empower® Template Management

RELEASE 9.10

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1. Introduction

With the help of empower® Template Management, you can create professional and legally compliant documents in seconds using dynamic templates. Rely on the professional template management system from empower® to ensure consistent document creation.

Templates can be provided easily and centrally to your entire organization.

> 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 2021*, 2024

> *End of life as of October 2026.
>
> As of October 2026, empower does no longer support this Office version. Please ensure that you switch to a supported version in time.
>
> For further information from Microsoft, see **End of support for Office 2021**.

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

Subscription Models

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

Due to technical reasons, empower® for Outlook cannot be used with the new Outlook.

If it is not an option to use the classic Outlook, you can use empower® Mails Online, the empower® Web Component for Outlook, in your browser as an alternative. empower® Mails Online offers a reduced feature set.

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

1.2. Telemetry Tracking in empower®

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

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

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

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

2. 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**).

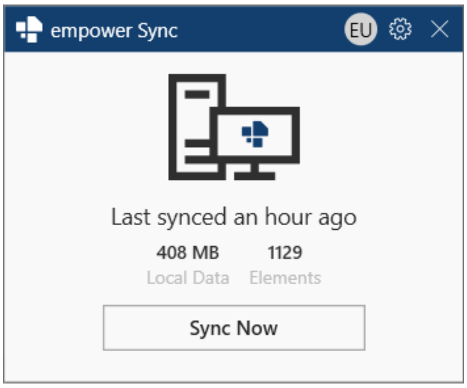


Figure 2. Main Window

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

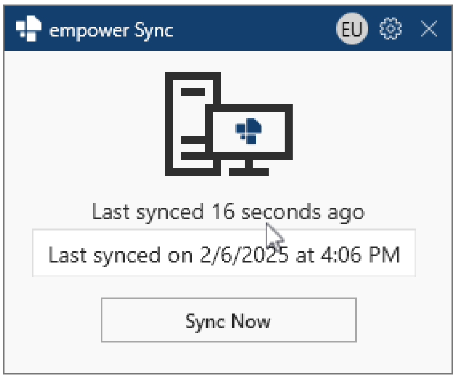


Figure 3. Mouse-Over **Last synced**

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.

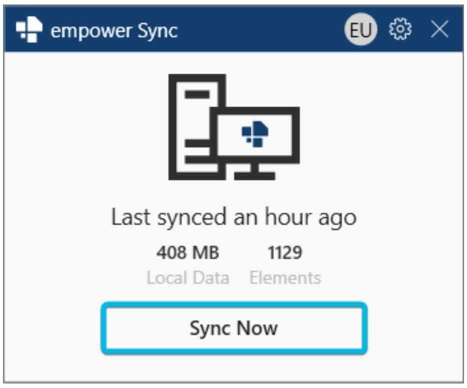


Figure 4. Button **Sync Now**

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.

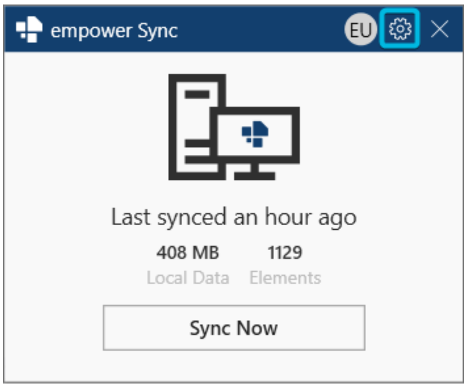


Figure 5. **Gear** Symbol

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

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

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

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

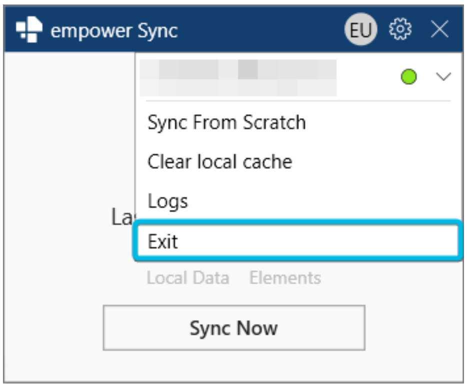


Figure 6. Option **Exit**

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

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

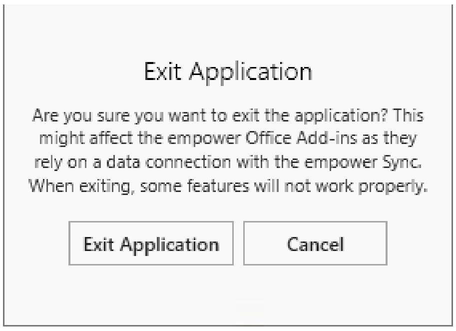


Figure 7. Message for Application Exit

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

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

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

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

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

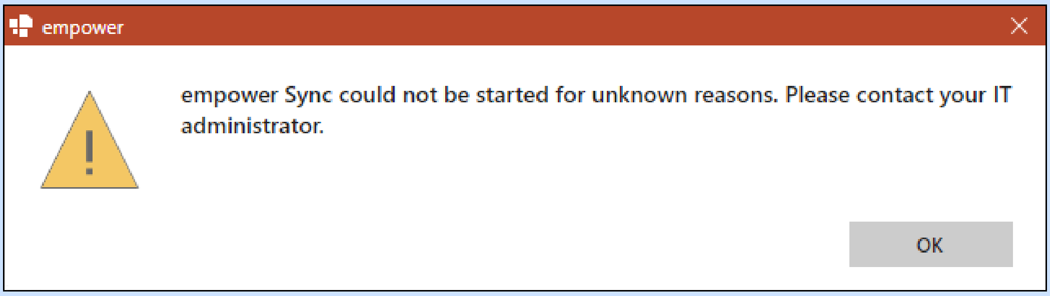


Figure 8. Error Message for Sync

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

Execute a Sync from Scratch

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

Content data will not be deleted.

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

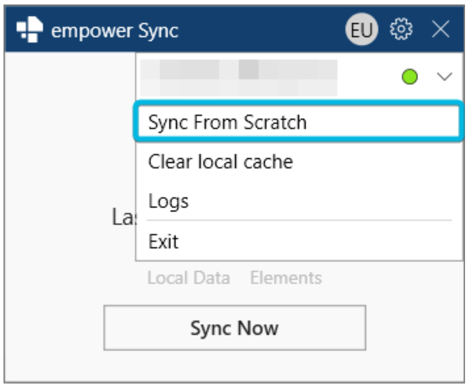


Figure 9. Option **Sync From Scratch**

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

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

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

Clear the Local Cache

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

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

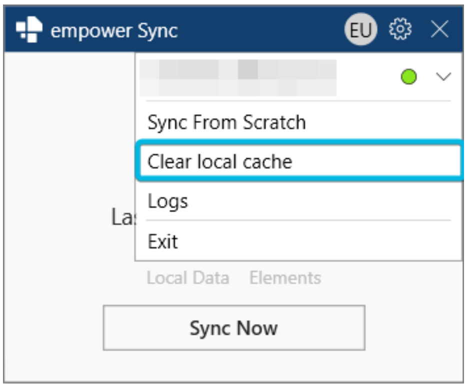


Figure 10. Option **Clear local cache**

A message appears. Read this message carefully.

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

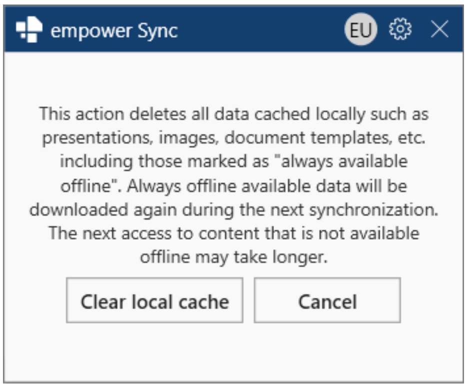


Figure 11. Message for **Clear local cache**

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

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

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

Open the Log Files

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

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

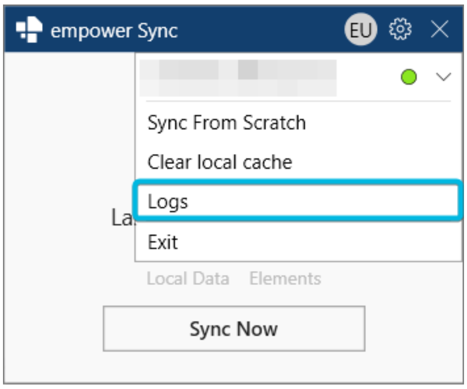


Figure 12. Option **Logs**

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

User Information

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

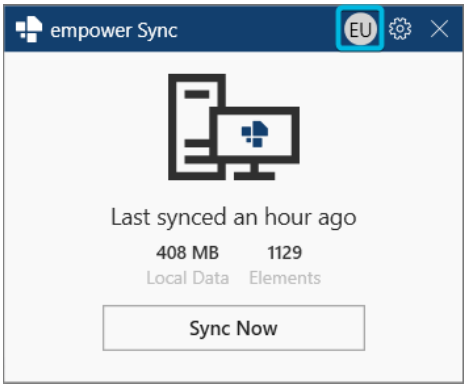


Figure 13. User Initials

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

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

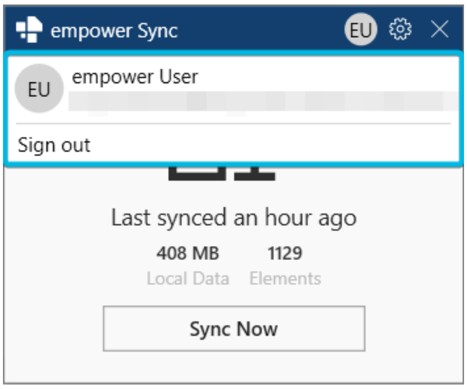


Figure 14. User Information

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.

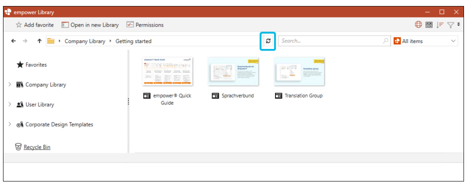


Figure 15. **Refresh** Symbol in Library

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**).

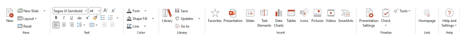


Figure 16. Classic Ribbon in PowerPoint

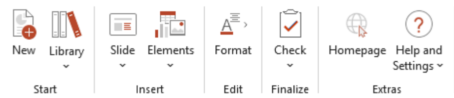


Figure 17. Simplified Ribbon in PowerPoint

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.

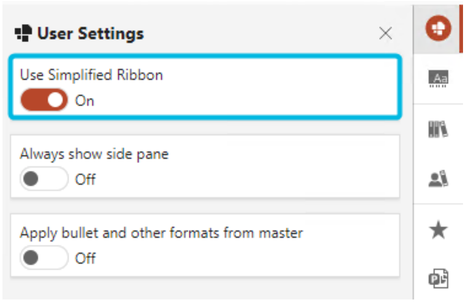


Figure 18. Option **Use Simplified Ribbon**

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.

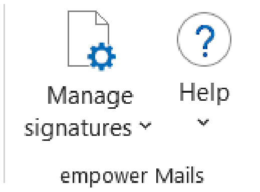


Figure 19. Group **empower Mails**

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

2.3. Office Theme Adaption

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

If the Office theme is switched to *black*, empower® adapts to this change (**Figure 20**).

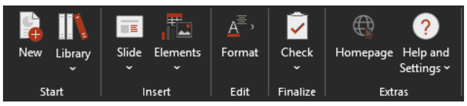


Figure 20. empower® Ribbon in Black Theme

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.

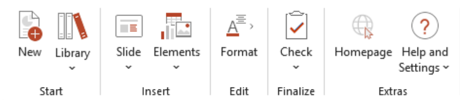


Figure 21. empower® Ribbon in White Theme

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.

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**.

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.

To access all features in the group Edit, click on the button **Format** (**Figure 22**).

Figure 22. Button **Format**

The group will be expanded to the right, opening the subgroups Text and Color (**Figure 23**).

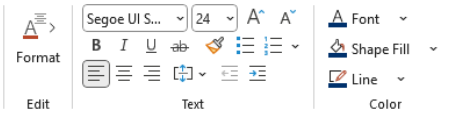


Figure 23. Groups Text and Color in PowerPoint

In Outlook, you can access the editing settings in the groups Text and Color (**Figure 24**). These groups are only available if you have opened an e-mail draft.

Figure 24. Groups Text and Color in Outlook

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.

2.6. 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 25**).

It opens in a new window.

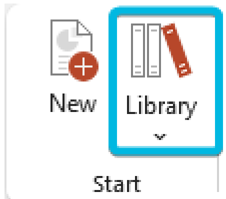


Figure 25. Button **Library**

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 26**).

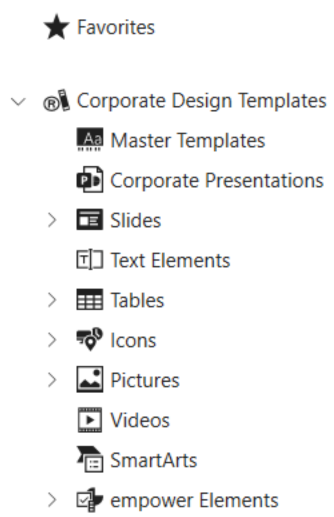


Figure 26. Library Structure

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

- Favorites
- 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 27**).

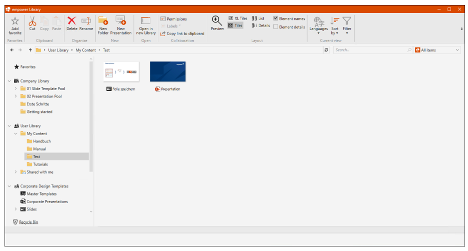


Figure 27. Library Window

You can tell what type of element it is by the icon in the bottom left corner of each element (**Figure 28**).

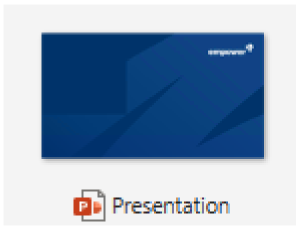


Figure 28. Presentation Icon

If there are two command buttons displayed in the empower® Library, a double-click will always execute the left button command (**Figure 29**).

Figure 29. Two Command Buttons in Library

For each element, further meta information such as author, last modification date and size can also be viewed on the bottom of the library (**Figure 30**).

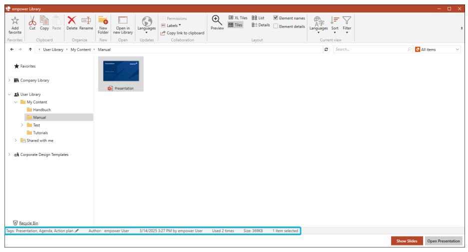


Figure 30. Metadata Display

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.

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 a 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 31**).

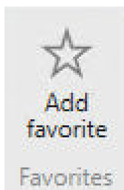


Figure 31. Button **Add favorite**

To remove a folder or an element from the section *Favorites*, navigate to the navigation bar and click on the button **Remove favorite** (Figure 32).

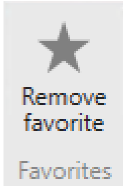


Figure 32. Button **Remove favorite**

> 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.

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 amount of available *Corporate Design Templates* might vary.

2.6.1. 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 extend 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.

i 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.

i 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 33).

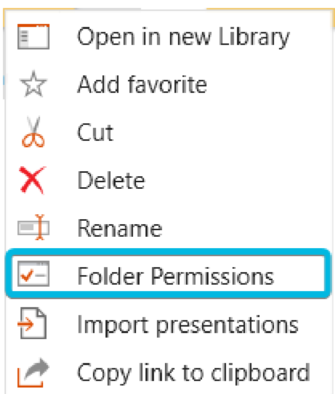


Figure 33. Option **Folder Permissions**

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 34).

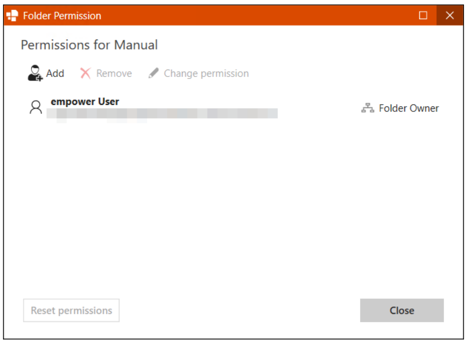


Figure 34. Dialog Box **Folder Permission**

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 35).

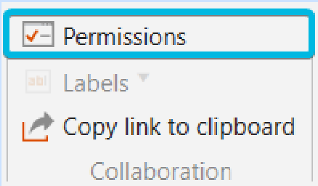


Figure 35. Button **Permissions**

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 36).
   A drop-down menu opens.

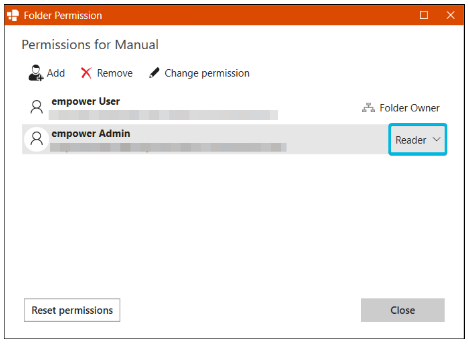


Figure 36. Permission Role Display

3. In the drop-down menu, choose the permission role you want to assign to the user or group (Figure 37).

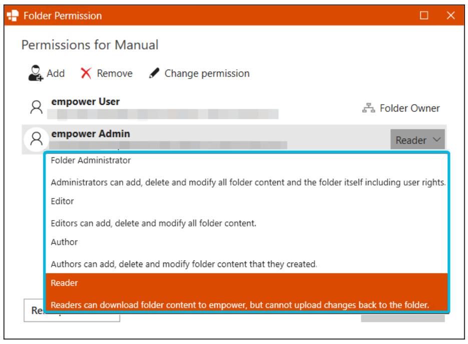


Figure 37. Permission Role Drop-Down Menu

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

Alternatively, you can select the user or group whose permission role you want to change and click on the button **Change permission** (Figure 38). Then, select a permission role from the list.

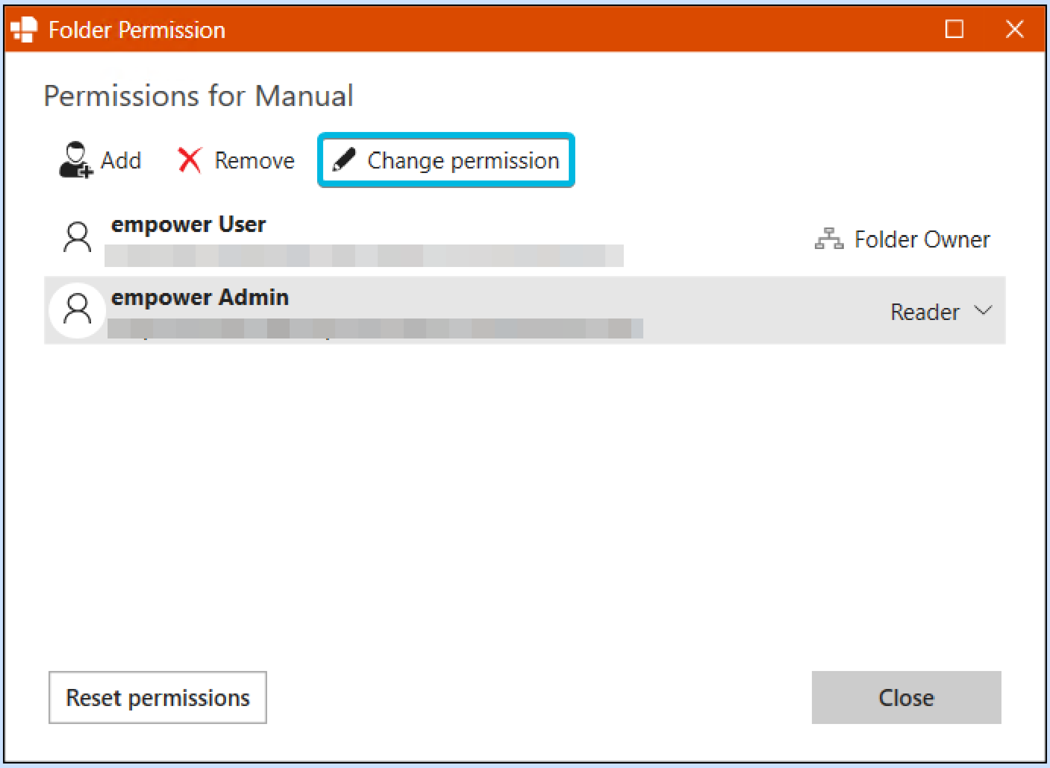


Figure 38. Button **Change permission**

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 39).
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.

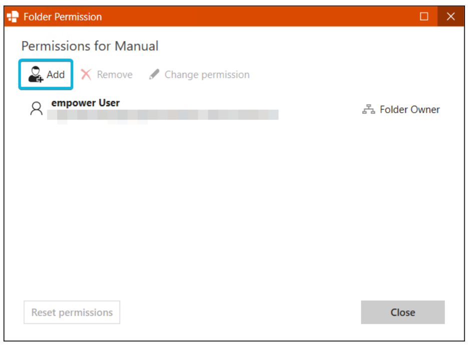


Figure 39. Button **Add** in Window **Folder Permission**

4. Click on the button **Add** (**Figure 40**).
   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**.

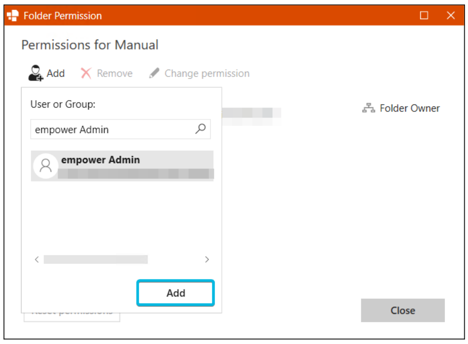


Figure 40. Button **Add**

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 41**).
   A dialog box opens.

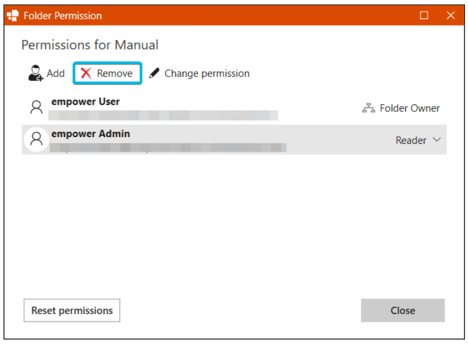


Figure 41. Button **Remove**

3. To remove the user or group from the list, click on the button **Yes** (**Figure 42**).

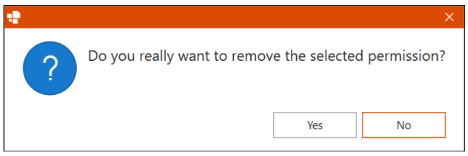


Figure 42. Dialog Box for Permission Removal

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 43).

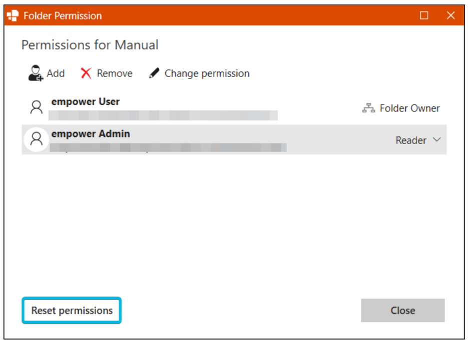


Figure 43. Button **Reset permissions**

A dialog box opens (Figure 44).

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

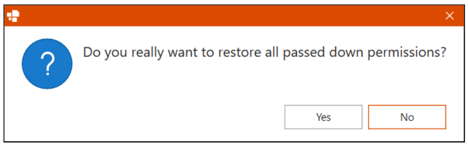


Figure 44. Dialog Box for Permission Reset

2.6.2. 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 them from the empower® Library.

Content in library folders marked with a **cloud** symbol is only available online (Figure 45).

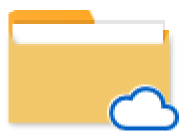


Figure 45. Online Folder

If folders in the library do not have a **cloud** symbol, the content stored here is also available offline (Figure 46).

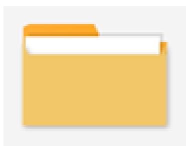


Figure 46. Offline Folder

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 47** **(1)**).
3. Click on the option **Make Available Offline** (**Figure 47** **(2)**).
4. Navigate to the empower® Sync and click on the button **Sync now**.
   Your folder is now available offline and does no longer have a **cloud** symbol.

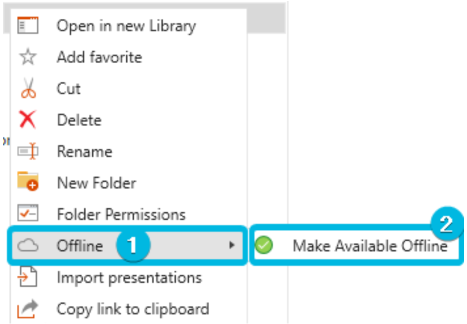


Figure 47. Option **Offline** and Button **Make Available Offline**

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 48** **(1)**).
3. Click on the option **Make Available Online Only** (**Figure 48** **(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.

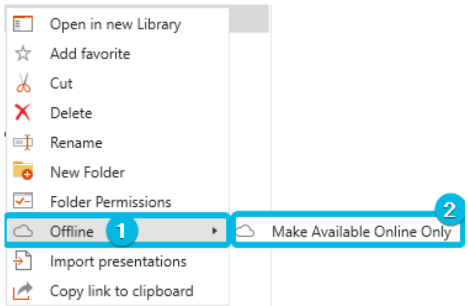


Figure 48. Option **Offline** and Button **Make Available Online Only**

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.

> i By default, a specific set of library sections and contents are available offline in your empower® Environment.
>
> Depending on the configuration of your empower® Environment, the amount of offline available content might vary.

> i 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.

2.6.3. 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 49**).

Figure 49. Collapsed Navigation Bar

To expand the navigation bar, click on the button **Expand** in the top right corner (**Figure 50**).

Figure 50. Button **Expand**

In the expanded navigation bar, you can access all available actions (**Figure 51**). If an action is not available for the currently selected element, it is grayed out.

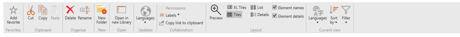


Figure 51. Expanded Navigation Bar

> 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 52**).

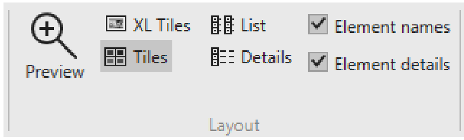


Figure 52. Group Layout

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

In addition, you can decide if the element names and details such as the assigned language should be displayed or not.

If you want to know what an element looks like in detail before inserting or opening it, you can use the option **Preview** (**Figure 53**).

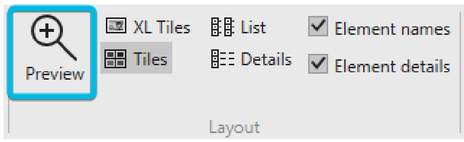


Figure 53. Button **Preview**

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 54**).

