empower®
Document Automation

Version 9.5

Content

Introduction

The Solution empower® Document Automation is available for both PowerPoint and Word. It has similar features in both applications that allow for the creation of automated documents.

1.1 Advantages of empower®

Do your quotes and contracts repeatedly contain incorrect information or omit important pieces of information completely? Do your colleagues spend more time searching for content or old documents to reuse and (re)formatting than doing their actual job? With the help of the empower® Document Automation, you will be able to easily create document templates to create ready-to-use documents.

1.2 System Requirements

In order to use the latest empower® Document Automation release for Windows, your system will need to fulfill the following requirements:

Windows Version

- Windows 10 or 11

Office Version

- Microsoft Office 2016, 2019

Abo Models

- Office 365 Pro Plus, Enterprise E3 und E5

We offer support for the above-mentioned versions.

1.3 Structure of Manual

Welcome to empower®, the add-in for Office applications. This manual will help you to understand empower® and to guide you along the first steps using empower®. If you are already familiar with empower®, this manual will aid you as a reference book for your everyday use. All important functions and buttons are explained individually. If you discover a previously unknown button or have always wondered about the function a particular button has, you will find all answers here.

Document Automation for PowerPoint

2.1 Introduction

With the help of empower® Document Automation, provide all your colleagues with templates for PowerPoint presentations that only need to be filled with the right content by your colleagues.

2.1.1 Permissions

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

The creation and editing of automated templates, on the other hand, is reserved for users who have installed the Visual Designer. The Visual Designer should only be installed for users who are permitted to manage automated templates. This ensures that only users familiar with the Visual Designer and its functions have the ability to create and edit automated templates.

2.1.2 Updates

Neither update links nor translation groups can be created for Document Automation templates. However, slide updates are possible for presentations that have been created using a Document Automation template under the following conditions:

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

> **Please note:**
> This update behavior does not apply to presentations that have been inserted via an empower® Link. Presentations will not be updated.

2.2 Using an Automated Template for PowerPoint

2.2.1 Open the Automated Template

To open the template, double-click on the item in the empower® Library (**Figure 1**) or select it and then click on the button **Open**. The wizard will open in a new window.

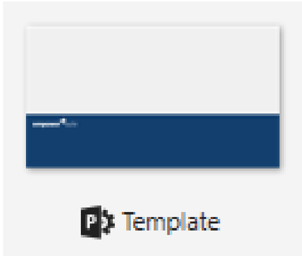

Figure 1: Document Automation template in the empower® Library

2.2.2 Wizard

In the Wizard, you will find all the questions and instructions that were defined when the automated template was created. Depending on the type of question or instruction, there are different ways to answer the questions and follow the instructions:

- Text Input – Enter the answer to the question or instruction into the text field (**Figure 2**).

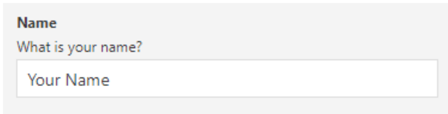

Figure 2: Text Input Question in the Wizard

- Yes/No – To answer the question, activate or deactivate the toggle button (**Figure 3**).

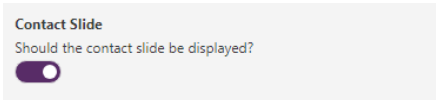

Figure 3: Yes/No Question in the Wizard

- The answer can also be shown in form of a checkbox. In this case, tick the checkbox if you want to answer *Yes* (**Figure 4**).

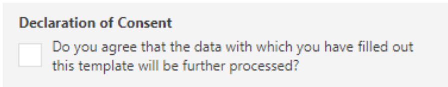

Figure 4: Checkbox for Yes/No Question

- Picture – Insert a picture that matches the question or instruction by clicking inside the box or using drag and drop (**Figure 5**).

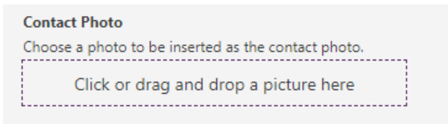

Figure 5: Picture Question in the Wizard

- Single Choice – Choose the most appropriate answer option from the dropdown menu (**Figure 6**).

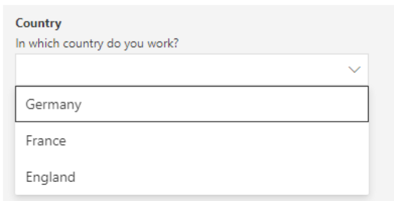

Figure 6: Single Choice Question in the Wizard

- Multiple Choice – Choose the most appropriate answer options from the dropdown menu (**Figure 7**).

