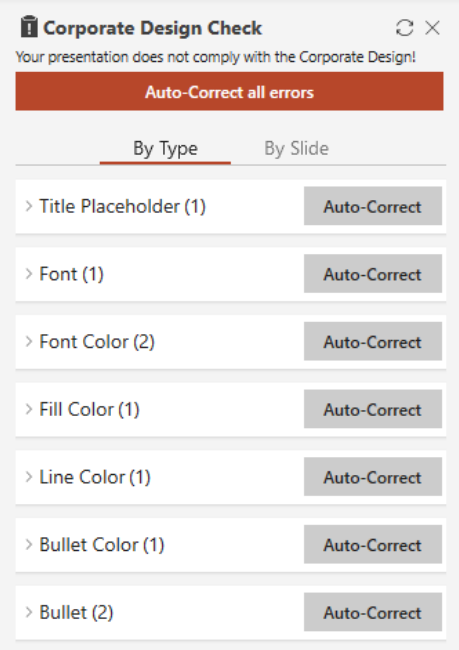


Figure 358. Corporate Design Check Overview

You can either display the entries by error type or by slide (Figure 359).

If you list them by type, the slide the error was found on and the affected element are listed for each entry.

If you select an error entry, the corresponding text or element is automatically selected.

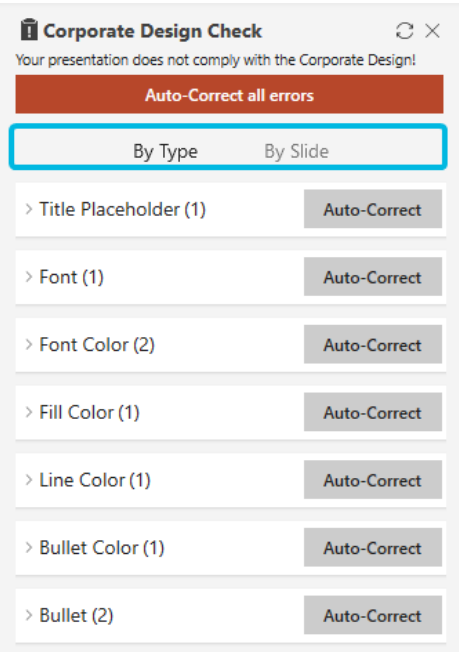


Figure 359. Sorting Options

To correct an error, follow the following steps:

1. Select the respective entry from the list.
2. If there is a drop-down menu for the error category, choose which predefined correction option you want to apply (Figure 360).
   If there is no drop-down menu, skip this step.

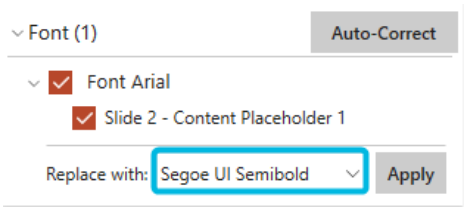


Figure 360. Drop-Down Menu with Correction Options

3. Then, click on the button **Apply** (Figure 361).
   If there is no drop-down menu, the button **Apply** is not available.
   Use the button **Auto-Correct** instead.

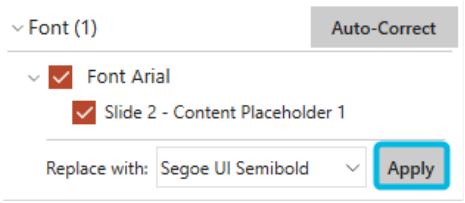


Figure 361. Button **Apply**

To correct multiple errors at once with the same correction option, select all the respective entries and click on the button **Apply**.

If you want to correct all errors of a category with a specific correction option, tick the checkbox next to the respective category. All errors in this category will be selected.

Now, click on the button **Apply**. You can also select multiple subcategories at once.

Auto-Correct Errors

If you do not want to process all errors separately, you can auto-correct them either per category or all together.

To auto-correct all errors in one category, click on the button **Auto-Correct** next to the respective category (Figure 362).

If you are displaying the entries by slide, you can also auto-correct all errors on a slide by clicking on the button **Auto-Correct** next to the slide.

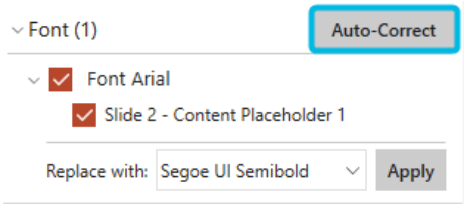


Figure 362. Button **Auto-Correct**

If you want to auto-correct all errors in the presentation, click on the button **Auto-Correct all errors** (Figure 363).

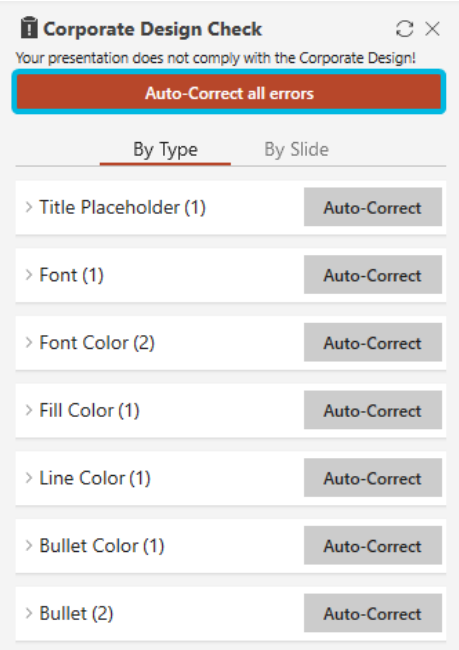


Figure 363. Button **Auto-Correct all errors**

When auto-correcting colors, empower® automatically selects the approved color of your corporate design that is closest to the flagged color. If no matching color is found, the errors remain in the list. The red text next to the category tells you how many errors are left (Figure 364).

Correct these errors manually by choosing an option from the drop-down menu and clicking on the button **Apply**.

When auto-correcting font sizes, empower® selects the next size value up or down from the flagged size value to set a font size that has been approved for your corporate design. The same is also performed for fonts.

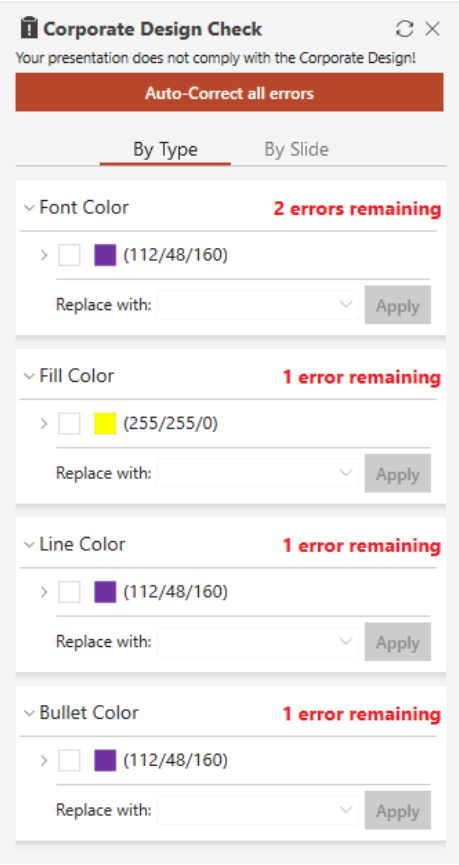


Figure 364. Remaining Errors

If all errors have been resolved, a message is shown in the side pane (Figure 365).

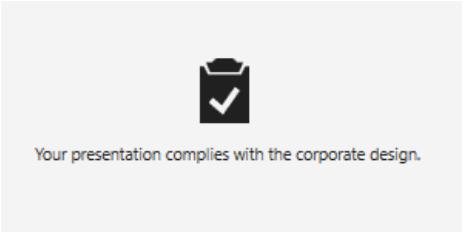


Figure 365. Corporate Design Check Completed

3.10. Show Content in Library

With the help of the button **Go to** in the empower® Ribbon, you can easily find content and its storage location in the empower® Library.

To do so, navigate to the group Start in the empower® Ribbon and click on the lower part of the split button **Library** (Figure 366).

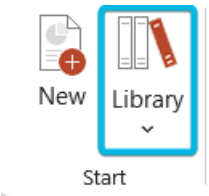


Figure 366. Button **Library**

Then, choose the option **Go to** (Figure 367).

If the element you have selected originates from the empower® Library, using the button **Go to** will open the library in a new window and navigate you directly to the element's location.

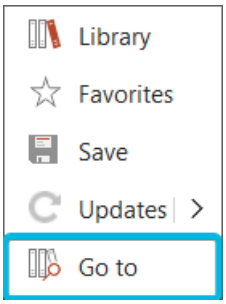


Figure 367. Option **Go to**

If the element does not originate from the empower® Library, a dialog box opens (Figure 368).

To add it to the empower® Library, save the element to the empower® Library.

To do so, follow the instructions under **Save Content to the Library**.



Figure 368. Dialog Box for Button **Go to**

The button **Go to** is only available in PowerPoint.

4. Word

empower® for Word enables efficient creation and design of documents within the framework of a given corporate design with just a few clicks. Automatically referenced person- and company-based information ensures working with up-to-date data.

Templates in empower® for Word can be designed dynamically so that, for example, information about the author, company and location is automatically filled in the header and footer of the document and manual editing is no longer necessary. The language settings can also be set and controlled centrally.

In the following chapter, you will learn more about our Word features and how to use them.

4.1. Create a New Document

To create a new document from a template, follow the following steps:

1. Click on the button **New Document** (Figure 369).
   The empower® Library opens in the section for *Document Templates*.

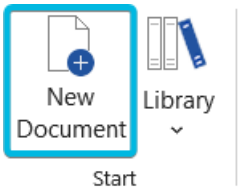


Figure 369. Button **New Document**

2. In the empower® Library, select one of the *Document Templates*.
3. Then, navigate to the group Selection in the navigation bar and click on the button **Open** (Figure 370).
   A new document is created using the template.

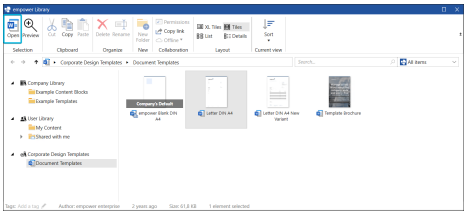


Figure 370. Button **Open**

If default settings have been made in advance in the profile management, the *Document Template* is automatically filled with information.

If not all default values or none of the default values required for the template have been set, empower® asks you to select the data to be filled in (Figure 371).

Your defined default values are preselected automatically.

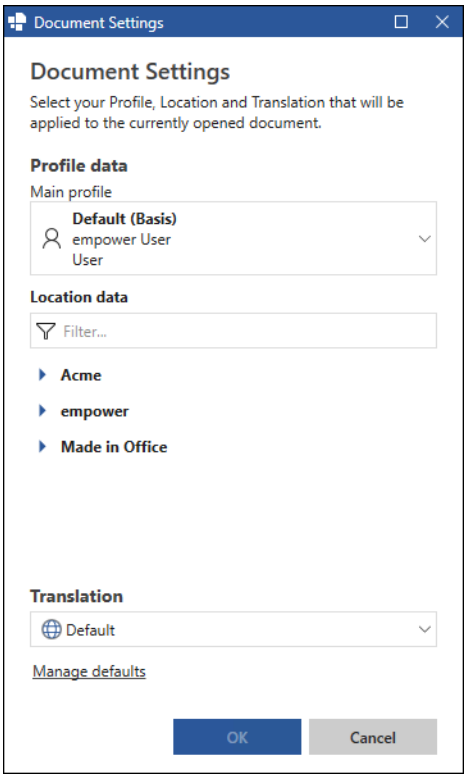


Figure 371. Dialog Box **Document Settings**

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 372).

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.

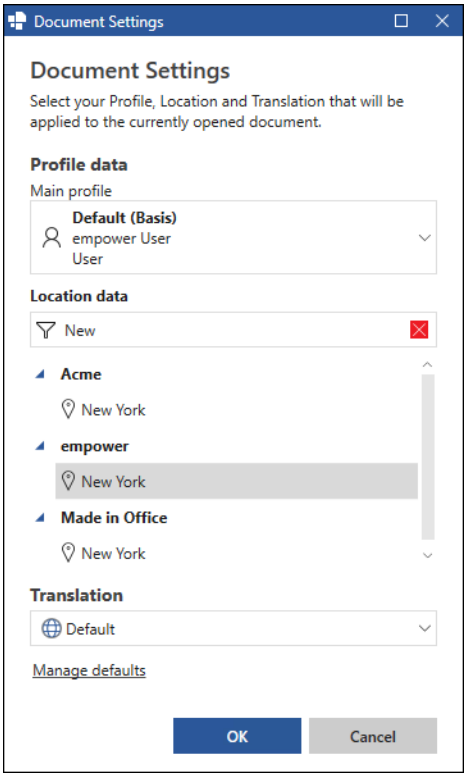


Figure 372. Search for Locations

If your search input does not lead to any result, a message is displayed in the dialog box (Figure 373).

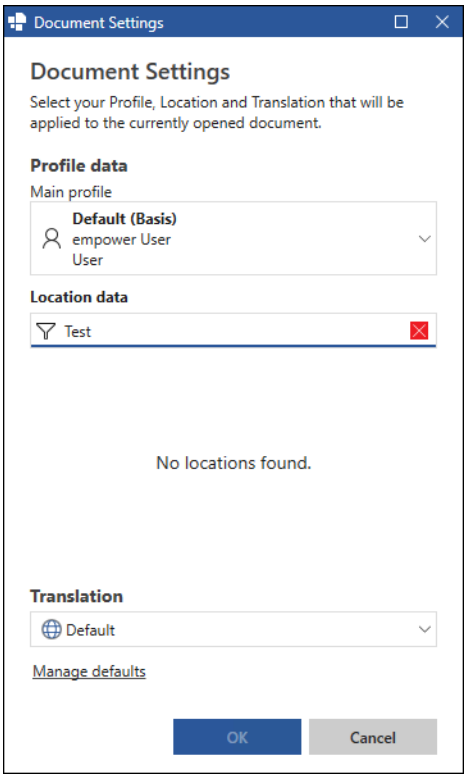


Figure 373. No Search Results

To abort the search, click on the **X** symbol in the input field (Figure 374).

All available locations will be listed again.

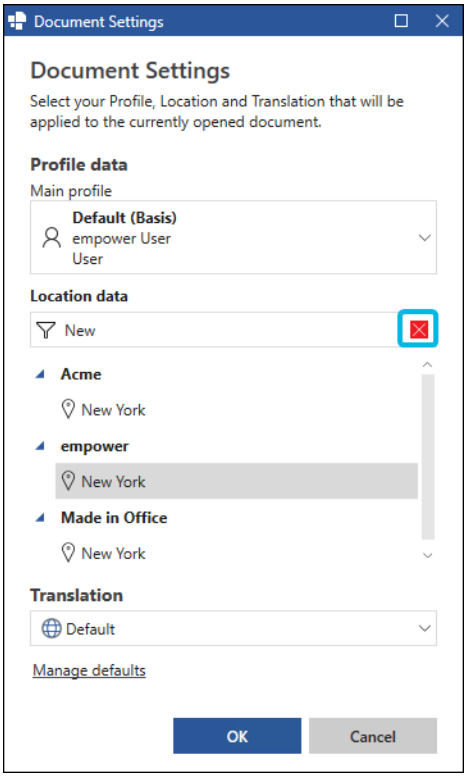


Figure 374. Abort Search

If you have opened a *Document Template* and want to fill in new profile data, click on the upper part of the split button **Fill in document** (Figure 375).
The same dialog box opens.

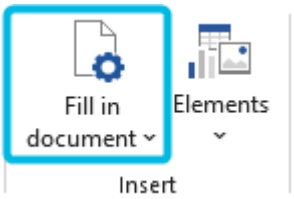


Figure 375. Button **Fill in document**

If default values have been set but you want to prevent the document from being filled out automatically, press **Shift** while opening the template.

This can be useful if you create documents for another person. If you have set up a referenced profile for this person, you can then choose this profile manually via the button **Fill in document**.

For further information regarding referenced profiles, see Set up Profiles.

Alternatively, you can use a double-click or open the context menu of a *Document Template* to open it.

If you enter a search input in the location search which only results in a company name, the company cannot be selected because it does not contain any locations that match your search input.

For further information regarding the setting of defaults, see Add a Profile.

Default Language Behavior

The selected default language affects the following elements of templates:

- **Logo selection:**
  The logo associated with the selected language is used.
- **Profile information:**
  The language-specific values stored in the selected user profile are inserted.
- **Location and company information:**
  The language-specific values stored for the selected location and the associated company information are inserted based on the selected default language.

If the user selects the option *Default*, there are three possible scenarios, depending on the user's settings and the configuration in empower®:

- **The Office language is supported by empower®:**
  If a user's Microsoft Office language is also configured in empower®, that language is automatically selected as the default language.
  Example: The user has Microsoft Office set to *English*, and *English* is also configured in empower®. *English* is automatically selected as the default language.
- **The Office language is not supported by empower®:**
  If a user's Microsoft Office language is not configured in empower®, it cannot be selected as the default language. In this case, empower® automatically uses the values and logos defined in the *Default* column during the initial configuration of empower®.
  Example: The user has Microsoft Office set to *Spanish*, but empower® is only configured for German and English. In this case, the values and logos stored in the *Default* column are used.
- **An administrator defines a fixed default language for empower®:**
  Regardless of the user's Microsoft Office language, an administrator can specify a fixed default language through a global setting in empower®.
  This setting overrides the automatic language selection and applies to all users.
  Example: An administrator sets *English* as the global default language. Even if a user has Microsoft Office set to *German*, *English* will be selected as the default language.



For Administrators

To influence which language is used for the option *Default* in the language selection, empower® Administrators can set the default language in the empower® Admin Center.

To do so, navigate to the setting **Default Language Code** in the section *Configuration* within the empower® Admin Center.

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

Hide Stationery

If you want to hide certain elements in your newly created document, you can use the feature *Hide stationery*.

Click on the button **Hide stationery** to hide elements before printing the document (Figure 376).



Figure 376. Button **Hide stationery**

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.

The elements that will be affected by this feature are predefined by your empower® Administrators.

For further information regarding the configuration of elements for this feature, see **Template Assistant**.

4.1.1. Add the Recipient Address

If you are using a *Document Template* for a letter or any other document type in which a recipient address should be inserted, you can easily insert that address from your Outlook address book using the option **Recipient Address**.

To access the option, click on the lower part of the split button **Fill in Document** and then choose the option **Recipient Address** (Figure 377).

A dialog box opens.

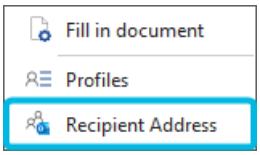


Figure 377. Option **Recipient Address**

You can now choose the Outlook contact whose address you want to insert into the document (Figure 378).

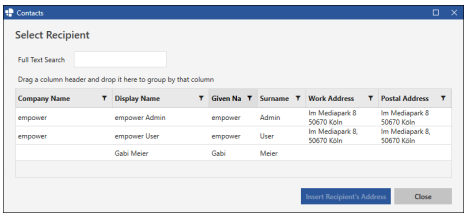


Figure 378. Dialog Box with Contact Information

Select the contact from the list and click on the button **Insert Recipient's Address** (Figure 379).

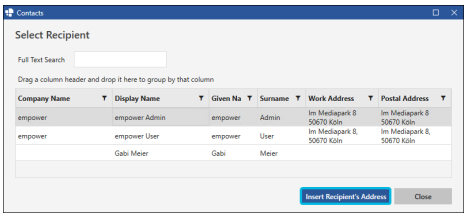


Figure 379. Button **Insert Recipient's Address**

If you cannot find the contact, you can search for it via the search bar (Figure 380).

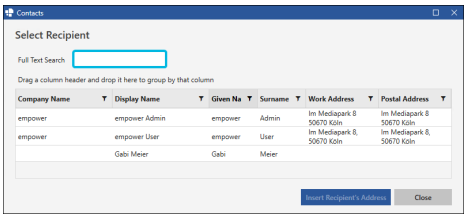


Figure 380. Search Bar

Additionally, you can sort the table according to one of the columns if you drag the respective column to the front of the table and drop it.

If you want to filter the contact list, click on the **filter** symbol next to one of the categories and select the required filters (Figure 381).

If your empower® Administrators have defined a specific placeholder for the recipient address, the address will be inserted into this placeholder.

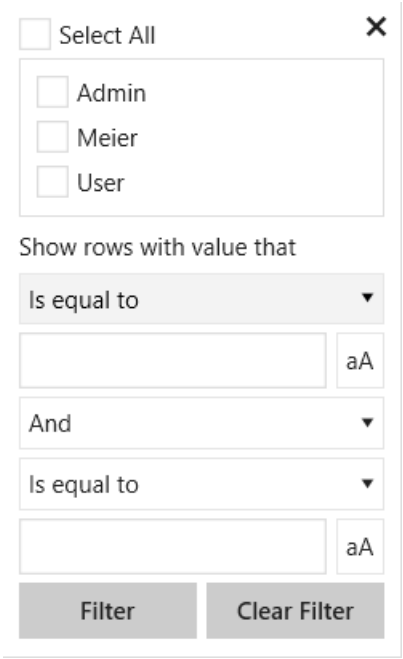


Figure 381. Filter Options

If they have not defined a placeholder, a dialog box opens (Figure 382).

Here, decide if you want to insert the recipient address at your current cursor position.

If you click on the button **Yes**, the recipient address is inserted into your document at your current cursor position.