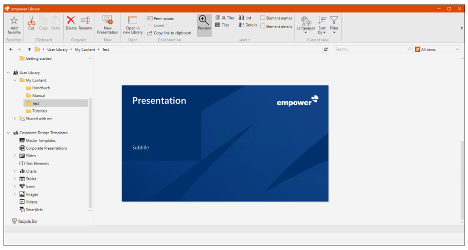


Figure 54. Library Window in Preview View

2.6.4. 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 to 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 55).

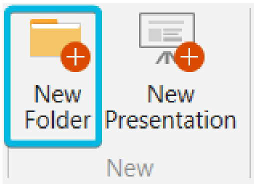


Figure 55. Button **New Folder** in Navigation Bar

The folder is added to the respective library section. By default, the folder is named *New Folder*.

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

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

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 sections *Corporate Design Templates* and *empower Elements*.

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 56).

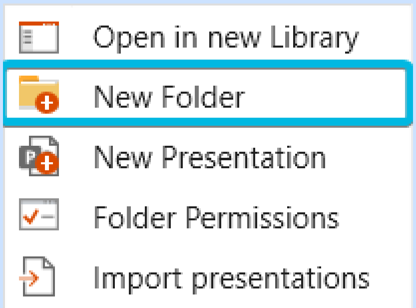


Figure 56. Option **New Folder** in Context Menu

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 57).

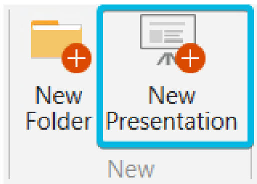


Figure 57. Button **New Presentation** in Navigation Bar

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 58).

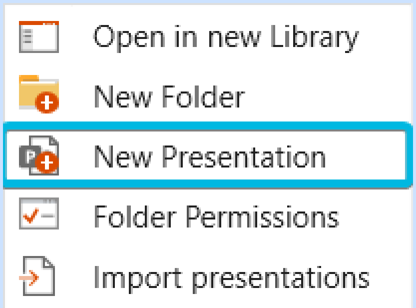


Figure 58. Button **New Presentation** in Context Menu

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.

2.6.5. 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 59).
   A dialog box opens.

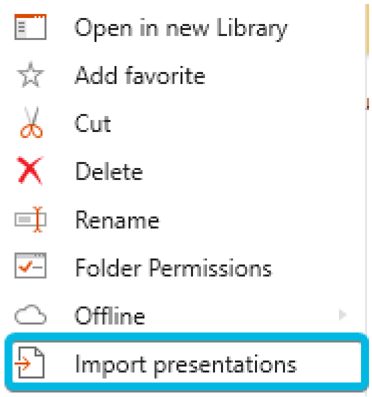


Figure 59. Option **Import presentations**

3. Choose your preferred option:
   a. Click on the option **Selected presentations** to import individual presentations to your selected folder (Figure 60 **(1)**).
   b. Click on the option **Whole folders** to import entire folders with presentations to your selected folder (Figure 60 **(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.

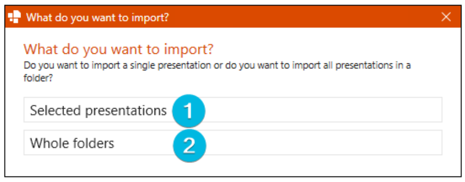


Figure 60. Dialog Box with Import Options

If you choose to import a whole folder, a dialog box opens (Figure 61).

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

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

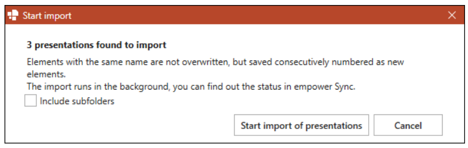


Figure 61. Dialog Box for Folder Import

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

- User 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.

2.6.6. 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 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 62**).
4. In the drop-down menu, click on the option **Save** (**Figure 63**).
   A menu opens.

Figure 62. Button **Library**

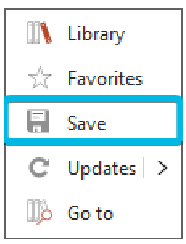


Figure 63. Option **Save**

5. In the menu, choose what element type you want to save.
6. Then, click on the button **Save as** (Figure 64).
   The library opens.

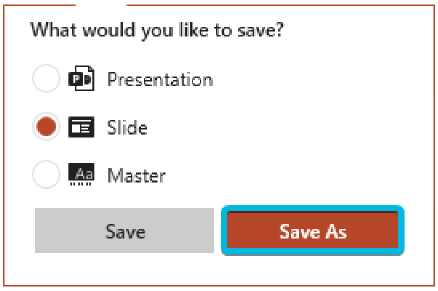


Figure 64. Button **Save as**

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 65).

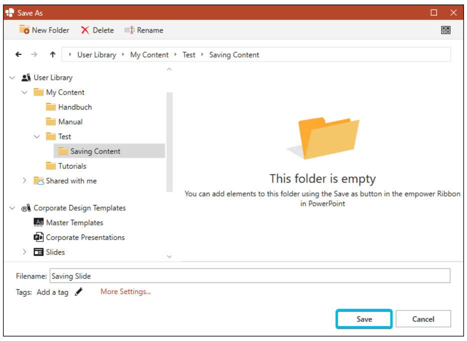


Figure 65. Button **Save** in Library

If you want to overwrite the existing version of the element, navigate to its original location and click on the button **Overwrite** (Figure 66).

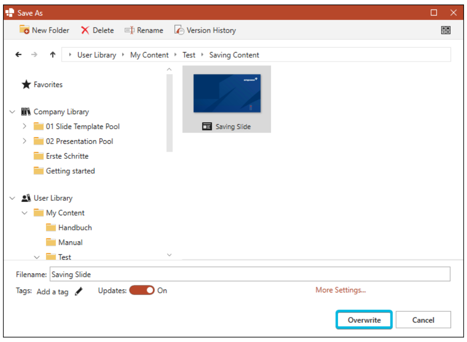


Figure 66. Button **Overwrite** in Library

Document Templates with relative links cannot be saved in the empower® Library.
A dialog box opens (Figure 67).

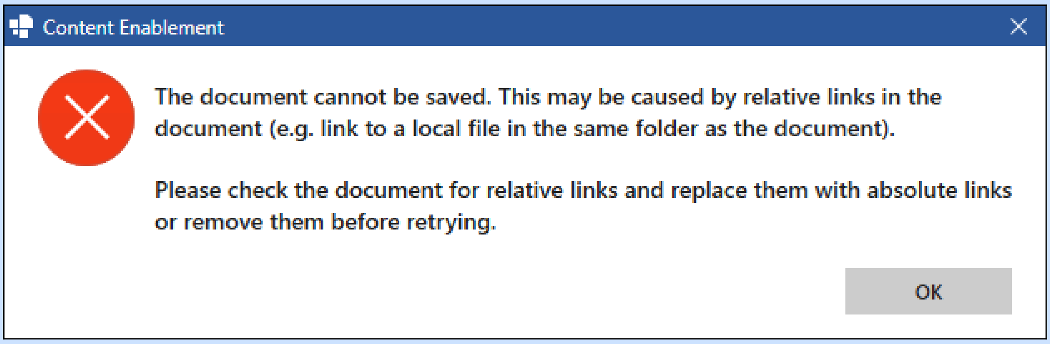


Figure 67. Document Template with Relative Links

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 68 **(1)**) from the list and click on the button **Save as** (Figure 68 **(2)**).

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

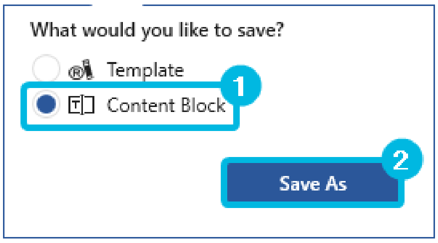


Figure 68. Save Content Block

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.

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 69**).
   You can now see the start and end marker for the rich text content control (**Figure 70**).

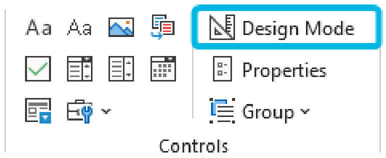


Figure 69. Enter Design Mode

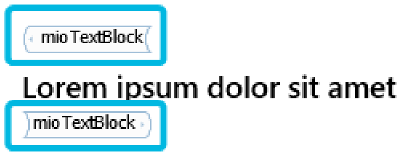


Figure 70. Start and End Marker for Content Control

4. To delete the rich text content control, right-click on the start marker and choose the option **Remove Content Control** (**Figure 71**).
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.

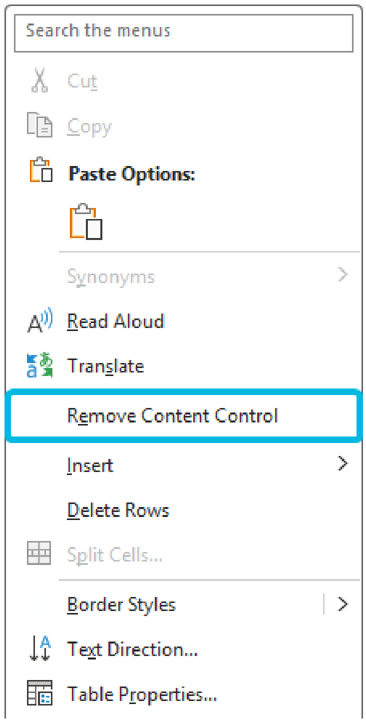


Figure 71. Option **Remove Content Control**

8. In this dialog box, confirm that you want to overwrite the content block by clicking on the button **Yes** (**Figure 72**).

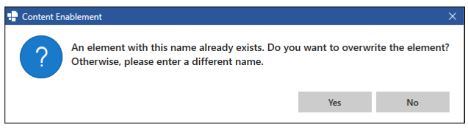


Figure 72. Dialog Box on Overwrite

If you do not delete the rich text content control, a dialog box opens when you try to overwrite the content block (**Figure 73**).

This is due to the fact that a content block cannot be saved if it is present in the currently open document.

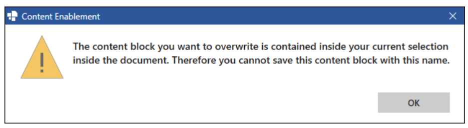


Figure 73. Dialog Box for Selected Content Block

If you are still in *Design Mode* while saving a content block, a dialog box opens (Figure 74).
Leave *Design Mode* to save the content block.

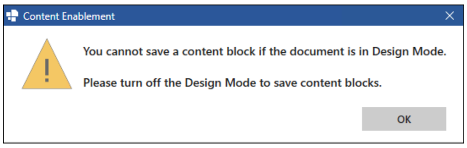


Figure 74. Dialog Box for Design Mode

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 marker 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 75).

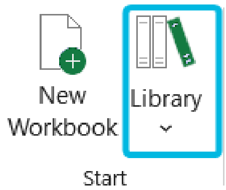


Figure 75. Button **Library**

3. Click on the option **Save** (Figure 76).

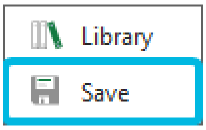


Figure 76. Option **Save**

4. Then click on the option **Table Size** (Figure 77 **(1)**).
5. Select the option **Save as** (Figure 77 **(2)**).
6. Navigate to the desired storage location, give the table size a name and confirm your selection.
   The table size is saved.

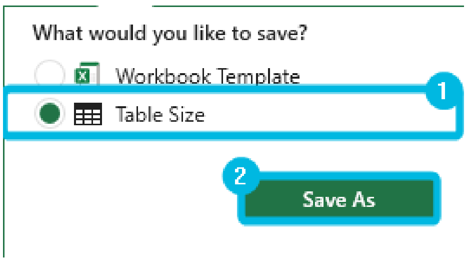


Figure 77. Save Table Size

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 78).

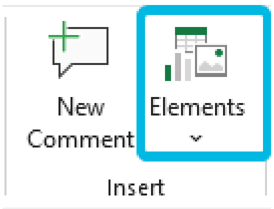


Figure 78. Button **Elements**

2. Select the option **Tables** (Figure 79).

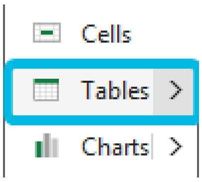


Figure 79. Option **Tables**

3. Then select the option **Table Size** (Figure 80 **(1)**).
4. Then select the option **Create Table Sizes** (Figure 80 **(2)**).
   A new workbook opens.

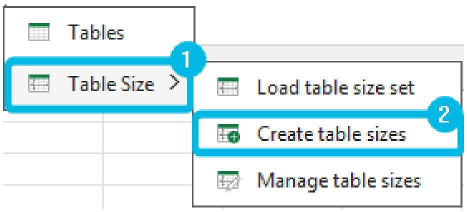


Figure 80. Options in **Table Sizes**

5. Apply your desired formatting to each column (Figure 81):
   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.

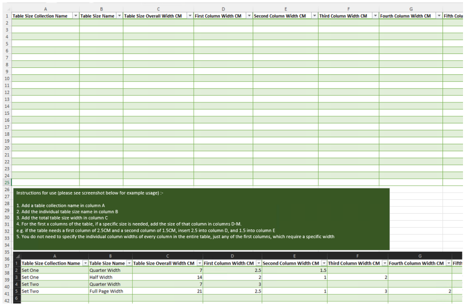


Figure 81. Workbook to Define Table Sizes

> 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 78).
2. Select the option **Tables** (Figure 79) and **Table size** (Figure 82 **(1)**).
3. Then select the option **Manage table sizes** (Figure 82 **(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.

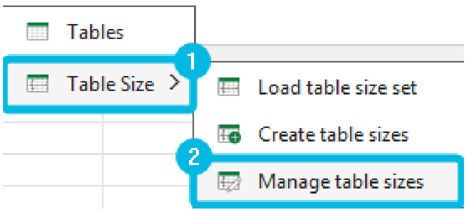


Figure 82. Option **Manage table sizes**

> 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 what you want element type to save.
4. Then, click on the button **Save** (Figure 83).

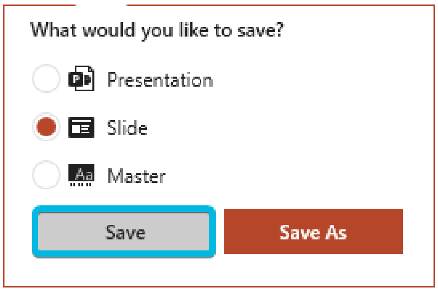


Figure 83. Button **Save**

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.

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 84).

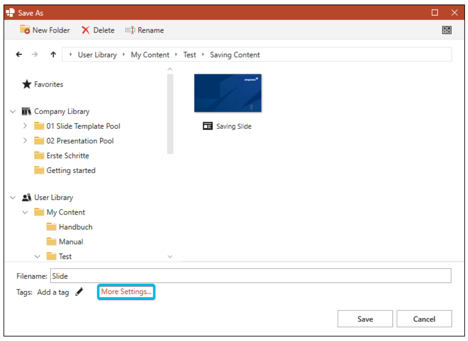


Figure 84. Button **More Settings…**

Here, you have three options (Figure 85):

- **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.
- **Automatic language detection** – To deactivate the automatic language detection, switch the toggle button to *Off*.
  The automatic language detection is used to assign a language to an element once it is saved based on its content. It works for all languages that have been enabled by your empower® Administrators.
- **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.

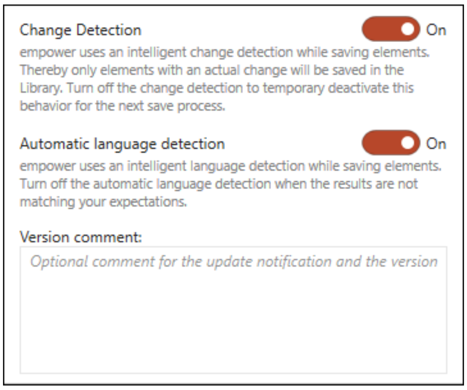


Figure 85. Advanced Settings

For multilingual slides, the automatic language detection works reliably if 2/3 of the content consist of one language.

The automatic language detection first checks all text placeholders to detect the language. Then, it checks the title placeholder.

Notes that have been added to slide are not taken into account during the language detection.

The advanced settings are only available in PowerPoint.

For further information regarding the assignment of languages, see **Assign Languages**.

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

The following options are available (Figure 86):

- **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.

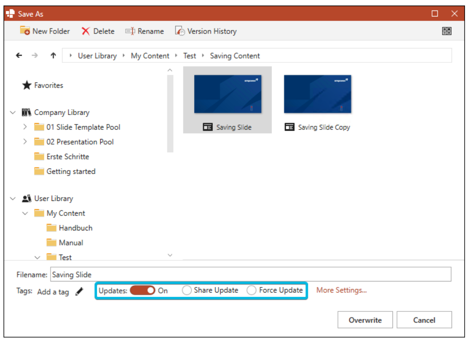


Figure 86. Update Settings

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 87**).
   A dialog box opens.

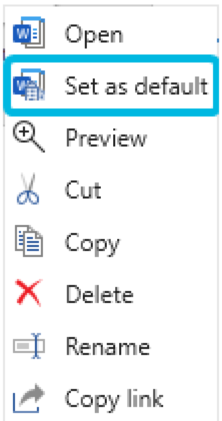


Figure 87. Option **Set as default**

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 88**).

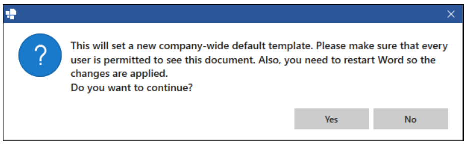


Figure 88. Dialog Box for New Company Default

The template will now be marked as the *Company's Default* (**Figure 89**).

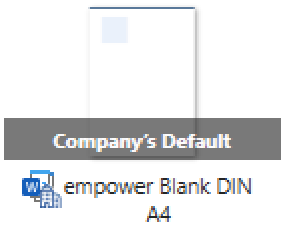


Figure 89. Document Template with Label

To revoke your choice for the company-wide default, right-click on the template and choose the option **Remove default** (Figure 90).

A dialog box opens.

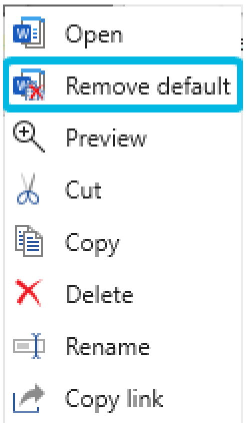


Figure 90. Option **Remove default**

To confirm the process, click on the button **Yes** (Figure 91).

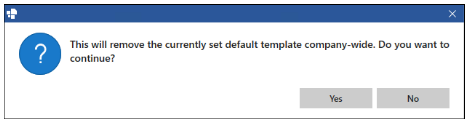


Figure 91. Dialog Box for Removal of Company Default

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 92).

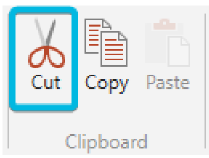


Figure 92. Button **Cut**

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 93**).

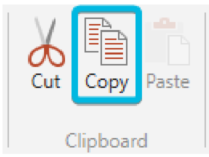


Figure 93. Button **Copy**

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 94**).

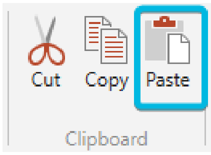


Figure 94. Button **Paste**

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.

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 95**).

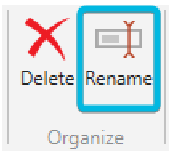


Figure 95. Button **Rename**

Type in the new element name (**Figure 96**).

Figure 96. Rename Element

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

Delete Content

To delete content, select it in the library. Then, navigate to the group Organize and click on the button **Delete** (**Figure 97**).

Figure 97. 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 98**).

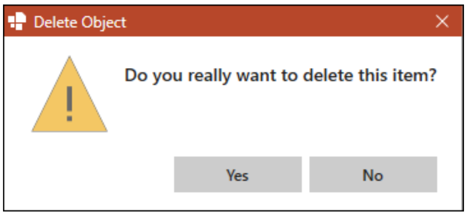


Figure 98. Dialog Box for Folder Deletion

If you delete an element that is not part of an update group or that is a linked copy of a root element, you will be asked if you want to share a deletion update (**Figure 99**).

If you want to share the deletion update, tick the checkbox.

Then, click on the button **Yes**.

The deletion update is shared with presentations that contain the slide and have been stored locally. It is not shared with other slides in the same update group.

For further information regarding this behavior, see **Update Groups**.

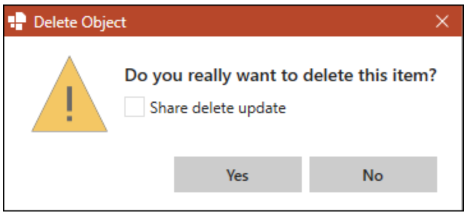


Figure 99. Dialog Box for Slide Deletion

If your selection contains elements that are part of an update group or of a translation group, a dialog box opens (**Figure 100**).

This dialog box informs you that these elements will be removed from the update or translation 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**.

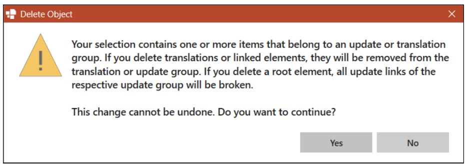


Figure 100. Dialog Box for Update or Translation Group Elements

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 101**).

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

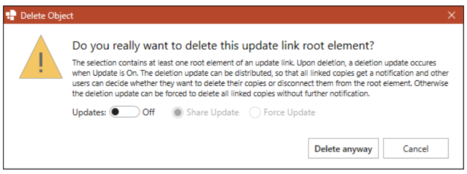


Figure 101. Dialog Box for Root Element Deletion

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**.

2.6.7. 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 102**).

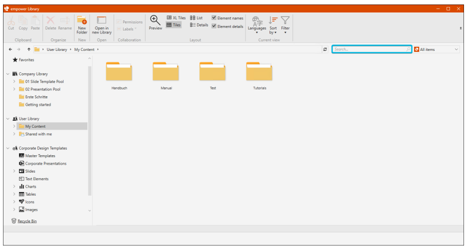


Figure 102. Search Bar

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.

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 103**).

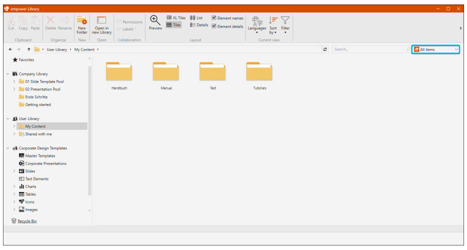


Figure 103. Search Scope

You can decide if you want to search in the whole library, in the current library, in the current folder or in the current folder and all its subfolders (**Figure 104**).

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.

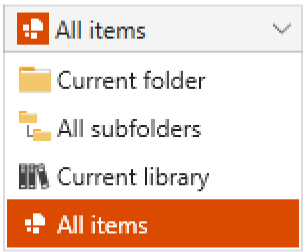


Figure 104. Search Scope Drop-Down Menu

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 105**)
  - 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 106**)
  - 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*.

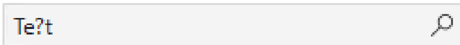


Figure 105. Question Mark

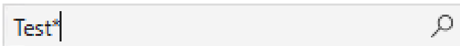


Figure 106. Asterisk

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

- AND: To combine two search terms (Figure 107)
  - 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.

Figure 107. AND

- OR: To search for elements containing either of the search terms (Figure 108)
  - 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.

Figure 108. OR

- NOT: To exclude elements containing a specific term (Figure 109)
  - 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*.

Figure 109. NOT

- Plus (+): To make a term obligatory (Figure 110)
  - 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 110. Plus

Fields

To specify your search, you can use fields. The following fields can be searched (Figure 111):

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

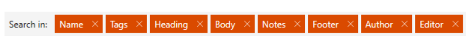


Figure 111. Available Fields in PowerPoint

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 112).

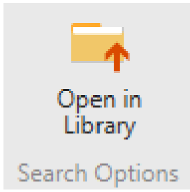


Figure 112. Button **Open in Library**

For slides that are part of a presentation, the button is called **Show in presentation** (Figure 113).

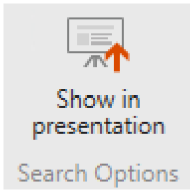


Figure 113. Button **Show in presentation**

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

2.6.8. Element Tags

You can add so-called tags to an element if you want to add information to the element's metadata (Figure 114).

Figure 114. Tag *Presentation*

To do so, follow the following steps:

1. Select the respective element in the empower® Library.
2. On the bottom of the window, click on the **pen** symbol (Figure 115).
   A dialog box opens (Figure 116).

Figure 115. **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.

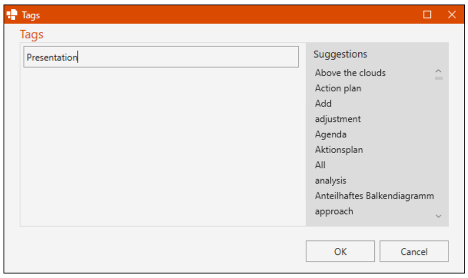


Figure 116. Window **Tags**

4. If you have finished, click on the button **OK** (**Figure 117**).
   Your tags will be added to the element. They are displayed along with the metadata on the bottom of the library window (**Figure 118**).
   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.

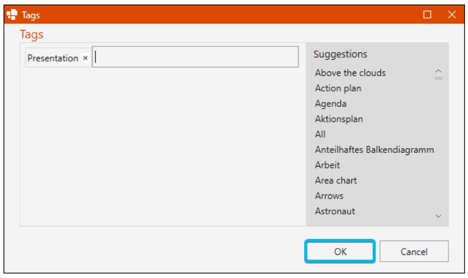


Figure 117. Button **OK**

Figure 118. 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.

In addition, you can add tags to an element directly when you save it.

To do so, click on the **pen** symbol next to *Add a tag* in the library window (**Figure 119**).

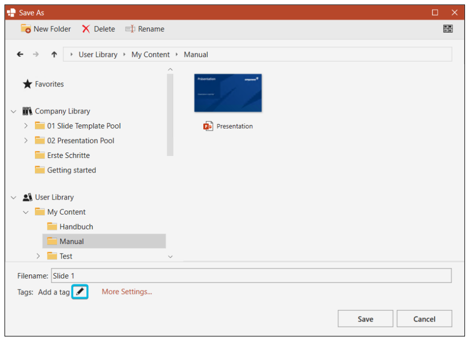


Figure 119. Add a Tag When Saving

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

Only users with the permission roles *Editor*, *Author* or *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.

There is a limit of a maximum of 1020 characters for all tags placed on an element (**Figure 120**).