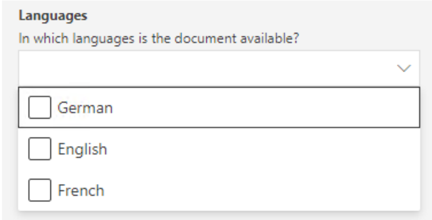

Figure 7: Multiple Choice Question in the Wizard

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

If you have answered all questions and instructions properly, click on the button **Create** (**Figure 8**).

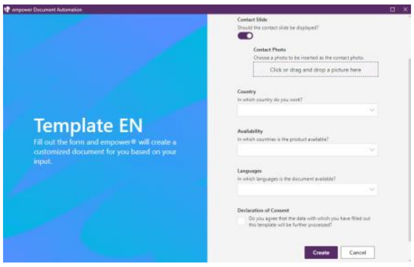

Figure 8: Document Automation Wizard

If a question or instruction defined as required has not been answered, a corresponding notice will appear (**Figure 9**). The presentation cannot be created until the required questions and instructions have been answered.

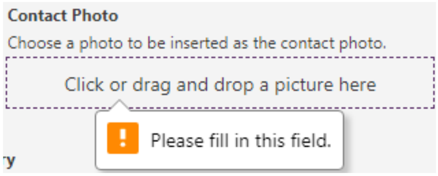

Figure 9: Notice if a required question has not been answered

If an agenda was used during the creation of the template, the agenda must be manually updated after the document is created in order to include the responses from the wizard in the agenda.

To do so, follow the following steps:

- Create the document. The agenda will appear in the document with the wrong numbering if sections are omitted due to the conditions and responses in the wizard.
- Open the **Agenda Editor**.
- Do not make any changes here. Reload the agenda by clicking on the button **Update Agenda** (**Figure 10**).

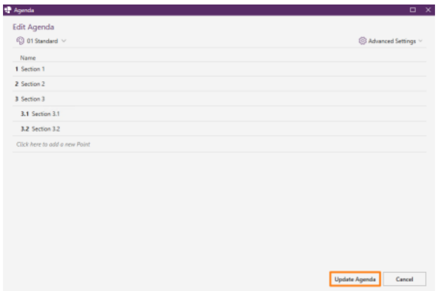

Figure 10: Agenda Editor

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

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

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

2.3 Create and Edit Automated Templates

2.3.1 Document Automation in the empower® Ribbon

If you have admin permissions and have installed the Visual Designer for empower® Document Automation, the empower® Ribbon will be expanded to include the group Document Automation (**Figure 11**). This group contains options that are described in the following chapter **User Interface**.

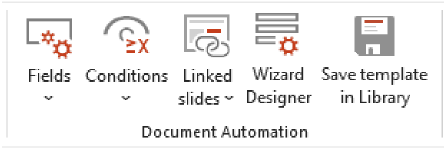

Figure 11: Document Automation in PowerPoint

The group Document Automation can also be displayed in the simplified empower® Ribbon. In the simplified ribbon, click on the button **Automation** to display all options (**Figure 12**).

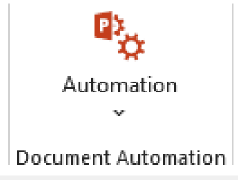

Figure 12: Document Automation in PowerPoint – simplified ribbon

2.3.2 User Interface

To create a template, use the group Document Automation in the empower® Ribbon.

In the group Document Automation, the following options are available:

- Fields
- Conditions
- Linked slides
- Wizard Designer
- Save template in Library

If you want to edit an automated template, navigate to the location of the template in the empower® Library. Right-click on the template and select the option **Edit template** from the context menu. The template will open in editing mode.

Please note: In the empower® Library, an automated template can be identified by the presentation icon featuring a gear (**Figure 1**).

For more information on the Wizard Designer, see chapter **Wizard Designer**.

2.3.3 Wizard Designer

In the **Wizard Designer**, you can define various questions that the user must answer when opening a template in order to fill in the template.

For more information on the Wizard Designer, see chapter **Wizard Designer**.

2.3.4 Fields

Under **Fields**, you have the option to define placeholders using the button **Insert field** (**Figure 13**), which will be filled with the corresponding user inputs from the wizard when using the automated template.

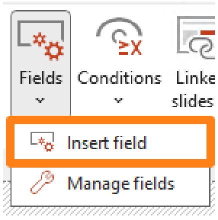

Figure 13: Button **Insert field**

In the text, placeholders are marked by square brackets, in which the name of the question is written (**Figure 14**).

Figure 14: Placeholder

To insert a field, please follow the following steps:

- Navigate to the location in the presentation where you want to insert the field.
- Then, under **Fields**, select the option **Insert field** (**Figure 13**).
- In the overview, select the question for whose answer you want to create a placeholder. The placeholder will be inserted at the desired location (**Figure 14**).