If you click on the button **No**, no address is inserted.

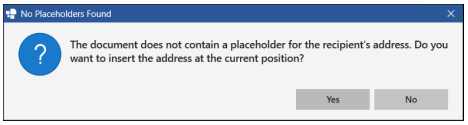


Figure 382. Dialog Box **No Placeholders Found**

You need to add contacts to the folder *Contacts* in your Outlook address book in advance to be able to choose them from the contact list in Word.

4.1.2. Use Content Blocks

To design your Word document, you can use elements from the empower® Library.

For example, you can insert corporate design compliant content blocks from your *Corporate Design Templates*.

Text elements, charts and tables are designed with sample content and can be customized after insertion according to the familiar editing options in Word.

Files that are protected either by the Office built-in document protection or by Microsoft Purview Information Protection cannot be processed by empower®.

Files with Microsoft Purview Information Protection labels similar to *Public* can be processed.

For further information regarding Microsoft Purview Information Protection, see **Protect your sensitive data with Microsoft Purview**.

Insert Content Blocks

There are two ways to insert content blocks into your document:

- Via the empower® Library
- Via the group Insert in the empower® Ribbon

For both ways, the content blocks are inserted into the document where your mouse cursor is positioned.

Insert Content Blocks via Library

To insert content blocks from the empower® Library, follow the following steps:

1. Navigate to the group Start and click on the button **Library** (**Figure 383**).
   The library opens.

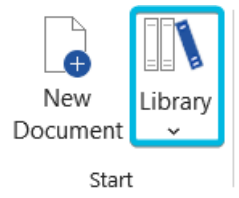


Figure 383. Button **Library**

2. In the library, navigate to the section *Corporate Design Templates* (**Figure 384 (1)**).
3. Then, navigate into the section *Content Blocks* (**Figure 384 (2)**).

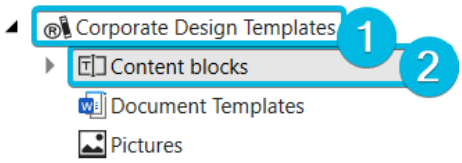


Figure 384. Sections *Corporate Design Templates* and *Content blocks*

4. Find the content block you want to insert and select it.
5. In the navigation bar, navigate to the group Selection.
6. Click on the button **Insert content block** (**Figure 385**).

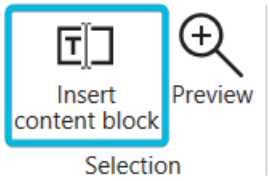


Figure 385. Button **Insert content block** in Library

You can preview the selected element by clicking on the button **Preview** in the group Selection.

Insert Content Blocks via the Ribbon

To insert content blocks via the group Insert in the empower® Ribbon, follow the following steps:

1. Navigate to the group Insert.
2. Click on the button **Elements** (Figure 386).
   A drop-down menu opens.

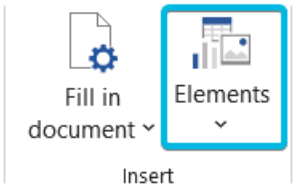


Figure 386. Button **Elements**

3. In the drop-down menu, click on the option **Content blocks** (Figure 387).
   The side pane opens its corresponding section.

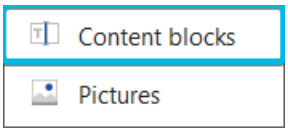


Figure 387. Option **Content blocks**

4. Find the content block you want to insert and select it.
5. Click on the button **Insert content block** (Figure 388).

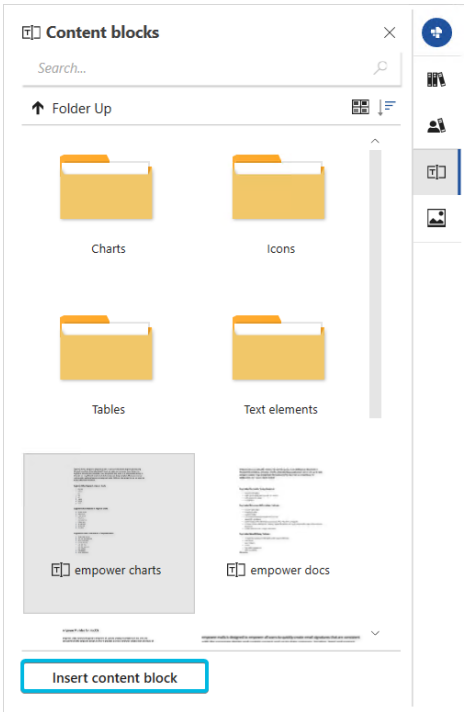


Figure 388. Button **Insert content block** in Side Pane

If your side pane is displayed, you can access the section *Content Blocks* directly by clicking on the corresponding symbol in the side pane.

For further information regarding the side pane, see **Side Pane**.

4.1.3. Use Pictures

To design your Word document, you can use elements from the empower® Library.

For example, you can insert corporate design compliant pictures from your *Corporate Design Templates*.

Text elements, charts and tables are designed with sample content and can be customized after insertion according to the familiar editing options in Word.

empower® supports Scalable Vector Graphics (in short SVG) – a common vector-based picture format – as elements in the empower® Library, when you are using an Office version that also supports this file format. Pictures in this format can be scaled to any size without loss of quality and also are quite small in storage size, which makes this format ideal for logos, visualizations, cliparts and non-photorealistic images in general.

Files that are protected either by the Office built-in document protection or by Microsoft Purview Information Protection cannot be processed by empower®.

Files with Microsoft Purview Information Protection labels similar to *Public* can be processed.

For further information regarding Microsoft Purview Information Protection, see **Protect your sensitive data with Microsoft Purview**.

Insert Pictures

There are two ways to insert pictures into your document:

- Via the empower® Library
- Via the group Insert in the empower® Ribbon

For both ways, the pictures are inserted into the document where your mouse cursor is positioned.

Insert Pictures via the Library

To insert pictures from the empower® Library, follow the following steps:

1. Navigate to the group Start and click on the button **Library** (**Figure 389**).
   The library opens.

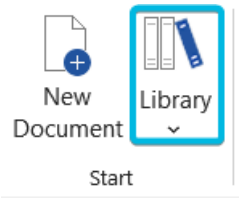


Figure 389. Button **Library**

2. In the library, navigate to the section *Corporate Design Templates* (**Figure 390 (1)**).
3. Then, navigate into the section *Pictures* (**Figure 390 (2)**).

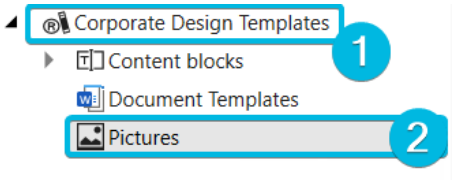


Figure 390. Sections *Corporate Design Templates* and *Pictures*

4. Find the picture you want to insert and select it.
5. In the navigation bar, navigate to the group Selection.
6. Click on the button **Insert picture** (**Figure 391**).

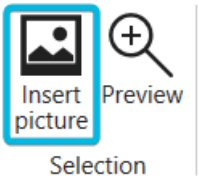


Figure 391. Button **Insert picture** in Library

You can preview the selected element by clicking on the button **Preview** in the group Selection.

Insert Pictures via the Ribbon

To insert pictures via the group Insert in the empower® Ribbon, follow the following steps:

1. Navigate to the group Insert.
2. Click on the button **Elements** (Figure 392).
   A drop-down menu opens.

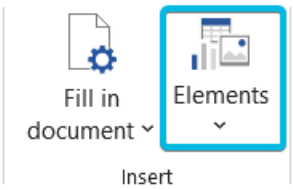


Figure 392. Button **Elements**

3. In the drop-down menu, click on the option **Pictures** (Figure 393).
   The side pane opens its corresponding section.

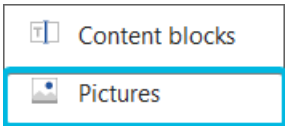


Figure 393. Option **Pictures**

4. Find the picture you want to insert and select it.
5. Click on the button **Insert picture** (Figure 394).

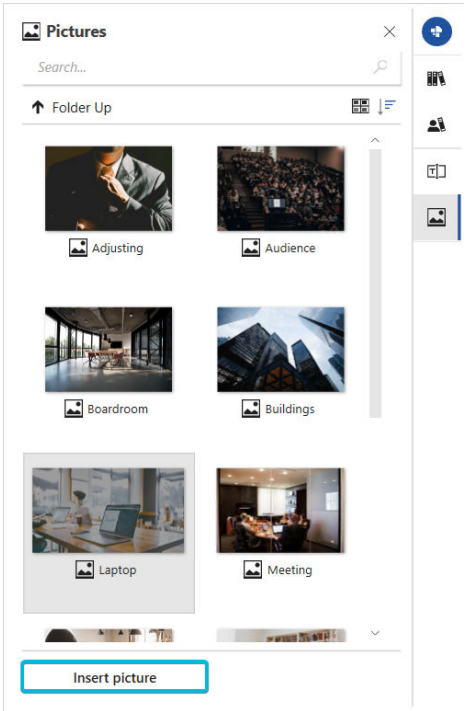


Figure 394. Button **Insert picture** in Side Pane

If your side pane is displayed, you can access the section *Pictures* directly by clicking on the corresponding symbol in the side pane.

For further information regarding the side pane, see Side Pane.

4.2. Update Fields

If you have used different Office built-in fields such as image or table captions in your Word document and don't want to update them separately, you can update them all at once.

To do so, navigate to the group Finalization and click on the button **Check** (Figure 395). A drop-down menu opens.



Figure 395. Button **Check**

In the drop-down menu, click on the option **Update all fields** (Figure 396).

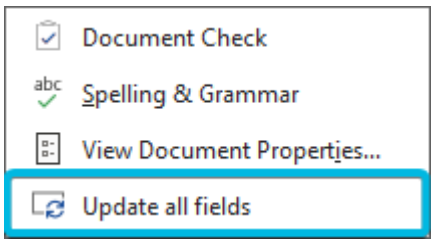


Figure 396. Option **Update all fields**

While empower® updates all fields in your document including the table of contents, if present, it shows a progress spinner (Figure 397).

If all your fields have been updated, the progress spinner disappears.

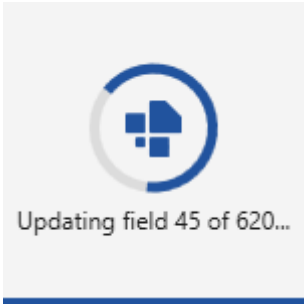


Figure 397. Progress Spinner

4.3. empower® Document Check

The *Document Check* inspects your entire document to ensure that it is corporate design compliant and also complies with other configurable rules concerning highlighting, page formats, page alignments, superfluous blank pages, spelling of names and terms among others.

To open the *Document Check*, navigate to the group Finalization and click on the button **Check** (Figure 398).

A drop-down menu opens.



Figure 398. Button **Check**

In the drop-down menu, click on the option **Document Check** (Figure 399).

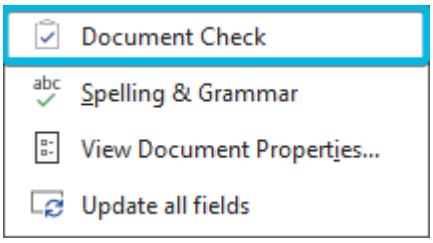


Figure 399. Option **Document Check**

empower® starts analyzing your document immediately. It shows a progress spinner (Figure 400).

As soon as the *Document Check* has been completed, its results open in the side pane on the right-hand side of the window.

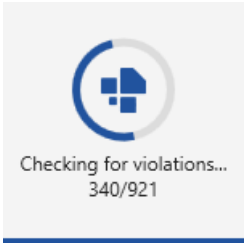


Figure 400. Progress Spinner for *Document Check*

The following aspects can be checked using the *Document Check*:

- Document protection
- Font
- Font color
- Font size
- Heading formatting
- Image and table captions
- Page margins
- Page orientation
- Presence of a table of contents
- Shape color
- Spaces and breaks
- Spelling
- Table of contents heading
- Text highlighting

Alternatively, you can open the section *Document Check* directly in the side pane.
For further information regarding the side pane, see Side Pane.

Depending on the *Document Check* configuration in your empower® Environment, not all of the above-mentioned categories are available.
The available categories are defined and can be changed by your empower® Administrators.

If the *Document Check* has not been configured by your administrators, the button is called **Check Document** (Figure 401). In this case, the Office built-in editor opens on the right side of the application window.

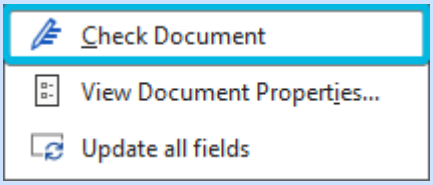


Figure 401. Button **Check Document**

The *Document Check* is only available in Word.

For further information regarding the empower® Consistency Check for PowerPoint see **empower® Consistency Check**.

For further information regarding the empower® Corporate Design Check for PowerPoint see **empower® Corporate Design Check**.

Process Document Check Results

The results from the *Document Check* are listed per category (Figure 402). Each category can have one or multiple subcategories.

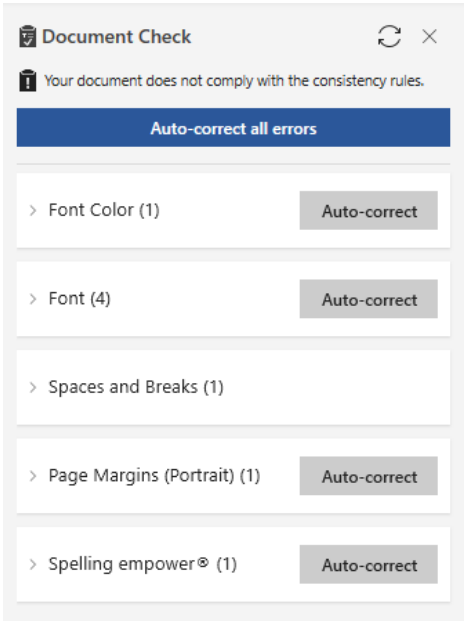


Figure 402. List of Errors

For each instance, the page the error was found on and the affected element is listed (Figure 403).

If you select an error entry, the corresponding text or element is automatically selected.

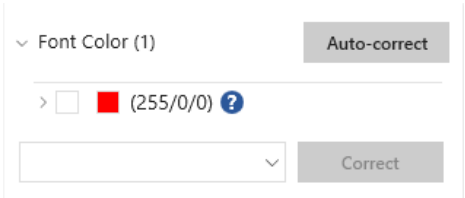


Figure 403. Error Category *Font Color*

To correct an error, follow the following steps:

1. Select the respective entry from the list.
2. If there is a drop-down menu for the error category, choose which predefined correction option you want to apply (Figure 404).
   If there is no drop-down menu, skip this step.

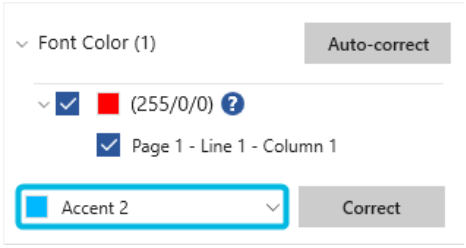


Figure 404. Drop-Down Menu with Correction Option (Collapsed)

3. Then, click on the button **Correct** (Figure 405).

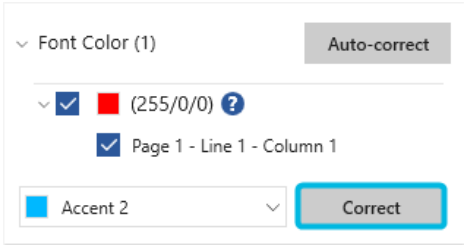


Figure 405. Button **Correct**

To correct multiple errors at once with the same correction option, select all the respective entries and click on the button **Correct**.

If you want to correct all errors of a category with a specific correction option, tick the checkbox next to the respective category. All errors in this category will be selected.

Now, click on the button **Correct**. You can also select multiple subcategories at once.

For further information on the specifications in your corporate design and how to correct the error, hover over the **question mark** symbol next to the category (Figure 406).

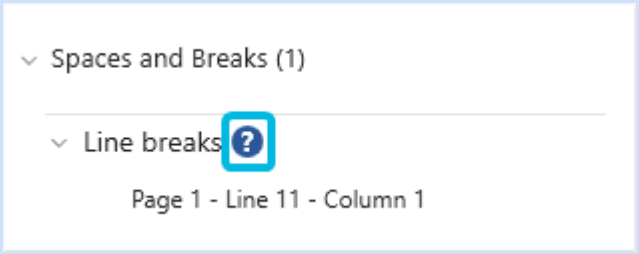


Figure 406. **Question Mark** Symbol

Auto-Correct Errors

If you do not want to process all errors separately, you can auto-correct them either per category or all together.

To auto-correct all errors in one category, click on the button **Auto-correct** next to the respective category (Figure 407).

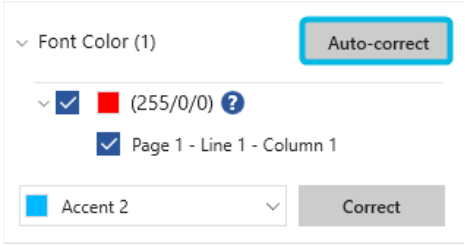


Figure 407. Button **Auto-correct** for Category

If you want to auto-correct all errors in the document, click on the button **Auto-correct all errors** (Figure 408).

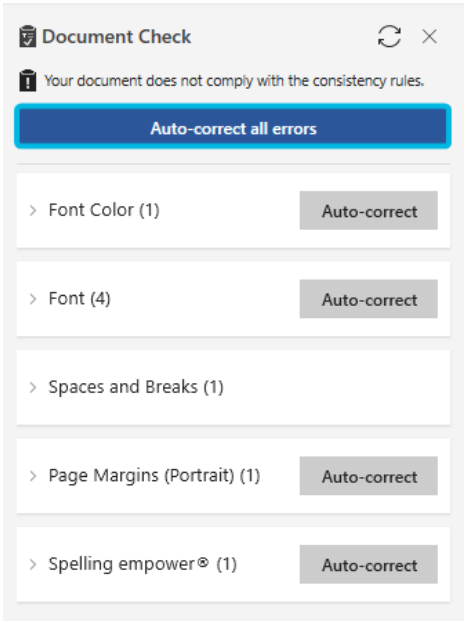


Figure 408. Button **Auto-correct all errors**

When auto-correcting colors, empower® automatically selects the approved color of your corporate design that is closest to the flagged color. If no matching color is found, a **warning** symbol appears and you need to adjust the color manually (Figure 409, Figure 410).



Figure 409. Warning for Manual Correction

When auto-correcting font sizes, empower® selects the next size value up or down from the flagged size value to set a font size that has been approved for your corporate design. The same is also performed for fonts.

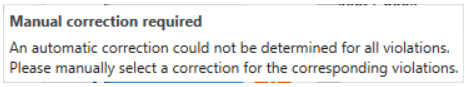


Figure 410. Tooltip **Manual Correction Required**

If you have finished the correction, reload the check results to be sure all errors have been resolved by clicking on the **refresh** symbol (Figure 411).

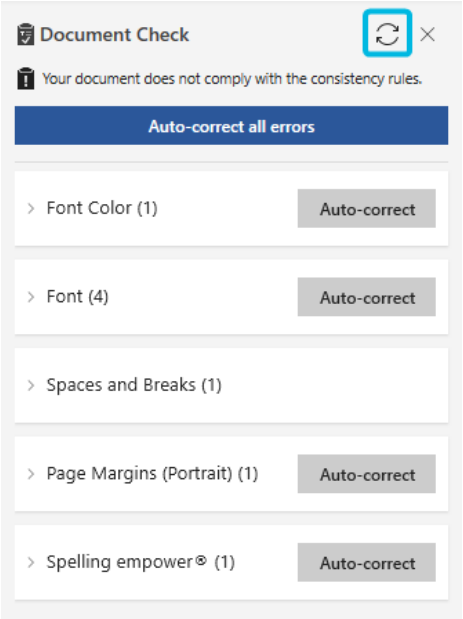


Figure 411. **Refresh** Symbol

If all errors have been resolved, a message appears in the side pane (Figure 412).

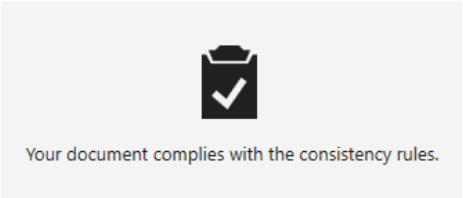


Figure 412. Document Check Complete

Depending on the error category, auto-correcting the error is not possible and you need to manually select the most fitting option to correct the error or correct the error manually. In this case, the button **Auto-correct** is not available.

4.4. 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 413).

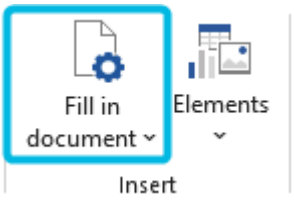


Figure 413. Button **Fill in document**

Then, choose the option **Template Assistant** (Figure 414).

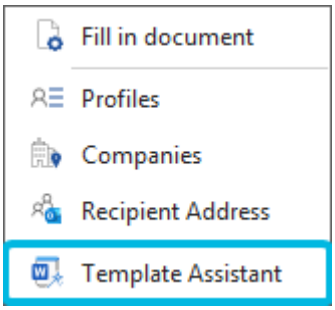


Figure 414. Option **Template Assistant**

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 you 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 415 **(1)**).
   A drop-down menu opens.
4. Choose the option **Rich Text Content Control** (Figure 415 **(2)**).
   A rich text content control is inserted at your current cursor position.