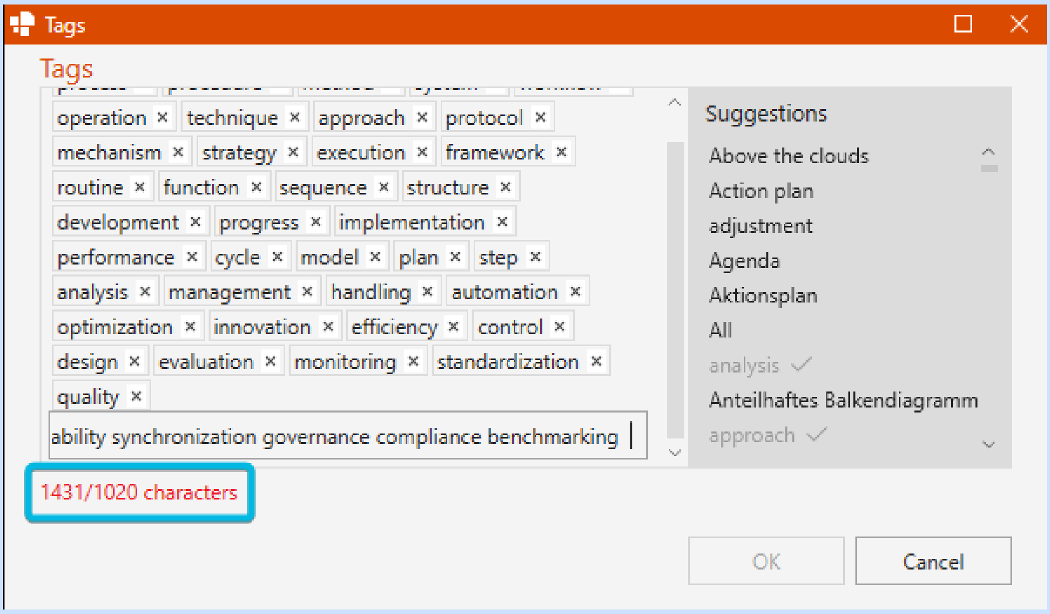


Figure 120. Character Limit

Tag List

The tag list consists of tags that are in use for at least one element (**Figure 121**). They are sorted in alphabetical order.

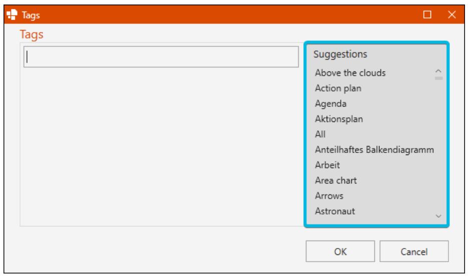


Figure 121. Tag List

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

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

1. Select the respective element in the empower® Library.
2. On 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 122**).
4. If you have finished, click on the button **OK**.

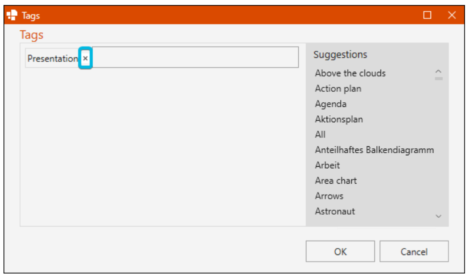


Figure 122. **Cross** Symbol

2.6.9. 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 123).

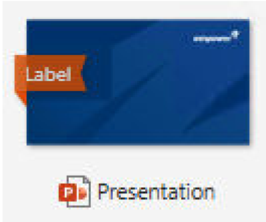


Figure 123. Presentation with Label

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 124).
   A drop-down menu opens.

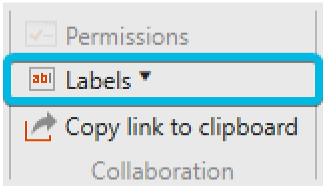


Figure 124. Button **Labels**

4. Choose the option **Custom label** (Figure 125).

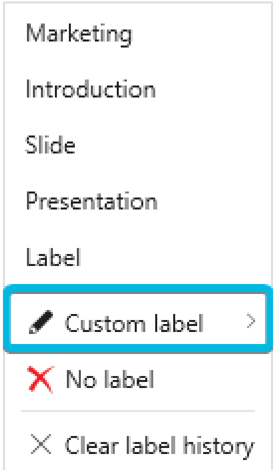


Figure 125. Option **Custom label**

5. In the input field, enter the label name.
6. Click on the button **Add** (Figure 126).
   The label will appear in the element's thumbnail.

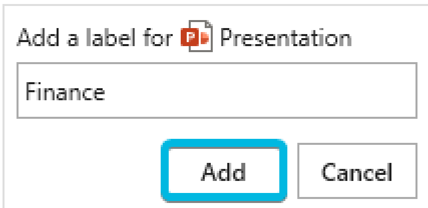


Figure 126. Button **Add** for New Label

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 127).

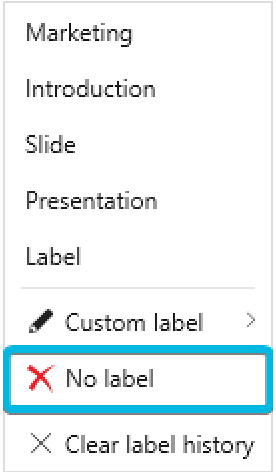


Figure 127. Option **No Label**

Only users with the permission roles *Editor*, *Author* or *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 128). 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**.

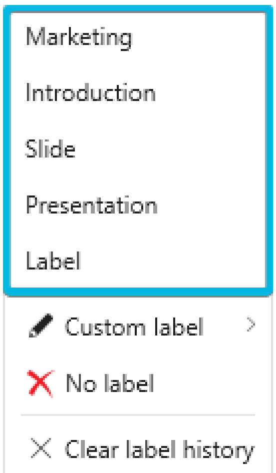


Figure 128. Label History

To delete all labels from the label history, click on the option **Clear label history** (Figure 129).

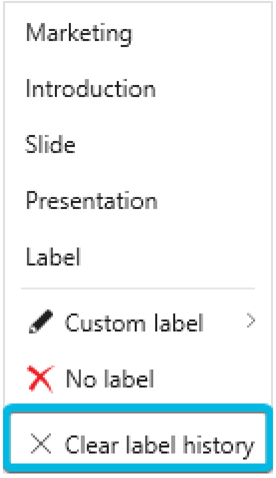


Figure 129. Option **Clear label history**

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.

2.6.10. Assign Languages

If enabled by your empower® Administrators, you can assign languages to elements in the empower® Library.

The language assignment feature is only available in PowerPoint.

Depending on the setup of your empower® Environment, the language assignment feature might not be available.

To assign a language to an element, the permission role *Folder Administrator*, *Editor* or *Author* is required.

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

Usually, the element language is detected automatically when you save an element to the empower® Library. If the language cannot be detected, the language option *Universal* is assigned to the element.

If the language could not be detected successfully or if you want to change the assigned language, you can assign another language to the element via the empower® Library.

To do so, follow the following steps:

1. Select the element in the empower® Library.
   You can also select multiple elements at once.
2. In the navigation bar, navigate to the group Updates.
3. Click on the button **Languages** (Figure 130).
   A drop-down menu opens

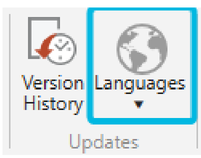


Figure 130. Button **Languages**

4. In the drop-down menu, click on the option **Change Language** (Figure 131).

Figure 131. Option **Change Language**

5. Then, select the language you want to assign to the element (Figure 132).
   The language is assigned to the element.

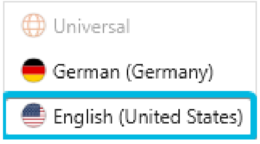


Figure 132. Select Language

If a language has been assigned to an element, a **flag** symbol is displayed in the element's thumbnail (Figure 133).

Figure 133. Thumbnail with **Flag** Symbol

> The language option *Universal* is meant for elements that cannot be assigned to a certain language.
> If the option *Universal* has been assigned to an element, no **flag** symbol is displayed in the element's thumbnail.

> Alternatively, you can access the option **Language** via the context element of an element.

> For further information regarding the language filter, see Filter by Language.

2.6.11. 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 134).
   A drop-down menu opens.

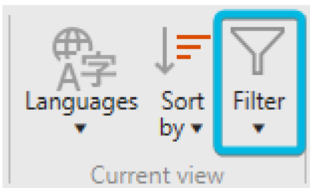


Figure 134. Button **Filter**

3. To select an element type you want to view, tick the checkbox next to the element type (Figure 135).
As soon as you tick a checkbox, the library will reload the content and apply the filter immediately.

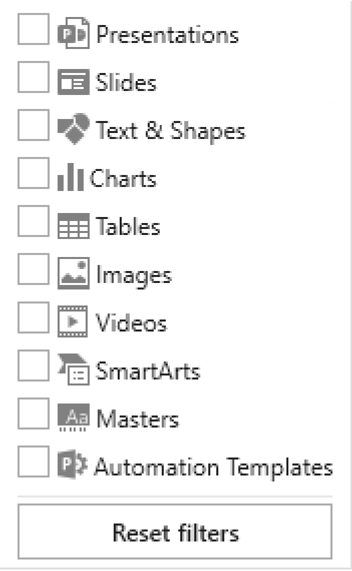


Figure 135. Available Filters

If you have selected any filters, empower® shows the number of applied filters next to the **filter** symbol (Figure 136).
You can select multiple element types at once.

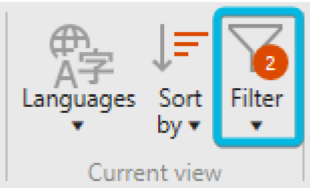


Figure 136. Number of Active Filters

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

To deselect all applied filters at once, click on the button **Reset filters** (Figure 137).

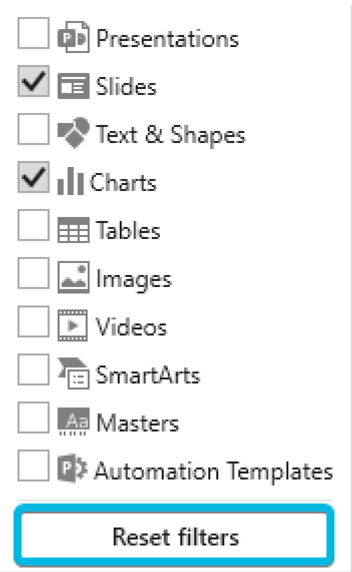


Figure 137. Button **Reset filters**

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 displayed element types depend on the empower® Solutions in use.

⚠ The element type filter is only available in PowerPoint.

2.6.12. Filter by Language

If multilingualism has been enabled by your administrators, you can filter the content in the empower® Library by languages.

To use the language filter, follow the following steps:

1. In the navigation bar, navigate to the group Current view.
2. Click on the button **Languages** (Figure 138).
   A drop-down menu opens. The drop-down menu offers you all languages that have been set up as available element languages in the library.

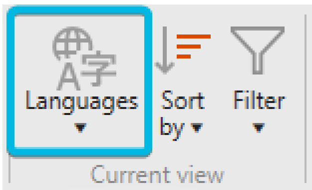


Figure 138. Button **Languages**

3. To select the languages to be displayed, tick the checkbox next to the respective language (Figure 139).

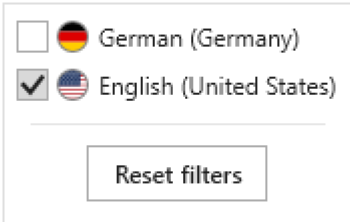


Figure 139. Drop-Down Menu for Language Filters

Your selection applies immediately. The empower® Library will now only show elements that have been assigned the selected language or languages. In addition, elements which are assigned to *Universal* will always be displayed.

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

To deselect all applied filters at once, click on the button **Reset filters** (Figure 140).

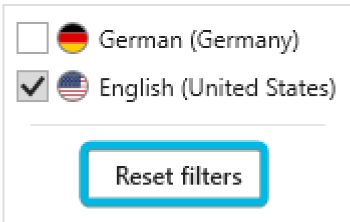


Figure 140. Option **Reset filters**

ℹ The language filter is only available in PowerPoint.

ℹ For further information regarding the assignment of languages, see **Assign Languages**.

2.6.13. Sort Library Content

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

The following sorting criteria is 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 **Custom Sort** 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 141**). Then, choose your preferred option.

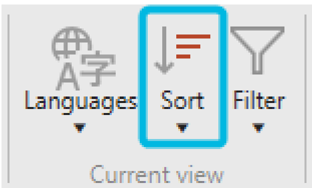


Figure 141. Button **Sort**

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.

2.6.14. 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 142).

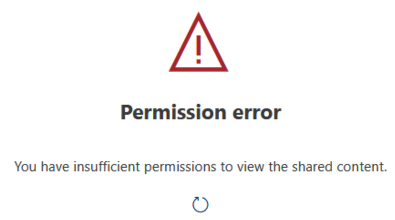


Figure 142. Message for Missing Permissions

> 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 143).
   The empower® Link is automatically copied to your clipboard.

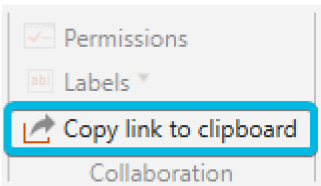


Figure 143. Button **Copy link to clipboard**

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

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 144).

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

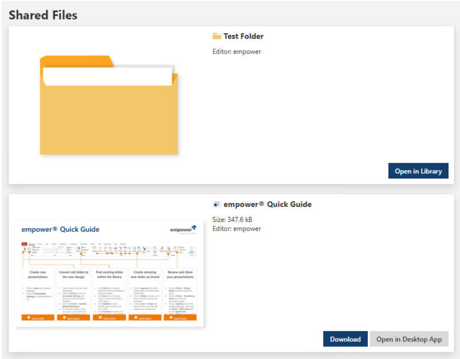


Figure 144. Shared Files

You can now choose between the following options:

- Download elements to your device by clicking on the button **Download** (Figure 145 **(1)**).
- Open elements directly on your device by clicking on the button **Open in Desktop App** (Figure 145 **(2)**).

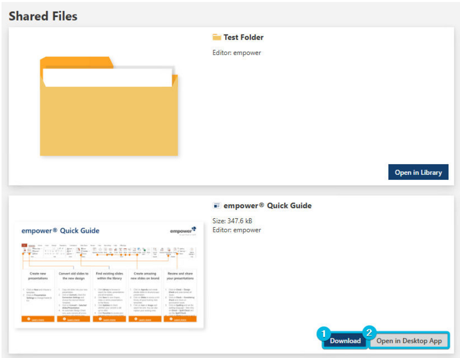


Figure 145. Buttons **Download** and **Open in Desktop App**

- Open folders directly in the empower® Web App by clicking on the button **Open in Library** (Figure 146).
  This option is only available for folders.

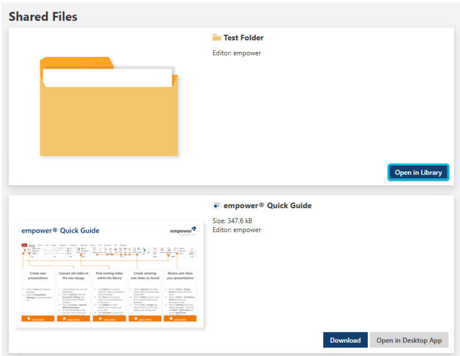


Figure 146. Button **Open in Library**

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 147).

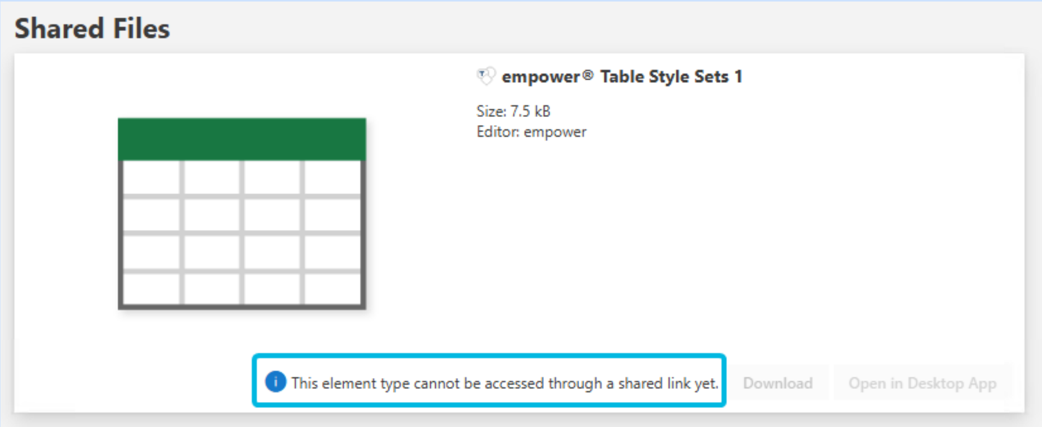


Figure 147. Message in Browser

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.

2.6.15. 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 148**).

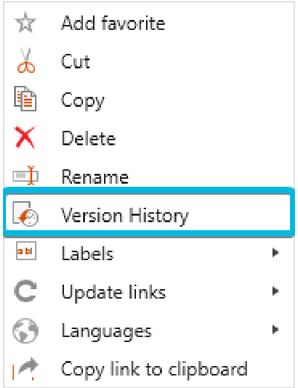


Figure 148. Option **Version History** in Element Context Menu

The version history opens in a new window (**Figure 149**).

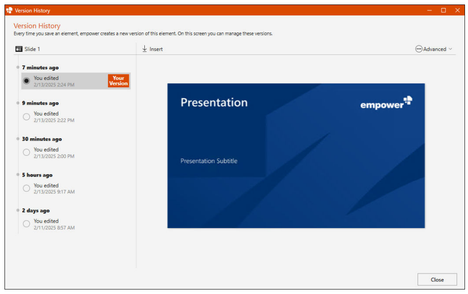


Figure 149. Window **Version History**

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 150**).

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

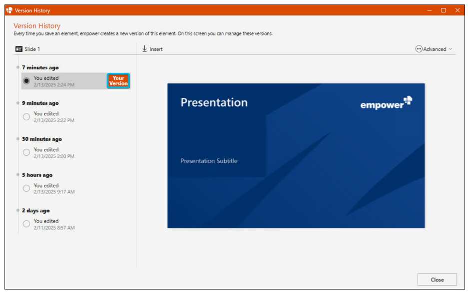


Figure 150. Highlight for Current Version

If the user who saved a version has left a version comment, this comment is displayed underneath the slide preview (**Figure 151**).

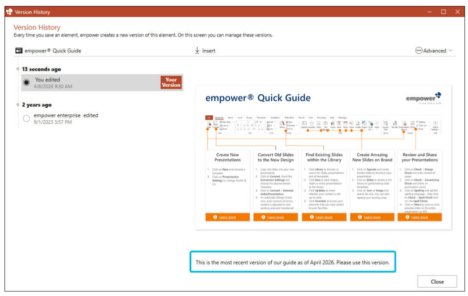


Figure 151. Version Comment

To insert the current version into your presentation, click on the button **Insert** (**Figure 152**).

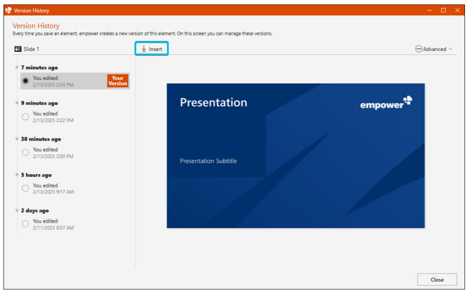


Figure 152. Button **Insert** for Current Version

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 have *Editor* or *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 153**).

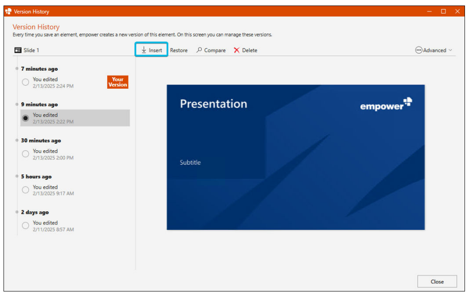


Figure 153. Button **Insert** for Old Version

To restore the selected version, click on the button **Restore** (Figure 154).

The older version will be restored and replaces 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.

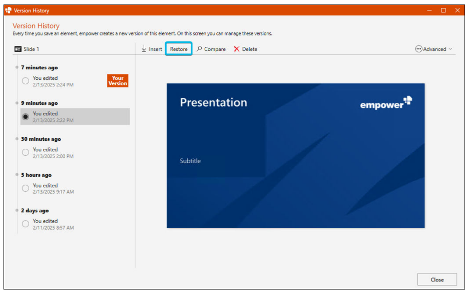


Figure 154. Button **Restore**

Compare Versions

To compare one of the older versions with the current version, select the older version and click on the button **Compare** (Figure 155).

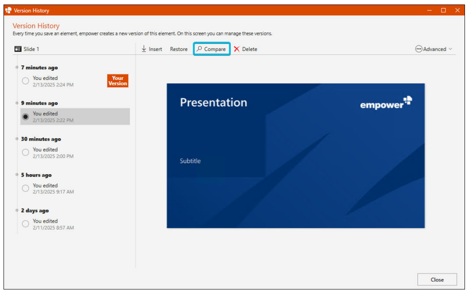


Figure 155. Button **Compare**

The older version is shown on the left and the current version is shown on the right (Figure 156).

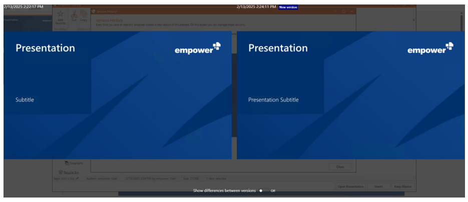


Figure 156. Comparison

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 157).

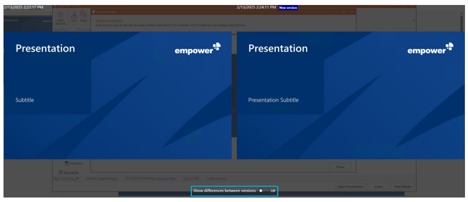


Figure 157. Toggle Button **Show differences between versions**

The differences will be highlighted in yellow (Figure 158).

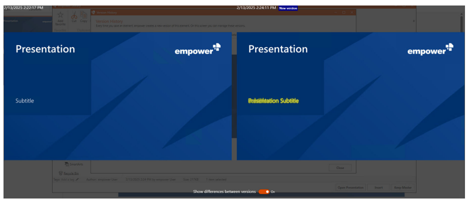


Figure 158. Comparison with Highlights

Delete Version

To delete an older version from the timeline, select the version and click on the button **Delete** (Figure 159).

A dialog box opens.

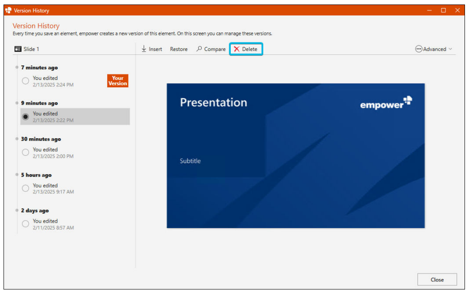


Figure 159. Button **Delete**

To confirm the deletion, click on the button **Yes** (Figure 160).

The selected version will be removed from the timeline.

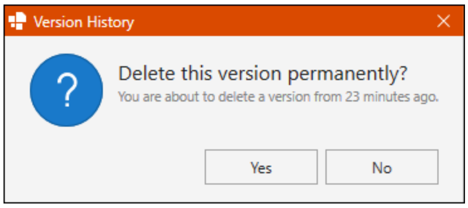


Figure 160. Dialog Box for Deletion

Advanced Settings in Version History

To open advanced settings for the version history, click on the button **Advanced** (Figure 161).

A drop-down menu opens.

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

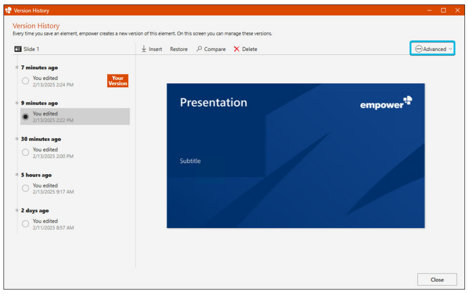


Figure 161. Button **Advanced**

In the drop-down menu, you have two additional options (Figure 162).

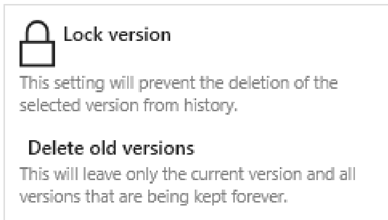


Figure 162. Drop-Down Menu for Button **Advanced** for Unlocked Version

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 163).
   The version will be locked. A **lock** symbol appears next to the version in the timeline (Figure 164) 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 165).

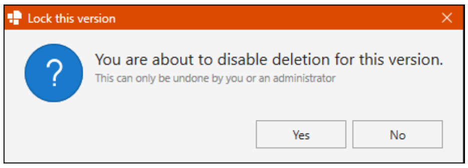


Figure 163. Dialog Box for Locking

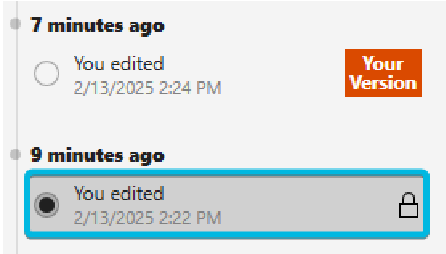


Figure 164. Locked Version

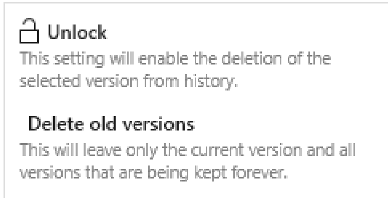


Figure 165. Drop-Down Menu for Button **Advanced** for Locked Version

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 166).
   If you have locked versions before using the option **Delete old versions**, the locked versions will not be deleted.

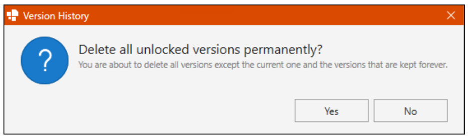


Figure 166. Dialog Box for Bulk Deletion

2.7. 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*.

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 167**):

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

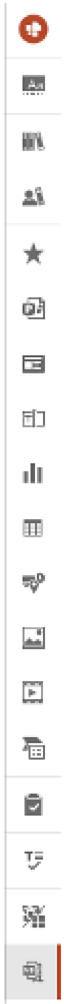


Figure 167. Sidebar in PowerPoint

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

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.

Template Assistant

For Administrators

If you are a *Customizing Admin*, the *Template Assistant* will also be visible in the side pane (**Figure 168**).

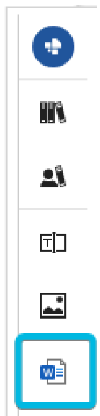


Figure 168. *Template Assistant* Icon in Sidebar

> 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.

2.8. Content Updates

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 169).

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.

If the dialog box opens, close it manually.

To do so, click on the button **OK** (Figure 170).

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

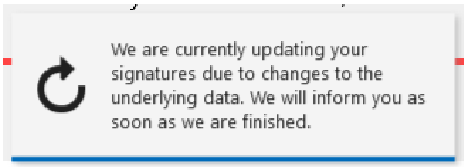


Figure 169. Update Notification in Outlook

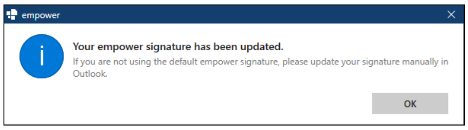


Figure 170. Dialog Box for Signature Updates

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.