If you want to insert placeholders for the answers to a **Multiple Choice** question, keep in mind that you need to insert multiple placeholders. Depending on how many answer options you want to insert, you have to insert a separate placeholder for each answer option. To do this, change the index in the field overview. The number in the index indicates which answer option is displayed (**Figure 15**). Index 1 corresponds to the answer that is first selected in the wizard.

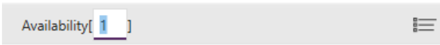

Figure 15: Index for Multiple Choice Questions

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

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

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

- Create a shape in the presentation using the option **Shapes** in the tab **Insert**, for example.

- Select the element.
- Under **Fields**, choose the option **Insert field**.
- For example, select a Picture Question in the overview so that the image selected by the user appears in this shape.

> **Please note:**
> The option **Insert field** is also available through the context menu. To open the context menu, right-click where you want to insert a field.

> **Please note:**
> In the template, it is not visible that elements have been provided with a field from the Wizard Designer. To see all assigned fields, go to **Fields** and select **Manage fields**.
>
> You will be provided with an overview of all fields and their usage in the presentation.
>
> In the *Manage Fields* window, click on one of the fields to directly navigate to the item in the presentation to which the field has been assigned.

2.3.5 Conditions

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

For every question or instruction type except for the Picture question/instruction, rules can be created that include conditions. For one rule, multiple conditions can be created, either all of which must be met or at least one of which must be met for the rule to take effect.

The conditions can be linked with either *AND* or *OR*. If you add two conditions that are linked by *AND* within a rule, both conditions must be met for the rule to apply. If you add two conditions within a rule that are linked by *OR*, only one of the conditions must be met for the rule to apply.

The rules are structured differently for each type of question:

Text Input

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

Yes/No Question

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

Single Choice

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

Multiple Choice

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

These rules work for slides and single elements.

Please note:
Conditions are not visible in the presentation. To get an overview of all conditions and their usage in the presentation, go to **Conditions** and select **Manage conditions**. If you expand the respective condition on the left side, it will show where the condition is used.

2.3.6 Linked Slides

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

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

- Open the empower® Library.
- Navigate to the location of the desired slide or presentation.
- Right-click on the element. A context menu will open.
- Select the option **Copy link to clipboard** (**Figure 16**).

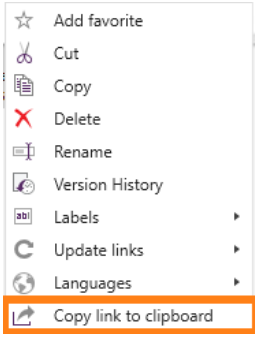

Figure 16: Context menu of an element in the empower® Library

- Go to the template to which you want to link the item.
- Navigate to the location in the presentation where you want to insert the linked slide or presentation.
- In the group Document Automation, navigate to **Linked slides** and click on the button **Insert linked slide** (**Figure 17**).

Figure 17: Button **Insert linked slide**

A window opens (**Figure 18**).

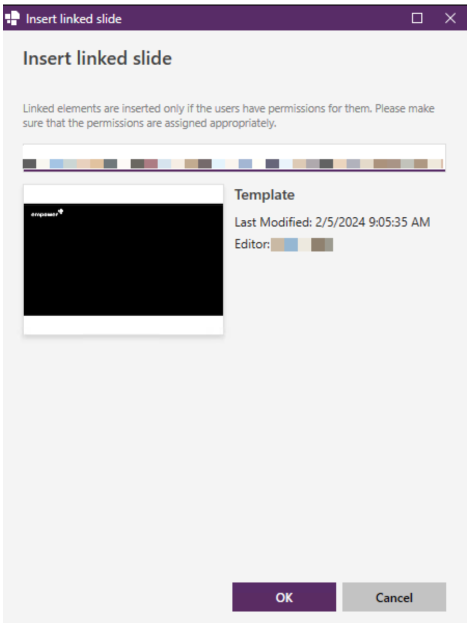

Figure 18: Window **Insert linked slide**

- Paste the previously copied link from the clipboard into the text field. A preview of the slide or presentation will appear in the window.
- Click on the button **OK**. A placeholder for the slide or presentation will be inserted below the currently selected slide in the presentation (**Figure 19**).

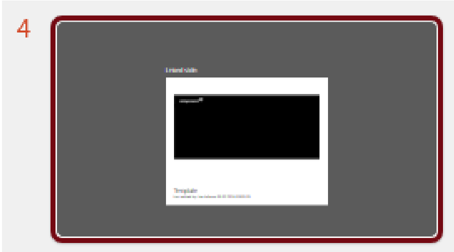

Figure 19: Placeholder for linked slide(s) in the presentation

In both, the window and the placeholder for the linked slide or presentation, the following information appears:

- Thumbnail
- File name
- Last edited by
- Date of last edit

2.3.7 Display Linked Slides Conditionally

The option to link individual slides or presentations in the automated template can be used to fill the templates with individual slides as needed. To do so, you can add conditions to placeholders for linked slides or presentations. An example is provided below:

- Individual contact slides are created, each containing the contact details for individual contacts in various industries. These individual slides are stored in the empower® Library.
- In an automated template for a presentation that can be used for clients from different industries, these slides are now linked. To do so, each contact slide must be linked individually and inserted as a placeholder.
- In the Wizard Designer, a **Single Choice** question can now be created, and multiple answer options can be specified. The question is: What industry does the client belong to? (**Figure 20**).