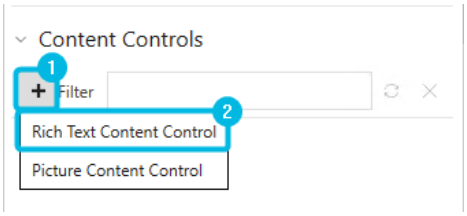


Figure 415. Add Rich Text Content Control

5. Under *Document Properties*, click on the button **Set to current database ID** (Figure 416).
   The database ID cannot be set individually.

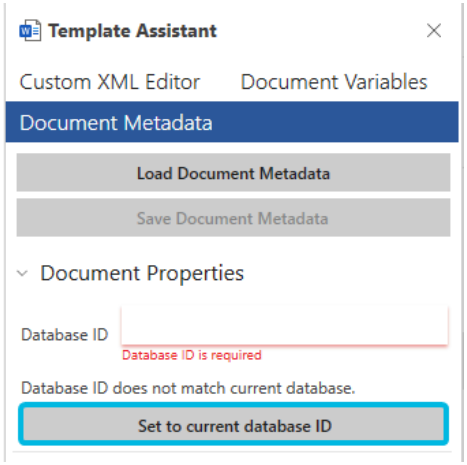


Figure 416. Button **Set to current database ID**

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 417 **(1)**).
7. To assign a valid GUID to the content control, click on the button **GUID** next to the input field *Tag* (Figure 417 **(2)**).
   An automatically generated and unique ID is assigned to the content control.
8. Assign the required group to the content control (Figure 417 **(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 417 **(4)**).

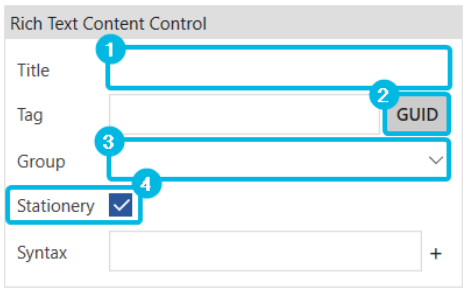


Figure 417. Rich Text Content Control Fields

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 418).
       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.

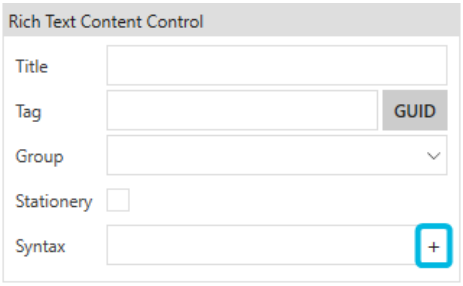


Figure 418. Insert Syntax Elements

11. To save the values, click on the button **Save Document Metadata** (Figure 419).

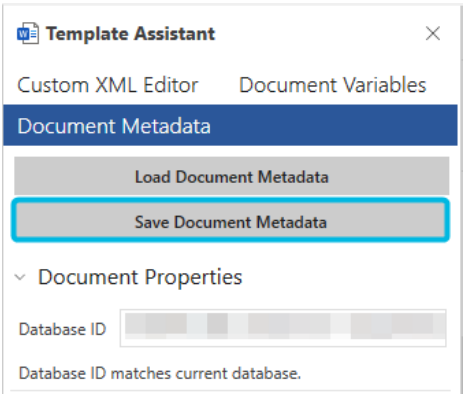


Figure 419. Button **Save Document Metadata**

The *Template Assistant* provides 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 420**).

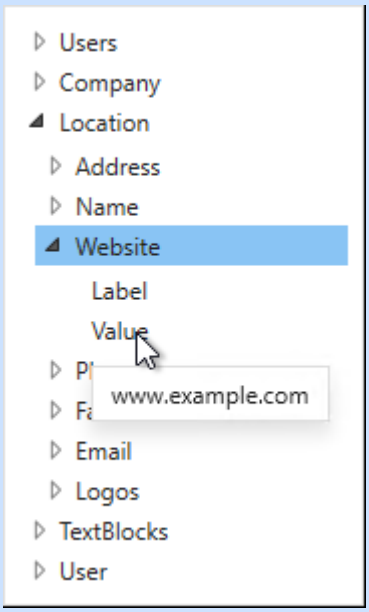


Figure 420. Mouse-Over for Values

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 421**):

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

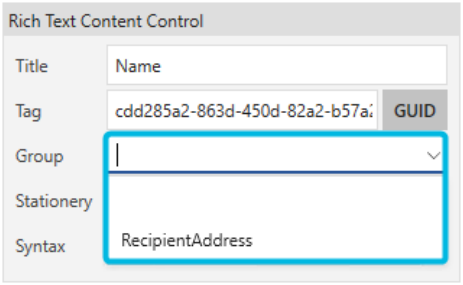


Figure 421. Placeholder Groups Drop-Down Menu

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 *RecipientAddress* 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 422**).

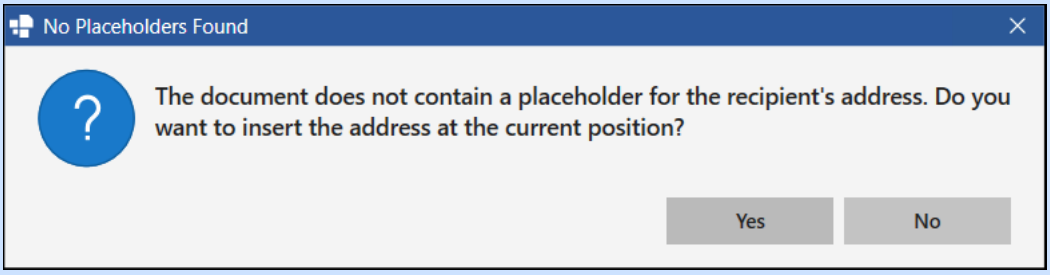


Figure 422. Dialog Box *No Placeholder Found*

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 423**).



Figure 423. Curved Brackets

2. Inside these brackets, first enter the entity (**Figure 424**).
   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.
3. Add a full stop after the entity.
4. Now, enter the property right afterwards (**Figure 425**).
   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.
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 426**).
   Enter *Value* to display the content of the field (**Figure 427**).
7. Check if your variable contains all required parts.



Figure 424. Example for Entity



Figure 425. Example for Property



Figure 426. Label



Figure 427. Value

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 428**).

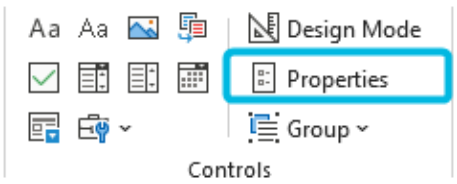


Figure 428. Button **Properties**

3. Tick the checkbox for **Use a style to format text typed into the empty control** (Figure 429).
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...**.

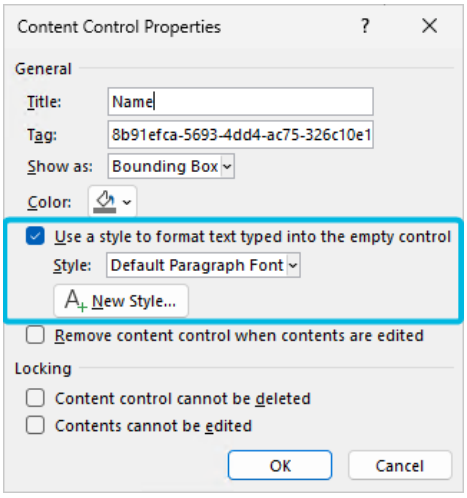


Figure 429. Text Style Options

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 individual content 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*:

Format	Tag	Example
Line Break	`[n/]`	Text[n/]Text
Bold	`[b] ... [/b]`	[b]Text[/b]
Underlined	`[u] ... [/u]`	[u]Text[/u]
Italics	`[i] ... [/i]`	[i]Text[/i]
Tab Stop	`[t/]`	
Centered	`[hcenter] ... [/hcenter]`	[hcenter] Text Text [/hcenter]
Align Right	`[hend] ... [/hend]`	[hend] Text Text [/hend]
Justified	`[hdistribute] ... [/hdistribute]`	[hdistribute] Text Text [/hdistribute]
Uppercase	`| Upcase`	{{Text | Upcase }}

Format	Tag	Example
Hyperlink	`[a target="linkTargetUri"] … [/a]`	**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]

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. The following excerpt shows the configuration for this example: `{{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 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 [CONDITION]
%} … {% 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 excerpt shows the else if condition for this example:

```
{% 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 %}
```

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

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 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 directors 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 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 [ENTITY VARIABLE] %}{{VAR}}
{% unless [CONDITION] %} ... {% 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 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 directors 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 }}`

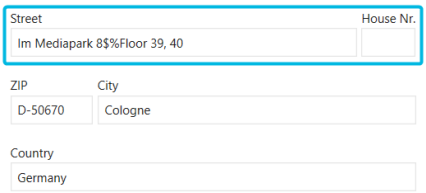
In front of the **pipe** symbol, enter the property name and type (label or value) of the property you want to filter.

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 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: Im Mediapark 8 Floor 39, 40 D-50670 Cologne

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 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: www.empowersuite.com, contact@empowersuite.com The outcome for a combination with more than 46 characters would be the following: www.empowersuite.com contactperson@empowersuite.com

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 430 **(1)**).
   A context menu opens.
4. Choose the option **Picture Content Control** (Figure 430 **(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 431).

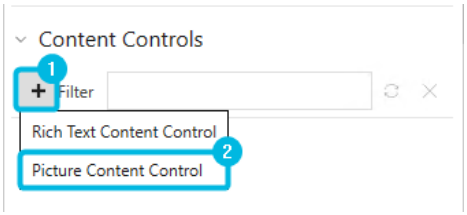


Figure 430. Add Picture Content Control

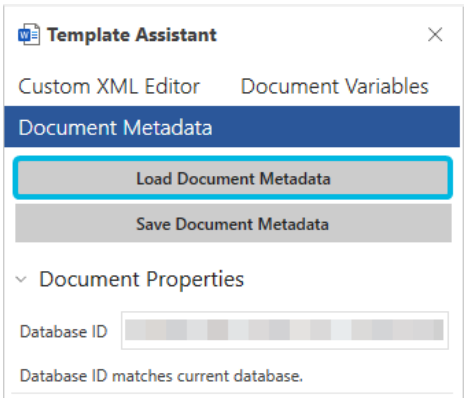


Figure 431. Button **Load Document Metadata**

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 432 **(1)**).
8. To assign a valid GUID to the content control, click on the button **GUID** next to the input field *Tag* (Figure 432 **(2)**).
   An automatically generated and unique ID is assigned to the content control.
9. Assign the required group to the content control (Figure 432 **(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 432 **(4)**).
    This usually makes sense if you work with pre-printed paper.
11. To save the values, click on the button **Save Document Metadata**.

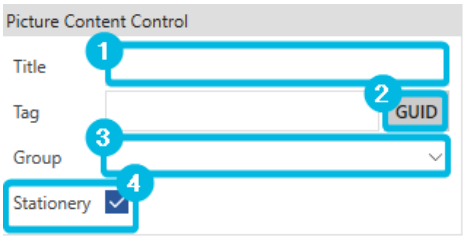


Figure 432. Picture Content Control Fields

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 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.

5. Excel

Create enterprise-wide unified Excel content in your corporate design (in short CD) – our Excel add-in provides an intelligent workbook management system, combined with corporate design tools and efficiency- enhancing features.

In the following chapter, you will learn more about our Excel features and how to use them.

5.1. Create a New Workbook

To create a new workbook from a workbook template, follow the following steps:

1. In the empower® Ribbon, navigate to the group Start.
2. Click on the button **New Workbook** (Figure 433).
   The empower® Library opens in the section for *Workbook Templates*.

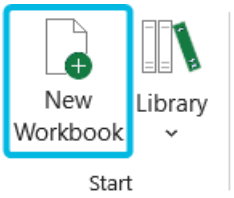


Figure 433. Button **New Workbook**

3. Select a workbook template from the library section *Corporate Design Templates – Workbook Templates* (Figure 434).
4. Double-click to open it.

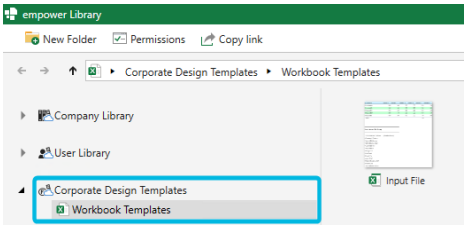


Figure 434. Section *Workbook Templates*

Alternatively, navigate to the *Company Library* to open a workbook. Double-click to open it.

If your empower® Administrators have set a company-wide default, a corporate design compliant workbook is already opened when you start Microsoft Excel.

Design Your Workbook

If you have opened a workbook, you can design this workbook individually using the empower® Features. You can make the following changes to design your workbook according to your needs:

1. Format table(s) with corporate design compliant custom table styles.
2. Format tables with custom table sizes.
3. Format cells with corporate design compliant custom cell styles.
4. Create corporate design compliant charts.

In addition, you can also check all used references in a workbook.

For further information regarding the use of these features, refer to the respective chapters.

5.2. Design Your Worksheets

To design your worksheets, you can use elements from the empower® Library.

For example, you can insert corporate design compliant table and cell styles as well as chart templates from your *Corporate Design Templates*.

Files that are protected either by the Office built-in document protection or by Microsoft Purview Information Protection cannot be processed by empower®.

Files with Microsoft Purview Information Protection labels similar to *Public* can be processed.

For further information regarding Microsoft Purview Information Protection, see **Protect your sensitive data with Microsoft Purview**.

Insert and Use Table and Cell Styles

You can use custom and corporate design compliant cell and table styles in empower® to format cells and tables.

To download a table style to your workbook, follow the following steps:

1. Navigate to the group Start and click on the button **Library** (**Figure 435**).
   The library opens.

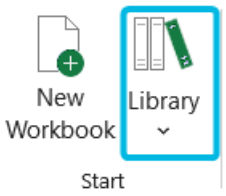


Figure 435. Button **Library**

2. In the library, navigate to the section *Corporate Design Templates* (Figure 436 **(1)**).
3. Then, navigate into the section *Table Style Sets* (Figure 436 **(2)**).
4. Find the table style set you want to insert and double-click it.
   The table style set is downloaded to your workbook.

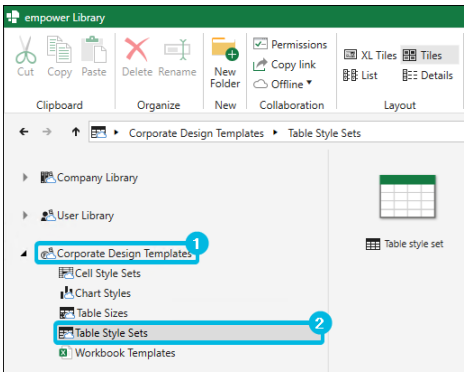


Figure 436. Section *Corporate Design Templates – Table Style Sets*

To apply a table style to a selected table, follow the following steps:

1. Select the table you want to format.
2. Navigate to the group Formatting and click on the button **Format as Table** (Figure 437).
   The category *Custom* is added to the styles.
3. Select the custom style you want to apply to the table.
   The table format is changed accordingly.

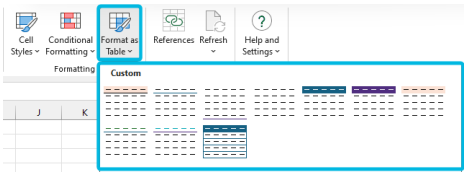


Figure 437. Button **Format as Table**

To download a cell style to your workbook, follow the following steps:

1. Navigate to the group Start and click on the button **Library** (Figure 435).
   The library opens.
2. In the library, navigate to the section *Corporate Design Templates* (Figure 438 **(1)**).
3. Navigate into the section *Cell Style Sets* (Figure 438 **(2)**).
4. Find the cell style set you want to insert and double-click it.
   The cell style set is downloaded to your workbook.

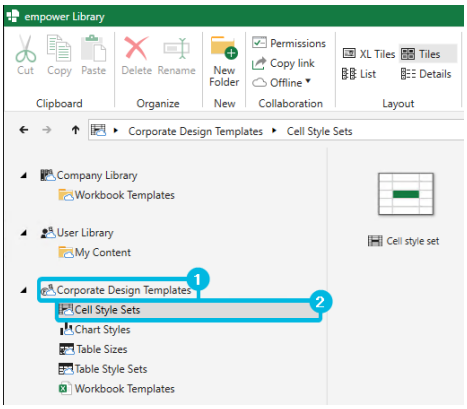


Figure 438. Section *Corporate Design Templates – Cell Style Sets*

To apply a cell style to a selected cell, follow the following steps:

1. Select the cell you want to format.
2. Navigate to the group Formatting and click on the button **Cell Styles** (Figure 439).
   The category *Custom* is added to the styles.
3. Select the custom style you want to apply to the cell.
   The cell format is changed accordingly.

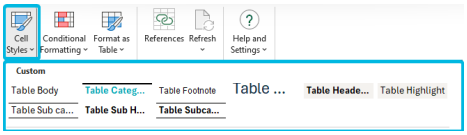


Figure 439. Button **Cell Styles**

Insert and Use Table Sizes

You can use predefined table sizes in empower® to format a table.

To download them to your workbook and apply them to an existing table, follow the following steps:

1. Select the table you want to apply a table size to.
2. Navigate to the group Start and click on the button **Library** (Figure 435).
   The library opens.
3. In the library, navigate to the section *Corporate Design Templates* (Figure 440 **(1)**).
4. Navigate into the section *Table Sizes* (Figure 440 **(2)**).
5. Find the table size you want to use and double-click it.
   The table size is downloaded to your workbook.

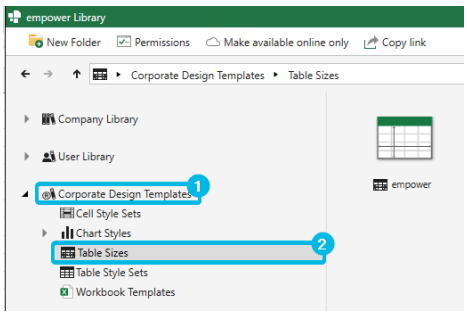


Figure 440. Section *Corporate Design Templates – Table Sizes*

To apply a table size to a selected table, follow the following steps:

1. Select the table you want to resize.
2. Navigate to the group Insert and click on the button **Elements** (Figure 441) to expand the drop-down menu.

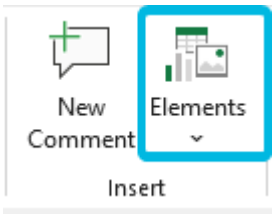


Figure 441. Button **Elements**

3. Select the option **Tables** (Figure 442 **(1)**), then select the option **Table Sizes** (Figure 442 **(2)**).
4. Select the option **Load table size set** (Figure 442 **(3)**).
   Find the table size you want to apply to your table and double-click it.
   The table format is changed accordingly.

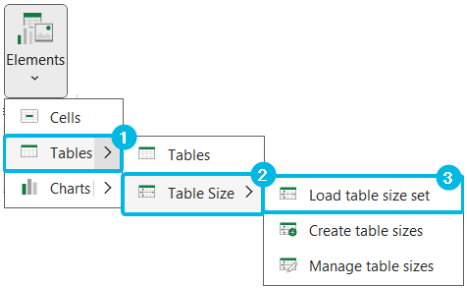


Figure 442. Load Table Size Sets

The table sizes are named by your empower® Administrators in a meaningful way, so that the names already provide information about the use of the table sizes.

The following values can be predefined for a table size:

- Total width of the table
- Column widths for individual columns

If the number of column widths defined in the table size is greater than the number of columns in the table to be formatted, all selected columns are formatted according to the table size, and any column widths additionally defined in the table size are not applied.

If the number of column widths defined in the table size is less than the number of columns in the table to be formatted, all selected columns are formatted according to the table size. For the remaining columns in the table to be formatted, the total width of the table defined in the table size is subtracted from the column widths already used, and the difference is distributed evenly among the remaining unformatted columns.



In case there are unsaved changes to your current workbook, you are asked to save the workbook to proceed.

If the workbook you are working with is saved in a cloud and you want to add a table size to it, you are informed that no other editors should be working in the file.

Table sizes are available in a workbook after being loaded once you select a range in your open workbook and will be kept in a workbook after saving it.

Use Chart Styles

You can use custom chart templates to illustrate the contents of a table with a chart.

To do so, follow the following steps:

1. Select the table contents you want to illustrate with a chart.
2. Navigate to the group Start and click on the button **Library**.
   The library opens.
3. In the library, navigate to the section *Corporate Design Templates* (**Figure 443 (1)**).
4. Navigate into the section *Chart Styles* (**Figure 443 (2)**).
   Find the chart style you want to use and double-click it.
   The chart style is used to illustrate the table content.

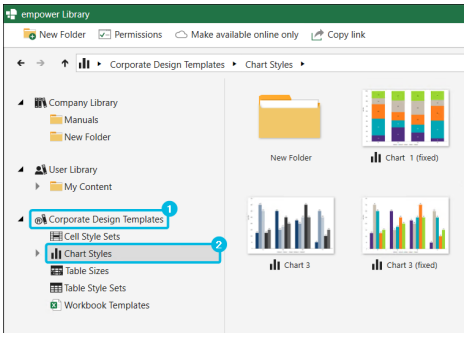


Figure 443. Section *Corporate Design Templates – Chart Styles*

A chart style can be of two types:

- with fixed colors
- with colors that dynamically adapt to the design or color scheme

The fixed color chart styles have the property that the colors used in the chart template are completely adapted to the corporate design and do not change even if the workbook's color scheme differs from the chart's colors or if the design of the workbook is changed via Excel (tab Page Layout – *Designs*).