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 171**).

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

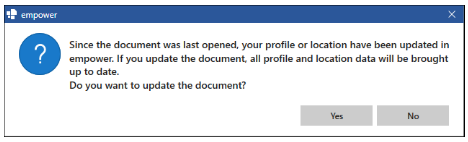


Figure 171. Changed Profile Data

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 172**).

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

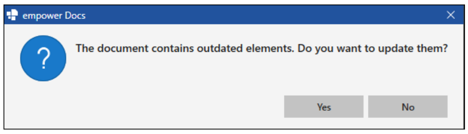


Figure 172. Update Notification for Elements

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 173**).

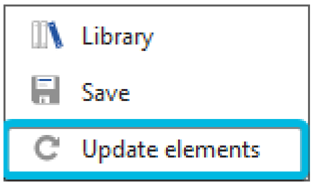


Figure 173. Option **Update elements**

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

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

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.

2.9. 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.

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

In Word, you can start right away with your default profile.

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 174).

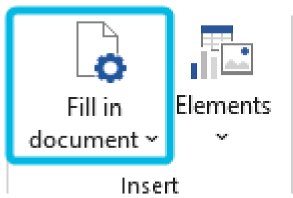


Figure 174. Split **Button Fill in document**

A drop-down menu opens.

Choose the option **Profiles** (Figure 175).

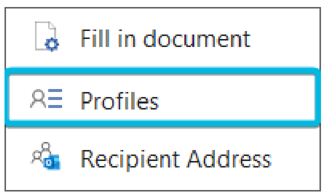


Figure 175. Option **Profiles**

To view your profile management in Outlook, navigate to the group empower Mails and click on the lower part of the split button **Manage Signatures** (Figure 176).

Figure 176. Split Button **Manage signatures**

A drop-down menu opens.
Choose the option **Profiles** (Figure 177).

Figure 177. Button **Profiles**

A new window opens (Figure 178).
The window offers the same settings in both applications.

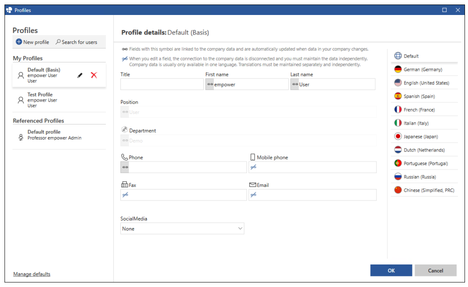


Figure 178. Profile Management Window

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

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

Edit a Profile

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

Basic information is automatically retrieved from your company's directory service and synchronized into fields in your profile. Fields that are filled this way are indicated by a **chain** symbol (Figure 179).

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

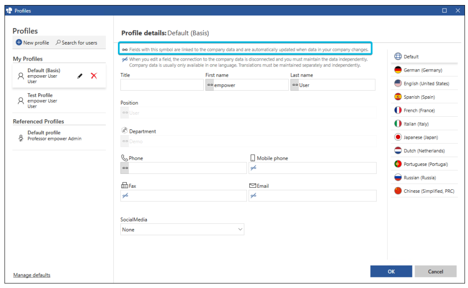


Figure 179. **Chain** Symbol for Automatically Synchronized Data

A **crossed-out chain** symbol (Figure 180) 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.

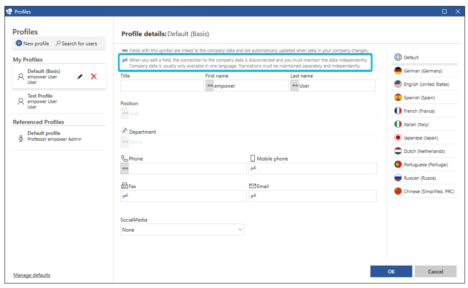


Figure 180. **Crossed-out Chain** Symbol for Not Automatically Synchronized Data

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

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

If you have finished entering your data, click on the button **OK** (Figure 181).

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

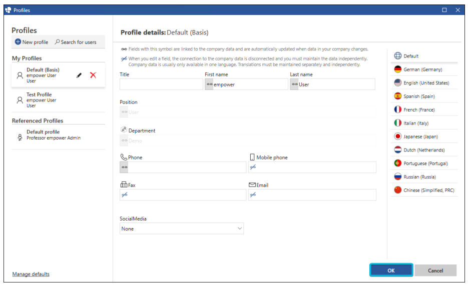


Figure 181. Button **OK** to Confirm Profile Data Changes

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 182).

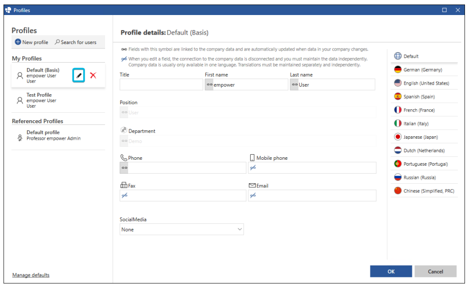


Figure 182. **Pen** Symbol to Rename a Profile

Enter the new name in the input field and click on the button **Apply** (Figure 183).

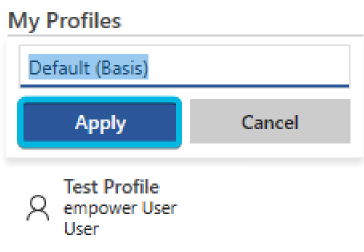


Figure 183. Button **Apply** to Confirm New Profile Name

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 184).

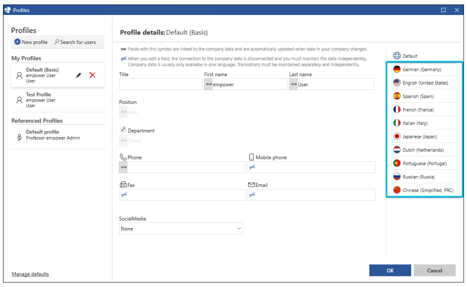


Figure 184. New Translation

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

The data will not be preloaded from the directory service. To add translations, enter the translated values into the input fields.
Alternatively, you can click on the crossed-out chain symbol to load data from the directory service, if there is any.

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

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

Add a Profile

To add a profile, click on the button **New Profile** (Figure 185).

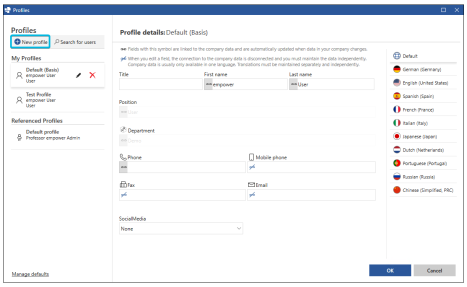


Figure 185. Button **New Profile**

Enter the profile name and click on the button **Add** (Figure 186).
The data from the directory service is preloaded. You can now make changes and add data to the profile.

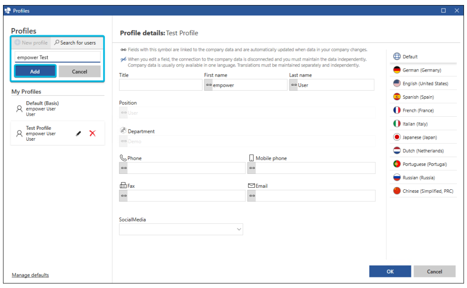


Figure 186. Add Profile

If you have finished entering your data, click on the button **OK** (Figure 181).

Work with Multiple Profiles

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

To manage your default profiles, click on the button **Manage defaults** (Figure 187).

A dialog box opens.

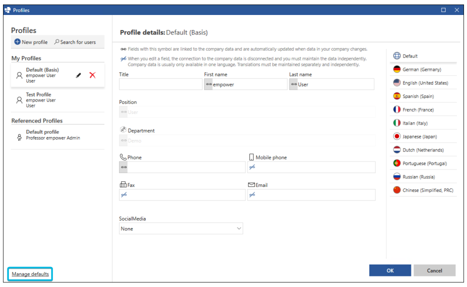


Figure 187. Button **Manage Defaults**

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 188).

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.

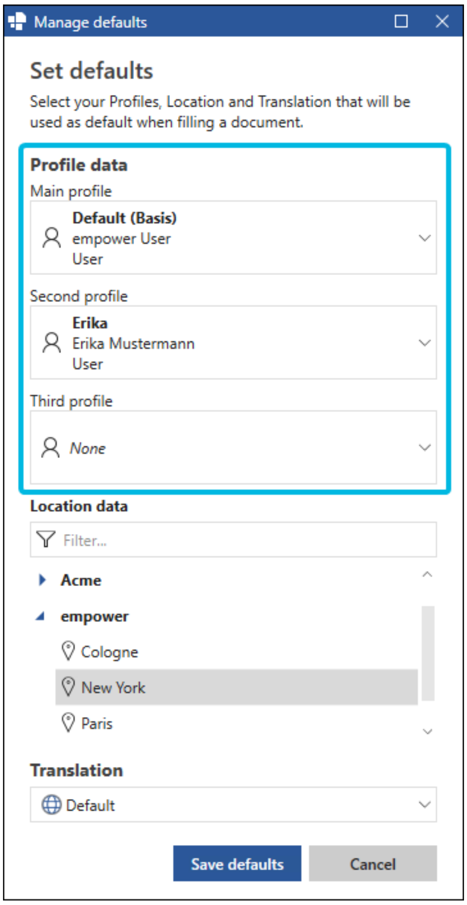


Figure 188. Set Default Profiles

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 189). To add a default company location, choose one from the list.

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

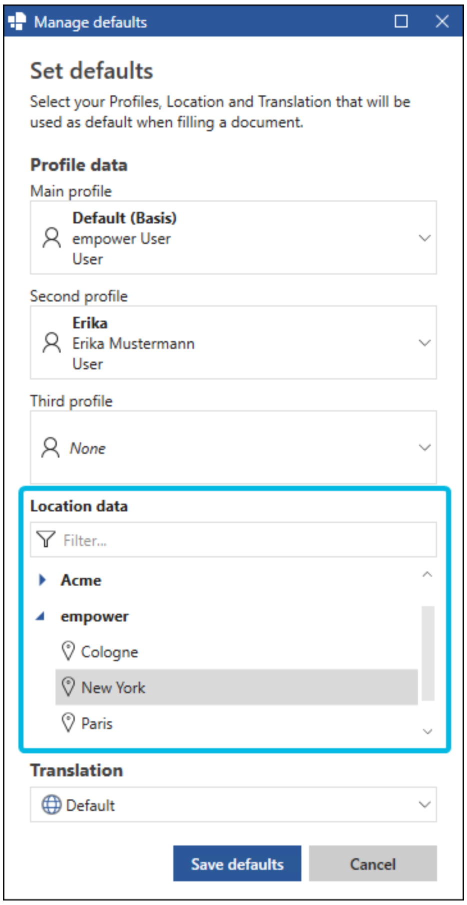


Figure 189. Location Data

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 190).

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.

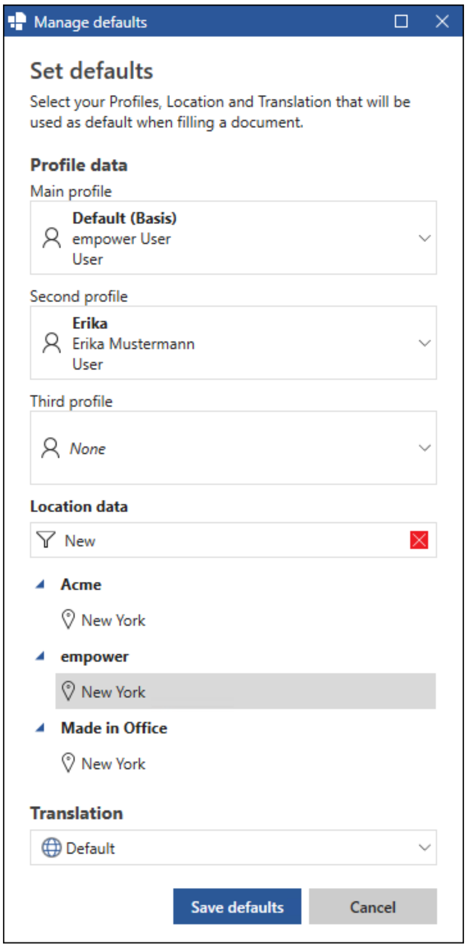


Figure 190. Search for Locations

If your search input does not lead to any result, a message is displayed in the dialog box (Figure 191).

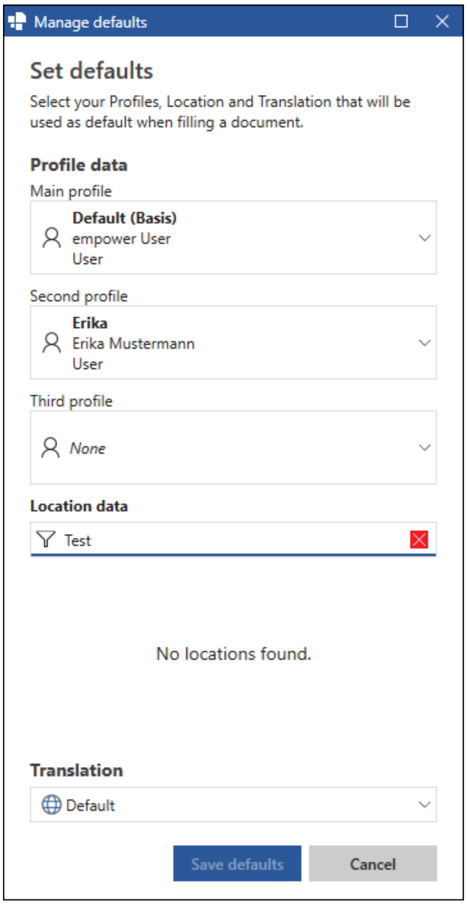


Figure 191. No Search Results

To abort the search, click on the **X** symbol in the input field (Figure 192).

All available locations will be listed again.

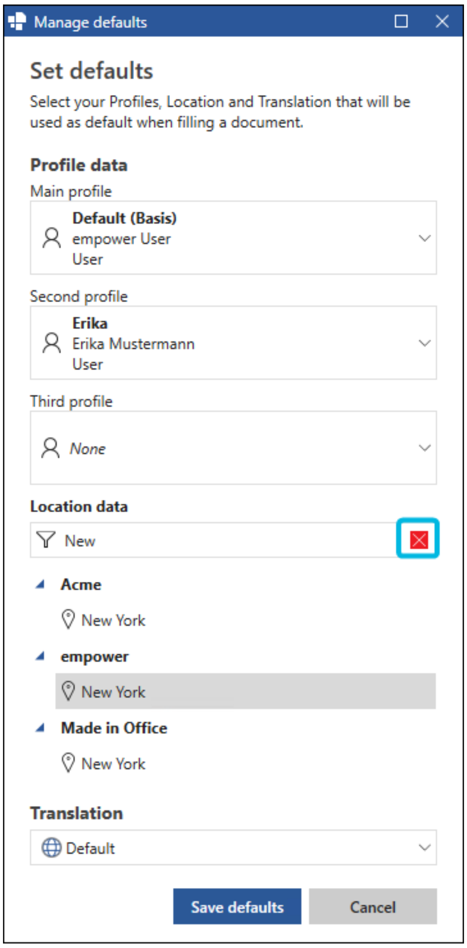


Figure 192. Abort Search

In the drop-down menu under *Translation*, all available languages are listed (Figure 193). To add a default translation, choose a language from the list.

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

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

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

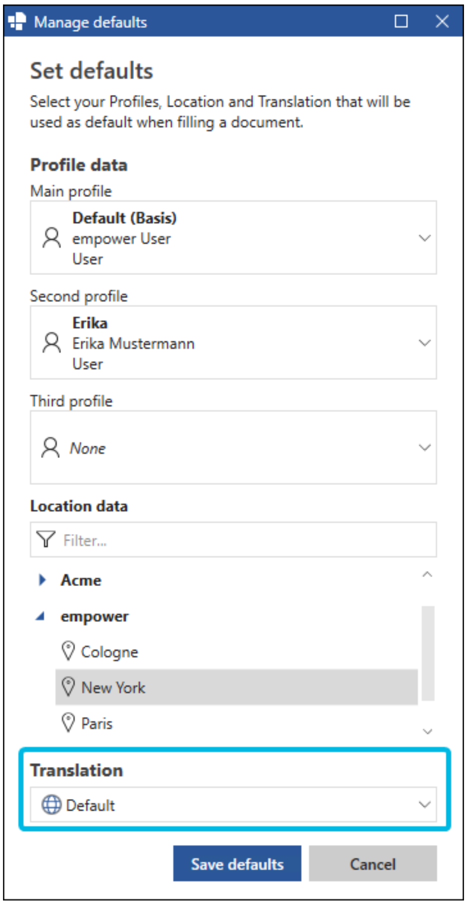


Figure 193. Translation

If you have finished, click on the button **Save defaults** (Figure 194).

Your settings are saved.

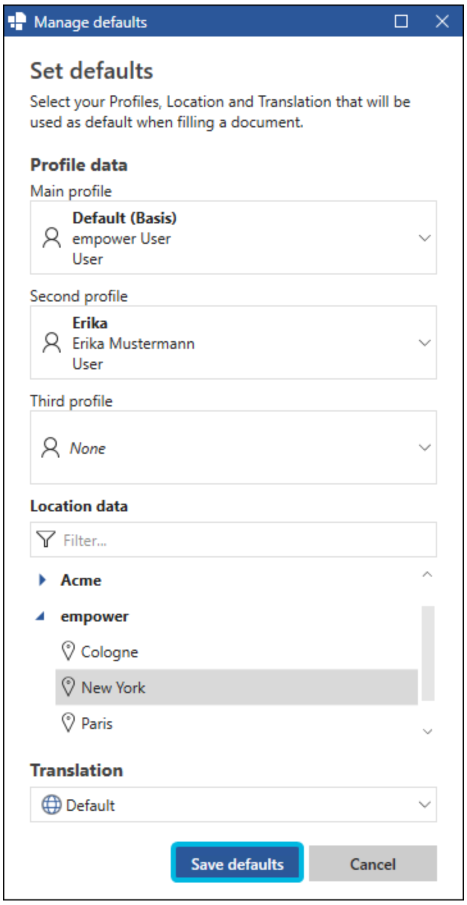


Figure 194. Button **Save defaults**

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

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

Reference Profiles

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

Once a user has set up a default profile, you can search for it via *Search for users* (Figure 195).

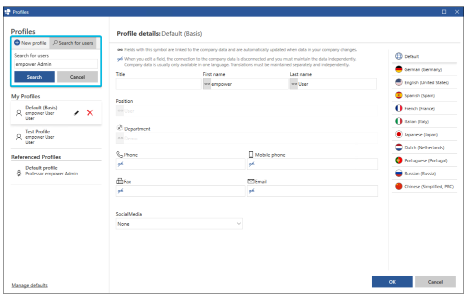


Figure 195. Option *Search for users* in Profile Management

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 196).

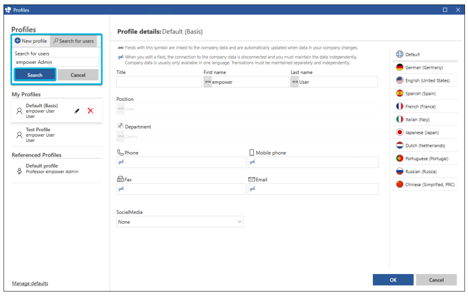


Figure 196. Button **Search**

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 197).

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.

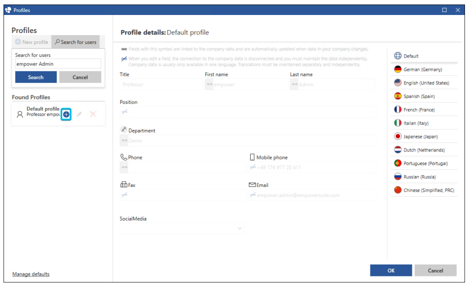


Figure 197. **Plus** Symbol to Add Profiles

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 198).

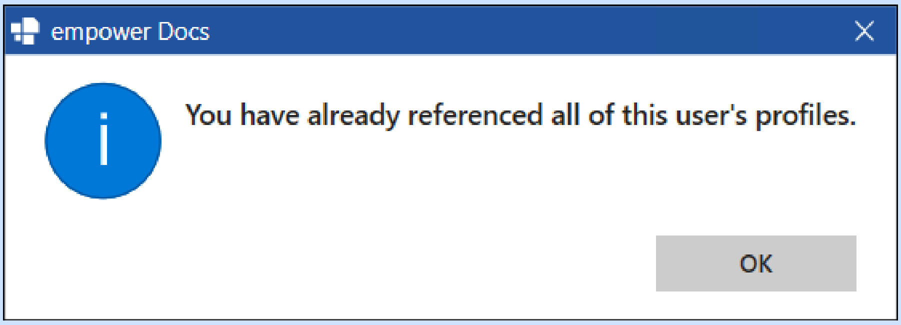


Figure 198. Dialog Box for Referenced Profiles

Delete a Profile

To delete a profile, click on the **X** symbol next to the profile in the profile list (**Figure 199**).

A dialog box opens.

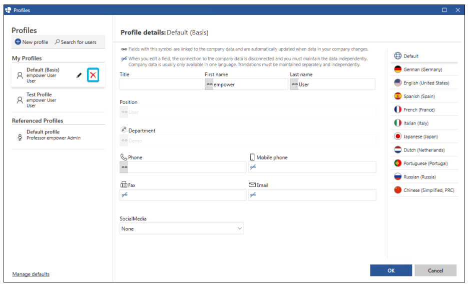


Figure 199. **Cross** Symbol to Delete a Profile

To confirm the deletion process, click on the button **Yes** (**Figure 200**).

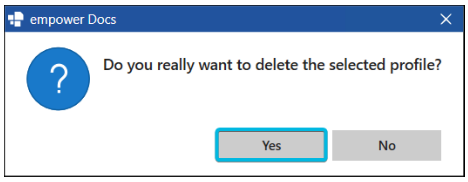


Figure 200. Button **Yes** to Confirm Deletion of a Profile

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.

2.10. 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 201**).

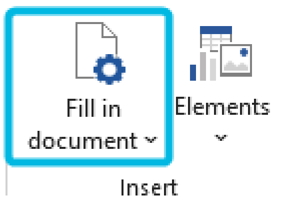


Figure 201. Split Button **Fill in document**

Choose the option **Companies** (Figure 202).
A dialog box opens.

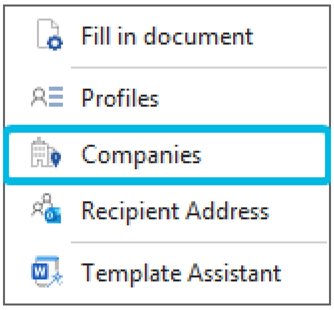


Figure 202. Option **Companies** in Word

In Outlook, you can access the option **Companies** by clicking on the lower part of the split button **Manage Signatures** (Figure 203).

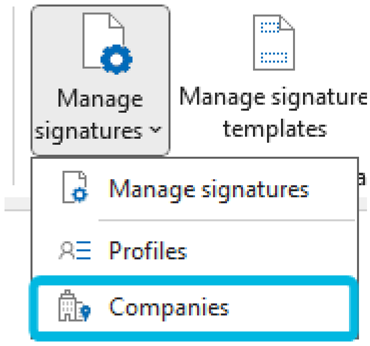


Figure 203. Option **Companies** in Outlook

If another user is currently working in the company management, a dialog box opens (Figure 204).

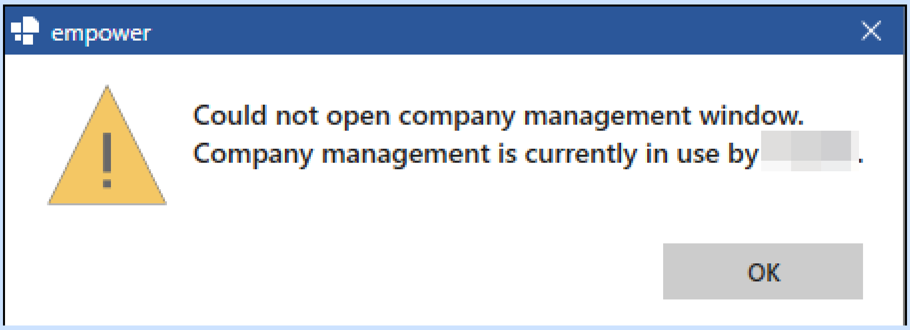


Figure 204. Dialog Box for Simultaneous Work

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 205).

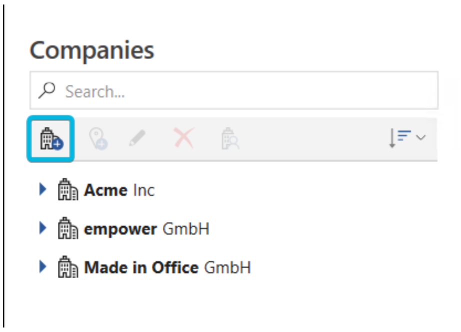


Figure 205. Button **Create Company**

2. Enter the display name for the company (Figure 206 **(1)**).
3. Select the legal entity type (Figure 206 **(2)**).
4. Click on the button **Apply** (Figure 206 **(3)**).
   On the right-hand side, the empty company fields appear.

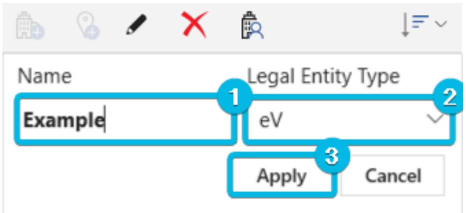


Figure 206. Add Company

5. To add a logo, click on the button **Select logo** (Figure 207 **(1)**).
6. Select the logo you want to use.
7. Then, fill in all company fields (Figure 207 **(2 + 3)**).
   The company fields vary depending on the legal entity type you have chosen.

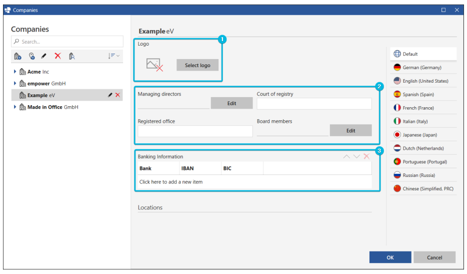


Figure 207. Company Fields

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 208).
   a. Here, click into the field *Click here to add a new item*.
   b. Type in the value you want to add and press **Enter**.
      If you add multiple values, you can change the display order using the two **arrow** symbols.
   c. Then, click on the button **OK**.