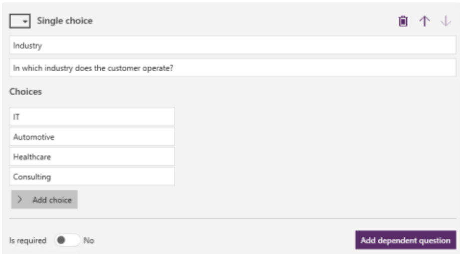

Figure 20: Example for Single Choice Question

- Conditions are now created under **Conditions** (**Figure 21**).
- The individual placeholders for the contact slides of individual contacts per industry can now be assigned to the corresponding condition. Like this, only the relevant contact slide for the industry will be displayed.

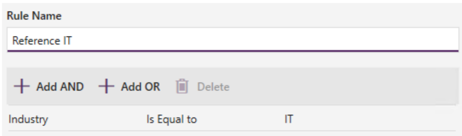

Figure 21: Example for a condition

Please note:
An overview of all linked slides and presentations can be found under **Linked slides** via the button **Manage linked slides**.

2.3.8 Using an Agenda in a Document Automation Template

empower® Document Automation is not directly compatible with the empower® Agenda feature. However, the agenda can be used in an automated template.

To do so, please follow the following steps:

- Start by creating a Document Automation template.
- Open the Agenda Editor.
- Select an agenda template and fill it with the required sections.
- Click on the button **Create Agenda** (**Figure 10**). The agenda will be fully inserted into the Document Automation template.
- Next, create the slides that you want to appear within the agenda sections.
- Now, create your questions in the **Wizard Designer**.
- In order to decide which agenda section to insert when creating an agenda, create Yes/No Questions.
  E.g.: Should section X be inserted?
  [Question name: Insert section X]
- If you have set up sub-items for the respective sections, create a dependent Yes/No question for this purpose.
  E.g.: If section 2 is to be inserted, the user will automatically be asked whether section 2.1 and section 2.2 should be inserted as well. If section 2 is not selected, neither section 2.1 nor section 2.2 will be available.
- Next, create your conditions.
  - In order for the answers to the agenda questions to have the desired effect, create conditions. These conditions could look like this, for example:
    Insert section 1 – is – selected
    Insert section 2 – is – selected
    Insert section 3 – is – selected
    Insert section 3 – is – selected;
    Insert section 3.1 – is – selected
- Link the slides to the conditions.
  - To link a section with a condition, select all associated slides, including content slides, divider slides and the overview slide. Then link the corresponding condition to the selected slides.
- Repeat this process for all sections and all conditions.

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

2.3.9 Save Template in Library

After you have set up all the questions and instructions in the Wizard Designer and filled the template with fields and conditions, save the template in the empower® Library. It will not be saved as a normal presentation, but as an automated template. To do so, please follow the following steps:

- In the group Document Automation, click on the button **Save template in Library** (**Figure 22**). The empower® Library will open.
- Navigate to the desired location.
- Then click on the button **Save**.
- The template will be labeled with the icon for automated templates in the empower® Library (**Figure 1**).

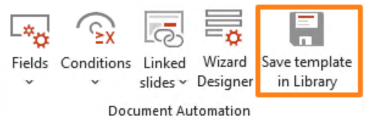

Figure 22: Button **Save template in Library**

Document Automation for Word

3.1 Introduction

With the help of empower® Document Automation, provide all your colleagues with templates for Word documents that only need to be filled with the right content by your colleagues.

3.1.1 Permissions

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

The creation and editing of automated templates, on the other hand, is reserved for users who have installed the Visual Designer The Visual Designer should only be installed for users who are permitted to manage automated templates. This ensures that only users familiar with the Visual Designer and its functions have the ability to create and edit automated templates.

3.1.2 Updates

Neither update links nor translation groups can be created for Document Automation templates. Content blocks can only be updated if they are inserted directly from the empower® Library. If they are inserted as linked content blocks using an empower® Link, the connection to empower® is lost. In this case, the content blocks will no longer be updated.

3.2 Using an Automated Template in Word

3.2.1 Open the Automated Template

To open the template, double-click on the item in the empower® Library (**Figure 23**) or select it and then click the button **Open**. The wizard will open in a new window.