If you choose a chart style with dynamically changing colors, the colors of the chart will automatically adapt to the workbook's design/color scheme.

To change the display order in charts for rows and columns, follow the following steps:

1. Navigate to the group Insert and click on the button **Elements** to expand the drop-down menu (**Figure 444 (1)**).
2. Select the option **Charts**.
3. Then select the option **Switch Row/Column** (**Figure 444 (2)**).

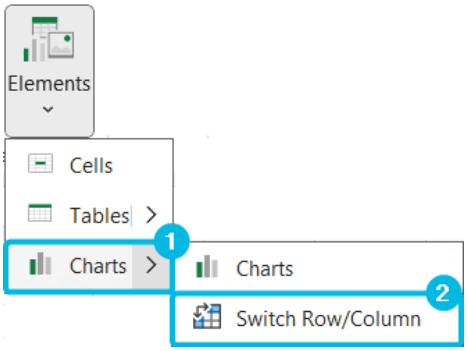


Figure 444. Switch Rows and Columns

With this option, you can toggle between assigning the rows and columns to the horizontal and vertical graph axes, depending on the arrangement of the series within a graph. The settings made here affect, among others, the chart title, legend and data point labels.

Chart styles in empower® can only be applied to Excel charts and not to charts that have been created with empower®.

5.3. Check References

Depending on the complexity of the content to be displayed in a workbook, references to other data sheets or separate workbooks are often used. With empower®, all these internal and external links to data sheets or separate workbooks can be checked for their functionality in an open workbook. All valid and invalid references are detected.

A reference is considered invalid if:

- a workbook is referenced (either stored locally or in the library) that has been deleted after the reference was created.
- a workbook saved to the empower® Library is referenced that has been closed after the reference was created.
- a data sheet is referenced that has been deleted after the reference was created. This applies both to data sheets within the open workbook and to data sheets from other workbooks. The workbooks can be either stored locally or in the library.
- a workbook with a file format that is not supported by Excel is referenced.

You can then manually edit and correct invalid references.

To check and correct references, follow the following steps:

1. Navigate to the group Finalize and click on the button **References** (Figure 445).
   The check is automatically started.

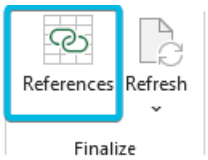


Figure 445. Button **References**

2. An overview opens via the side pane, displaying all existing references, sorted by the categories *Internal* and *External*.
   If one of the references is invalid, it is marked with an **X** symbol (**Figure 446**).
3. Click on one of the references to navigate directly to the data source in the workbook.
   The linked data will be selected accordingly.

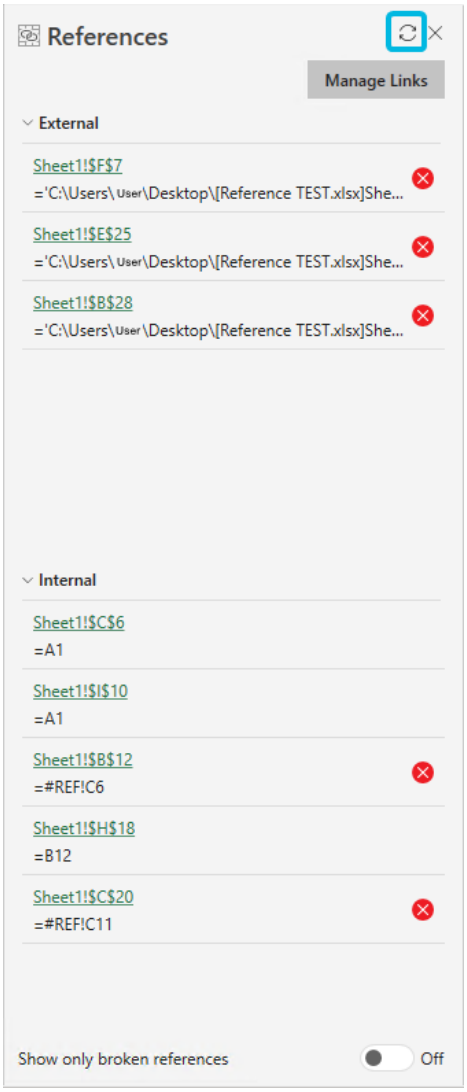


Figure 446. Reference Overview

4. Switch the toggle button **Show only broken references** to *On* if you want to focus on all invalid references (Figure 447).
   The overview is filtered accordingly.
   References and formulas inserted on hidden datasheets are also taken into account and recognized by the check and listed in the overview (Figure 448).
5. Manually correct any invalid references that are found.

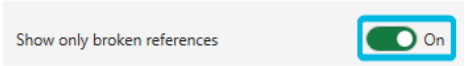


Figure 447. Toggle Button **Show only broken references**

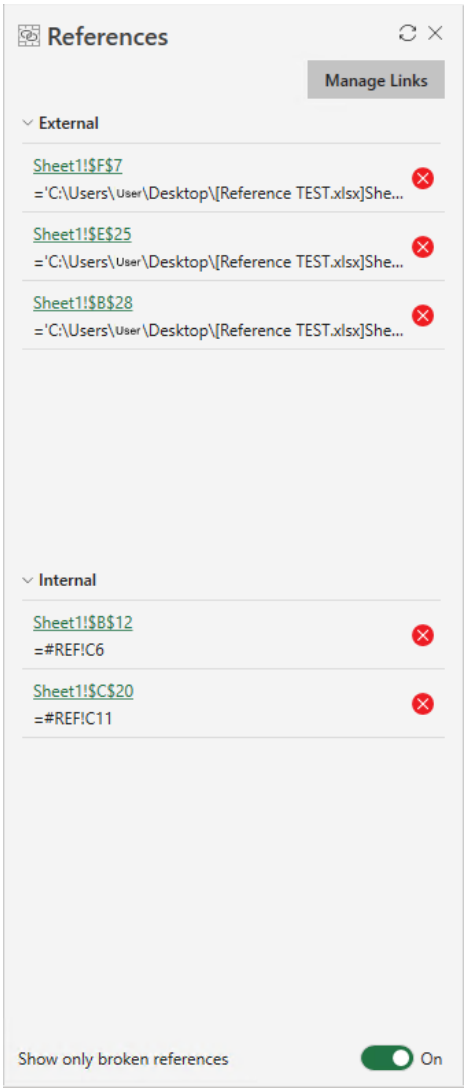


Figure 448. Invalid References Only

To refresh the overview after making changes, click on the **refresh** symbol to the left of the **X** symbol in the open overview (Figure 449).

You also have the option to refresh all references in your workbook using the Excel built-in functions directly in the empower® Ribbon.

To do so, use the options under the split button **Refresh** in the group Finalize.

These options reflect the Excel built-in options available in the group Queries & Connections in tab Data.

For further information regarding the Excel built-in functions, see **Refresh an external data connection in Excel**.

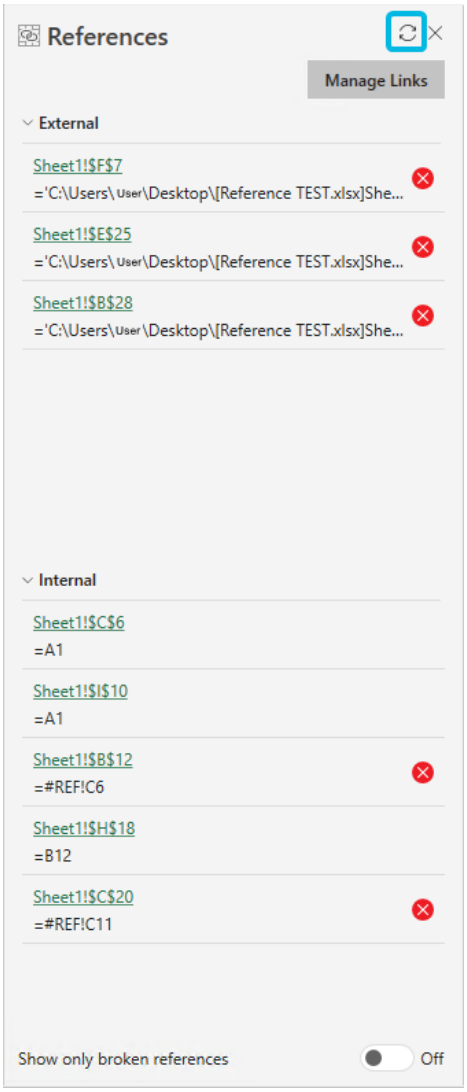


Figure 449. **Refresh** Symbol

6. Outlook

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

In the following chapter, you will learn more about our Outlook features and how to use them.

6.1. 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 450).

A drop-down menu opens.

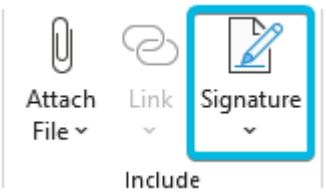


Figure 450. Button **Signature**

In the drop-down menu, click on your preferred option (Figure 451).

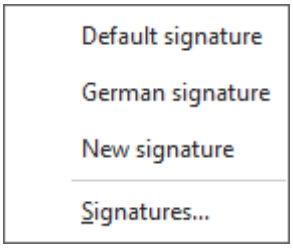


Figure 451. Drop-Down Menu with Signatures

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.

6.2. 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 452).

A dialog box opens.

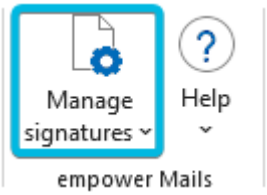


Figure 452. Button **Manage signatures**

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 453).

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

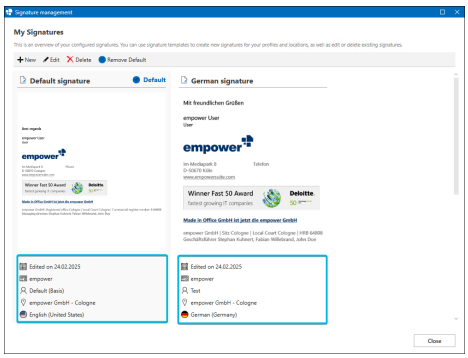


Figure 453. Metadata for Signatures

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 454).
A dialog box opens.

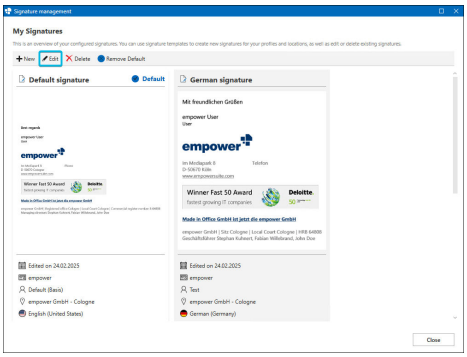


Figure 454. Button **Edit**

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 455).

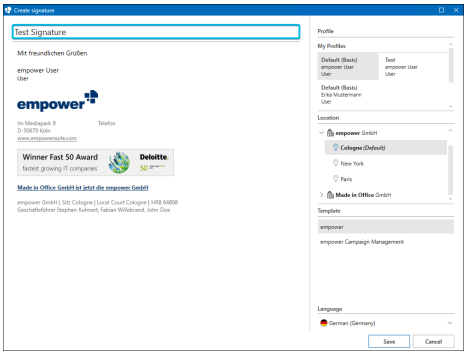


Figure 455. Title Input Field

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 456 **(1)**).
2. Then, select the company and location you want to display in your signature (Figure 456 **(2)**).
3. Choose the signature template you want to use (Figure 456 **(3)**).
4. To choose the language for the signature, open the drop-down menu under *Language* and select your preferred language (Figure 456 **(4)**).

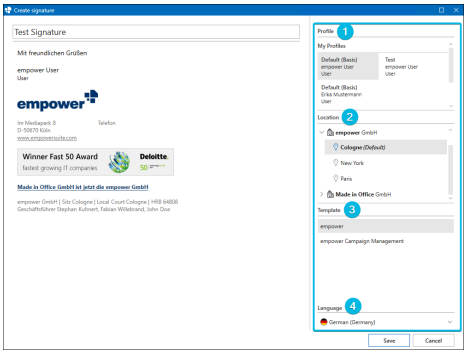


Figure 456. Signature Values

5. Click on the button **Save** (Figure 457).
   The window closes automatically and empower® starts changing your signature.

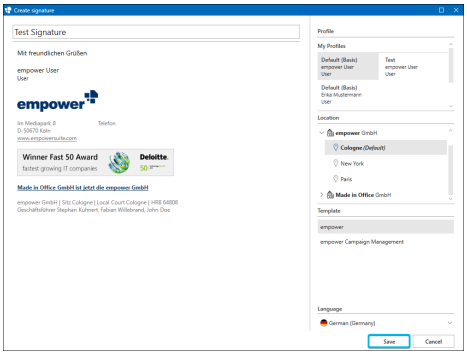


Figure 457. Button **Save**

If you select a signature template that references more than one profile, a dialog box opens (**Figure 458**).

This indicates that the selected signature template requires an update. Signature templates support only a single profile, so templates that reference multiple profiles cannot be used.

Contact your empower® Administrators to have the signature template corrected.

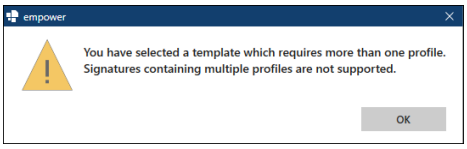


Figure 458. Dialog Box for Template with Multiple Profiles

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**.

Default Language Behavior

The selected default language affects the following elements of templates:

- **Logo selection:**
  The logo associated with the selected language is used.
- **Profile information:**
  The language-specific values stored in the selected user profile are inserted.
- **Location and company information:**
  The language-specific values stored for the selected location and the associated company information are inserted based on the selected default language.

If the user selects the option *Default*, there are three possible scenarios, depending on the user's settings and the configuration in empower®:

- **The Office language is supported by empower®:**
  If a user's Microsoft Office language is also configured in empower®, that language is automatically selected as the default language.
  Example: The user has Microsoft Office set to *English*, and *English* is also configured in empower®. *English* is automatically selected as the default language.
- **The Office language is not supported by empower®:**
  If a user's Microsoft Office language is not configured in empower®, it cannot be selected as the default language. In this case, empower® automatically uses the values and logos defined in the *Default* column during the initial configuration of empower®.
  Example: The user has Microsoft Office set to *Spanish*, but empower® is only configured for German and English. In this case, the values and logos stored in the *Default* column are used.
- **An administrator defines a fixed default language for empower®:**
  Regardless of the user's Microsoft Office language, an administrator can specify a fixed default language through a global setting in empower®.
  This setting overrides the automatic language selection and applies to all users.
  Example: An administrator sets *English* as the global default language. Even if a user has Microsoft Office set to *German*, *English* will be selected as the default language.

For Administrators

To influence which language is used for the option *Default* in the language selection, empower® Administrators can set the default language in the empower® Admin Center.

To do so, navigate to the setting **Default Language Code** in the section *Configuration* within the empower® Admin Center.

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

Set as Default Signature

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 459).

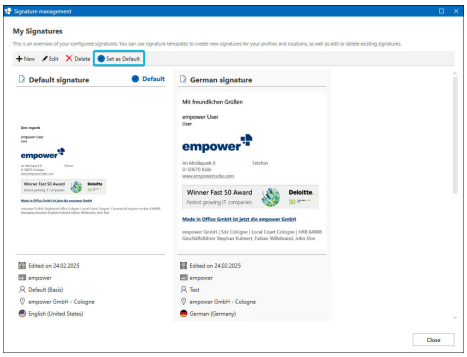


Figure 459. Button **Set as Default**

The signature will be marked as default and is the first one to appear in the dialog box (Figure 460).

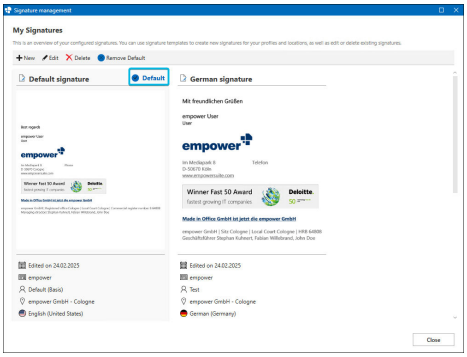


Figure 460. Default Marker

To remove the default marker from a signature, select it from the dialog box and click on the button **Remove Default** (Figure 461).

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

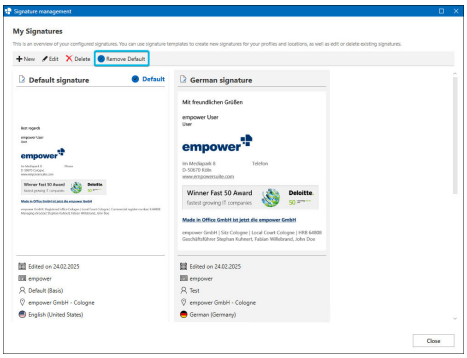


Figure 461. Button **Remove Default**

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 462).
A dialog box opens.

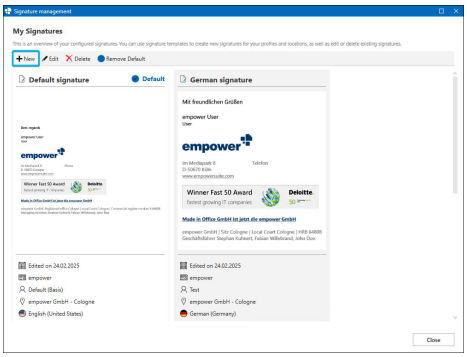


Figure 462. Button **New**

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 455).
2. On the right side of the dialog box, choose the profile you want to use for the signature (Figure 456 **(1)**).
3. Then, select the company and location you want to display in your signature (Figure 456 **(2)**).
4. Choose the signature template you want to use (Figure 456 **(3)**).
5. To choose the language for the signature, open the drop-down menu under *Language* and select your preferred language (Figure 456 **(4)**).
6. Click on the button **Save** (Figure 457).
   The window closes automatically and empower® starts creating your new signature.

If you select a signature template that references more than one profile, a dialog box opens (Figure 458).
This indicates that the selected signature template requires an update. Signature templates support only a single profile, so templates that reference multiple profiles cannot be used.
Contact your empower® Administrators to have the signature template corrected.

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 463**).
A dialog box opens.

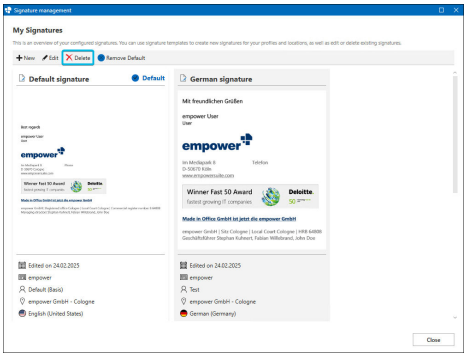


Figure 463. Button **Delete**

To confirm the deletion process, click on the button **Yes** (**Figure 464**).
The signature will be deleted.

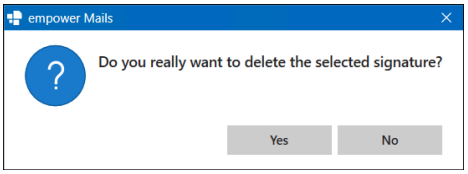


Figure 464. Deletion Dialog Box

6.2.1. 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 465).
   A dialog box opens.

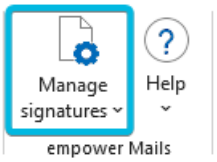


Figure 465. Button **Manage signatures**

3. In the upper right corner of this dialog box, click on the button **Set up on Mobile** (Figure 466).
   A dialog box opens.

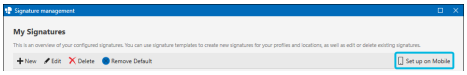


Figure 466. Button **Set up on Mobile**

4. Scan the QR code in this dialog box with your mobile device (Figure 467 **(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 467 **(2)**).
      You can then send this link to your mobile device and open the signature management via this link.

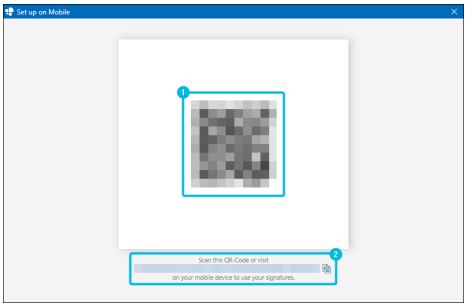


Figure 467. Access Signature Management

5. In the signature management, click on the signature you want to use (Figure 468).
   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.

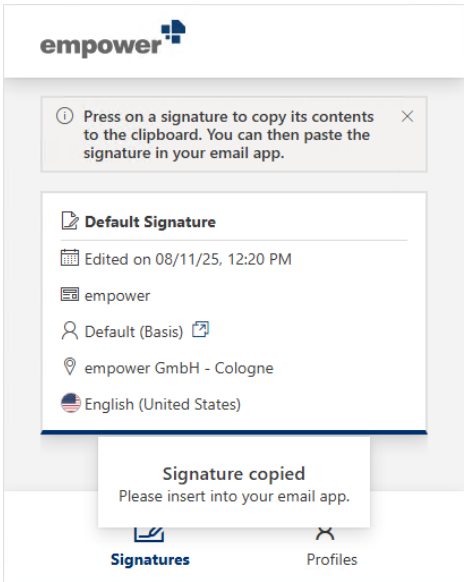


Figure 468. Signature Management on Mobile Device

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.

6.3. 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 469**).