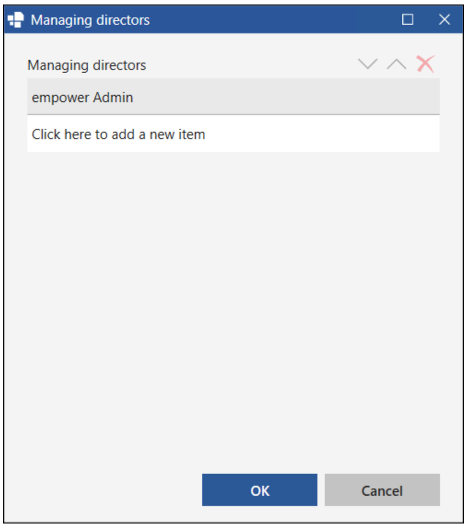


Figure 208. Add Values

9. To enter the company's banking information, click into the field *Click here to add a new item* (Figure 207 **(3)**). The fields to fill in vary depending on the legal entity type you have chosen.
10. To save the new company, click on the button **OK**. Alternatively, you can proceed and add a location to the company.

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

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

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

For further information regarding the 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 209).

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

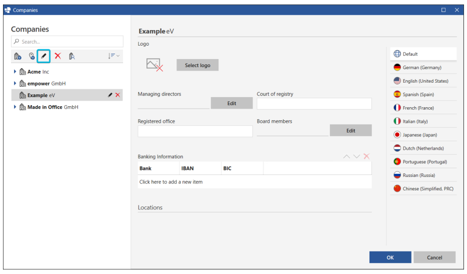


Figure 209. **Pen** Symbol for Company

If you change the legal entity type of a company, a dialog box opens (Figure 210).

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

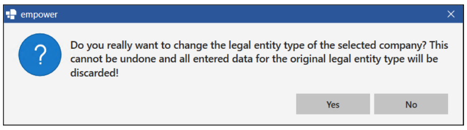


Figure 210. Dialog Box for Legal Entity Type Change

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

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

To delete a company, select it from the list and click on the **X** symbol (Figure 211).

A dialog box opens.

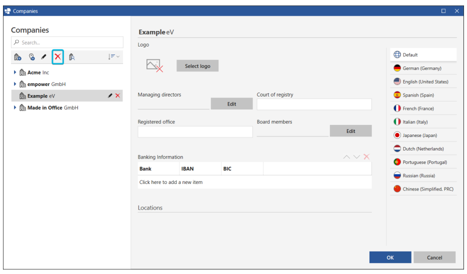


Figure 211. **Cross** Symbol for Company

To confirm the process, click on the button **Yes** (Figure 212).

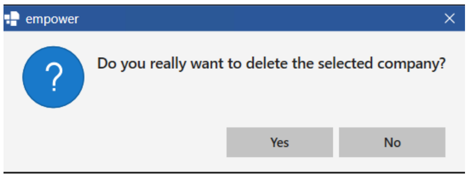


Figure 212. Dialog Box for Company Deletion

To edit the permissions for the company, click on the button **Edit permissions for selected company** (Figure 213).

A dialog box opens.

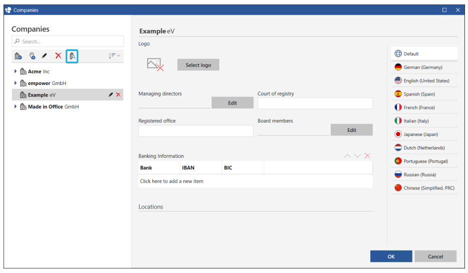


Figure 213. Button **Edit permissions for selected company**

In this dialog box, you can grant permissions to other users, remove permissions from users or change the permissions for users (Figure 214).

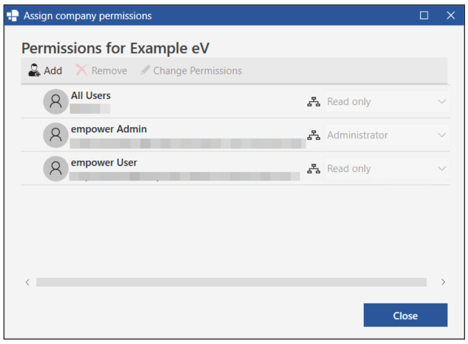


Figure 214. Permissions

If the **inheritance** symbol is displayed next to a user, this user has been granted permissions via the database (Figure 215). These permissions cannot be changed via the user interface.

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

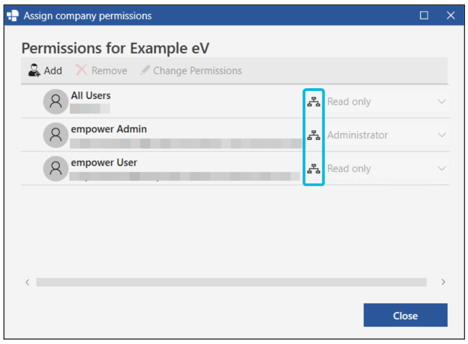


Figure 215. **Inheritance** Symbol

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

1. Click on the button **Add** (Figure 216).

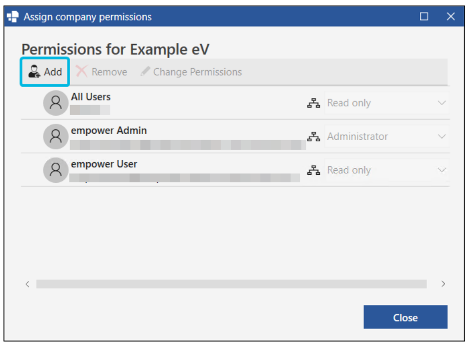


Figure 216. Button **Add**

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 217).
   The user will be added with the permission *Read only*.

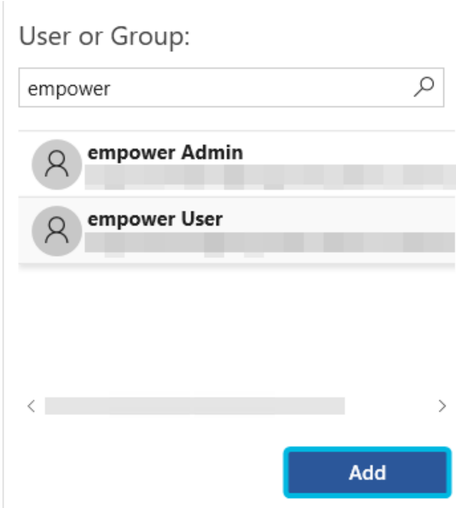


Figure 217. Add User

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 218).

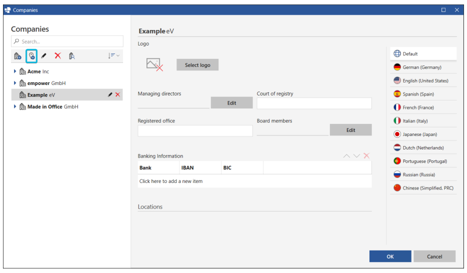


Figure 218. Button **Create location**

3. Enter the display name for the location (Figure 219 **(1)**).
4. Click on the button **Apply** (Figure 219 **(2)**).
   On the right-hand side, the empty location fields appear.

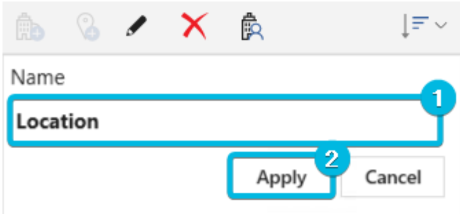


Figure 219. Add Location

5. To add a logo, click on the button **Select logo** (Figure 220 **(1)**).
6. Select the logo you want to use.
7. Then, fill in all location fields (Figure 220 **(2)**).

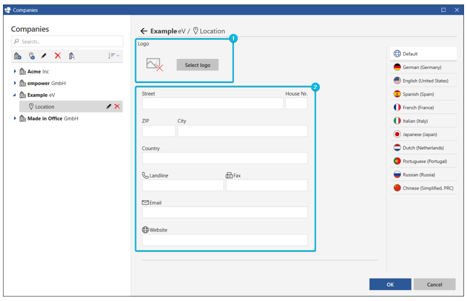


Figure 220. Location Fields

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

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

Edit and Delete Locations

To edit an existing location's name, select the location and click on the **pen** symbol (Figure 221).

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

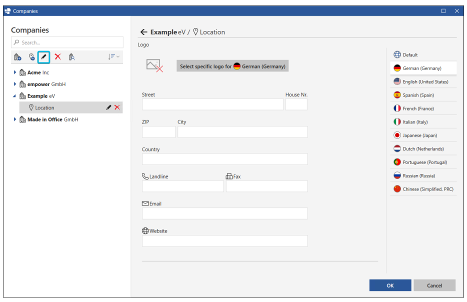


Figure 221. **Pen** Symbol for Location

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

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

To delete a location, select it from the list and click on the **X** symbol (**Figure 222**).

A dialog box opens.

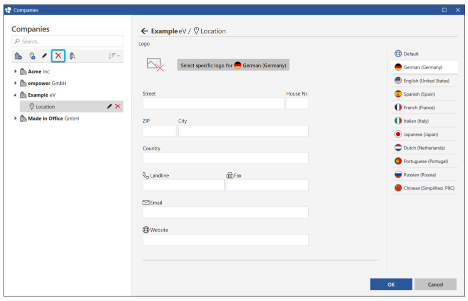


Figure 222. **Cross** Symbol for Location

To confirm the process, click on the button **Yes** (**Figure 223**).

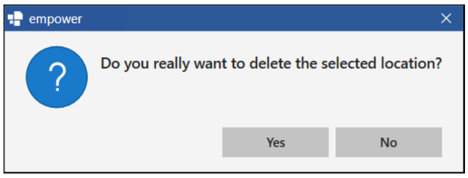


Figure 223. Dialog Box for Location Deletion

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 224**).

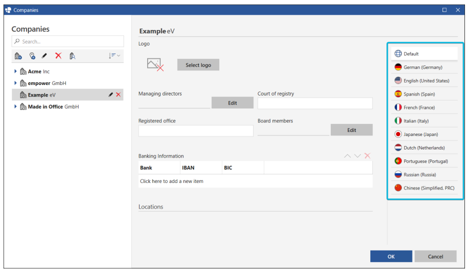


Figure 224. Languages

3. To add a logo, click on the button **Select specific logo for [language]** (**Figure 225**).
4. Select the logo you want to use.
5. Then, fill in all fields.

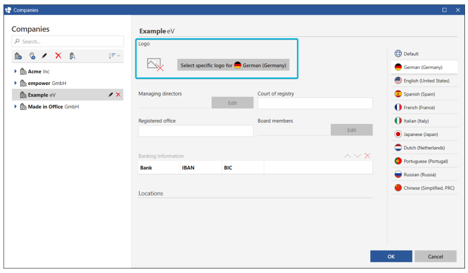


Figure 225. Logo for Translation

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

You can add separate logos for all languages.

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

2.11. 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 226).

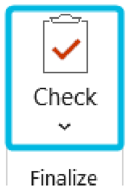


Figure 226. Button **Check**

In the drop-down menu, choose the option **View Document Properties...** (Figure 227).

A dialog box opens.

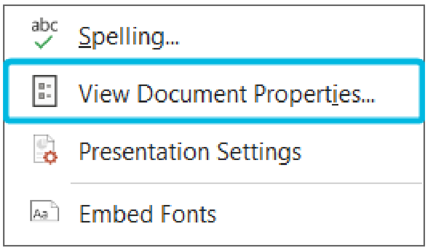


Figure 227. Option **View Document Properties...**

For further information regarding the Office built-in feature, see Microsoft 365 Support.

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.

2.12. 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 228).

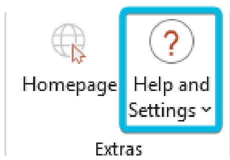


Figure 228. Button **Help and Settings**

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

To view your options here, click on the button **Help** (**Figure 229**).

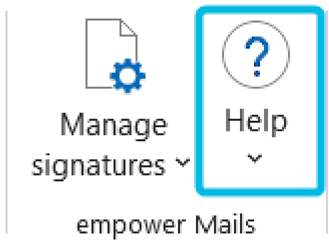


Figure 229. Button **Help** in Outlook

You can choose from the following options (**Figure 230**):

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

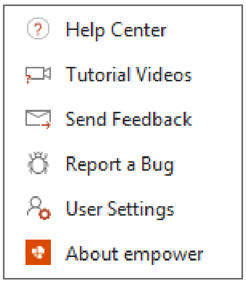


Figure 230. Drop-Down Menu for Button **Help and Settings**

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 231**).

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.

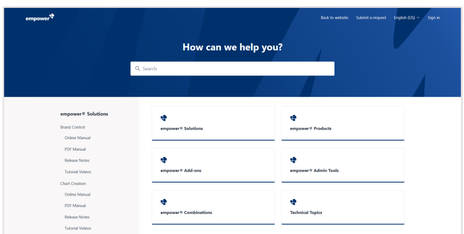


Figure 231. Help Center

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 232). All feedback is welcome as we are always looking to improve our software.

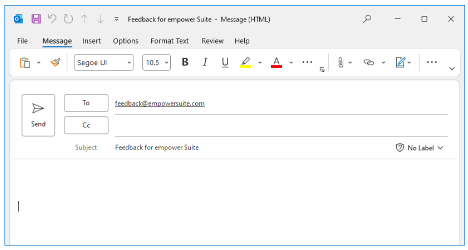


Figure 232. Feedback E-Mail

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 233).
  In this window, you have to enter various information about yourself, as well as the bug you want to report. This information is relevant for the empower® Support so that they can respond to it in the best possible way.

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

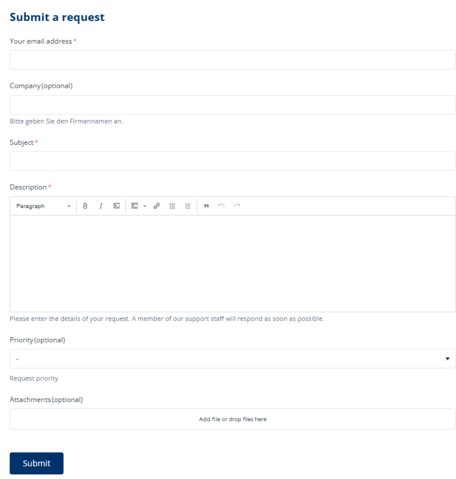


Figure 233. Report a Bug in Help Center

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 234).

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.

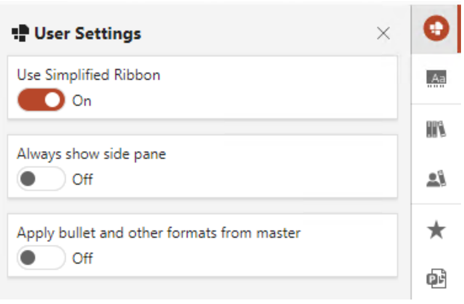


Figure 234. User Settings

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 235).

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.

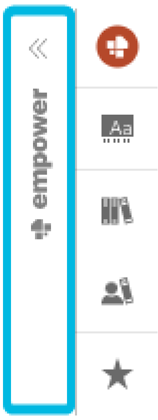


Figure 235. Expand Side Pane

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 & 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**.

A dialog box opens. This dialog box contains information about the empower® Version and solutions in use (Figure 236).

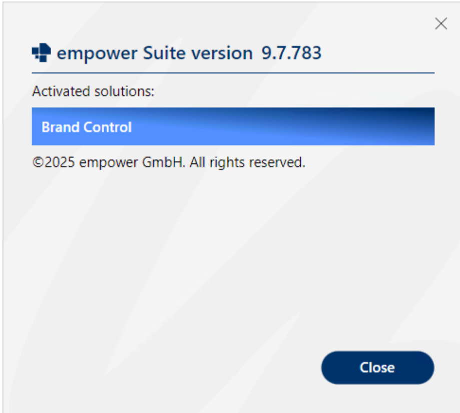


Figure 236. Dialog Box **About empower**

If your company uses the solution empower® Template Management, the window shows that the solution empower® Brand Control has been activated.

Customizing Center

For Administrators

If you are a *Customizing Admin*, the option **Customizing Center** will be visible for you (Figure 237).

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

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

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

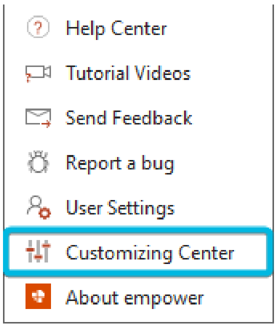


Figure 237. Option **Customizing Center**

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

2.13. 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 238**).

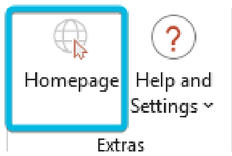


Figure 238. External Link Button

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**.

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.

If defined by your empower® Administrators, the master selection opens automatically.

To create a new presentation from the empower® Ribbon, navigate to the group Start and click on the button **New** (**Figure 239**).

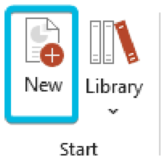


Figure 239. Button **New**

The empower® Library opens in the section *Master Templates* (**Figure 240**).

Here, choose your preferred master template.

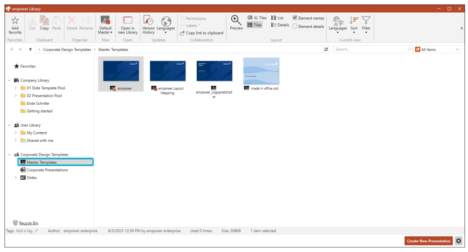


Figure 240. Master Templates

Then, click on the button **Create New Presentation** (**Figure 241**).

The new presentation opens in a new window and will be created based on the selected master template.

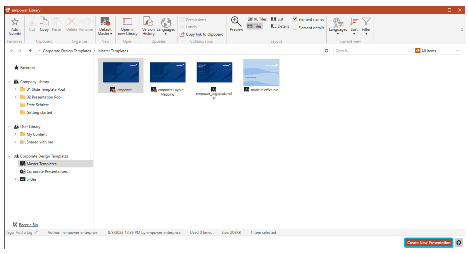


Figure 241. Button **Create New Presentation**

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.

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 242).

In addition, the icon next to the file name changes.

Figure 242. Label for Company Default

In addition, you can set your personal default master via the user interface.

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 243).
3. Right-click on the master template you want to define as your default.
   A context menu opens.

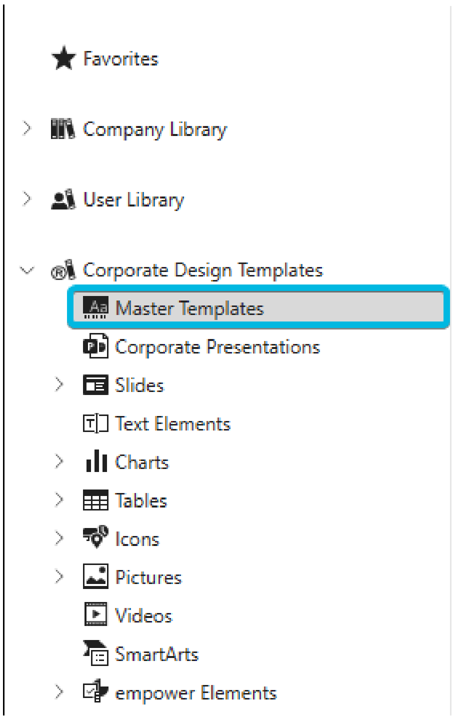


Figure 243. Section *Master Templates*

4. In the context menu, click on the option **Set as Default Master** (Figure 244).

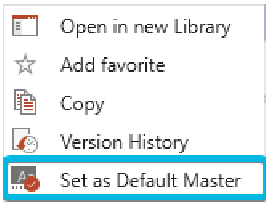


Figure 244. Option **Set as Default Master**

If you have defined a master template as your personal default, the label *Default Master* is displayed in its thumbnail (Figure 245).

In addition, the icon next to the file name changes.

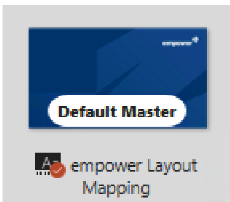


Figure 245. Label for Personal Default

If you now open a new PowerPoint window, your personal default master will automatically be inserted into your new presentation.

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 246).

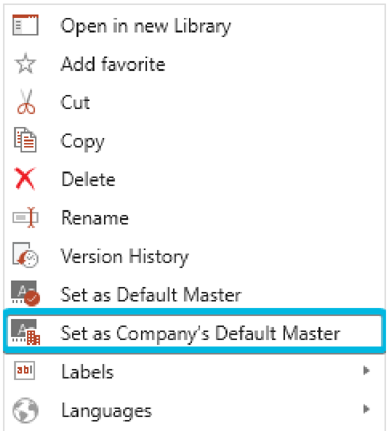


Figure 246. Option **Set as Company's Master**

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** 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 on the whole presentation, click on the button **Presentation** (Figure 247 **(1)**).
   b. To apply the master on the selected slides, click on the button **Slide(s)** (Figure 247 **(2)**).

Figure 247. 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 248).

Figure 248. **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 249).

Figure 249. Master Settings

3.2.1. 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 250).

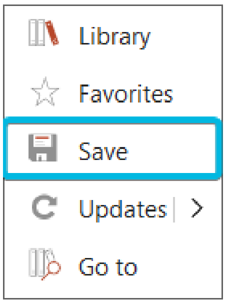


Figure 250. Option **Save**

5. Choose the option **Master** (Figure 251 **(1)**).
6. Then, click on the button **Save as** (Figure 251 **(2)**). The empower® Library opens in the section *Master Templates*.
7. Click on the button **Save** to save the master template.

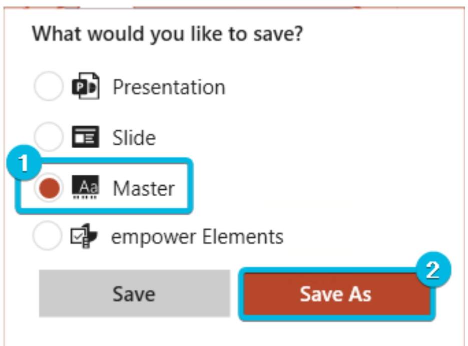


Figure 251. Save Master Template

After you click on the button **Save**, the dialog box **Master Information** opens (Figure 252). Here, you can make further settings for the master template.

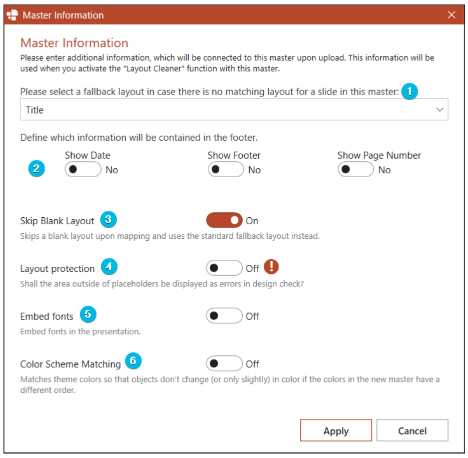


Figure 252. Dialog Box **Master Information**

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 252 **(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 252 **(2)**).

Switch the toggle button **Skip Blank Layout** to *On* for empty layouts to be skipped upon mapping during conversion (Figure 252 **(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 252 **(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 252 **(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 252 **(6)**).

Once you have checked all settings, follow the following steps to finish the upload of the master template:

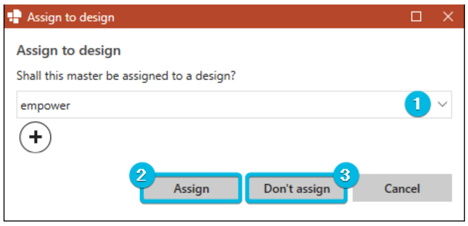


Figure 253. Dialog Box **Assign to Design**

1. In the window **Master Information**, click on the button **Apply**.
   The dialog box **Assign to design** opens (Figure 253).
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 253 **(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 254 **(1)**) and switch the toggle buttons to *On* to use the defined color scheme, used font and font sizes in the master template (Figure 254 **(2)**).
   Click on the button **OK** to confirm your settings (Figure 254 **(3)**) and choose the newly added design from the drop-down menu to assign the master to it.

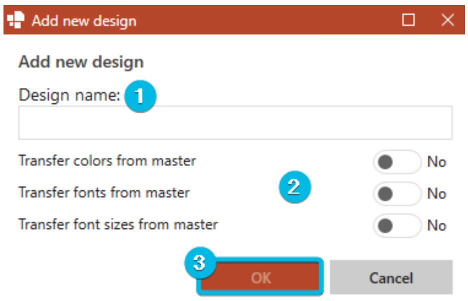


Figure 254. Dialog Box **Add New Design**

3. Click on the button **Assign** (Figure 253 **(2)**).

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 253** (**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 250**).
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.
8. Click on the button **Save** to save the master template.

After you click on the button **Save**, the dialog box **Master Information** opens with all settings previously selected for this master template (**Figure 252**). Check the settings and adjust, if required.

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 253**).
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 253** **(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 254** **(1)**) and switch the toggle buttons to *On* to use the defined color scheme, used font and font sizes in the master template (**Figure 254** **(2)**).
      Click on the button **OK** to confirm your settings (**Figure 254** **(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 253** **(2)**).

3.2.2. 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 you 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 255**).

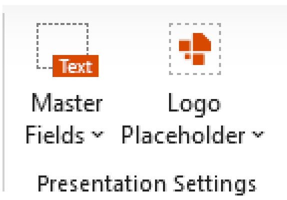


Figure 255. Group *Presentation Settings*

4. Click on the button **Logo Placeholder** to expand the drop-down menu and choose the option **Define logo** (Figure 256).
   To confirm the shape as a logo placeholder, a message box appears and confirms the change (Figure 257).
   The shape is now defined as a logo placeholder and the master is set up for the logo feature.

Figure 256. Option **Define logo**

Figure 257. 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 258).
   The placeholder should now be named **MIO_LOGOPLACEHOLDER#**.

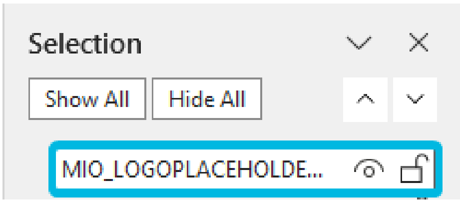


Figure 258. Shape in Selection Pane

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 mater template that should use a specific logo variant instead of the main logo, follow step 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 259**).
   The **eye** symbol for this shape is stroke through now in the selection pane.
   Click on the button **Show logo** to reveal the shape at any time.

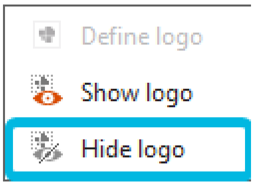


Figure 259. Option **Hide logo**

9. Save the master template to the library.
   For further information regarding the master upload, see **Upload a Master Template**.

> 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 260 **(1)**).
  - If you add a variant of this logo, add **#[VARIANT NAME]** to the main logo name, e.g. *empower#white* (Figure 260 **(2)**).
    The variant name after # must be reflected in the logo placeholder name in the master template.

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 261).

If a user chooses the main logo, the logo variants are used for slides which have been set up accordingly in the master template.