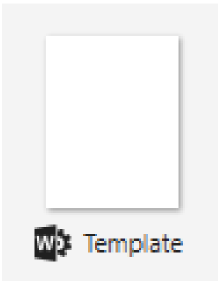

Figure 23: Document Automation template in the empower® Library

3.2.2 Wizard

In the Wizard, you will find all the questions and instructions that were defined when the automated template was created. Depending on the type of question or instruction, there are different ways to answer the questions and follow the instructions:

- Text input – Enter the answer to the question or instruction into the text field (**Figure 24**).

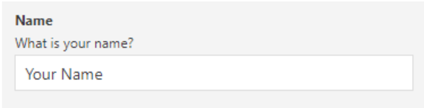

Figure 24: Text Input Question in the Wizard

- Yes/No – To answer the question, activate or deactivate the toggle button (**Figure 25**).

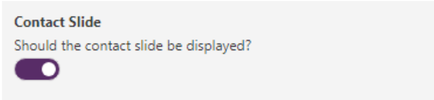

Figure 25: Yes/No Question in the Wizard

- The answer to Yes/No Questions can also be shown in form of a checkbox. In this case, tick the checkbox if you want to answer *Yes* (**Figure 26**).

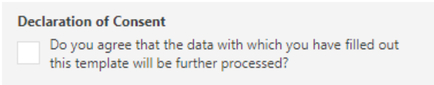

Figure 26: Checkbox for Yes/No Question

- Picture – Insert a picture that matches the question or instruction by clicking in the box or using drag and drop (**Figure 27**).

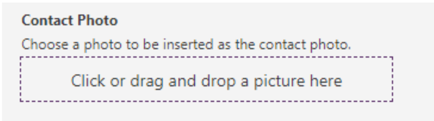

Figure 27: Picture Question in the Wizard

- Single Choice – Choose the most appropriate answer option from the dropdown menu (**Figure 28**).

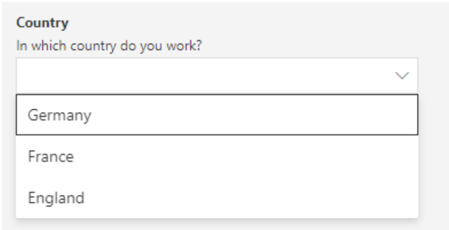

Figure 28: Single Choice Question in the Wizard

- Multiple Choice – Choose the most appropriate answer options from the dropdown menu (**Figure 29**).

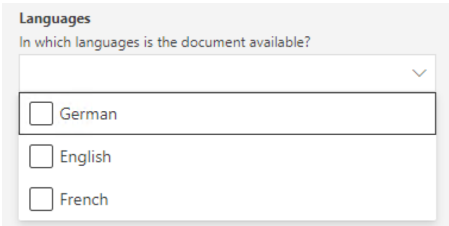

Figure 29: Multiple Choice Question in the Wizard

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

If you have answered all questions and instructions properly, click on the button **Create** (**Figure 30**).

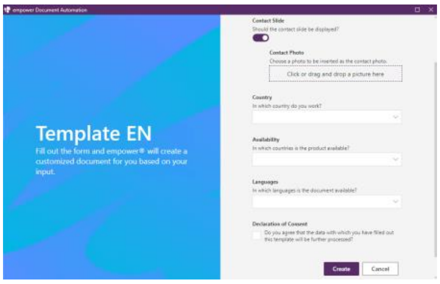

Figure 30: Document Automation Wizard

If a question or instruction marked as required has not been answered, a corresponding notice will appear (**Figure 31**). The presentation cannot be created until the required questions and instructions have been answered.

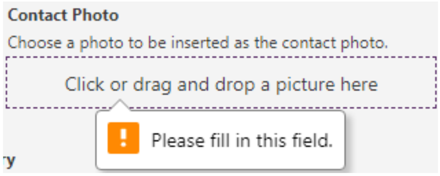

Figure 31: Notice if a required question has not been answered

If updates are known for the content blocks used in the template and should be applied in the template, go to the group **Library** in the empower® Ribbon and click on the button **Update elements**. If there are updates available for outdated elements, a notice will appear (**Figure 32**). Confirm that you want to update these elements.

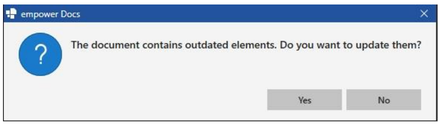

Figure 32: Notification about outdated elements

Please note:
Content blocks are not automatically updated during document creation, and there is no update notification. As described above, updates must be triggered manually.

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

3.3 Create an Automated Template for Word

3.3.1 Document Automation in the empower® Ribbon

If you have admin permissions and have installed the Visual Designer for empower® Document Automation, the empower® Ribbon will be expanded to include the group Document Automation (**Figure 33**). This group contains options that are described in the following chapter **User** Interface.