Click on this button to open the empower® Library.

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.

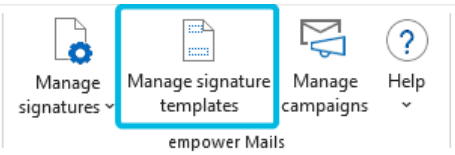


Figure 469. Button **Manage signature templates**

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 470).

Word opens automatically.

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

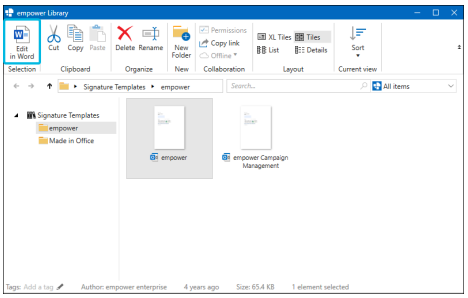


Figure 470. Button **Edit in Word**

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 fonts and colors might be displayed differently.

Referencing multiple profiles in signature templates is not supported.

In Word, you also have access to some empower® Features via the empower® Ribbon (Figure 471).



Figure 471. empower® Ribbon in Word

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 472).

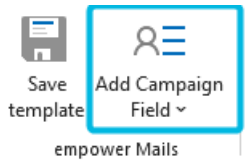


Figure 472. Button **Add Campaign Field**

A drop-down menu opens (Figure 473).

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

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

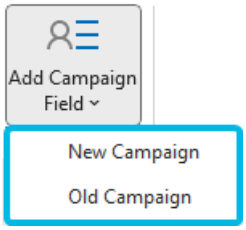


Figure 473. Campaign Field Drop-Down Menu

If you want to insert a campaign field into 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 474).

Your file explorer opens.

Navigate to the respective Word file and select it.

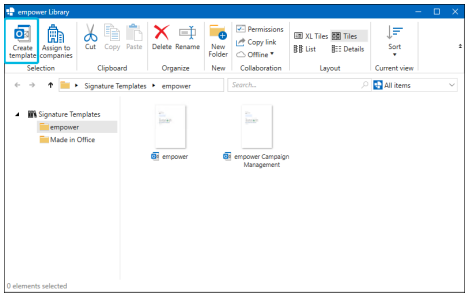


Figure 474. Button **Create template**

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 475).

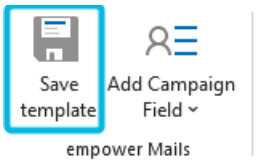


Figure 475. Button **Save template**

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 476).

A dialog box opens.

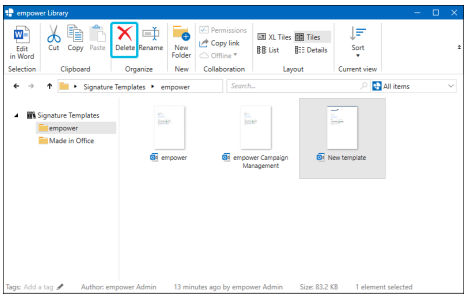


Figure 476. Button **Delete**

To confirm the deletion process, click on the button **Yes** (Figure 477).

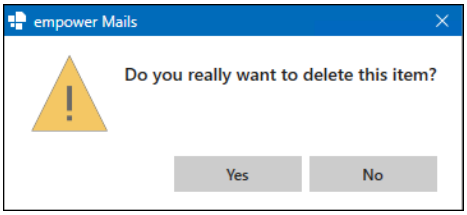


Figure 477. Dialog Box for Deletion

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 478).

A dialog box opens.

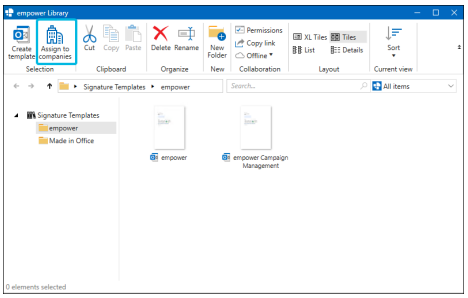


Figure 478. Button **Assign to companies**

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 479 **(1)**).

If you want to deselect all companies, click on the button **Uncheck all** (Figure 479 **(2)**).

Alternatively, tick the checkboxes for the individual entries.

Then, click on the button **OK** (Figure 479 **(3)**).

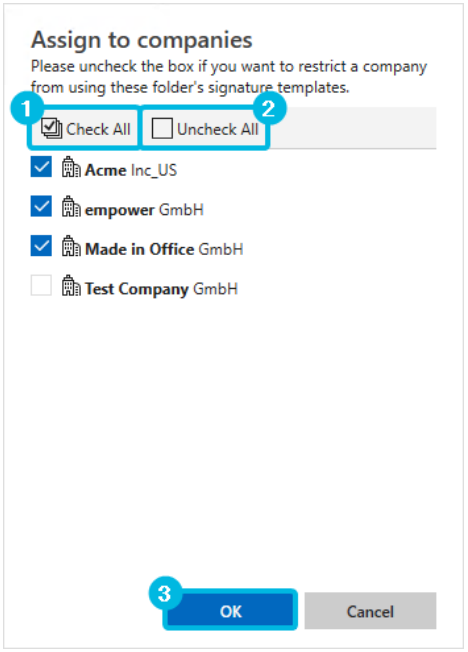


Figure 479. Dialog Box for Template Assignment

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.

6.4. 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 480).
2. Select your signature template and double-click it to open the template in Word.

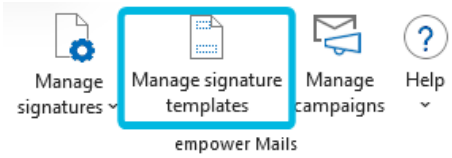


Figure 480. Button **Manage signature templates**

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 481).

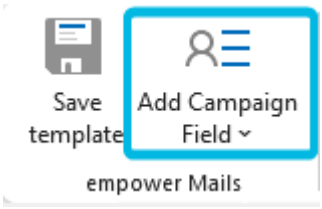


Figure 481. Button **Add Campaign Field**

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 482).

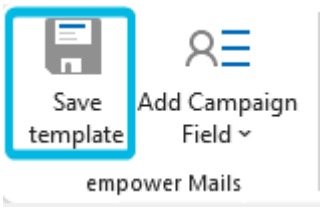


Figure 482. Button **Save template**

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 campaign 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 483).
   A dialog box opens.

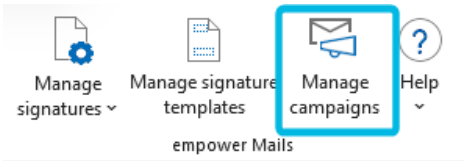


Figure 483. Button **Manage campaigns**

2. Click on the button **New Campaign** (Figure 484).
   A dialog box opens.



Figure 484. Button **New Campaign**

3. Insert a campaign name into the input field *Name* (**Figure 485 (1)**).
4. Click on the **arrow** symbol in the field *Duration* to access the calendar (**Figure 485 (2)**).
5. Pick the start and end date for the campaign (**Figure 486**).
   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 485 (3)**).
7. Tick the checkboxes for all user groups you want to assign the campaign to.
8. 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 485 (4)**).
   b. Click on the button **Select image** to use an image that is already stored in the empower® Library (**Figure 485 (5)**).
9. Set a hyperlink via the input field *Hyperlink* that can be accessed with a click on the previously selected image (**Figure 485 (6)**).
10. Click on the button **Preview** to check what your campaign will look like (**Figure 485 (7)**).
11. Click on the button **Save** to confirm the information added to your campaign (**Figure 485 (8)**).

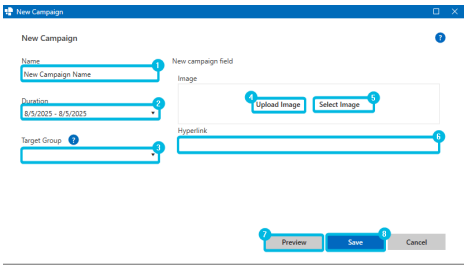


Figure 485. Dialog Box New Campaign

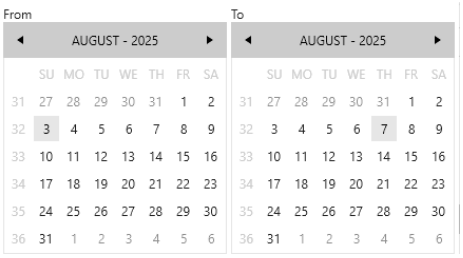


Figure 486. Date Picker in Input Field *Duration*

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 483**).

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 487**):

- **Active** – Currently active campaign
- **Planned** – Campaign with defined start date in the future
- **On hold** – Campaign with defined duration in the 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

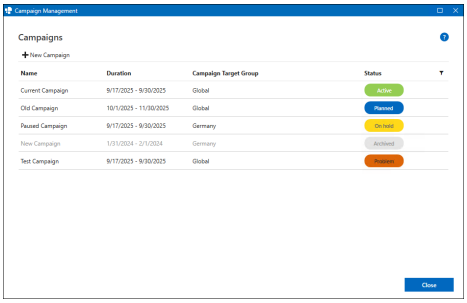


Figure 487. Campaign Management Status

To edit a campaign, follow the following steps:

1. Navigate to the tab Home and click on the button **Manage campaigns** (Figure 483).
2. Select a campaign from the list and click on the button **Edit** (Figure 488).
   A dialog box opens.
3. Perform all necessary changes and click on the button **Save** to confirm the changes.



Figure 488. Button **Edit**

To delete a campaign, navigate to the tab Home and click on the button **Manage campaigns** (Figure 483).

Then, click on the button **Delete** (Figure 489).

A dialog box opens.

Figure 489. Button **Delete**

Click on the button **Yes** to confirm the deletion of the campaign (Figure 490).

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*.

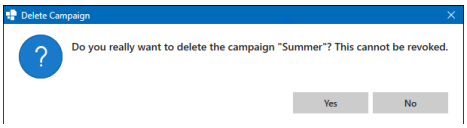


Figure 490. Dialog Box **Delete Campaign**

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 491).



Figure 491. 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 492).

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

Open the campaign management to adjust your existing campaigns.

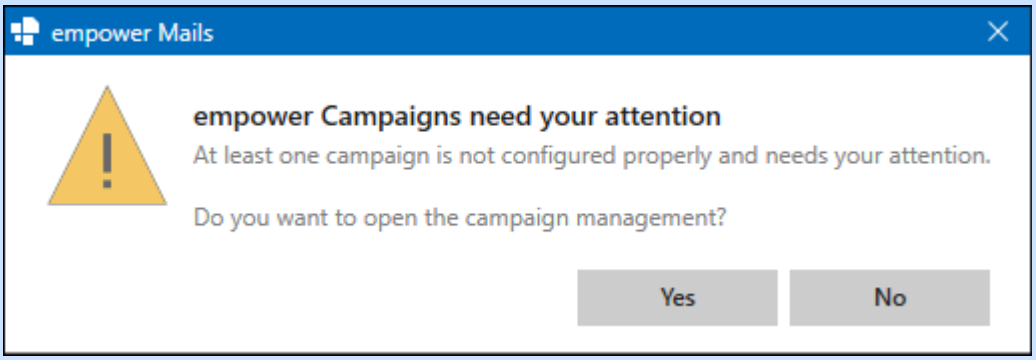


Figure 492. Dialog Box for Deleted Campaign Image

7. Document Automation

7.1. Permission Distribution

empower® Document Automation allows for the creation of templates that can be run by all users in the company.

Similar to other items in the empower® Library, permissions for these templates can be adjusted.

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

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

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

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

If you have the required permissions, the button **Automation Designer** integrates into your ribbon in PowerPoint and Word (Figure 493).



Figure 493. Button **Automation Designer** in PowerPoint

For further information regarding the permission concept, see **Permission Concept**.

7.2. Update Behavior

In PowerPoint, update groups cannot be created for automated templates. However, slide updates are possible for presentations that have been created using an automated template under the following conditions:

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

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

Presentations will not be updated.

For further information regarding update groups, see **Update Groups**.

In automated templates for Word, content blocks can only be updated if they have been inserted via the empower® Library.

If they are inserted as linked content blocks, they will not be updated.

For further information regarding content blocks in automated templates, see **Create Automated Templates in Word**.

7.3. Use Automated Templates in PowerPoint

Automated templates have a special icon indicating that they are automated (**Figure 494**).



Figure 494. Automated Presentation with Icon

To open such a template, double-click on it or click on the button **Open** (**Figure 495 (1)**).

If you want to insert an automated template into your current presentation, click on the button **Insert** (**Figure 495 (2)**).

A dialog box opens.

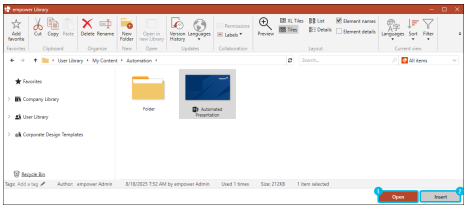


Figure 495. Open Automated Template

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

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

Fill in Templates

In the dialog box, you will find all the questions and instructions that were defined when the automated template was created (Figure 496).

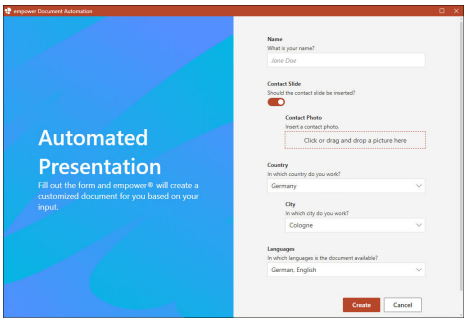


Figure 496. Dialog Box for Automated Template

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

- **Text Input** – Enter the answer to the question or instruction into the input field (Figure 497).

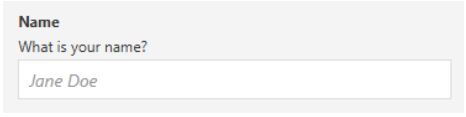


Figure 497. Text Input Question

- **Yes/No** – To answer the question, enable or disable the toggle button (Figure 498).
  The answer can also be shown in form of a checkbox. In this case, tick the checkbox if you want to answer with *Yes*.

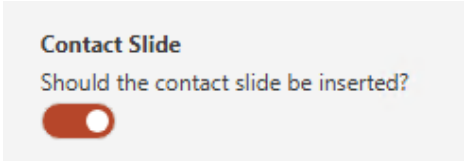


Figure 498. Yes/No Question

- **Picture** – Insert a picture that matches the question or instruction by clicking inside the box or using drag & drop (Figure 499).

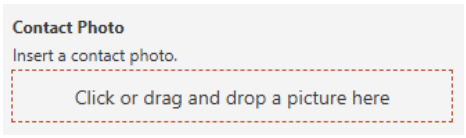


Figure 499. Picture Question

- **Single Choice** – Choose the most appropriate answer option from the drop-down menu (Figure 500).

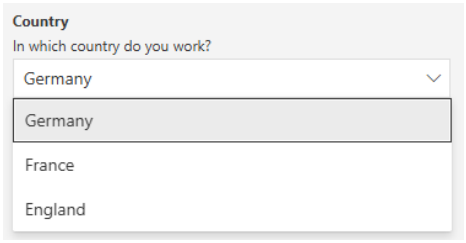


Figure 500. Single Choice Question

- **Multiple Choice** – Choose the most appropriate answer options from the drop-down menu (Figure 501).

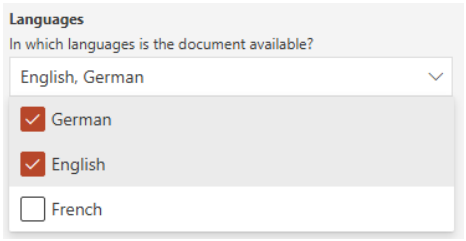


Figure 501. Multiple Choice Question

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

Required questions are marked by an asterisk.

If a question or instruction defined as required has not been answered, a corresponding message appears (Figure 502).



Figure 502. Missing Answer

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

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

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

7.4. Use Automated Templates in Word

Automated templates have a special icon indicating that they are automated (Figure 503).

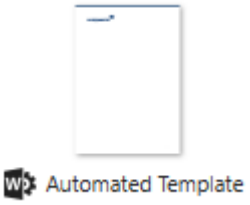


Figure 503. Automated Document with Icon

To open such a template, double-click on it or click on the button **Open** (Figure 504).

A dialog box opens.

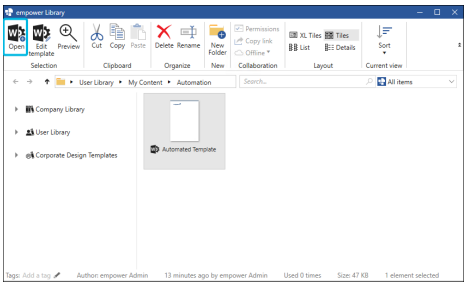


Figure 504. Open Automated Template

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

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

Fill in Templates

In the dialog box, you will find all the questions and instructions that were defined when the automated template was created (Figure 505).

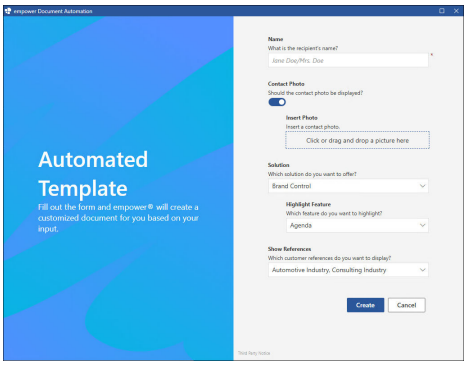


Figure 505. Dialog Box for Automated Template

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

- **Text Input** – Enter the answer to the question or instruction into the input field (Figure 506).

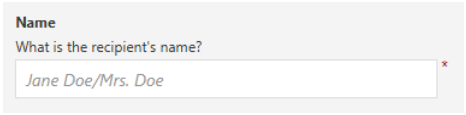


Figure 506. Text Input Question

- **Yes/No** – To answer the question, enable or disable the toggle button (Figure 507).
  The answer can also be shown in form of a checkbox. In this case, tick the checkbox if you want to answer with *Yes*.

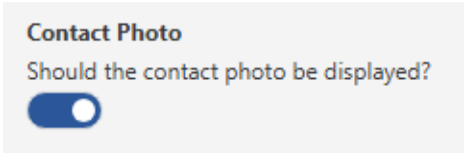


Figure 507. Yes/No Question

- **Picture** – Insert a picture that matches the question or instruction by clicking inside the box or using drag & drop (Figure 508).

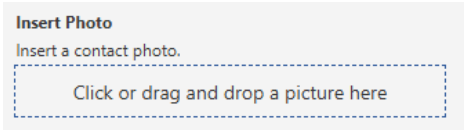


Figure 508. Picture Question

- **Single Choice** – Choose the most appropriate answer option from the drop-down menu (Figure 509).



Figure 509. Single Choice Question

- **Multiple Choice** – Choose the most appropriate answer options from the drop-down menu (Figure 510).



Figure 510. Multiple Choice Question

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

Required questions are marked by an asterisk.

If a question or instruction defined as required has not been answered, a corresponding message appears (Figure 511).

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

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

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



Figure 511. Missing Answer

Check for Updated Elements

To check your filled-in template for updated content blocks and pictures, click on the option **Update elements** (Figure 512).

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

Confirm that you want to update these elements.

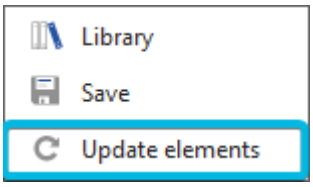


Figure 512. Option **Update elements**

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

As described above, updates must be triggered manually.

7.5. Create Automated Templates in PowerPoint

For Administrators

If you have the required permissions, you can access the button **Automation Designer** via your ribbon (Figure 513).



Figure 513. Button **Automation Designer**

If you click on this button, a drop-down menu opens, featuring the following options (Figure 514):

- Wizard Designer
- Fields
- Conditions
- Linked slides

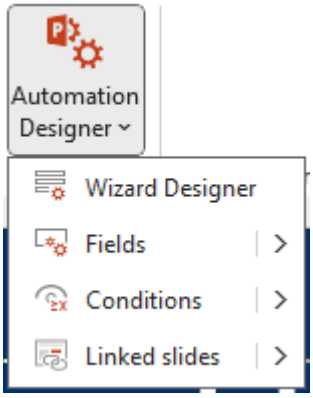


Figure 514. Options under **Automation Designer**

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

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

The context menu opens.

Choose the option **Edit template** (Figure 515).

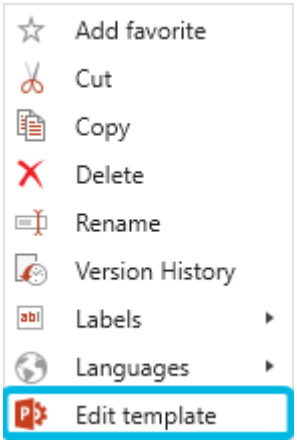


Figure 515. Option **Edit Template**

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

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

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

Add Fields

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

In the text, placeholders are marked by square brackets, in which the name of the question is written (Figure 516).



Figure 516. Placeholder on Slide

To insert a field, follow the following steps:

1. Navigate to the location in the presentation where you want to insert the field.
2. Then, click on the button **Automation Designer** and choose the option **Fields** (Figure 517).
   A dialog box opens.

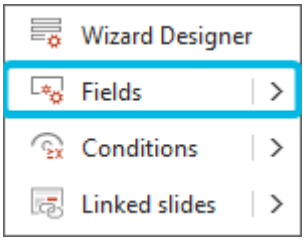


Figure 517. Option **Fields**

3. In the dialog box, select the question for whose answer you want to create a placeholder (Figure 518).
4. Then, click on the button **OK**.
   The placeholder will be inserted at the desired location.