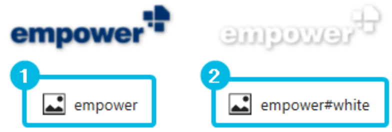


Figure 260. Main Logo (1) and Logo Variant (2) in Library

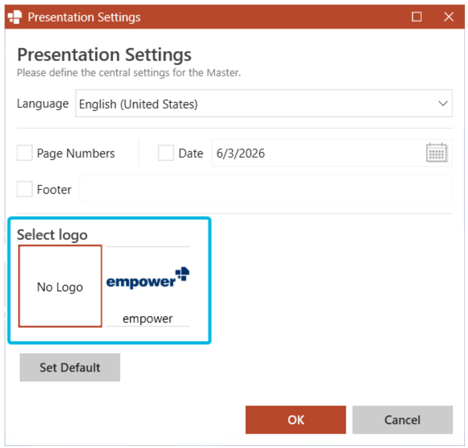


Figure 261. Main Logo in *Presentation Settings*

3.3. 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 262**):

- Language
- Slide numbers
- Date
- Footer text
- Master fields
  - Confidentiality
  - Label
  - Watermark
- Logo

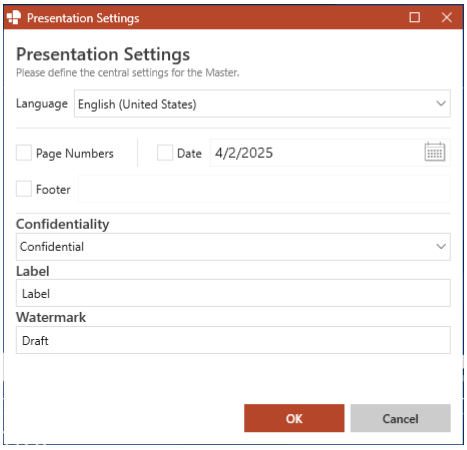


Figure 262. Presentation Settings

If you apply the *Presentation Settings* on a presentation, the values are saved in the background and can be applied on your next presentation.

The values are not applied automatically on 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 263**).

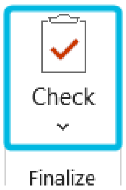


Figure 263. Button **Check**

In the drop-down menu, click on the button **Presentation Settings** (**Figure 264**).

A dialog box opens.

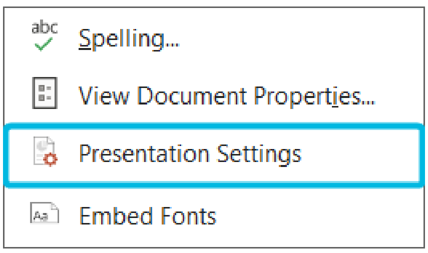


Figure 264. Option **Presentation Settings**

Under *Language*, you can set a global language for the presentation.

To do so, open the drop-down menu and choose your preferred language.

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 265).

Figure 265. 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 266).

Then, open the drop-down menu under *Format* to choose a date format.

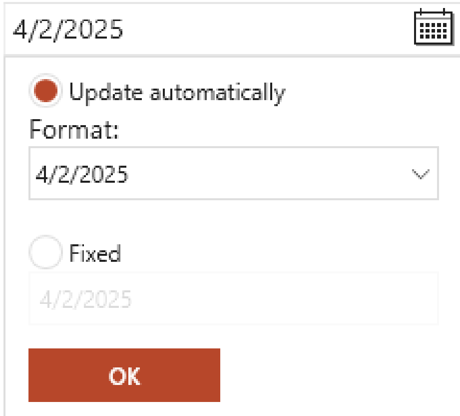


Figure 266. Update Date Automatically

If you want to display a fixed date in a custom format, choose the option **Fixed** and type in the date (Figure 267).

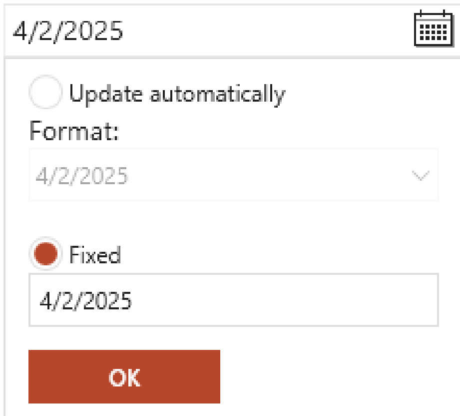


Figure 267. Fixed Date

The date will be added to your slide (Figure 268).

Figure 268. Date (Example)

Depending on the setup of the master template in use, slide numbers might not be placed on certain slides on purpose.

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 269**).

Figure 269. 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 270**).

Figure 270. Confidentiality Master Field (Example)

They can also be used to insert a label (**Figure 271**).

Figure 271. Label Master Field (Example)

A watermark can also be configured as a master field (Figure 272).

Figure 272. Watermark Master Field (Example)

If you want to switch to a different logo to be displayed, select it from the available options (Figure 273).

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**.

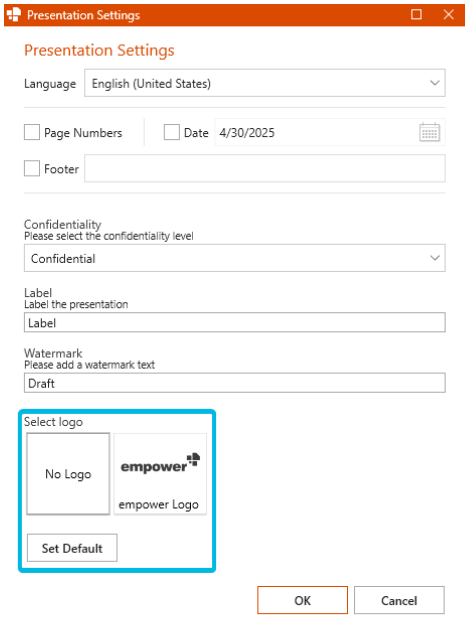


Figure 273. Logo Options

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 on 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.

3.3.1. 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 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 fields.

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 274**).

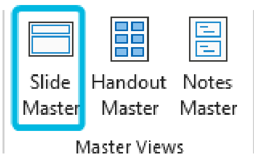


Figure 274. Button **Slide Master**

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 275 (**1**)).
   A drop-down menu opens.
7. In this drop-down menu, select the option **Define Master Fields** (Figure 275 (**2**)).
   A dialog box opens.
8. In this dialog box, choose which type of master field you want to create (Figure 276 (**1**)).
9. Enter a name and a description for the master field which will be displayed for the users (Figure 276 (**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 276 (**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 276 (**4**)).

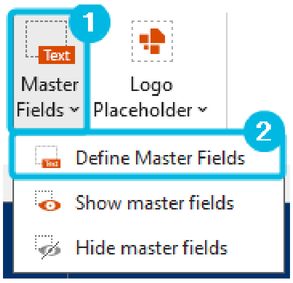


Figure 275. Option **Define Master Fields**

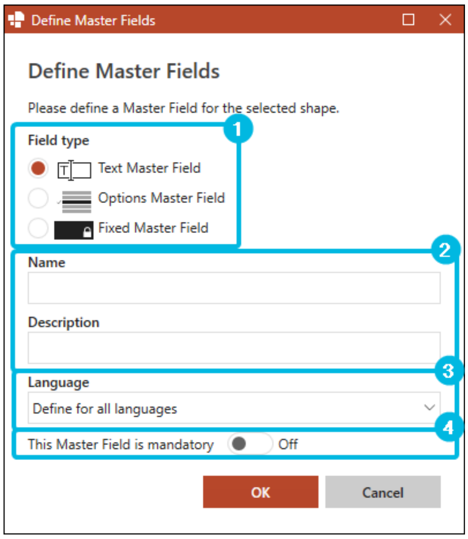


Figure 276. Define Master Field

12. If you have chosen the *Options Master Field*, add options.
    a. To do so, click on the button **Add** (Figure 277 **(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 277 **(2)**).
    d. To change the display order of the options, use the buttons **Up** and **Down** (Figure 277 **(3)**).

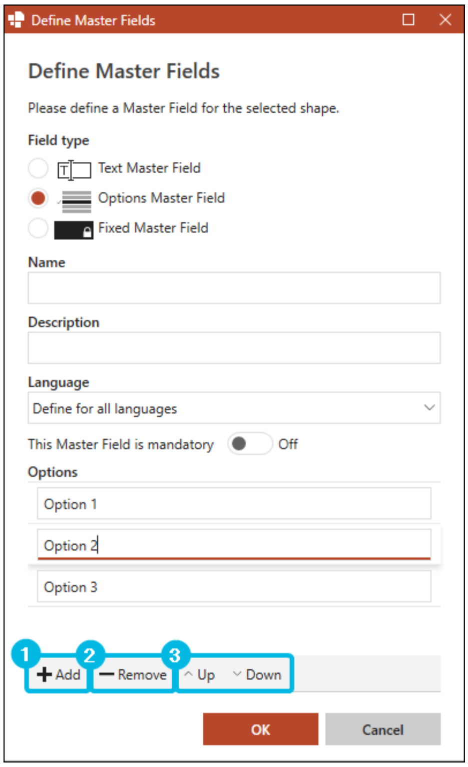


Figure 277. Add Options

13. If you have finished, click on the button **OK**.

> 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.
> Placeholder always overlap shapes. Therefore, make sure there are not 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 278).

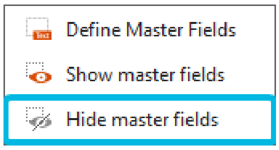


Figure 278. Option **Hide master fields**

When editing the master template, you can always make them visible again via the button **Show master fields** (Figure 279).

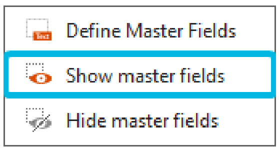


Figure 279. Option **Show master fields**

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.

3.4. 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 texts 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 280**).
   A drop-down menu opens.

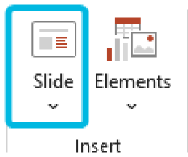


Figure 280. Button **Slide**

2. In this drop-down menu, choose if you want to insert a new slide or change the layout of the current slide (**Figure 281**).
   a. If you insert a new slide, click on the **arrow** symbol next to the option **New Slide** to open the slide layout selection.

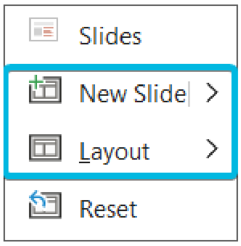


Figure 281. Options **New Slide** and **Layout**

3. Then, choose a slide layout you want to use (**Figure 282**).

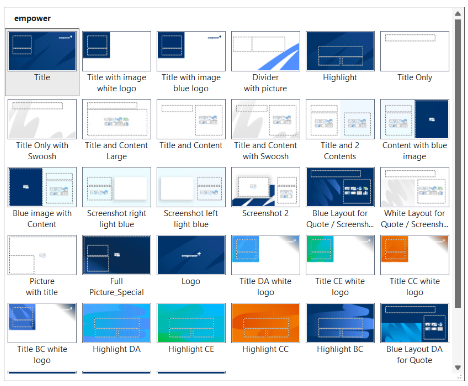


Figure 282. Slide Layout Selection

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 283).

Alternatively, click on the individual icons inside of a placeholder.

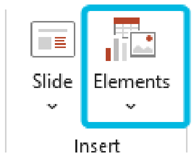


Figure 283. Button **Elements**

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 284).

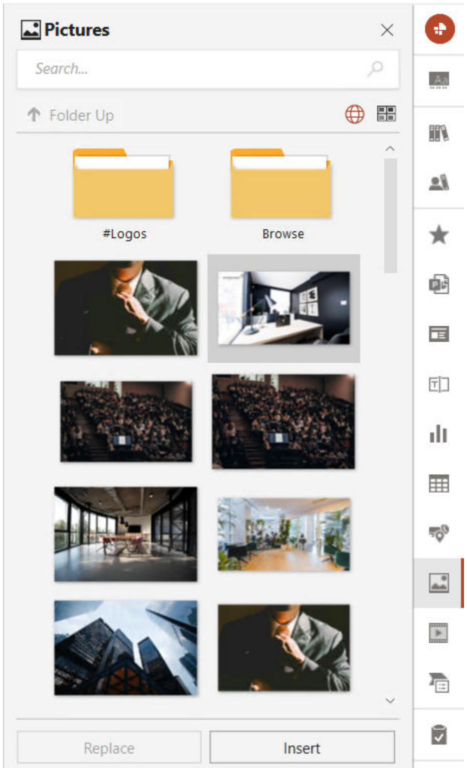


Figure 284. Section *Pictures*

Some placeholder elements might be disabled by your company.

If this is the case, a dialog box opens (Figure 285).

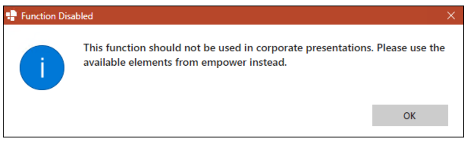


Figure 285. Dialog Box for Disabled Placeholder Function

> 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
- Stamps

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.

Stamps can be used to add a stamp to one slide or all slides.

If you choose the option **Stamp**, a dialog box opens and you can either choose a predefined stamp or create your own (Figure 286).

You can then apply this stamp to the selected slides or to the entire presentation.

To remove all stamps in the presentation, click on the button **Remove**.

After inserting a stamp, you can also access the settings via its context menu.

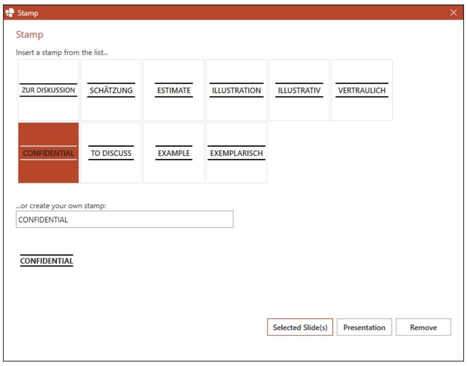


Figure 286. Dialog Box for Stamps

> Stamps cannot be inserted in the master view.

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 287).
   The side pane opens in the subsection *Slides* of the section *Corporate Design Templates*.

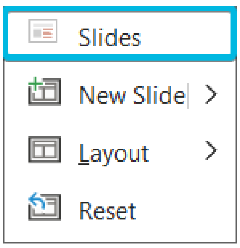


Figure 287. Option **Slides**

3. Here, select the template you want to use.
4. Either double-click on it or click on the button **Insert** (Figure 288 **(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 288 **(2)**).

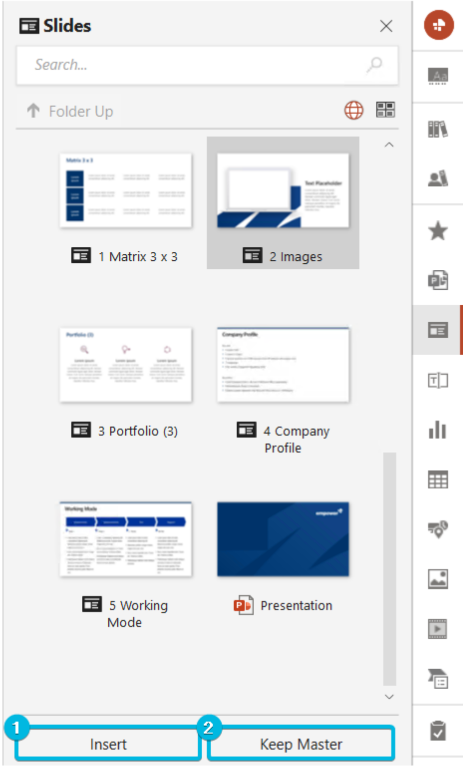


Figure 288. Buttons **Insert** and **Keep Master**

5. Now, you can replace all texts and images with the content you want to use for your presentation (Figure 289).

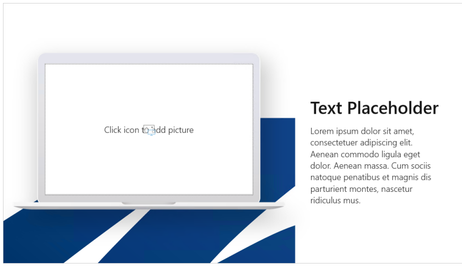


Figure 289. Slide Template – Example

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**.

3.5. Use Presentation Tools

Under the button **Check** in the group Finalize, you can find the option **Embed Fonts** (Figure 290).

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**.

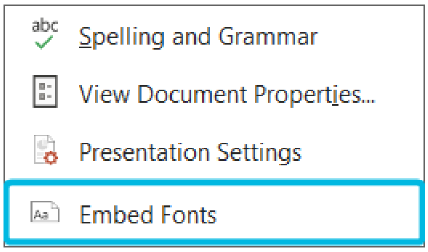


Figure 290. Option **Embed Fonts**

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.

3.6. 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 291).

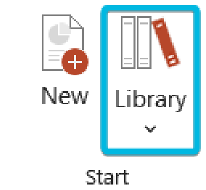


Figure 291. Button **Library**

Then, choose the option **Go to** (Figure 292).

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.

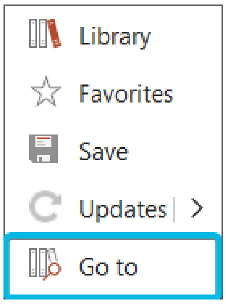


Figure 292. Option **Go to**

If the element does not originate from the empower® Library, a dialog box opens (Figure 293).

Figure 293. Dialog Box for Button **Go to**

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.

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 294).
   The empower® Library opens in the section for *Document Templates*.

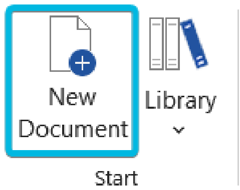


Figure 294. Button **New Document**

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 295).
   A new document is created using the template.

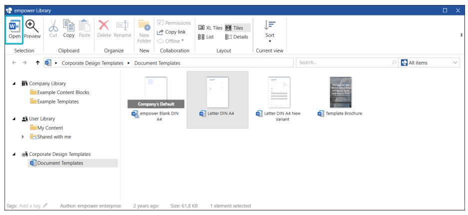


Figure 295. Button **Open**

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 296).

Your defined default values are preselected automatically.

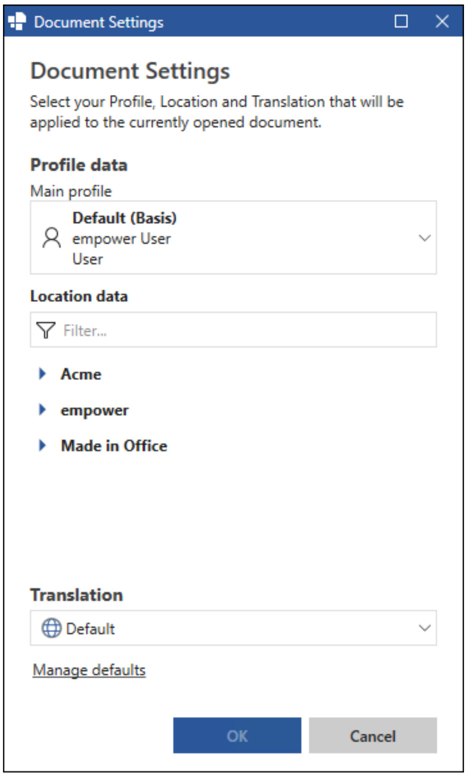


Figure 296. Dialog Box **Document Settings**

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 297).

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.

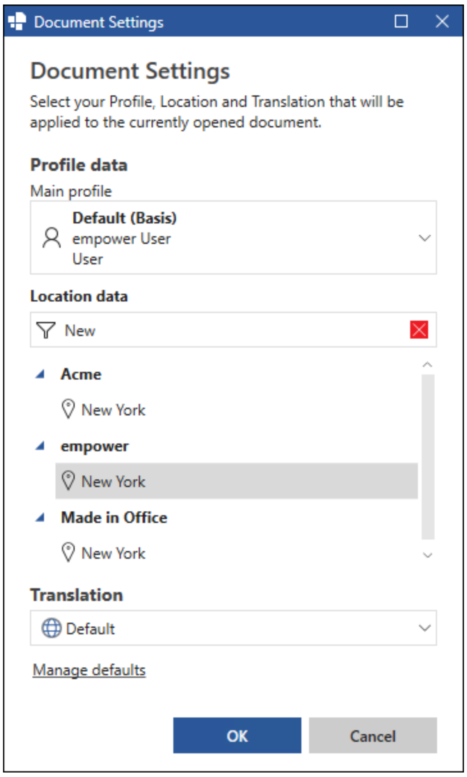


Figure 297. Search for Locations

If your search input does not lead to any result, a message is displayed in the dialog box (Figure 298).

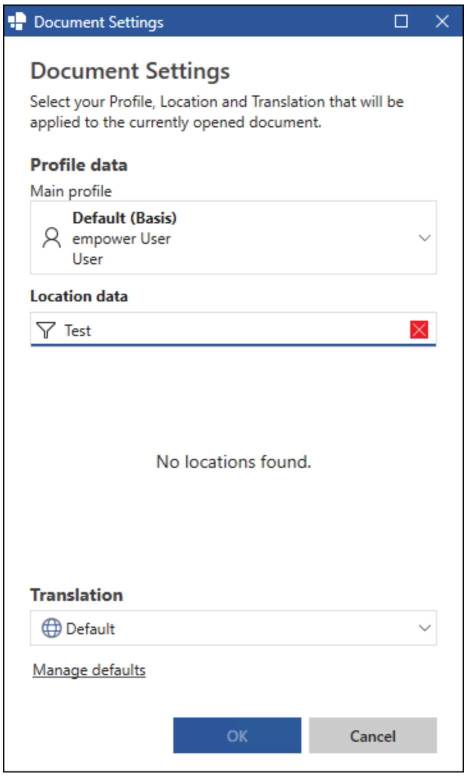


Figure 298. No Search Results

To abort the search, click on the **X** symbol in the input field (Figure 299).

All available locations will be listed again.

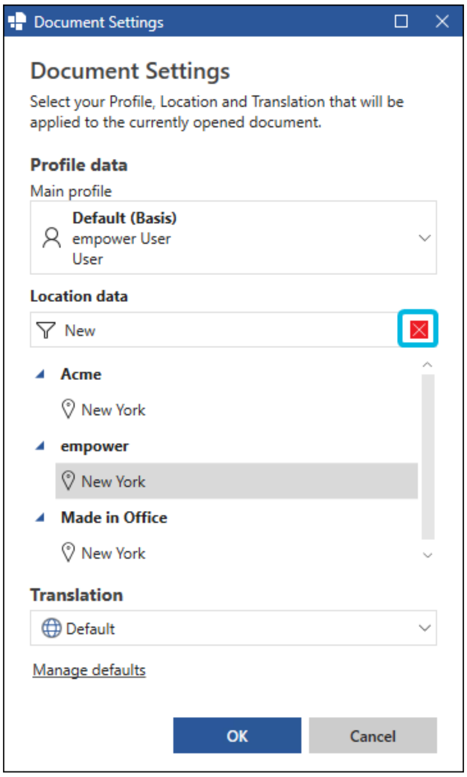


Figure 299. Abort Search

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 300).

The same dialog box opens.

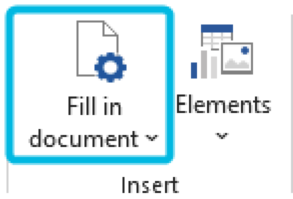


Figure 300. Button **Fill in document**

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**.

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 301).

Figure 301. 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 302).

A dialog box opens.

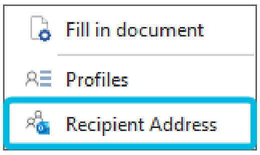


Figure 302. Option **Recipient Address**

You can now choose the Outlook contact whose address you want to insert into the document (Figure 303).

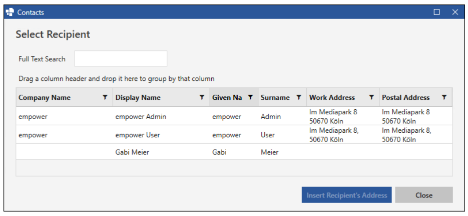


Figure 303. Dialog Box with Contact Information

Select the contact from the list and click on the button **Insert Recipient's Address** (Figure 304).

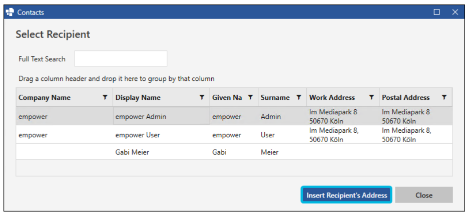


Figure 304. Button **Insert Recipient's Address**

If you cannot find the contact, you can search for it via the search bar (Figure 305).

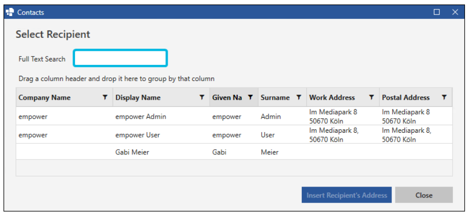


Figure 305. Search Bar

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 306**).

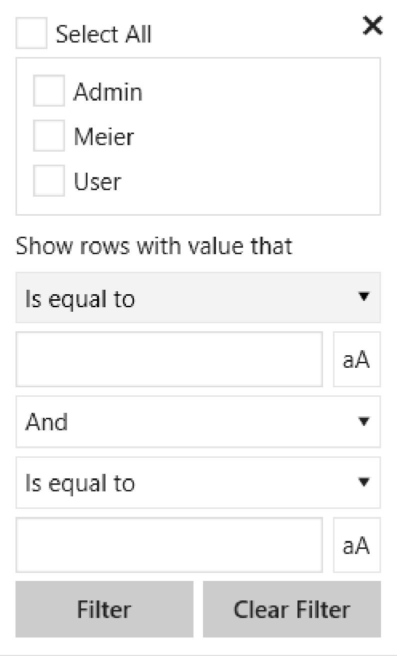


Figure 306. Filter Options

If your empower® Administrators have defined a specific placeholder for the recipient address, the address will be inserted into this placeholder.

If they have not defined a placeholder, a dialog box opens (**Figure 307**).

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.

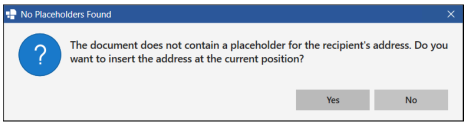


Figure 307. Dialog Box **No Placeholders Found**

> 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 308**).
   The library opens.

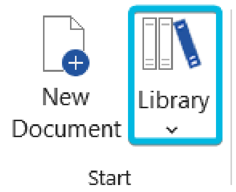


Figure 308. Button **Library**

2. In the library, navigate to the section *Corporate Design Templates* (**Figure 309** **(1)**).
3. Then, navigate into the section *Content Blocks* (**Figure 309** **(2)**).

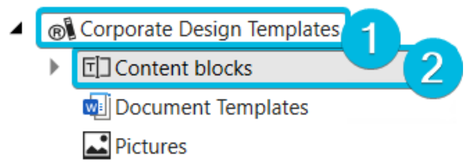


Figure 309. Sections *Corporate Design Templates* and *Content blocks*

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 310**).