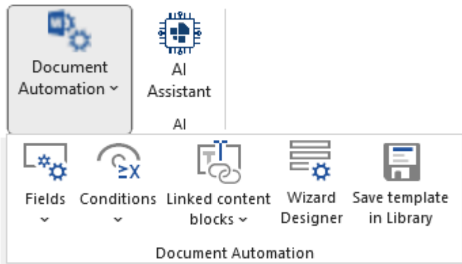

Figure 33: Document Automation in Word

If the Visual Designer has been installed, the empower® Ribbon cannot be displayed as simplified ribbon

3.3.2 User Interface

To create a template, use the group Document Automation in the empower® Ribbon.

In the group Document Automation, the following options are available:

- Fields
- Conditions
- Linked content blocks
- Wizard Designer
- Save template in Library

If you want to edit an automated template, navigate to the location of the template in the empower® Library. Right-click on the template and select the option **Edit template** from the context menu. The template will open in editing mode.

> **Please note:**
> In the empower® Library, an automated template can be identified by the presentation icon featuring a gear (**Figure 23**).

For more information on the Wizard Designer, see chapter **Wizard Designer**.

3.3.3 Wizard Designer

In the **Wizard Designer**, you can define various questions that the user must answer when opening a template in order to fill in the template.

For more information on the Wizard Designer, see chapter **Wizard Designer**.

3.3.4 Fields

Under **Fields**, you have the option to define placeholders using the button **Insert field** (**Figure 34**), which will be filled with the corresponding user inputs from the wizard when using the automated template.

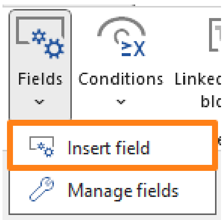

Figure 34: Button **Insert field**

In the text, placeholders are marked by square brackets, in which the name of the question is written (**Figure 35**).

Figure 35: Placeholder

To insert a field, please follow the following steps:

- Navigate to the location in the document where you want to insert the field.
- Then, under **Fields**, select the option **Insert field** (**Figure 34**).
- In the overview, select the question for whose answer you want to create a placeholder. The placeholder will be inserted at the desired location (**Figure 35**).

If you want to insert placeholders for the answers to a **Multiple Choice** question, keep in mind that you need to insert multiple placeholders. Depending on how many answer options you want to insert, you have to insert a separate placeholder for each answer option. To do this, change the index in the field overview. The number in the index indicates which answer option is displayed (**Figure 36**). Index 1 corresponds to the answer that is first selected in the wizard.

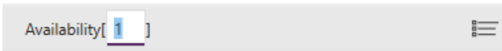

Figure 36: Index for Multiple Choice Questions

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

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

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

- Create a shape in the document using the option **Shapes** in the tab **Insert**, for example.
- Select the element.
- Under **Fields**, choose the option **Insert Field**.
- For example, select a **Picture** Question in the overview so that the image selected by the user appears in this shape.

> **Please note:**
> The option **Insert field** is also available through the context menu. To open the context menu, right-click where you want to insert a field.

> **Please note:**
> In the template, it is not visible that elements have been provided with a field from the Wizard Designer. To see all assigned fields, go to **Fields** and select **Manage fields**. You will be provided with an overview of all fields and their usage in the presentation.

3.3.5 Conditions

You can use conditions to specify when an element should be inserted and when it should not. For every question or instruction type except for the **Picture** question/instruction, rules can be created that include conditions. For a rule, multiple conditions can be created, either all of which must be met or at least one of which must be met for the rule to take effect.

The conditions can be linked with either *AND* or *OR*. If you add two conditions that are linked by *AND* within a rule, both conditions must be met for the rule to apply. If you add two conditions within a rule that are linked by *OR*, only one of the conditions must be met for the rule to apply.

The rules are structured differently for each type of question:

Text input

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

Yes/No Question

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

Single Choice

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

Multiple Choice

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

Please note:
Conditions are not visible in the document. To get an overview of all conditions and their usage in the document, go to **Conditions** and select **Manage conditions**. If you expand the respective condition on the left side, it will show where the condition is used.

In the *Manage Fields* window, click on one of the fields to directly navigate to the item in the document to which the field has been assigned.

3.3.6 Linked Content Blocks

With empower® Document Automation, you can link content blocks in the automated template. When the template is used, a placeholder is inserted instead of the link.

To link content blocks, please follow the following steps:

- Open the empower® Library.
- Navigate to the folder **Content blocks** and navigate to the desired content block.
- Right-click on the content block.
  A context menu will open.
- Select the option **Copy link** (**Figure 37**).