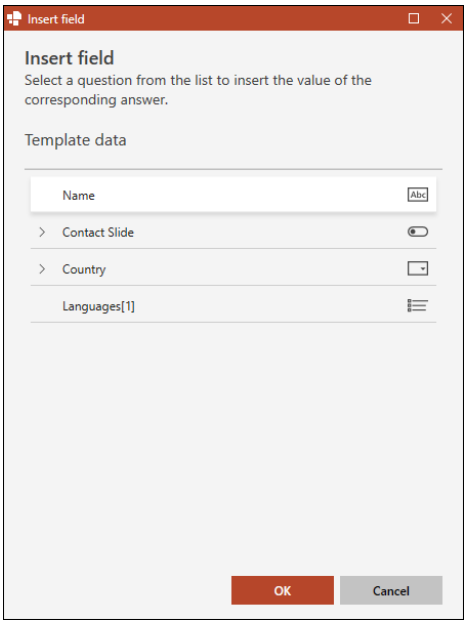


Figure 518. Choose Field

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

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

To do so, change the index in the field overview. The number in the index indicates which answer option is displayed (Figure 519).

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

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

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

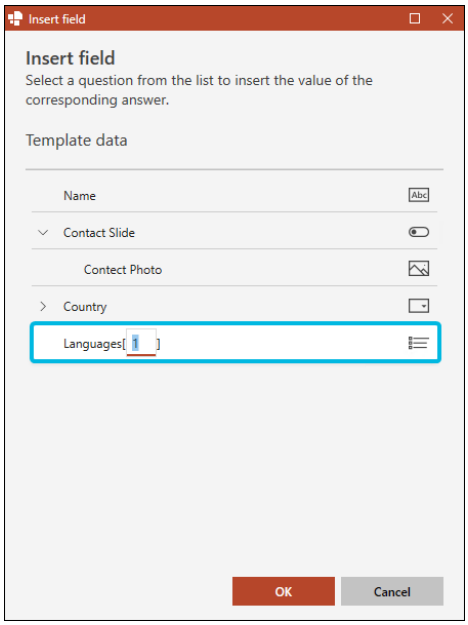


Figure 519. Enter Index

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

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

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

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

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

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

To see all assigned fields, click on the button **Automation Designer** and then click on the **arrow** symbol next to the option **Fields** (Figure 520).

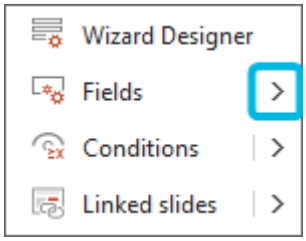


Figure 520. Open Options for Fields

Here, choose the option **Manage Fields** (Figure 521).
A dialog box opens.

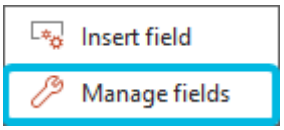


Figure 521. Option **Manage Fields**

In this dialog box, you are provided with an overview of all fields in your presentation.
To insert the field again at your current cursor position, select the entry and click on the button **Insert** (Figure 522 **(1)**).
To add a new field at your current cursor position, click on the button **Create** (Figure 522 **(2)**).

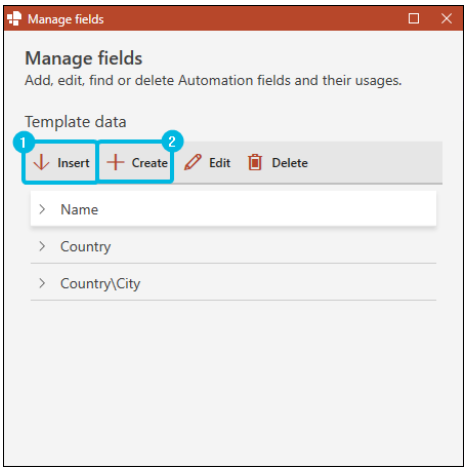


Figure 522. Buttons **Insert** and **Create** for Fields

In the dialog box, choose one of the available fields from the list and click on the button **OK** (Figure 523).
You can now insert the new field via the button **Insert**.

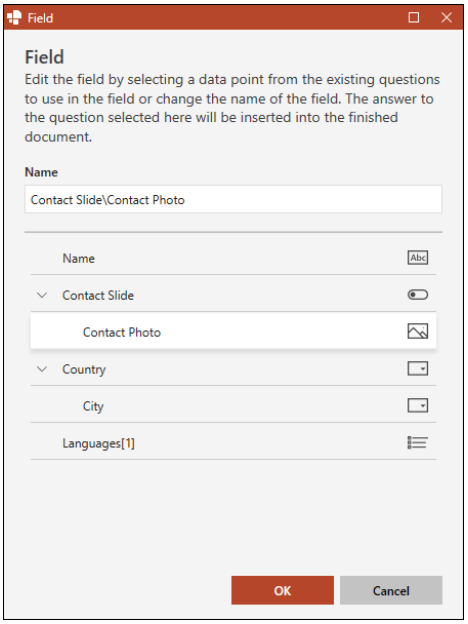


Figure 523. Dialog for Field Creation

To edit an existing entry, select it and click on the button **Edit** (Figure 524).
In the dialog box, you can change the field you have used.

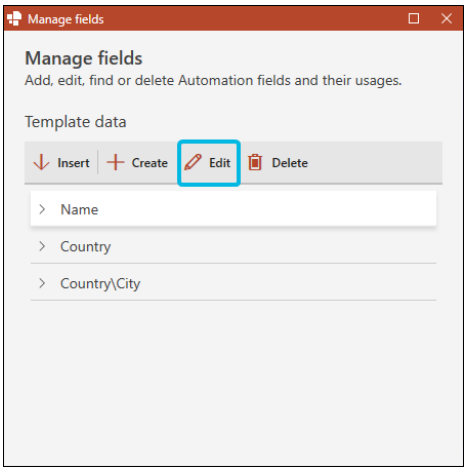


Figure 524. Button **Edit** for Field

The same field can also be inserted multiple times in one presentation.
To see where the field has been inserted, expand the entry (Figure 525).

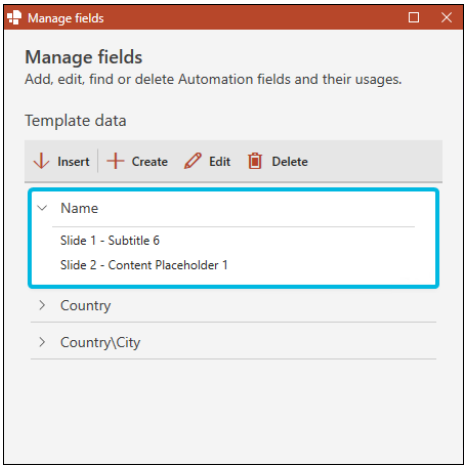


Figure 525. Expanded Field Entry

To delete one occurrence of a field, select it from the entry and click on the button **Delete** (Figure 526).

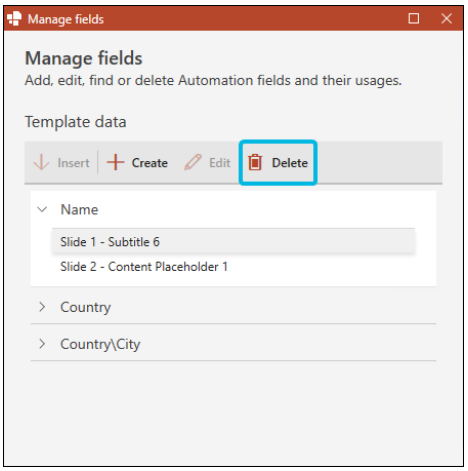


Figure 526. Delete Single Field Occurrence

To delete the entry completely and therefore remove all occurrences of the field, select the entry itself and click on the button **Delete** (Figure 527).

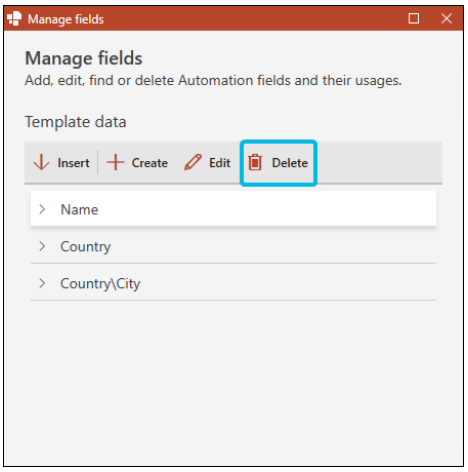


Figure 527. Delete Entire Field Entry

A dialog box opens (Figure 528).

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

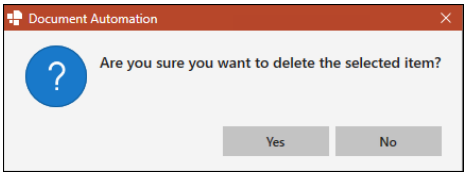


Figure 528. Deletion Confirmation for Fields

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

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

Add Conditions

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

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

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

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

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

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

To insert a condition, follow the following steps:

1. Navigate to the location in the presentation where you want to insert the condition.
2. Choose a shape or slide on which you want to apply the condition.
3. Click on the button **Automation Designer** and choose the option **Conditions** (Figure 529).
   A dialog box opens.

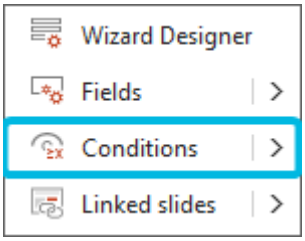


Figure 529. Option **Conditions**

4. In the dialog box, select the condition you want to assign (Figure 530).
   To view the condition rule in a mouse-over, hover over the **information** symbol.
5. Then, click on the button **OK**.

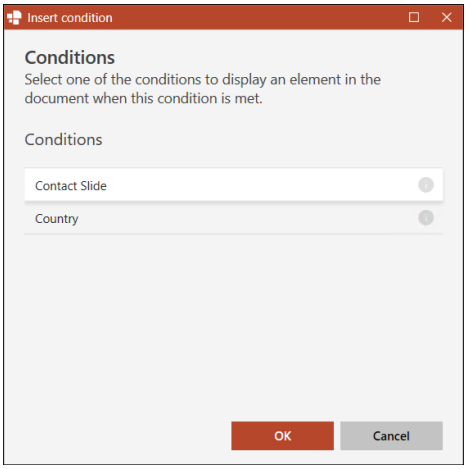


Figure 530. Choose Condition

Conditions are not visible in the presentation.

To see all conditions and their usage in the presentation, click on the button **Automation Designer** and then click on the **arrow** symbol next to the option **Conditions** (Figure 531).

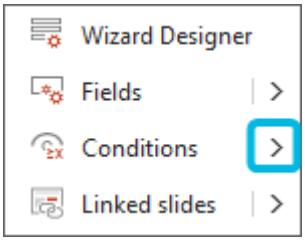


Figure 531. Open Options for Conditions

Then, choose the option **Manage conditions** (Figure 532).

A dialog box opens.

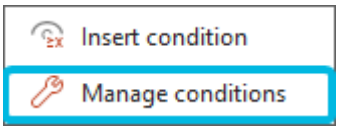


Figure 532. Option **Manage conditions**

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

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

To apply the condition to the currently selected shape or slide, first select the element in your presentation and then the condition in the dialog box and click on the button **Insert** (Figure 533).

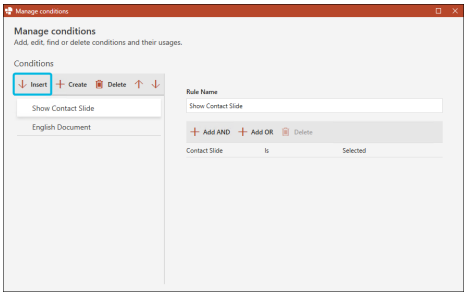


Figure 533. Insert Condition

To add a new condition, click on the button **Create** (Figure 534 **(1)**).

On the right-hand side, enter a name for the rule into the input field (Figure 534 **(2)**).

Then, either click on the button **Add AND** or **Add OR**, depending on the condition you want to create (Figure 534 **(3)**).

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

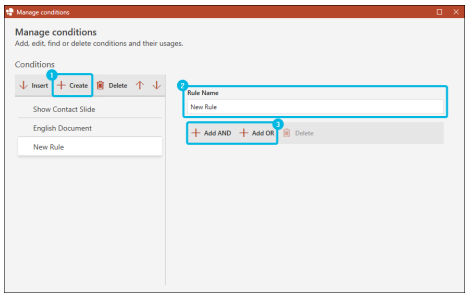


Figure 534. Create Condition

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

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

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

To delete rules from the condition, select the rule and click on the button **Delete** on the right-hand side of the dialog box (Figure 535).

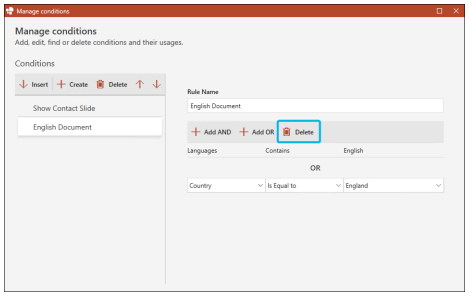


Figure 535. Delete Rule

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

To see where the condition has been applied, expand the entry on the left-hand side of the dialog box (Figure 536).

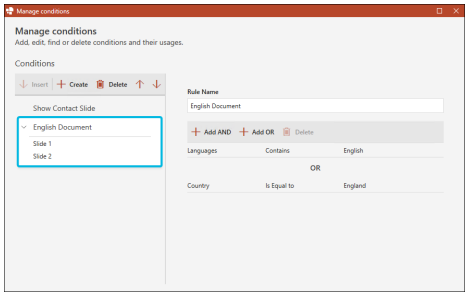


Figure 536. Expanded Condition Entry

To delete one occurrence of a condition, select it from the entry and click on the button **Delete** on the left-hand side of the dialog box (Figure 537).

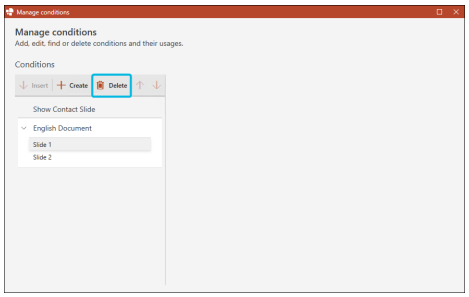


Figure 537. Delete Single Condition Occurrence

To delete the entry completely and therefore remove all occurrences of the condition, select the entry itself and click on the button **Delete** (Figure 538).

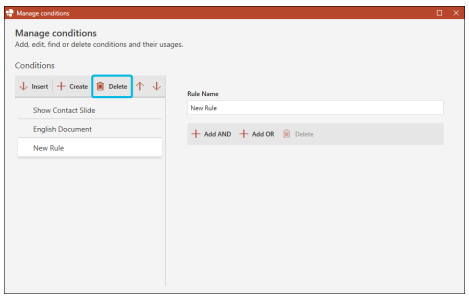


Figure 538. Delete Entire Condition Entry

A dialog box opens (Figure 539).
To confirm the deletion process, click on the button **Yes**.

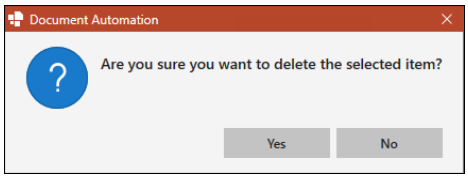


Figure 539. Deletion Confirmation for Condition

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

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

Rule Structure

The rules are structured differently for each type of question:

Text Input Question

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

Yes/No Question

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

Single Choice Question

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

Multiple Choice Question

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

These rules work for slides and single elements.

Add Linked Slides

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

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

1. Open the empower® Library.
2. Navigate to the location of the desired slide or presentation.
3. Select the element you want to link.
4. In the navigation bar, click on the button **Copy link to clipboard** (Figure 540).

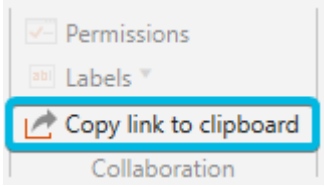


Figure 540. Option **Copy link to clipboard**

5. Go back to your automated template and navigate to the slide after which you want to insert the linked slide.
6. Click on the button **Automation Designer** and choose the option **Linked slides** (Figure 541).
   A dialog box opens.

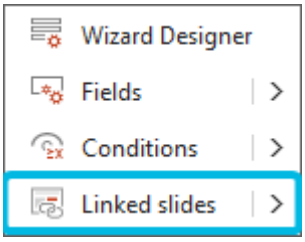


Figure 541. Option **Linked slides**

7. In the dialog box, paste the link into the input field.
   A preview of the slide or presentation appears, as well as its metadata (Figure 542).

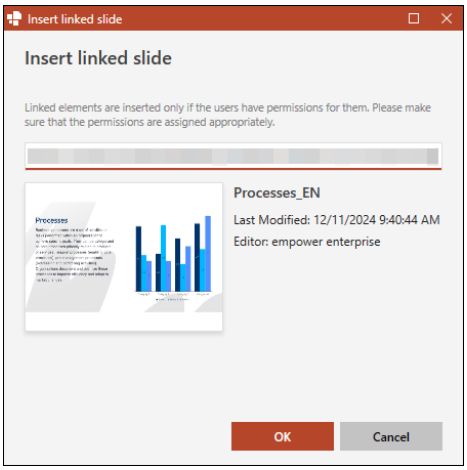


Figure 542. Insert Linked Slide

8. Then, click on the button **OK**.
   A placeholder slide is inserted (**Figure 543**).



Figure 543. Placeholder Slide in Slide Overview

The placeholder slide also shows a preview of the slide or presentation and contains the respective metadata (**Figure 544**).

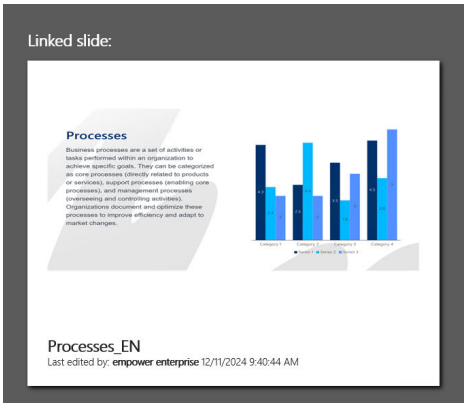


Figure 544. Placeholder Slide Content

To view an overview of all linked slides and presentations, click on the button **Automation Designer** and then click on the **arrow** symbol next to the option **Linked slides** (**Figure 545**).

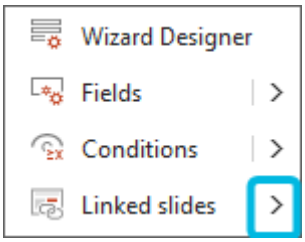


Figure 545. Open Options for Linked Slides

Then, choose the option **Manage linked slides** (**Figure 546**).
A dialog box opens.

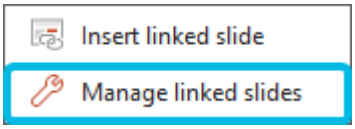


Figure 546. Option **Manage linked slides**

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

To insert the linked slide again, select the entry and click on the button **Insert** (Figure 547 **(1)**).

To add a new linked slide or presentation, click on the button **Create** (Figure 547 **(2)**).

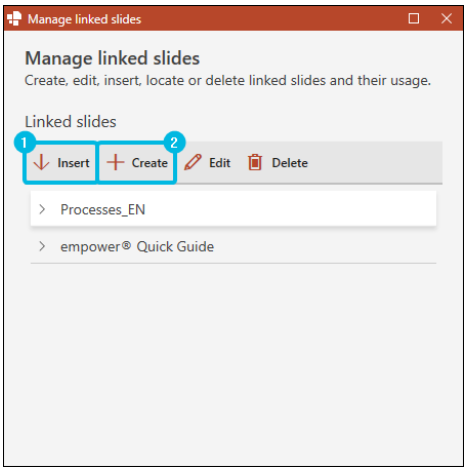


Figure 547. Buttons **Insert** and **Create** for Linked Slides

In the dialog box, enter a name for the linked slide and then paste the link into the second input field (Figure 548).

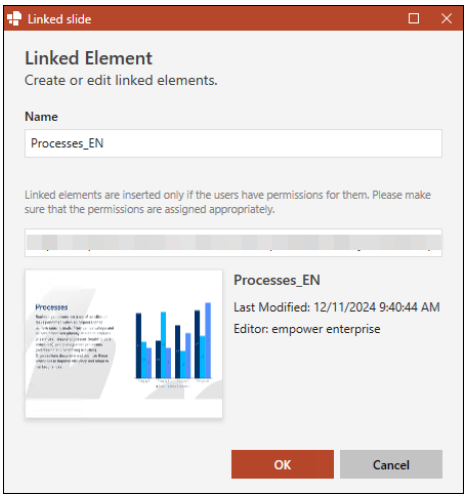


Figure 548. Link New Slide

To edit an existing entry, select it and click on the button **Edit** (Figure 549).

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

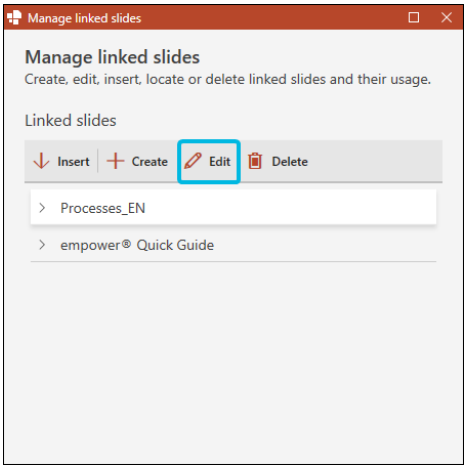


Figure 549. Button **Edit** for Linked Slide

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

To see where the slide or presentation has been linked, expand the entry (Figure 550).