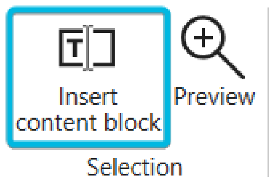


Figure 310. Button **Insert content block** in Library

> i 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 311).
   A drop-down menu opens.

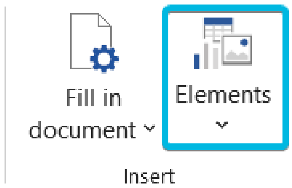


Figure 311. Button **Elements**

3. In the drop-down menu, click on the option **Content blocks** (Figure 312).
   The side pane opens its corresponding section.

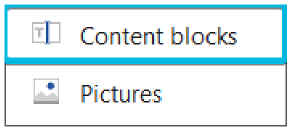


Figure 312. Option **Content blocks**

4. Find the content block you want to insert and select it.
5. Click on the button **Insert content block** (Figure 313).

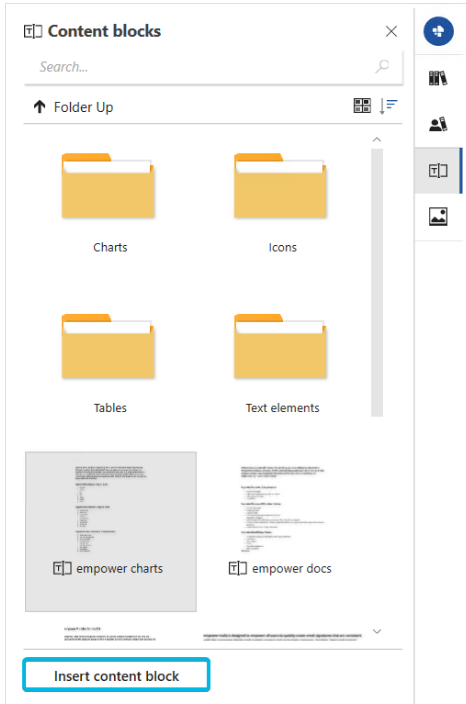


Figure 313. Button **Insert content block** in Side Pane

> 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 314**).
   The library opens.

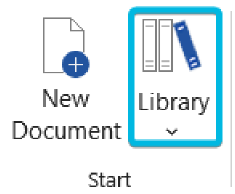


Figure 314. Button **Library**

2. In the library, navigate to the section *Corporate Design Templates* (**Figure 315** **(1)**).
3. Then, navigate into the section *Pictures* (**Figure 315** **(2)**).

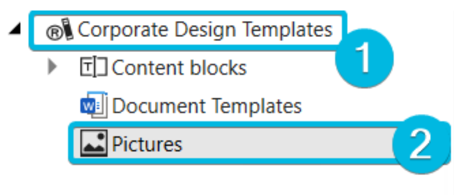


Figure 315. Sections *Corporate Design Templates* and *Pictures*

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 316**).

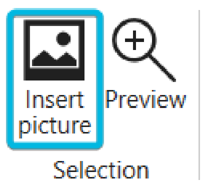


Figure 316. Button **Insert picture** in Library

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 317).
   A drop-down menu opens.

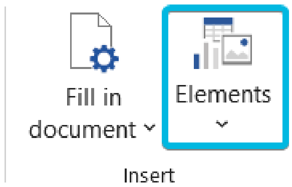


Figure 317. Button **Elements**

3. In the drop-down menu, click on the option **Pictures** (Figure 318).
   The side pane opens its corresponding section.

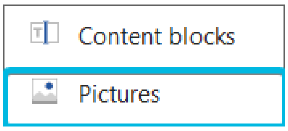


Figure 318. Option **Pictures**

4. Find the picture you want to insert and select it.
5. Click on the button **Insert picture** (Figure 319).

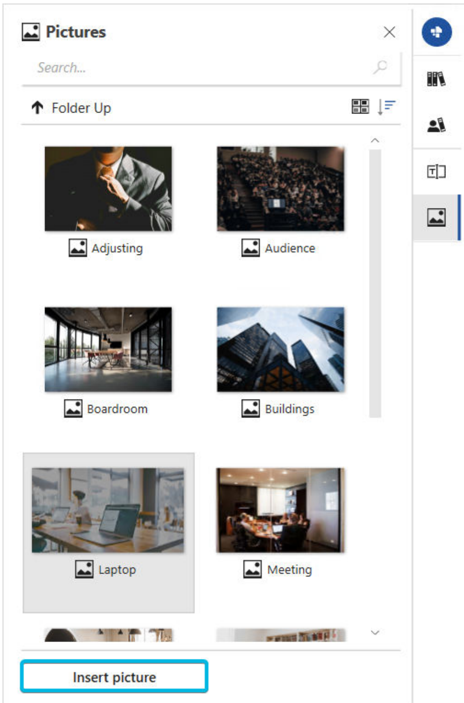


Figure 319. Button **Insert picture** in Side Pane

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 320). A drop-down menu opens.

Figure 320. Button **Check**

In the drop-down menu, click on the option **Update all fields** (Figure 321).

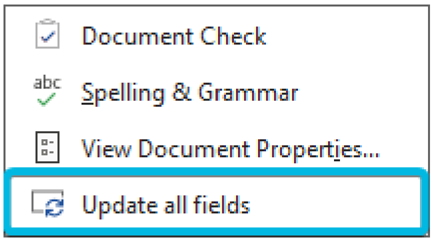


Figure 321. Option **Update all fields**

While empower® updates all fields in your document including the table of contents, if present, it shows a progress spinner (Figure 322).

If all your fields have been updated, the progress spinner disappears.

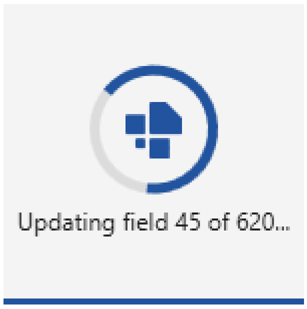


Figure 322. Progress Spinner

4.3. 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 323).

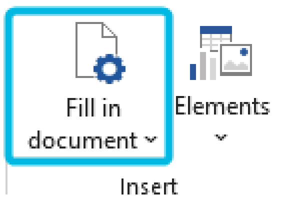


Figure 323. Button **Fill in document**

Then, choose the option **Template Assistant** (Figure 324).

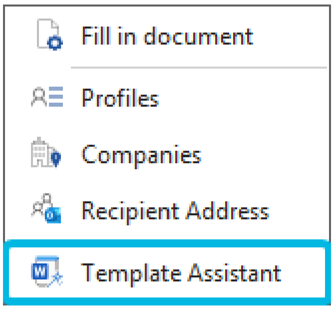


Figure 324. Option **Template Assistant**

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 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 325 **(1)**).
   A drop-down menu opens.
4. Choose the option **Rich Text Content Control** (Figure 325 **(2)**).
   A rich text content control is inserted at your current cursor position.
5. Under *Document Properties*, click on the button **Set to current database ID** (Figure 326).
   The database ID cannot be set individually.

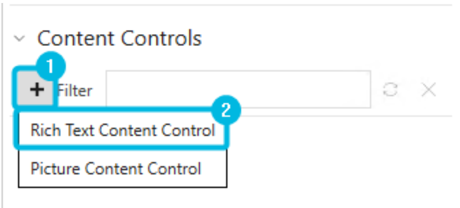


Figure 325. Add Rich Text Content Control

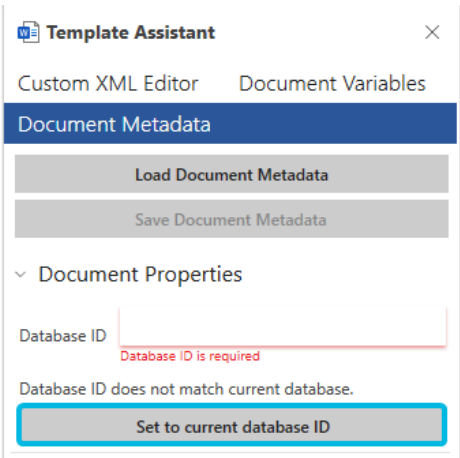


Figure 326. Button **Set to current database ID**

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 327 **(1)**).
7. To assign a valid GUID to the content control, click on the button **GUID** next to the input field *Tag* (Figure 327 **(2)**).
   An automatically generated and unique ID is assigned to the content control.
8. Assign the required group to the content control (Figure 327 **(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 327 **(4)**).
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 328).
       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.
11. To save the values, click on the button **Save Document Metadata** (Figure 329).

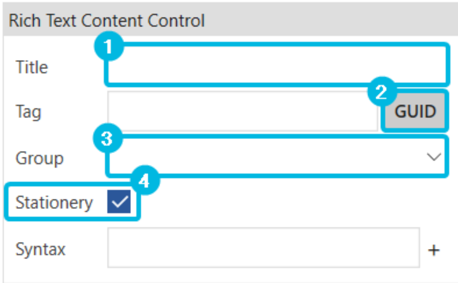


Figure 327. Rich Text Content Control Fields

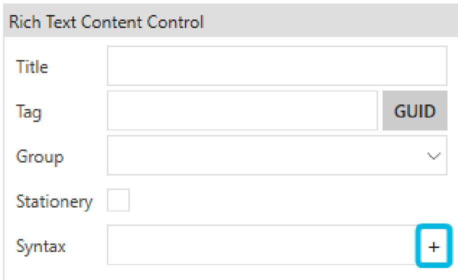


Figure 328. Insert Syntax Elements

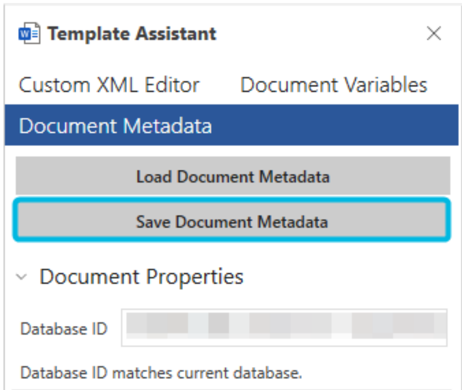


Figure 329. Button **Save Document Metadata**

> ⚠ The *Template Assistant* provides a quick access to the basic EAV model categories via the drop-down menu. All entities that have been added manually to the EAV model need to be entered manually.
>
> Additional entries are usually added by empower during your onboarding process.
>
> For further information regarding the manual composition of variables, see **Compose Variables Manually**.

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

It shows the values which would be displayed in the document for the current profile (Figure 330).

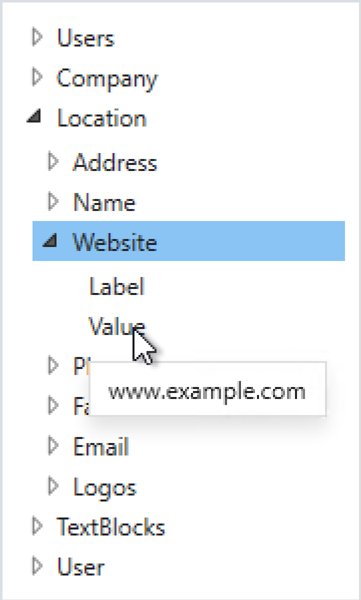


Figure 330. Mouse-Over for Values

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 331**):

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

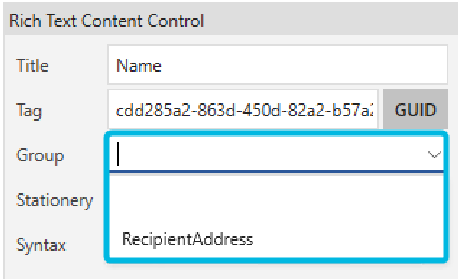


Figure 331. Placeholder Groups Drop-Down Menu

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

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

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

If there is no content control for the recipient address, the user will be asked if they want to insert the data at their current mouse cursor position (**Figure 332**).

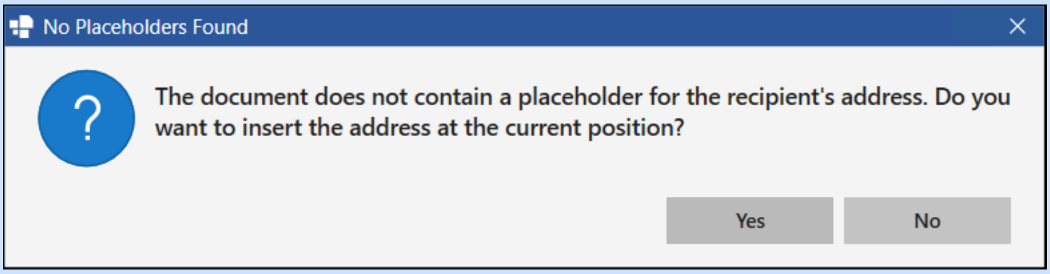


Figure 332. Dialog Box *No Placeholder Found*

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 333**).

Figure 333. Curved Brackets

2. Inside these brackets, first enter the entity (**Figure 334**).
   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.

Figure 334. Example for Entity

3. Add a full stop after the entity.
4. Now, enter the property right afterwards (**Figure 335**).
   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.

Figure 335. Example for Property

5. Add a full stop after the property.
6. Then, either enter *Label* or *Value*, depending on what part of the property you want to display.
   Enter *Label* to display the title of the field (**Figure 336**).
   Enter *Value* to display the content of the field (**Figure 337**).

Figure 336. Label

7. Check if your variable contains all required parts.

Figure 337. 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 338**).

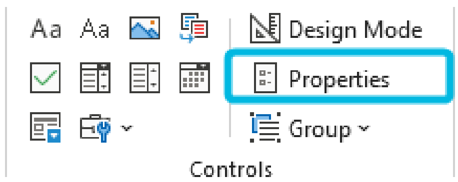


Figure 338. Button **Properties**

3. Tick the checkbox for **Use a style to format text typed into the empty control** (**Figure 339**).
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...**.

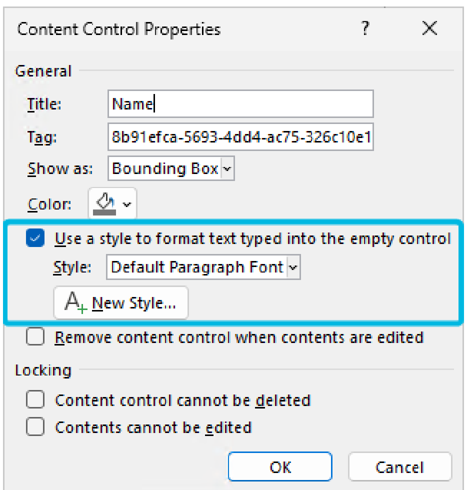


Figure 339. Text Style Options

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

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

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

Add Formatting Tags

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

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] … [/hend]`	[hdistribute] Text Text [/hdistribute]
Uppercase	`| Upcase`	{{Text | Upcase }}
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 %} … {% 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 directory are *empower Admin* and *empower User* would be the following: Managing directors: empower Admin empower User

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

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

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

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

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

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

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

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

The pattern for this configuration is as follows:

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

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

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

Apply Filters

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

Filters are implemented as follows:

```
{{ [VARIABLE NAME] | [FILTER NAME]: Argument }}
```

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

Name	Function	Syntax
Capitalize	The first character in a string is capitalized.	`{{ [PROPERTY NAME] | Capitalize }}`
Upcase	All characters in a string are written in uppercase.	`{{ [PROPERTY NAME] | Upcase }}`
Downcase	All characters in a string are written in lowercase.	`{{ [PROPERTY NAME] | Downcase }}`
Replace	Substrings are replaced by another substring.	`{{ [PROPERTY NAME] | Replace: "cats", "dogs" }}`

<table>
<tr><th>Name</th><th>Function</th><th>Syntax</th></tr>
<tr><td>Size</td><td>Defines the number of characters in a string or array.</td><td><code>{{ [PROPERTY NAME] | Size }}</code></td></tr>
<tr><td>Strip</td><td>Whitespaces prior to or after a string are removed.</td><td><code>{{ [PROPERTY NAME] | Strip }}</code></td></tr>
</table>