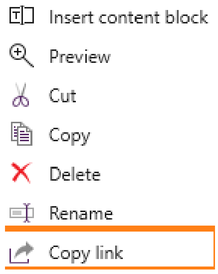

Figure 37: Context menu of an element in the empower® Library

- Go to the template to which you want to link the content block.
- Navigate to the location in the document where you want to insert the linked content block.
- In the group Document Automation, click on the button **Insert linked content block** (**Figure 38**).
  A window opens (**Figure 39**).

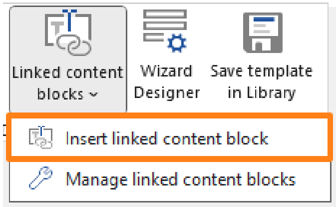

Figure 38: Button **Insert linked content block**

- Paste the previously copied link from the clipboard into the text field.
  A preview of the content block appears in the window.
- Click on the button **OK**.
  A placeholder for the content block is inserted into the document. This placeholder contains the path to the respective content block.

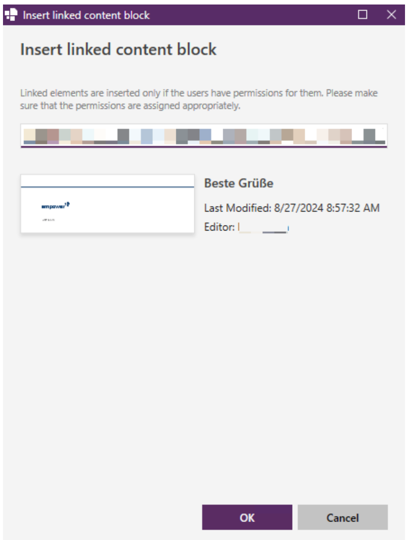

Figure 39: Window **Insert linked content block**

Please note:
An overview of all linked content blocks can be found under **Linked content blocks** via the button **Manage linked content blocks**.

Please note:
If you insert content blocks as linked content blocks using an empower® Link, the content block cannot be updated when it is updated in the empower® Library. Since empower® Document Automation is intended to create finished documents that are not updated, linked content blocks should be preferred.

If you still want the content block to be updatable, follow the instructions for **inserting content blocks from the empower® Library**.

3.3.7 Insert Content Blocks from the empower® Library

In empower® Document Automation templates, you can insert content blocks from the empower® Library. To do so, please follow the following steps:

- In your Document Automation template, navigate to the point where you want to insert the content block.
- Open the empower® Library.
- Open the folder **Content blocks** and navigate to the desired content block.
- Select the desired content block.
- To insert the content block in the template, double-click on the content block. The content block will be placed in the document.

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

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

Please note:
If content blocks from the empower® Library are provided with a condition, this condition must entirely encompass the content block.

3.3.8 Save Template in Library

After you have set up all the questions and instructions in the Wizard Designer and filled the template with fields and conditions, save the template in the empower® Library. It will not be saved as a normal presentation, but as an automated template. To do so, please follow the following steps:

- In the section Document Automation, click on the button **Save template in Library** (**Figure 40**).
- The empower® Library will open.
- Navigate to the desired location.
- Then click on the button **Save**.
  The template will be labeled with the icon for automated templates in the empower® Library (**Figure 23**).

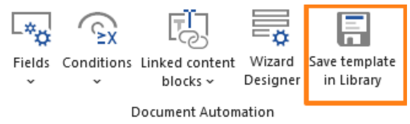

Figure 40: Button **Save template in Library**

Wizard Designer

4.1 Question Types

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

The following five types of questions are available in the Wizard Designer when creating a template.

4.1.1 Text input

The question type **Text input** is used to define the content of text fields. You have the option to name the question. Then enter a question or an instruction in the field **Question**. In the field **Watermark**, you can enter text that serves as a watermark for the response field. This text serves as sample text for answering the question.

Finally, you have the option to define the question as a mandatory field. If you activate the toggle button for **Is required** the template cannot be used without answering this question (**Figure 41**).

Figure 41: Text Input Question

Example:

- Name of the Question: Name
- Question: What is your name?
- Watermark: Your Name

4.1.2 Yes/No Questions

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

Here you have the opportunity to set the **Initial value** for the question and to decide whether the answer option should be displayed as a checkbox or as a toggle button.

If you decide that answering is required for a **Yes/No Question**, the initial value is automatically set to off, and the answer option is automatically displayed as a **checkbox**. This setting cannot be changed afterwards (**Figure 42**).

Figure 42: Yes/No Question

Example:

- Name of the question: Contact Slide
- Question: Should the contact slide be displayed?
- Initial value: On
- Checkbox: Off
- Required: No

> **Please note:**
> Defining a **Yes/No Question** as required only makes sense if the user is supposed to give their consent for something, and the document cannot be created without this consent.

4.1.3 Picture

With the option **Picture**, you can insert an image that will be displayed at a specific location in the presentation, on the slide, or in the document.