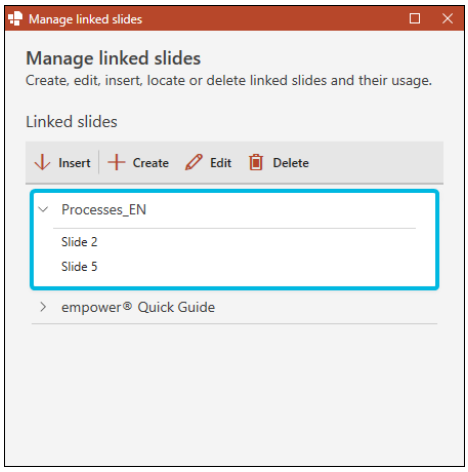


Figure 550. Expanded Linked Slide Entry

To delete one occurrence of a linked slide or presentation, select it from the entry and click on the button **Delete** (Figure 551).

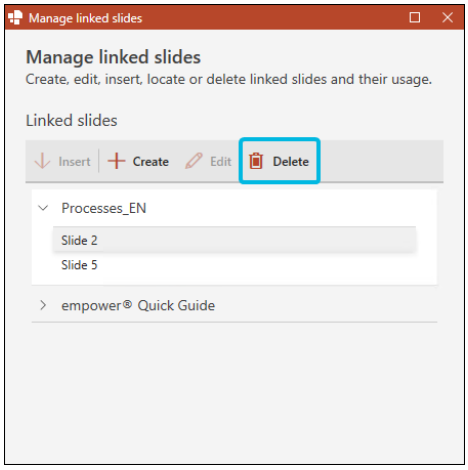


Figure 551. Delete Single Linked Slide Occurrence

To delete the entry completely and therefore remove all occurrences, select the entry itself and click on the button **Delete** (Figure 552).

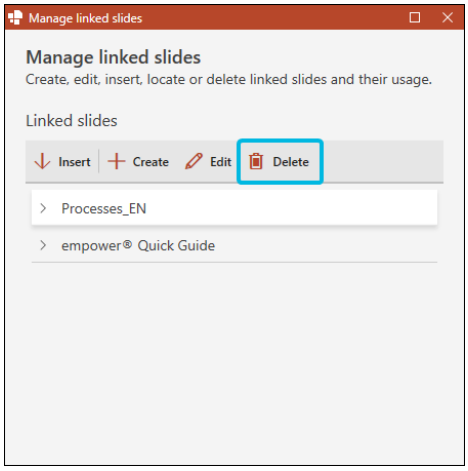


Figure 552. Delete Entire Linked Slide Entry

A dialog box opens (Figure 553).

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

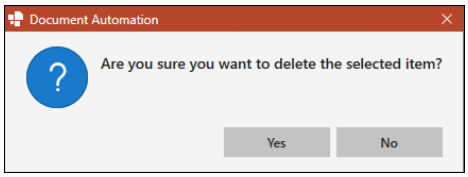


Figure 553. Deletion Confirmation for Linked Slide

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

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

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

For further information regarding empower® Links, see **Use empower® Links**.

Display Linked Slides Conditionally

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

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

The following table shows an example for conditionally linked slides:

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

Save Template to Library

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

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

To do so, follow the following steps:

1. Click on the lower part of the split button **Library** (**Figure 554**).



Figure 554. Button **Library**

2. Here, choose the option **Save** (Figure 555).
   A drop-down menu opens.

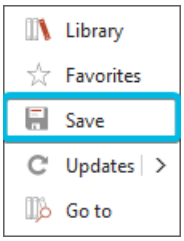


Figure 555. Option **Save**

3. In the drop-down menu, choose the option **Automation Template** (Figure 556 **(1)**).
4. Then, click on the button **Save as** (Figure 556 **(2)**).
   a. If you want to overwrite an existing automated template, click on the button **Save**.

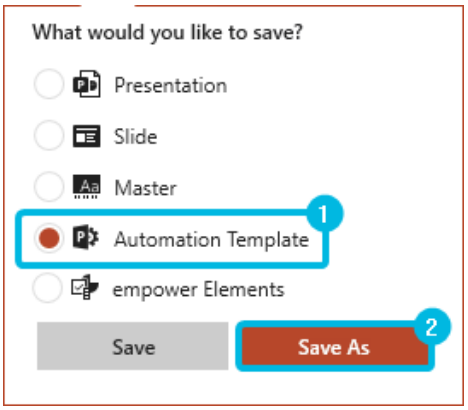


Figure 556. Saving Dialog

5. Navigate to the location in the library where you want to save the automated template.
6. Type in a name in the input field (Figure 557 **(1)**).
7. Click on the button **Save** (Figure 557 **(2)**).
   a. If you are overwriting an existing template, click on the button **Overwrite**.

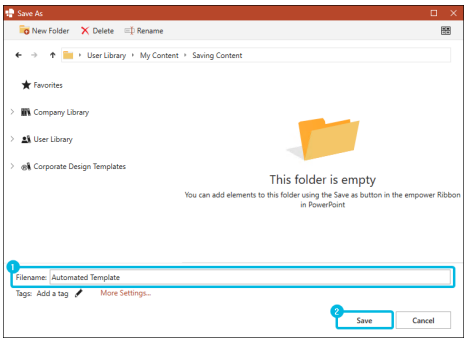


Figure 557. Save Automated Template

If you save an automated template as a normal slide or presentation, all automation features are lost.
A dialog box opens (Figure 558).

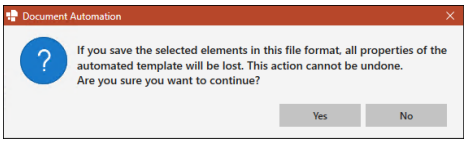


Figure 558. Dialog Box – File Format

If you save a filled-in automated template as an automated template again, the automation features will not work as expected.
A dialog box opens (Figure 559).



Figure 559. Dialog Box – Filled-in Template

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

7.6. Create Automated Templates in Word

For Administrators

If you have the required permissions, you can access the button **Automation Designer** via your ribbon (Figure 560).



Figure 560. Button **Automation Designer**

If you click on this button, a drop-down menu opens, featuring the following options (Figure 561):

- Wizard Designer
- Fields
- Conditions
- Linked content blocks

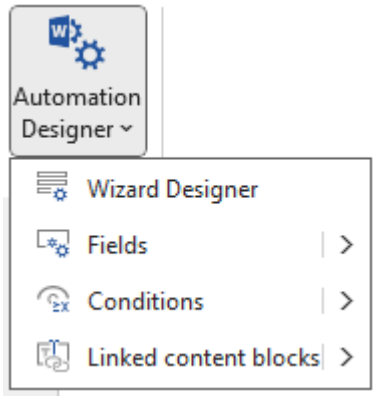


Figure 561. Options under **Automation Designer**

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

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

The context menu opens.

Choose the option **Edit template** (Figure 562).

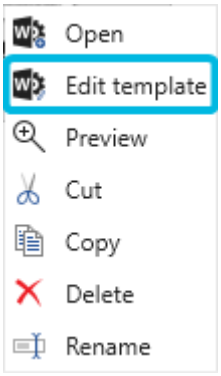


Figure 562. Option **Edit Template**

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

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

Add Fields

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

In the text, placeholders are marked by square brackets, in which the name of the question is written (Figure 563).

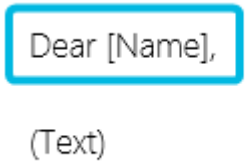


Figure 563. Placeholder in Document

To insert a field, follow the following steps:

1. Navigate to the location in the document where you want to insert the field.
2. Then, click on the button **Automation Designer** and choose the option **Fields** (Figure 564).
   A dialog box opens.

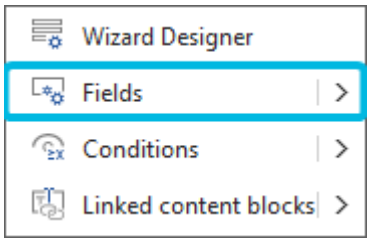


Figure 564. Option **Fields**

3. In the dialog box, select the question for whose answer you want to create a placeholder (Figure 565).
4. Then, click on the button **OK**.
   The placeholder will be inserted at the desired location.

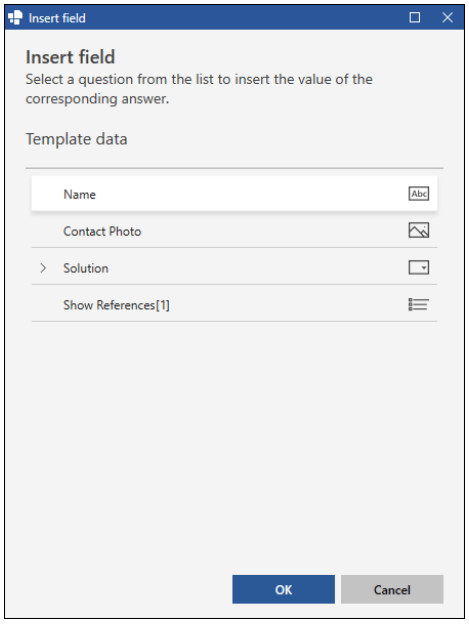


Figure 565. Choose Field

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

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

To do so, change the index in the field overview. The number in the index indicates which answer option is displayed (Figure 566).

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

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

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

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

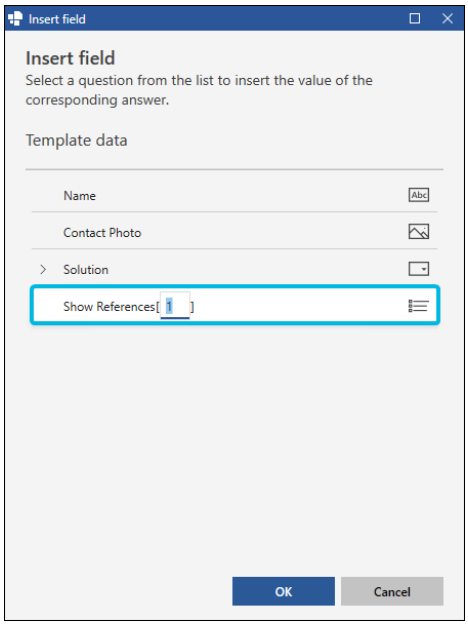


Figure 566. Enter Index

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

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

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

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

To see all assigned fields, click on the button **Automation Designer** and then click on the **arrow** symbol next to the option **Fields** (Figure 567).



Figure 567. Open Options for Fields

Here, choose the option **Manage Fields** (Figure 568).

A dialog box opens.

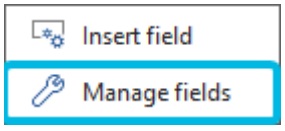


Figure 568. Option **Manage fields**

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

To insert the field again at your current cursor position, select the entry and click on the button **Insert** (Figure 569 **(1)**).

To add a new field at your current cursor position, click on the button **Create** (Figure 569 **(2)**).

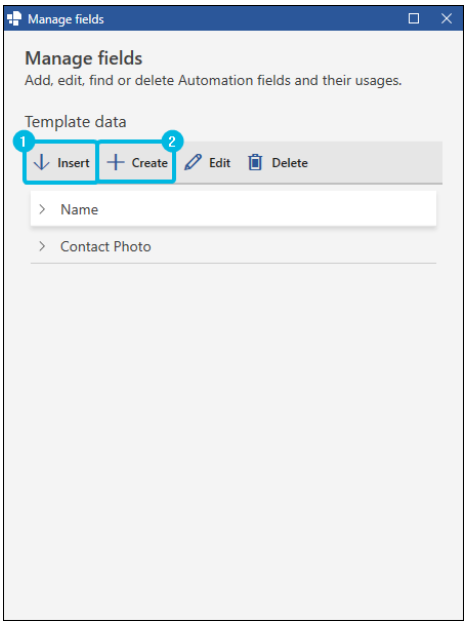


Figure 569. Buttons **Insert** and **Create** for Fields

In the dialog box, choose one of the available fields from the list and click on the button **OK** (Figure 570).

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

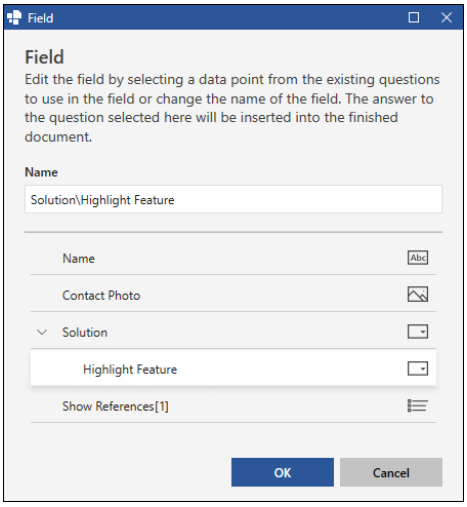


Figure 570. Dialog for Field Creation

To edit an existing entry, select it and click on the button **Edit** (Figure 571).

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

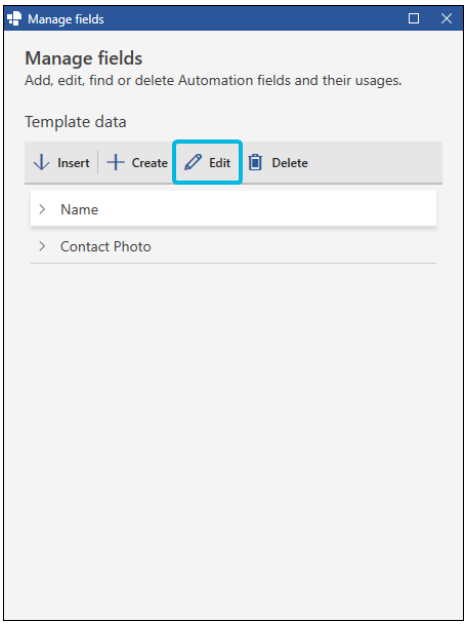


Figure 571. Button **Edit** for Field

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

To see where the field has been inserted, expand the entry (Figure 572).

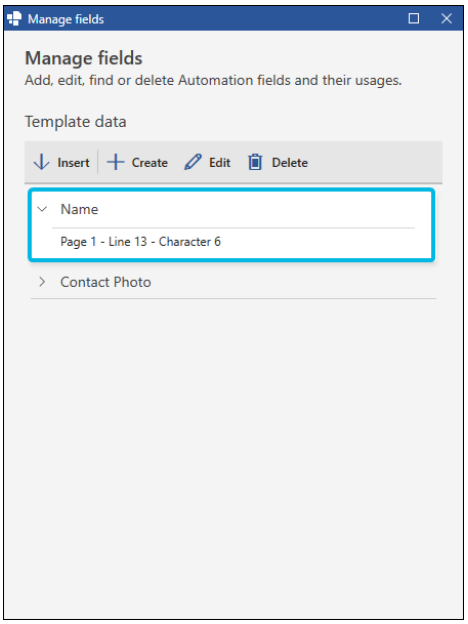


Figure 572. Expanded Field Entry

To delete one occurrence of a field, select it from the entry and click on the button **Delete** (Figure 573).

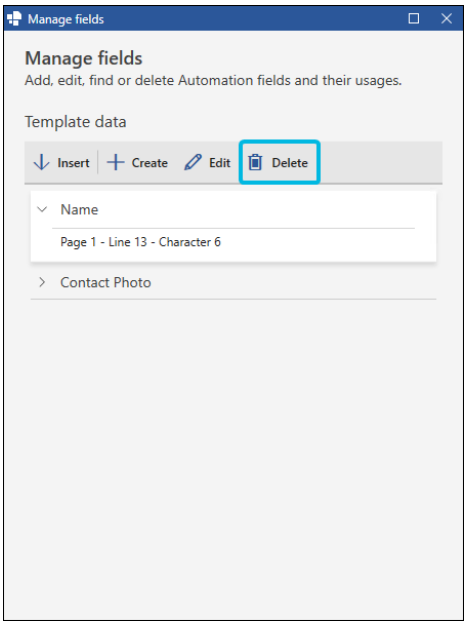


Figure 573. Delete Single Field Occurrence

To delete the entry completely and therefore remove all occurrences of the field, select the entry itself and click on the button **Delete** (Figure 574).

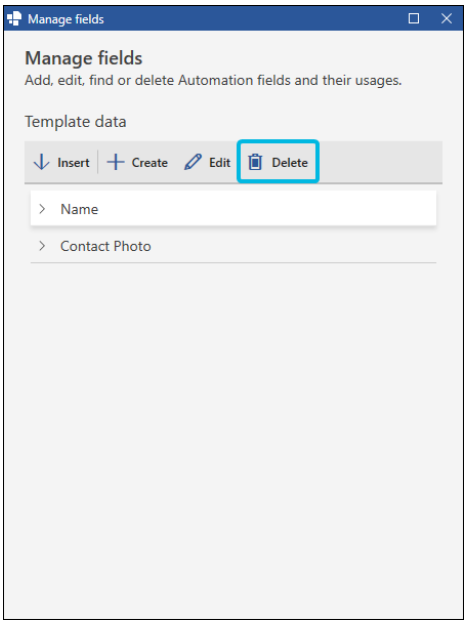


Figure 574. Delete Entire Field Entry

A dialog box opens (Figure 575).

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

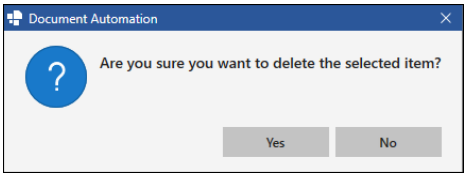


Figure 575. Deletion Confirmation for Fields

Add Conditions

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

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

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

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

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

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

To insert a condition, follow the following steps:

1. Navigate to the location in the document where you want to insert the condition.
2. Choose a shape or content block on which you want to apply the condition.
3. Click on the button **Automation Designer** and choose the option **Conditions** (Figure 576).
   A dialog box opens.

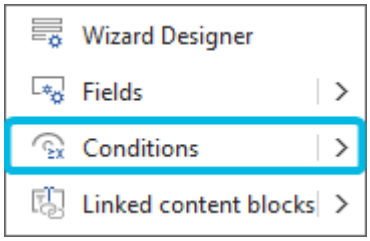


Figure 576. Option **Conditions**

4. In the dialog box, select the condition you want to assign (Figure 577).
   To view the condition rule in a mouse-over, hover over the **information** symbol.
5. Then, click on the button **OK**.

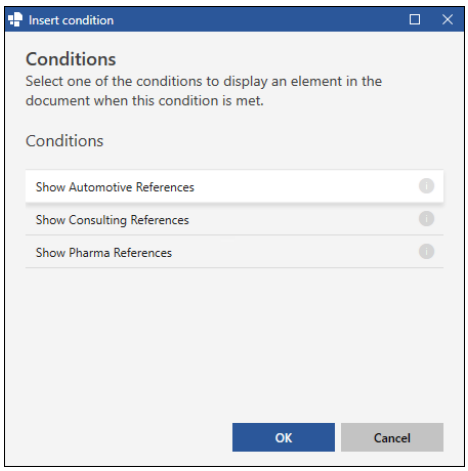


Figure 577. Choose Condition

Conditions are not visible in the document.

To see all conditions and their usage in the document, click on the button **Automation Designer** and then click on the **arrow** symbol next to the option **Conditions** (Figure 578).



Figure 578. Open Options for Conditions

Then, choose the option **Manage conditions** (Figure 579).
A dialog box opens.

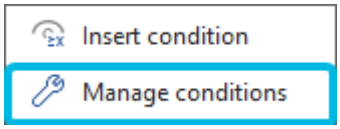


Figure 579. Option **Manage conditions**

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

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

To apply the condition on the currently selected shape or text, first select the element in your document and then the condition in the dialog box and click on the button **Insert** (Figure 580).

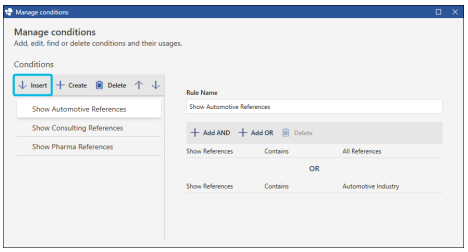


Figure 580. Insert Condition

To add a new condition, click on the button **Create** (Figure 581 **(1)**).

On the right-hand side, enter a name for the rule into the input field (Figure 581 **(2)**).

Then, either click on the button **Add AND** or **Add OR**, depending on the condition you want to create (Figure 581 **(3)**).

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

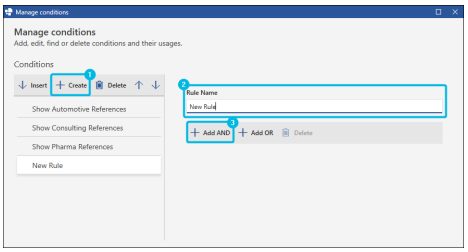


Figure 581. Create Condition

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

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

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

To delete rules from the condition, select the rule and click on the button **Delete** on the right-hand side of the dialog box (Figure 582).

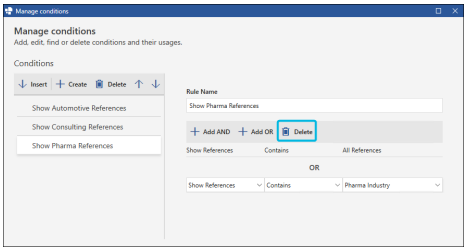


Figure 582. Delete Rule

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

To see where the condition has been applied, expand the entry on the left-hand side of the dialog box (Figure 583).