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 }}
```

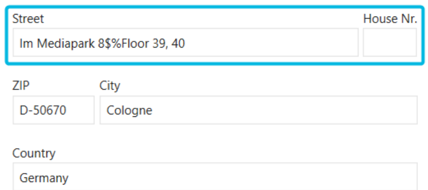
The following are examples for the use of filters:

<table>
<tr><th>Example</th><th></th></tr>
<tr><td>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:

<code>{{Location.Address.Value.Street.Value | Replace: "\$\%", "[n/]"}}</code></td><td>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</td></tr>
</table>

<table>
<tr><th>Example</th><th></th></tr>
<tr><td>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:

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

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 340 **(1)**).
   A context menu opens.
4. Choose the option **Picture Content Control** (Figure 340 **(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 341).

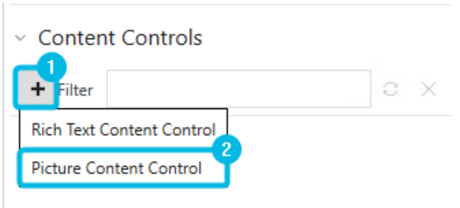


Figure 340. Add Picture Content Control

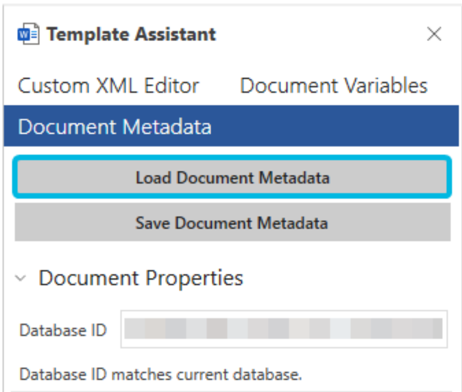


Figure 341. Button **Load Document Metadata**

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 342 **(1)**).
8. To assign a valid GUID to the content control, click on the button **GUID** next to the input field *Tag* (Figure 342 **(2)**).
   An automatically generated and unique ID is assigned to the content control.
9. Assign the required group to the content control (Figure 342 **(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 342 **(4)**).
    This usually makes sense if you work with pre-printed paper.
11. To save the values, click on the button **Save Document Metadata**.

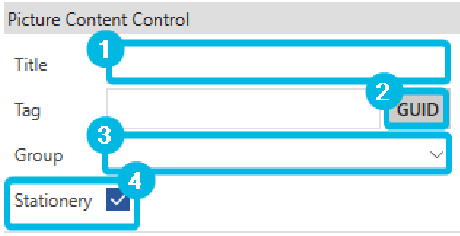


Figure 342. Picture Content Control Fields

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

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

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

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

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

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

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

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

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 343).
   The empower® Library opens in the section for *Workbook Templates*.

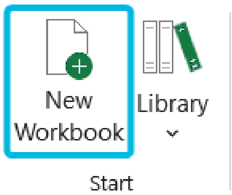


Figure 343. Button **New Workbook**

3. Select a workbook template from the library section *Corporate Design Templates – Workbook Templates* (Figure 344).
4. Double-click to open it.

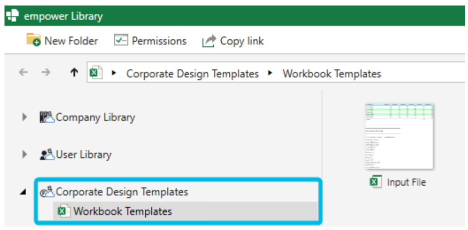


Figure 344. Section *Workbook Templates*

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 styles.
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 345**).
   The library opens.

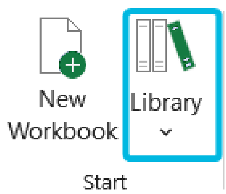


Figure 345. Button **Library**

2. In the library, navigate to the section *Corporate Design Templates* (Figure 346 **(1)**).
3. Then, navigate into the section *Table Style Sets* (Figure 346 **(2)**).

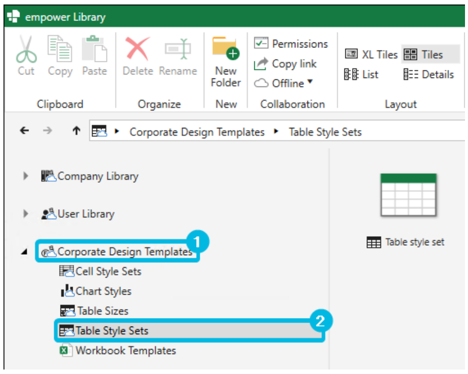


Figure 346. Section *Corporate Design Templates – Table Style Sets*

4. Find the table style set you want to insert and double-click it.
   The table style set is downloaded to your workbook.

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 347).
   The category *Custom* is added to the styles.

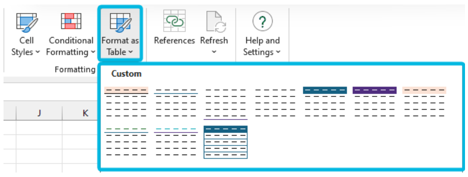


Figure 347. Button **Format as Table**

3. Select the custom style you want to apply to the table.
   The table format is changed accordingly.

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 345).
   The library opens.
2. In the library, navigate to the section *Corporate Design Templates* (Figure 348 **(1)**).
3. Navigate into the section *Cell Style Sets* (Figure 348 **(2)**).

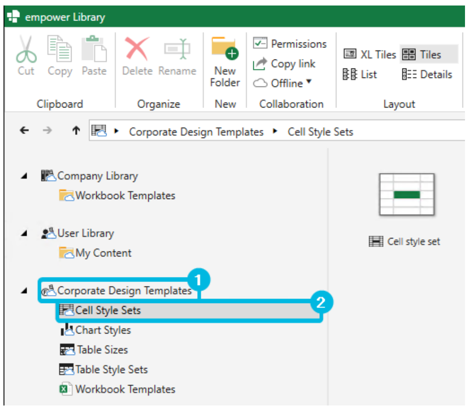


Figure 348. Section *Corporate Design Templates – Cell Style Sets*

4. Find the cell style set you want to insert and double-click it.
   The cell style set is downloaded to your workbook.

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 349**).
   The category *Custom* is added to the styles.

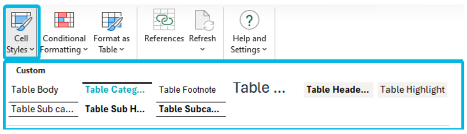


Figure 349. Button **Cell Styles**

3. Select the custom style you want to apply to the table.
   The cell format is changed accordingly.

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 345**).
   The library opens.
3. In the library, navigate to the section *Corporate Design Templates* (**Figure 350** **(1)**).
4. Navigate into the section *Table Sizes* (**Figure 350** **(2)**).

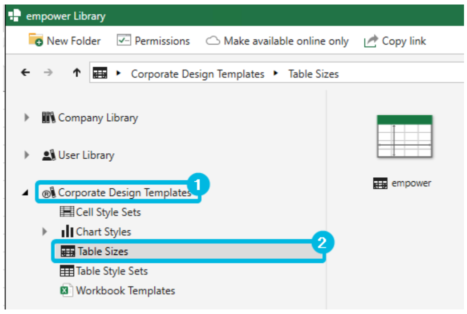


Figure 350. Section *Corporate Design Templates – Table Sizes*

5. Find the table size you want to use and double-click it.
   The table size is downloaded to your workbook.

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 351**) to expand the drop-down menu.

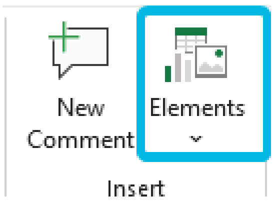


Figure 351. Button **Elements**

3. Select the option **Tables** (Figure 352 **(1)**), then select the option **Table Sizes** (Figure 352 **(2)**).
4. Select the option **Load table size set** (Figure 352 **(3)**).
   Find the table size you want to apply to your table and double-click it.
   The table format is changed accordingly.

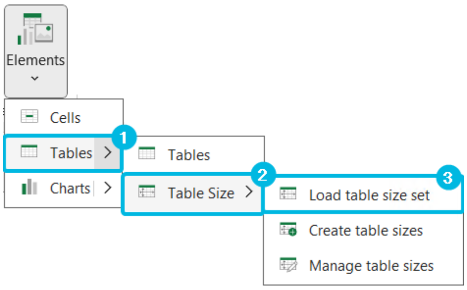


Figure 352. Load Table Size Sets

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 353 **(1)**).
4. Navigate into the section *Chart Styles* (Figure 353 **(2)**). Find the chart style you want to apply use and double-click it.
   The chart style is used to illustrate the table content.

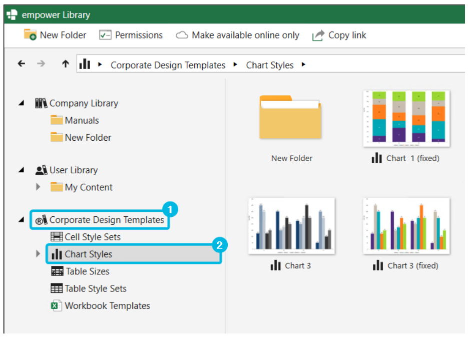


Figure 353. Section *Corporate Design Templates – Charts Styles*

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 354 **(1)**).
2. Select the option **Charts**.
3. Then select the option **Switch Row/Column** (Figure 354 **(2)**).

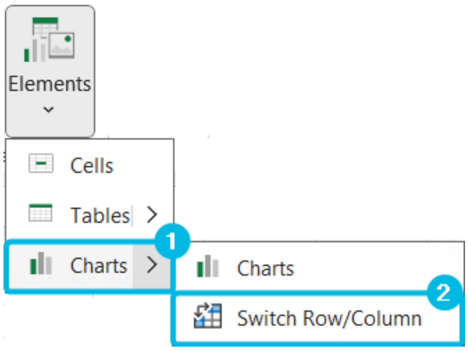


Figure 354. Switch Rows and Columns

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 355**).
   The check is automatically started.

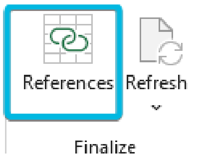


Figure 355. Button **References**

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 a **X** symbol (**Figure 356**).

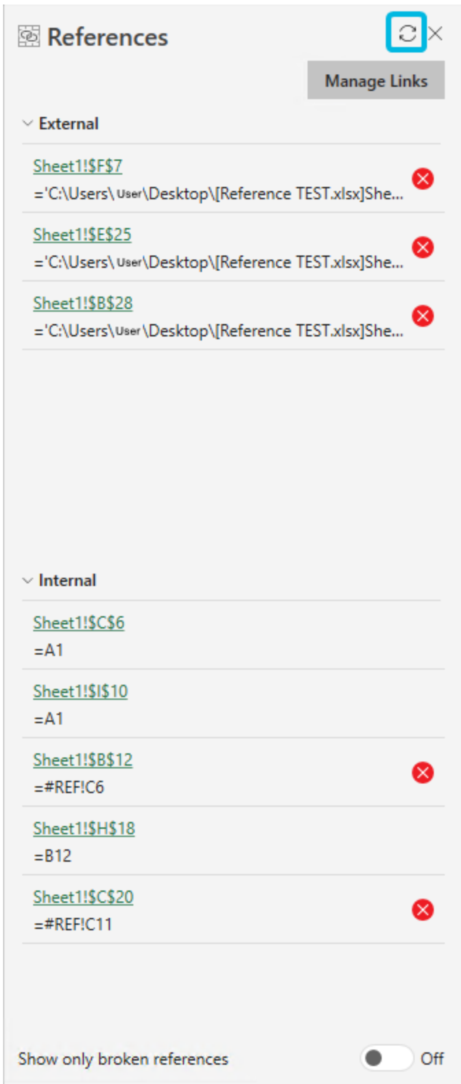


Figure 356. Reference Overview

3. Click on one of the references to navigate directly to the data source in the workbook.
   The linked data will be selected accordingly.

4. Switch the toggle button **Show only broken references** to *On*, if you want to focus on all invalid references (Figure 357).
   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 358).
5. Manually correct any invalid references that are found.

Figure 357. Toggle Button **Show only broken references**

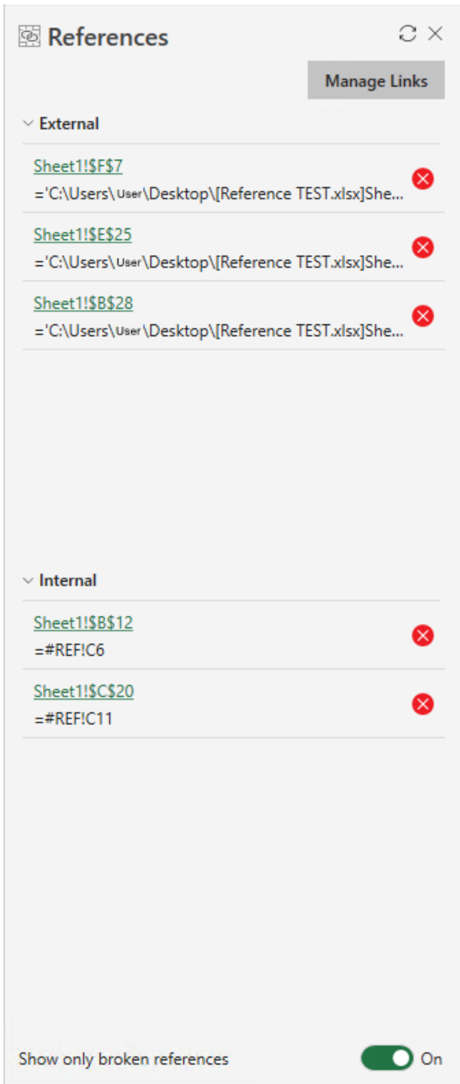


Figure 358. Invalid References Only

To refresh the overview after making changes, click on the **refresh** symbol to the left of the **X** symbol in the open overview (Figure 359).

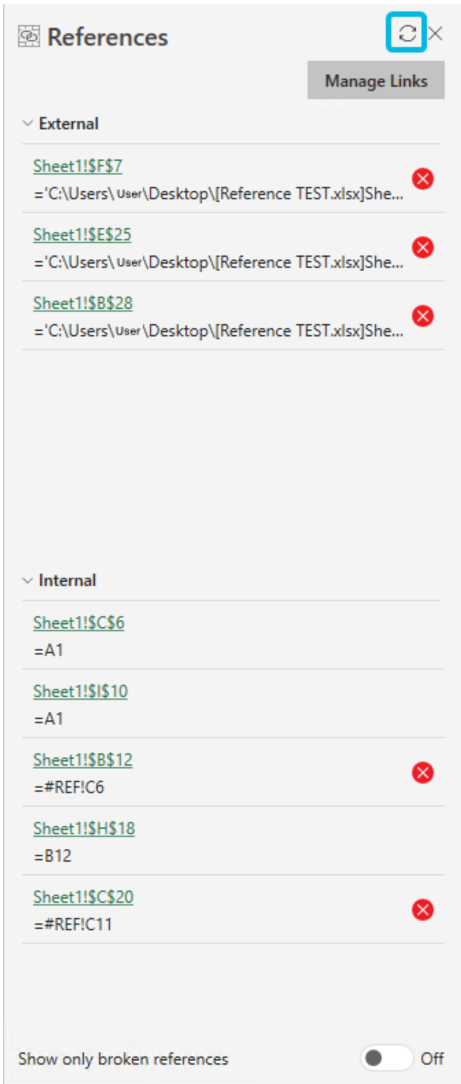


Figure 359. **Refresh** Symbol

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**.

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 ensures 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 360**).

A drop-down menu opens.

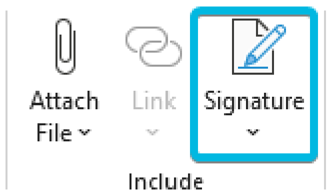


Figure 360. Button **Signature**

In the drop-down menu, click on your preferred option (**Figure 361**).

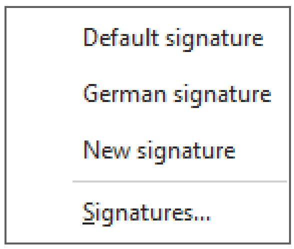


Figure 361. Drop-Down Menu with Signatures

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 362**).

A dialog box opens.

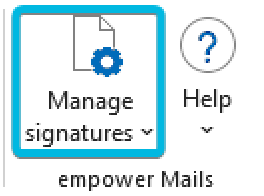


Figure 362. Button **Manage signatures**

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 363**).

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

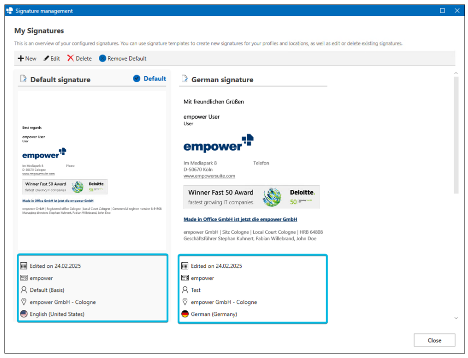


Figure 363. Metadata for Signatures

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 364).

A dialog box opens.

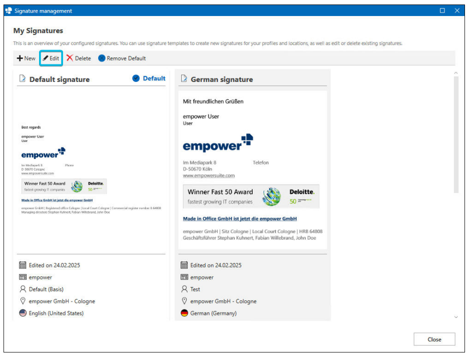


Figure 364. Button **Edit**

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 365).

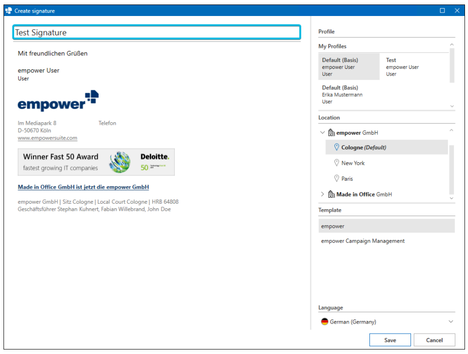


Figure 365. Title Input Field

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 366 **(1)**).
2. Then, select the company and location you want to display in your signature (Figure 366 **(2)**).
3. Choose the signature template you want to use (Figure 366 **(3)**).
4. To choose the language for the signature, open the drop-down menu under *Language* and select your preferred language (Figure 366 **(4)**).

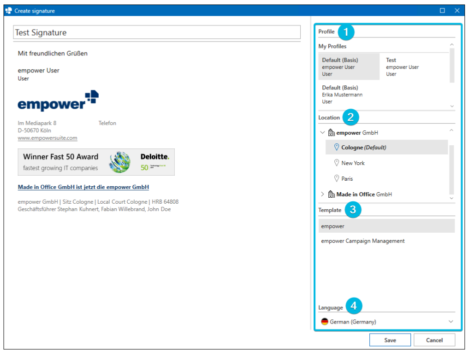


Figure 366. Signature Values

5. Click on the button **Save** (Figure 367).
   The window closes automatically and empower® starts changing your signature.

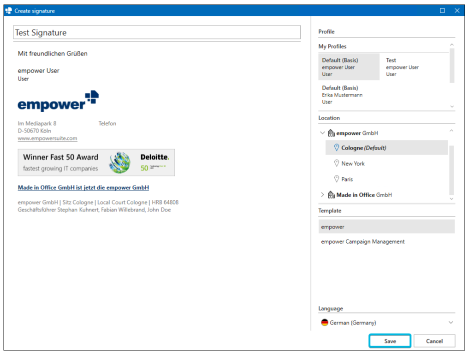


Figure 367. Button **Save**

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

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

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

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

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

Set as Default

To set one of your signatures as your default signature, select it from the dialog box and click on the button **Set as Default** (Figure 368).

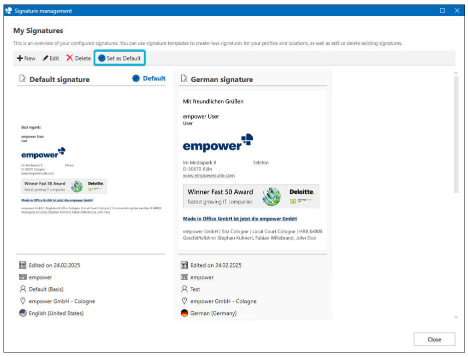


Figure 368. Button **Set as Default**

The signature will be marked as default and is the first one to appear in the dialog box (Figure 369).

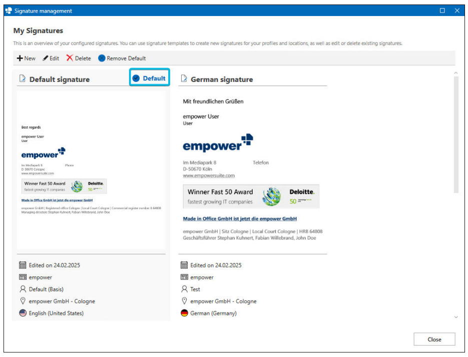


Figure 369. Default Marker

To remove the default marker from a signature, select it from the dialog box and click on the button **Remove Default** (Figure 370).

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

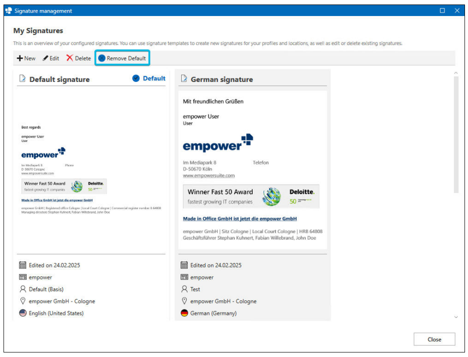


Figure 370. Button **Remove Default**

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 371).

A dialog box opens.

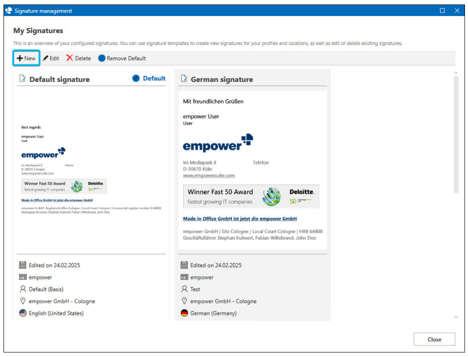


Figure 371. Button **New**

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 365).
2. On the right side of the dialog box, choose the profile you want to use for the signature (Figure 366 **(1)**).
3. Then, select the company and location you want to display in your signature (Figure 366 **(2)**).
4. Choose the signature template you want to use (Figure 366 **(3)**).
5. To choose the language for the signature, open the drop-down menu under *Language* and select your preferred language (Figure 366 **(4)**).
6. Click on the button **Save** (Figure 367).
   The window closes automatically and empower® starts creating your new signature.

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

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

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

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

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

Delete a Signature

To delete a signature, select the signature from the dialog box and click on the button **Delete** (**Figure 372**).

A dialog box opens.

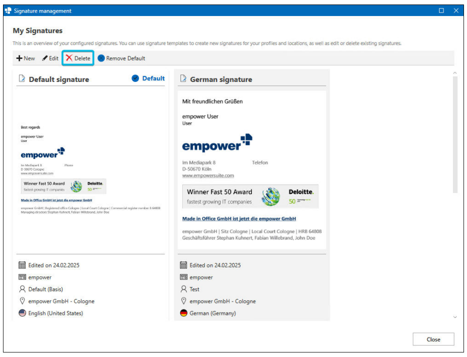


Figure 372. Button **Delete**

To confirm the deletion process, click on the button **Yes** (**Figure 373**).

The signature will be deleted.

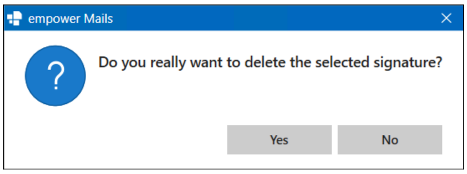


Figure 373. Deletion Dialog Box

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 374).
   A dialog box opens.

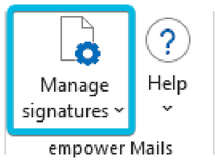


Figure 374. Button **Manage signatures**

3. In the upper right corner of this dialog box, click on the button **Set up on Mobile** (Figure 375).
   A dialog box opens.

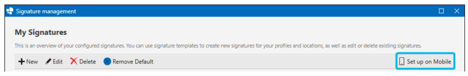


Figure 375. Button **Set up on Mobile**

4. Scan the QR code in this dialog box with your mobile device (Figure 376 **(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 376 **(2)**).
      You can then send this link to your mobile device and open the signature management via this link.

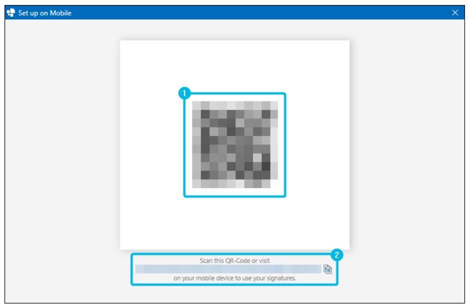


Figure 376. Access Signature Management

5. In the signature management, click on the signature you want to use (Figure 377).
   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.

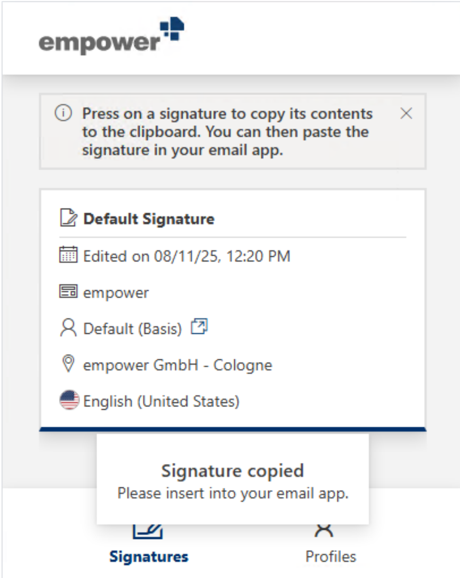


Figure 377. Signature Management on Mobile Device

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 378**).
Click on this button to open the empower® Library.

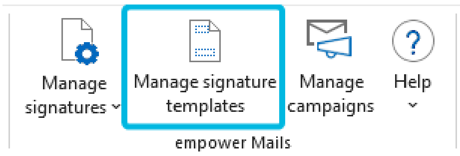


Figure 378. Button **Manage signature templates**

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

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

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

Edit Signature Templates

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

If you want to edit an existing signature template, select it in the library and then click on the button **Edit in Word** in the navigation bar (**Figure 379**).
Word opens automatically.

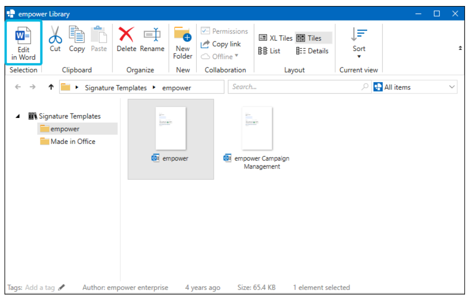


Figure 379. Button **Edit in Word**

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

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

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

In order to create the template more easily, enable formatting characters and gridlines.
Make sure the fonts, font sizes and colors match your corporate design.

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

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

In Word, you also have access to some empower® Features via the empower® Ribbon (Figure 380).

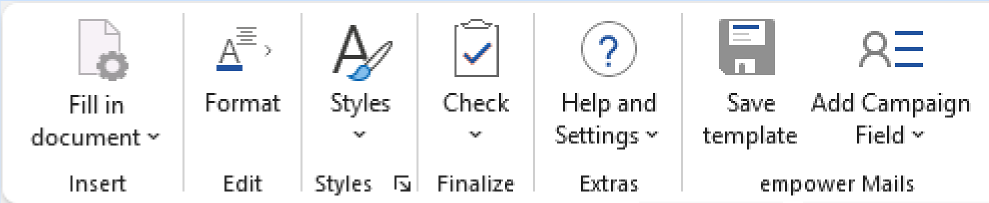


Figure 380. empower® Ribbon in Word

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 381).

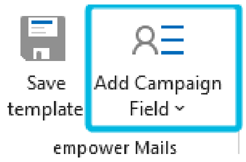


Figure 381. Button **Add Campaign Field**

A drop-down menu opens (Figure 382).

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

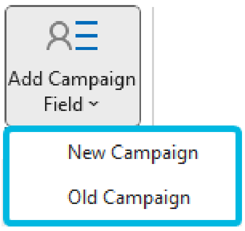


Figure 382. Campaign Field Drop-Down Menu

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

If you want to insert a campaign field to a new template, first save the template to the empower® Library and then open it from the library.

For further information regarding the saving process, see Save a Signature Template.

For further information regarding the management of campaign fields and campaign groups, refer to our empower® Admin Center manual.

For further information regarding the setup of a campaign, see Create and Manage Campaigns.

Save a Signature Template

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

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

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

Then, click on the button **Create template** in the navigation bar (Figure 383).

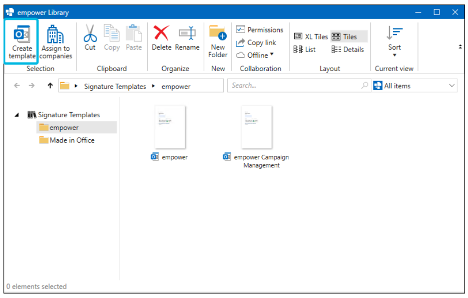


Figure 383. Button **Create template**

Your file explorer opens.

Navigate to the respective Word file and select it.

The Word file opens in a new Word window.

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

Then, click on the button **Save template** to save the template to the empower® Library (Figure 384).

Figure 384. 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 385).

A dialog box opens.

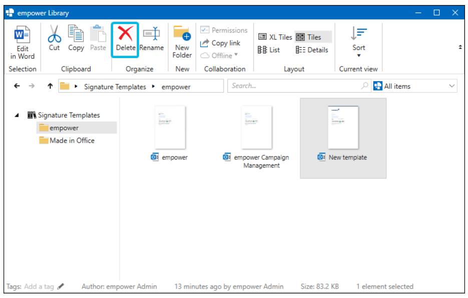


Figure 385. Button **Delete**

To confirm the deletion process, click on the button **Yes** (Figure 386).

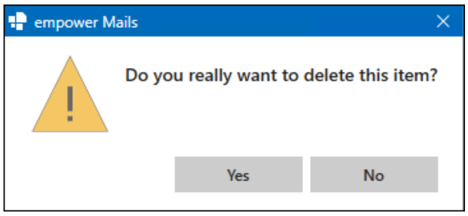


Figure 386. Dialog Box for Deletion

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 387).

A dialog box opens.

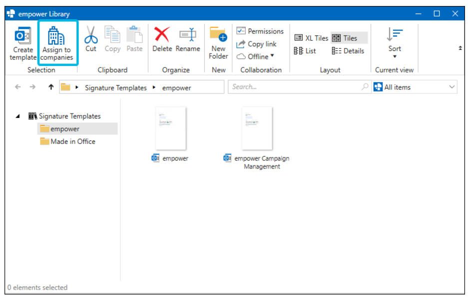


Figure 387. Button **Assign to companies**

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 388 (**1**)).

If you want to deselect all companies, click on the button **Uncheck all** (Figure 388 (**2**)).

Alternative, tick the checkboxes for the individual entries.

Then, click on the button **OK** (Figure 388 (**3**)).

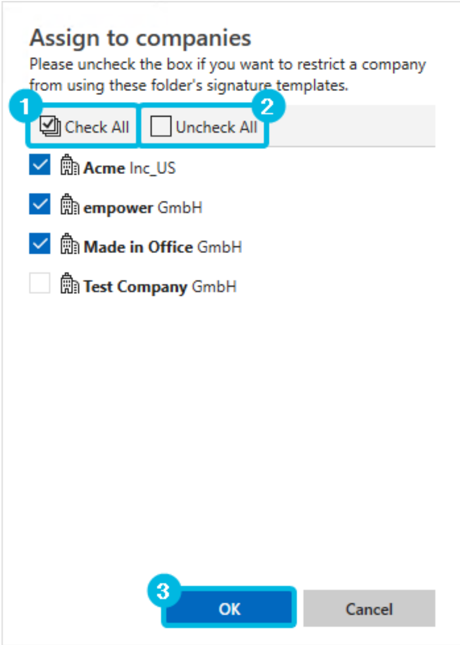


Figure 388. Dialog Box for Template Assignment

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 389**).
2. Select your signature template and double-click it to open the template in Word.
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 390**).

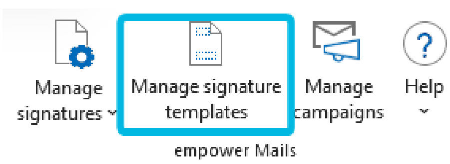


Figure 389. Button **Manage signature templates**

Figure 390. 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 391).

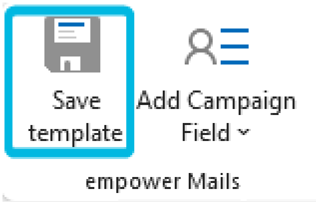


Figure 391. Button **Save template**

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

Add a Campaign

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

- Campaign name
- Duration
- Target groups

To add a campaign, follow the following steps:

1. Navigate to the tab Home and click on the button **Manage campaigns** (Figure 392).
   A dialog box opens.

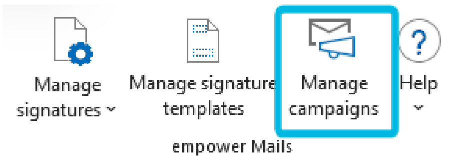


Figure 392. Button **Manage campaigns**

2. Click on the button **New Campaign** (Figure 393).
   A dialog box opens.

Figure 393. Button **New Campaign**

3. Insert a campaign name into the input field *Name* (**Figure 394** **(1)**).
4. Click on the **arrow** symbol in the field *Duration* to access the calendar (**Figure 394** **(2)**).
5. Pick the start and end date for the campaign (**Figure 395**).
   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 394** **(3)**).
   Tick the checkboxes for all user groups you want to assign the campaign to.
7. To select a campaign banner for your campaign, follow the following steps:
   a. Click on the button **Upload image** to browse through your device and select your desired image (and thus, upload it into the empower® Library) (**Figure 394** **(4)**).
   b. Click on the button **Select image** to use an image that is already stored in the empower® Library (**Figure 394** **(5)**).
8. Set a hyperlink via the input field *Hyperlink* that can be accessed with a click on the previously selected image (**Figure 394** **(6)**).
9. Click on the button **Preview** to check how your campaign will look like (**Figure 394** **(7)**).
10. Click on the button **Save** to confirm the information added to your campaign (**Figure 394** **(8)**).

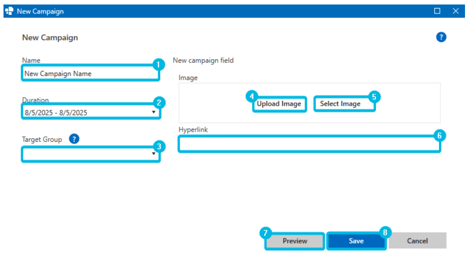


Figure 394. Dialog Box New Campaign

Figure 395. 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 392**).

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 396**):

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

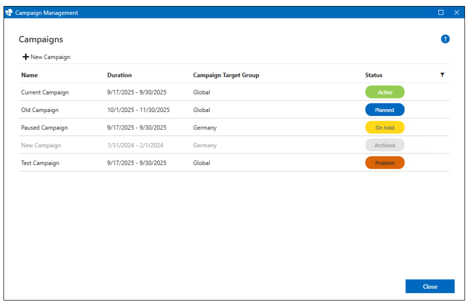


Figure 396. Campaign Management Status

To edit a campaign, follow the following steps:

1. Navigate to the tab Home and click on the button **Manage campaigns** (Figure 392).
2. Select a campaign from the list and click on the button **Edit** (Figure 397).
   A dialog box opens.
3. Perform all necessary changes and click on the button **Save** to confirm the changes.

Figure 397. Button **Edit**

To delete a campaign, navigate to the tab Home and click on the button **Manage campaigns** (Figure 392).

Then, click on the button **Delete** (Figure 398).

A dialog box opens.

Figure 398. Button **Delete**

Click on the button **Yes** to confirm the deletion of the campaign (Figure 399).

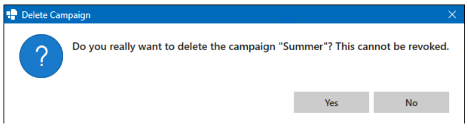


Figure 399. Dialog Box **Delete Campaign**

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

A campaign that is put on hold can be reactivated. To do so, select the campaign and click on the button **Set to active** in the navigation bar (Figure 400).

Figure 400. 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 401).

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

Open the campaign management to adjust your existing campaigns.

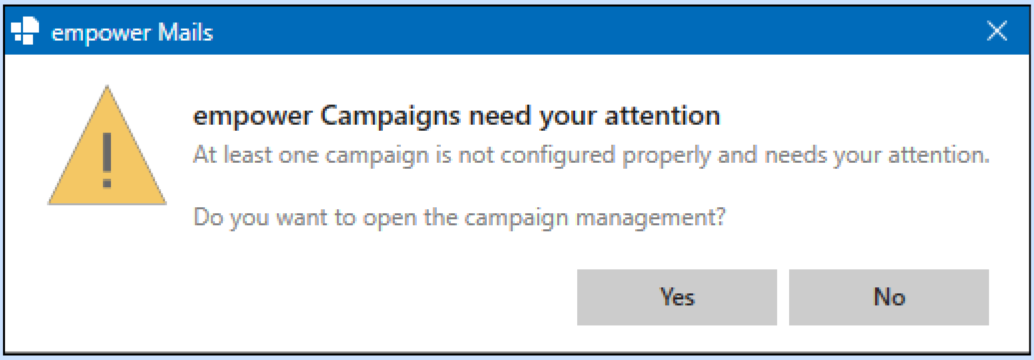


Figure 401. Dialog Box for Deleted Campaign Image

empower

Be your best at work.

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