This question type can also be defined as required. If the question is defined as required, the template cannot be used without selecting an image (**Figure 43**).

Example:

- Name of the question: Contact Photo
- Question: Choose a photo to be inserted as the contact photo.
- Required: No

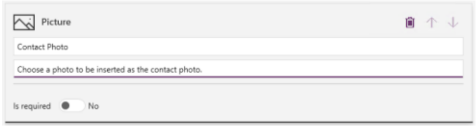

Figure 43: Picture Question

4.1.4 Single Choice

If you define a question with the option **Single Choice**, you can offer multiple answer options. The user is allowed to select only one of the answer options when answering the question. You can offer as many answer options as you like. You can define this question type as required as well. If the question has been defined as required, the template cannot be used without selecting an answer (**Figure 44**).

Example:

- Name of the Question: Country
- Question: In which country do you work?
- Answer options: Germany, France, England

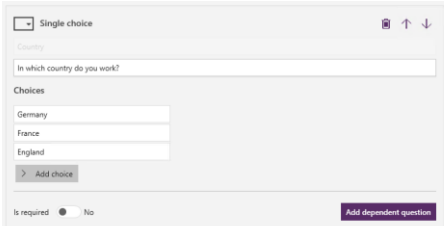

Figure 44: Single Choice Question

4.1.5 Multiple Choice

If you define a question with the option **Multiple Choice**, you can offer multiple answer options. The user is allowed to select multiple answer options when answering the question.

You can offer as many answer options as you like. You can define this question type as required as well. If the question has been defined as required, the template cannot be used without selecting an answer (**Figure 45**).

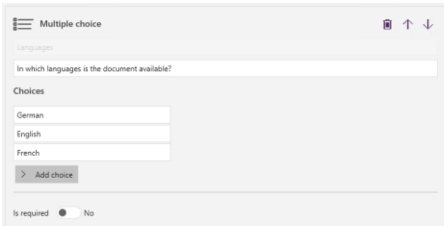

Figure 45: Multiple Choice Question

Please note:
The question type **Multiple Choice** can be linked to conditions. If the answer options are inserted as text placeholders, this can lead to problems and additional effort.

Certain aspects of text placeholders need to be considered, and it may result in additional effort.

For more information on this topic, see chapter **Fields**.

Example:

- Name of the question: Languages
- Question: In which languages is the document available?
- Answer options: German, English, French

4.1.6 Dependent Question

For the question types **Text input**, **Yes/No Question**, and **Single Choice**, it is possible to create one or more dependent questions (**Figure 46**). For the dependent questions, you can also choose from the five question types.

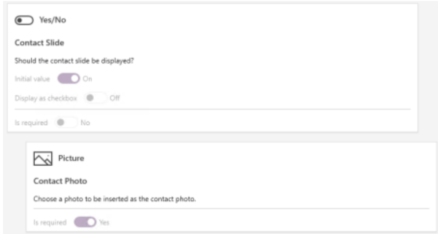

Figure 46: Dependent question

4.1.7 Dependent Questions for Single Choice

If you create a dependent question for a **Single Choice** question and this question is a **Single Choice** or **Multiple Choice** question, you can determine for the dependent question whether the answer options depend on the answer to the parent question. This way, you can determine which answer options the user sees when they give a specific answer to the parent question.

The following section provides different examples (**Figure 47**).

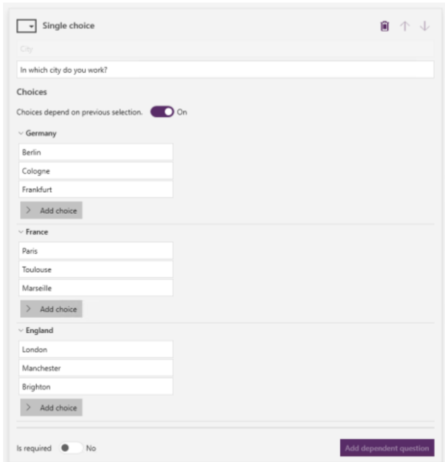

Figure 47: Dependent question for Single Choice

Example:

- The **Single Choice** parent question is: In which country do you work?
- The answer options are Germany, France, and England.
- The dependent question is: In which city do you work?
- The answer options can now depend on the previous selection. That means that for each answer option of the parent question, answer options can be provided that are only displayed when the respective answer from the parent question is selected.
- If Germany is selected, only Cologne, Berlin, and Frankfurt are displayed as cities.
- If England is selected, only London, Manchester, and Brighton are displayed as cities.
- If France is selected, only Paris, Marseille, and Toulouse are displayed as cities.

Example:

- The question *Contact Photo* of the question type **Picture** can be a dependent question to the **Yes/No Question** *Contact Slide*. In this case, the contact photo can only be selected if the contact slide is to be displayed.