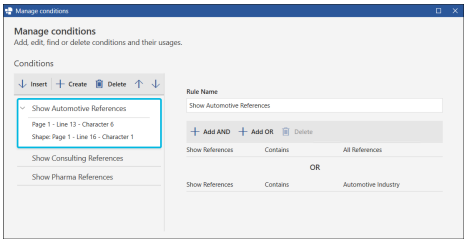


Figure 583. Expanded Condition Entry

To delete one occurrence of a condition, select it from the entry and click on the button **Delete** on the left-hand side of the dialog box (Figure 584).

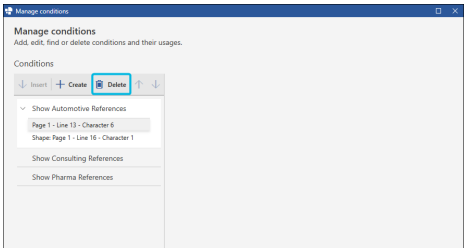


Figure 584. Delete Single Condition Occurrence

To delete the entry completely and therefore remove all occurrences of the condition, select the entry itself and click on the button **Delete** (Figure 585).

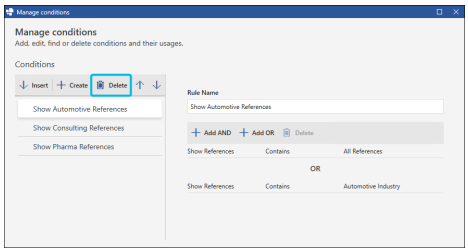


Figure 585. Delete Entire Condition Entry

A dialog box opens (Figure 586).
To confirm the deletion process, click on the button **Yes**.

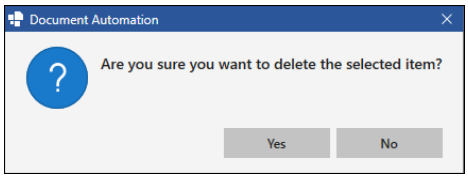


Figure 586. Deletion Confirmation for Condition

Rule Structure

The rules are structured differently for each type of question:

Text Input Question

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

Yes/No Question

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

Single Choice Question

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

Multiple Choice Question

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

Add Linked Content Blocks

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

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

To link a content block, follow the following steps:

1. Open the empower® Library.
2. Navigate to the location of the desired content block.
3. Select the element you want to link.
4. In the navigation bar, click on the button **Copy link** (Figure 587).

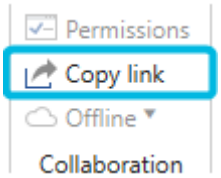


Figure 587. Button **Copy link**

5. Go back to your automated template and navigate to the position where you want to insert the linked content block.
6. Click on the button **Automation Designer** and choose the option **Linked content blocks** (Figure 588).
   A dialog box opens.

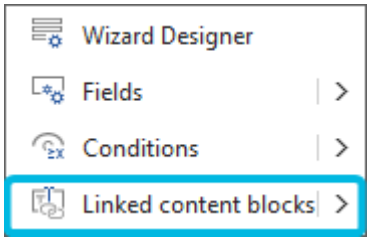


Figure 588. Option **Linked content blocks**

7. In the dialog box, paste the link into the input field.
   A preview of the content block appears, as well as its metadata (Figure 589).
8. Then, click on the button **OK**.
   A placeholder for the content block is inserted.

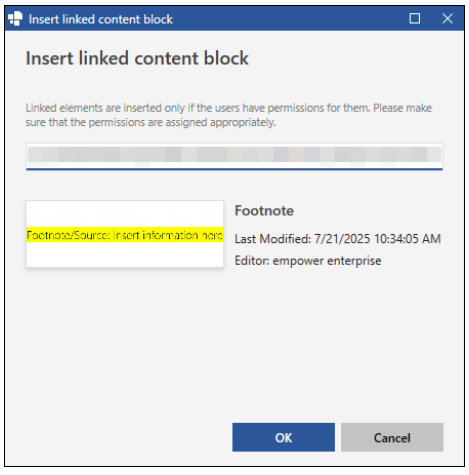


Figure 589. Insert Linked Content Block

To view an overview of all linked content blocks, click on the button **Automation Designer** and then click on the **arrow** symbol next to the option **Linked content blocks** (Figure 590).

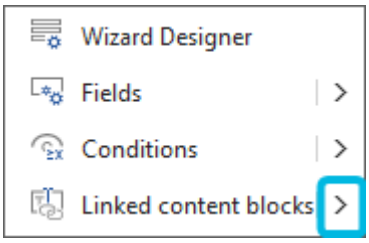


Figure 590. Open Options for Linked Content Blocks

Then, choose the option **Manage linked content blocks** (Figure 591).

A dialog box opens.

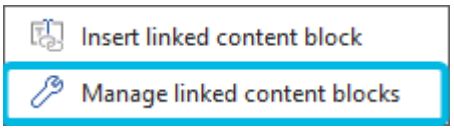


Figure 591. Option **Manage linked content blocks**

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

To insert the linked content block again, select the entry and click on the button **Insert** (Figure 592 **(1)**).

To add a new linked content block, click on the button **Create** (Figure 592 **(2)**).

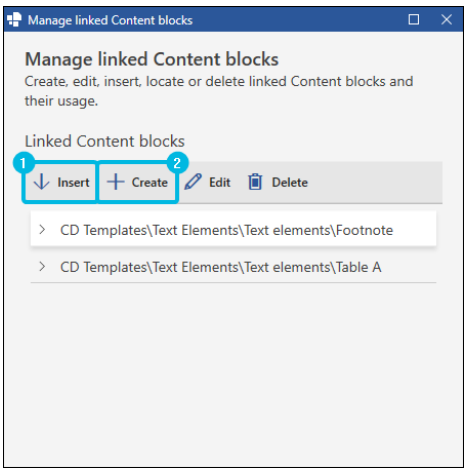


Figure 592. Buttons **Insert** and **Create** for Linked Content Blocks

In the dialog box, enter a name for the linked content block and then paste the link into the second input field (Figure 593).

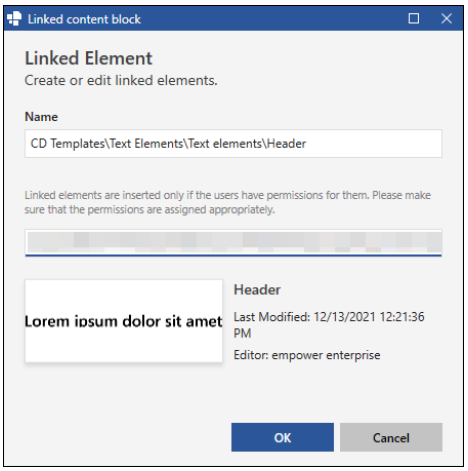


Figure 593. Link New Content Block

To edit an existing entry, select it and click on the button **Edit** (Figure 594).

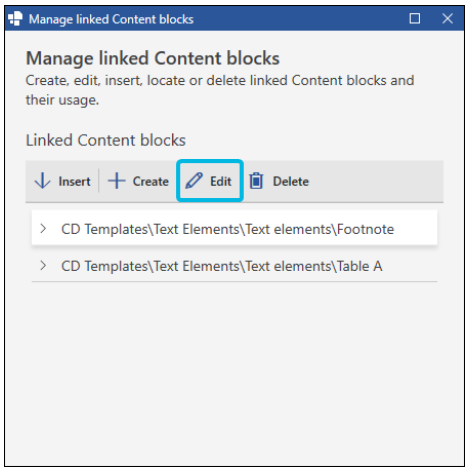


Figure 594. Button **Edit** for Linked Content Block

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

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

To see where the content block has been linked, expand the entry (Figure 595).

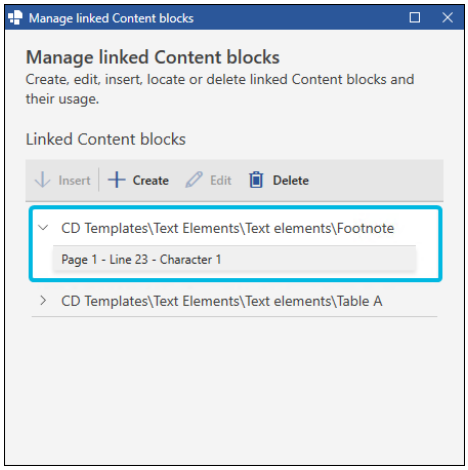


Figure 595. Expanded Linked Content Block Entry

To delete one occurrence of a linked content block, select it from the entry and click on the button **Delete** (Figure 596).

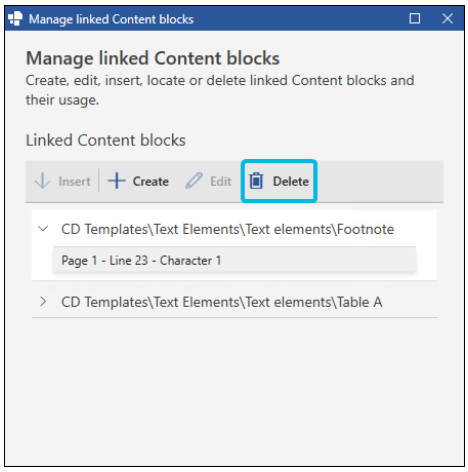


Figure 596. Delete Single Linked Content Block Occurrence

To delete the entry completely and therefore remove all occurrences, select the entry itself and click on the button **Delete** (Figure 597).

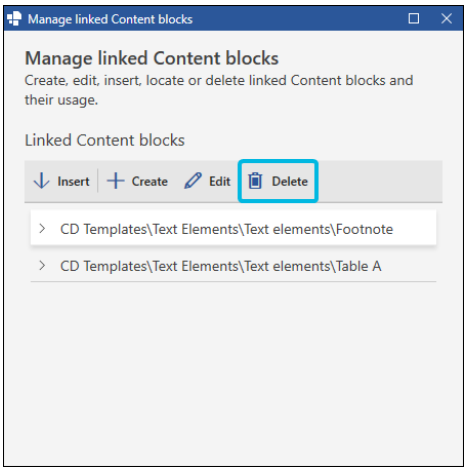


Figure 597. Delete Entire Linked Content Block Entry

A dialog box opens (Figure 598).

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

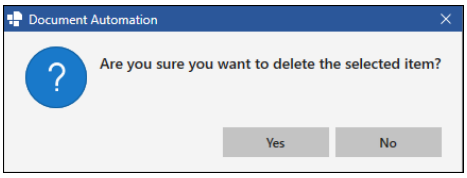


Figure 598. Deletion Confirmation for Linked Content Block

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

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

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

For further information regarding empower® Links, see **Use empower® Links**.

Insert Content Blocks via Library

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

To do so, follow the following steps:

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

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

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

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

Save Template to Library

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

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

To do so, follow the following steps:

1. Click on the lower part of the split button **Library** (**Figure 599**).

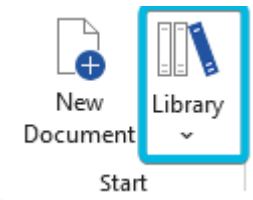


Figure 599. Button **Library**

2. Here, choose the option **Save** (**Figure 600**).
   A drop-down menu opens.

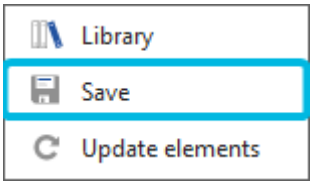


Figure 600. Option **Save**

3. In the drop-down menu, choose the option **Automation Template** (**Figure 601 (1)**).
4. Then, click on the button **Save as** (**Figure 601 (2)**).

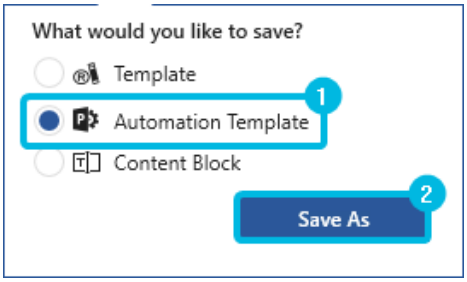


Figure 601. Saving Dialog

5. Navigate to the location in the library where you want to save the automated template.
6. Type in a name in the input field (**Figure 602 (1)**).
7. Click on the button **Save** (**Figure 602 (2)**).
   a. If you are overwriting an existing template, click on the button **Overwrite**.

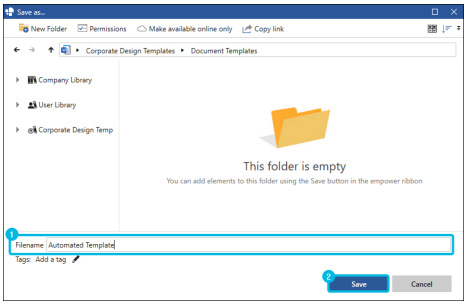


Figure 602. Save Automated Template

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

A dialog box opens (**Figure 603**).

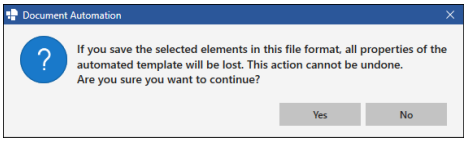


Figure 603. Dialog Box – File Format

If you save a filled-in automated template as an automated template again, the automation features would not work as expected.
A dialog box opens (Figure 604).



Figure 604. Dialog Box – Filled-in Template

7.7. Use the Wizard Designer

For Administrators

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

The following five types of questions are available in the *Wizard Designer* when creating an automated template (Figure 605):

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

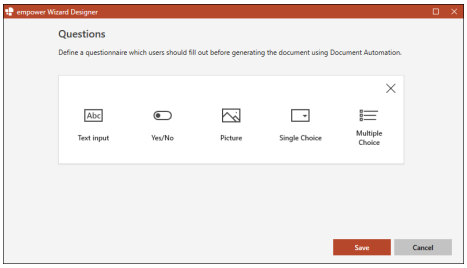


Figure 605. Question Types

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

To open the *Wizard Designer*, click on the button **Automation Designer** and then choose the option **Wizard Designer** (Figure 606).

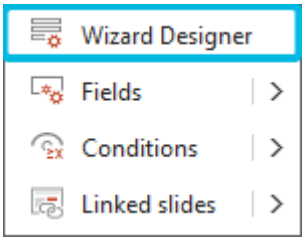


Figure 606. Option **Wizard Designer**

To add a new question, click on the button **Add new question** (Figure 607 **(1)**).

To edit a question, click into the question panel (Figure 607 **(2)**).

To delete a question, click into the question panel and then click on the **bin** symbol (Figure 607 **(3)**).

To move a question up or down, use the **arrow** symbols in the question panel (Figure 607 **(4)**).

To save your changes, click on the button **Save** (Figure 607 **(5)**).

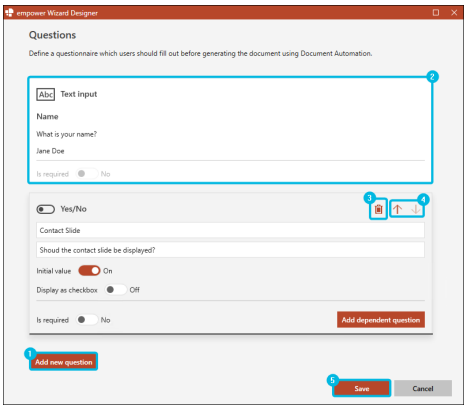


Figure 607. General Options in *Wizard Designer*

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

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

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

Use Text Input Questions

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

To create a *Text Input* question, follow the following steps (Figure 608):

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

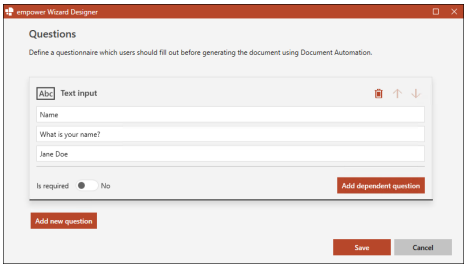


Figure 608. *Text Input* Question

The following example provides a use case for this question:

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

Use Yes/No Questions

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

To create a *Yes/No* question, follow the following steps (Figure 609):

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

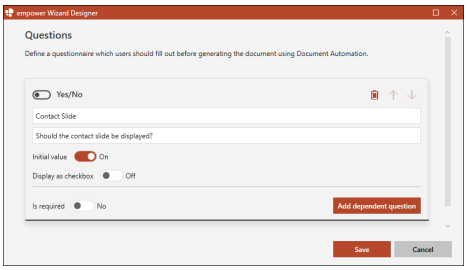


Figure 609. *Yes/No* Question

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

These settings cannot be changed and are therefore grayed out.

The following example provides a use case for this question:

Example

Name of the Question: Contact Slide

Question: Should the contact slide be displayed?

Initial Value: On

Checkbox: Off

Required: No

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

Use Picture Questions

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

To create a *Picture* question, follow the following steps (Figure 610):

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

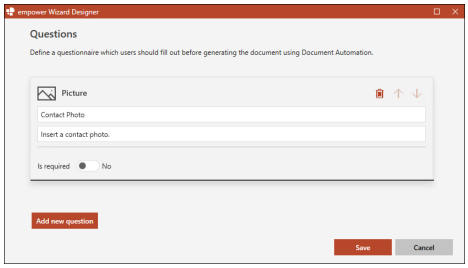


Figure 610. *Picture* Question

The following example provides a use case for this question:

Example

Name of the Question: Contact Photo

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

Required: No

Use Single Choice Questions

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

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

You can offer as many answer options as you like.

To create a *Single Choice* question, follow the following steps (Figure 611):

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

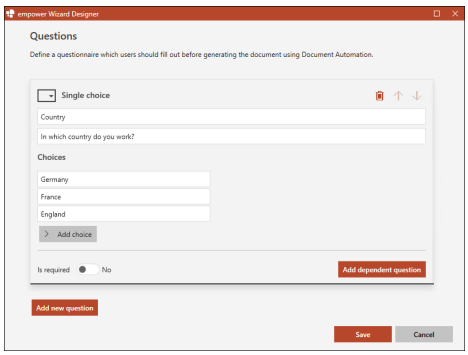


Figure 611. *Single Choice* Question

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

The following example provides a use case for this question:

Example

Name of the Question: Country

Question: In which country do you work?

Answer Options: Germany, France, England

Required: No

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

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

Use Multiple Choice Questions

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

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

You can offer as many answer options as you like.

To create a *Multiple Choice* question, follow the following steps (Figure 612):

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

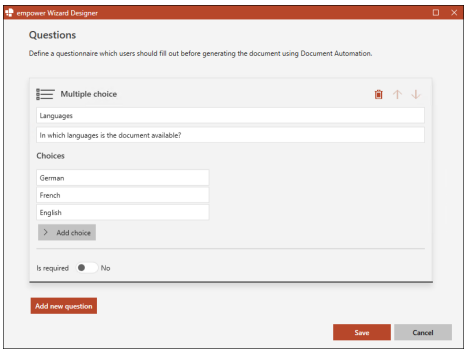


Figure 612. *Multiple Choice* Question

The following example provides a use case for this question:

Example
Name of the Question: Languages
Question: In which languages is the document available?
Answer Options: German, French, English
Required: No

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

For further information regarding this issue, see Add Fields.

Add Dependent Questions

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

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

To add a dependent question to an existing question, select the existing question and click on the button **Add dependent question** (Figure 613).

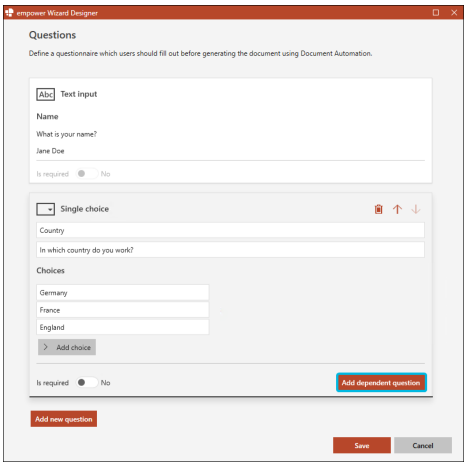


Figure 613. Button **Add dependent question**

The following example provides a use case for this scenario:

Example

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

Answer: Yes

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

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

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

Add Dependent Questions for Single Choice

If you create a dependent question for a *Single Choice* question and this dependent question is a *Single Choice* or *Multiple Choice* question, you can determine for the dependent question whether the answer options depend on the answer to the parent question (Figure 614).

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

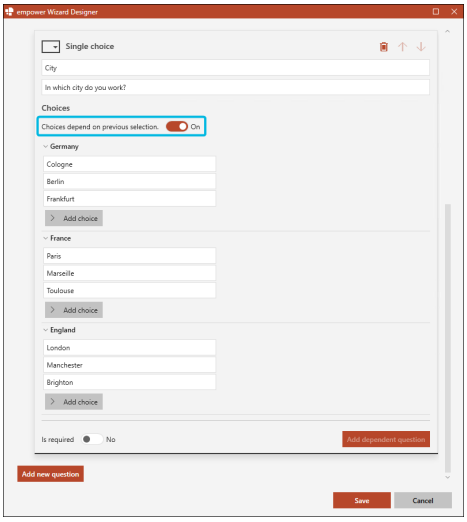


Figure 614. Toggle Button for Dependent *Single Choice* Question

The following example provides a use case for this scenario:

Example

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

Answer Options for Parent Question: Germany, France, England

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

Answer Options for Dependent Question:

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



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