

---

## Templates Manager – Manual

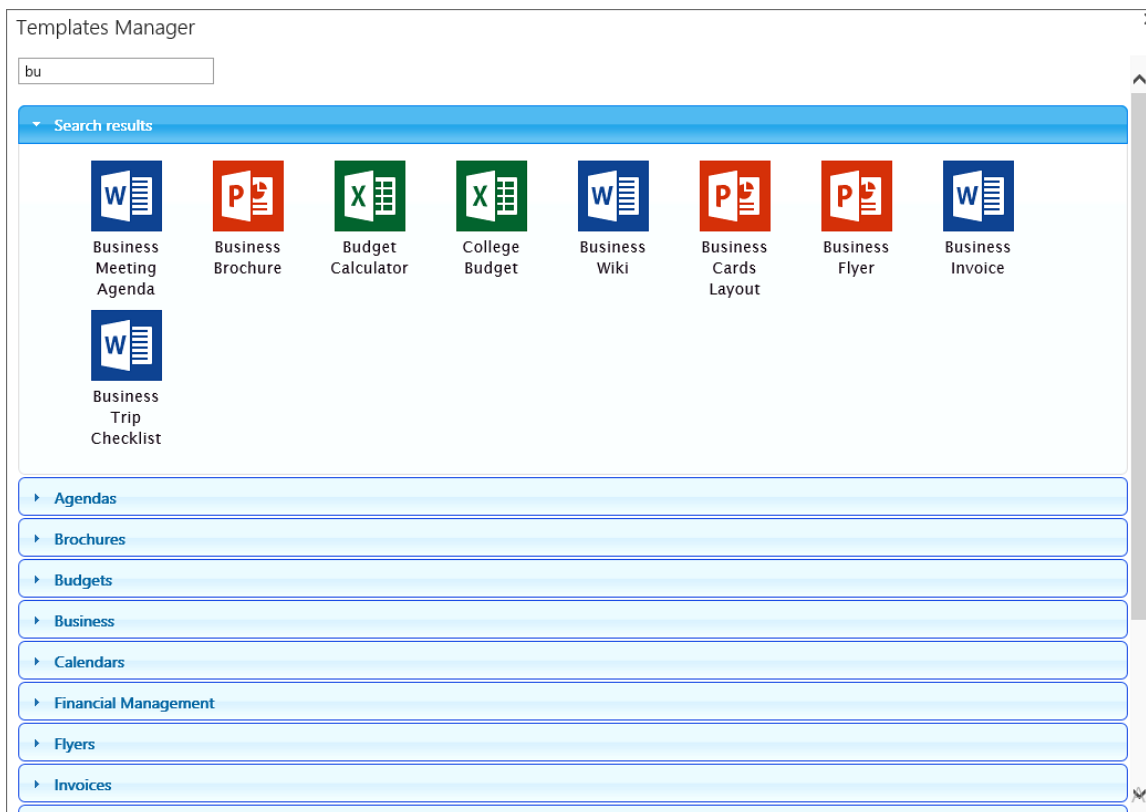
### Table of contents

<b>1</b>	<b>INTRODUCTION .....</b>	<b>2</b>
1.1	LANGUAGES .....	2
1.2	REQUIREMENTS .....	2
<b>2</b>	<b>USER ROLES .....</b>	<b>3</b>
2.1	PUBLISHER.....	3
2.2	USER.....	3
<b>3</b>	<b>PUBLISHING.....</b>	<b>3</b>
<b>4</b>	<b>INSTALLATION OF TEMPLATES MANAGER .....</b>	<b>3</b>
4.1	INTRODUCTION .....	3
4.2	INSTALL AND ACTIVATE FOR SITE COLLECTION .....	3
4.3	ACTIVATE FOR SITE .....	5
4.4	PERMISSIONS .....	5
4.4.1	Users.....	5
4.4.2	Publisher .....	5
<b>5</b>	<b>PUBLISHER SITE FIRST TIME USAGE .....</b>	<b>6</b>
5.1	EXAMPLE DATA.....	6
5.2	REMOVE EXAMPLE DATA .....	7
<b>6</b>	<b>USER SITE FIRST TIME USAGE .....</b>	<b>7</b>
<b>7</b>	<b>PUBLISHER ADMINISTRATION .....</b>	<b>7</b>
7.1	TEMPLATE CATEGORIES .....	8
7.2	UPLOAD TEMPLATE .....	8
7.3	PUBLISH.....	9
<b>8</b>	<b>USING TEMPLATES MANAGER.....</b>	<b>10</b>
8.1	SEARCH TEMPLATES.....	10
8.2	USE TEMPLATE .....	10
<b>9</b>	<b>UPGRADE.....</b>	<b>11</b>
<b>10</b>	<b>REGISTRATION AND TRIAL INFO.....</b>	<b>12</b>
<b>11</b>	<b>SUBSCRIPTION.....</b>	<b>13</b>
<b>12</b>	<b>CONTACT .....</b>	<b>13</b>
<b>13</b>	<b>DEACTIVATION AND REMOVAL.....</b>	<b>13</b>
<b>14</b>	<b>MORE SHAREPOINT TIPS .....</b>	<b>13</b>

## 1 INTRODUCTION

*Templates Manager* helps organizations to manage, distribute and search Office templates in SharePoint. The software makes it possible to distribute templates to the whole SharePoint farm, and the Search feature makes it easy for users to find the template they need.

*Templates Manager* is a sandboxed SharePoint solution which is uploaded to a SharePoint solution gallery and activated there and on each site in the collection where it should be used.



All screenshots in the manual are taken from Office 365 SharePoint Online, but *Templates Manager* works with all editions of SharePoint 2010 and above.

Section 8 of this manual is intended for all users, while the rest is meant for the administrator/publisher.

### 1.1 LANGUAGES

The language of *Templates Manager* is automatically set to the same as on the SharePoint site. The supported languages are: Danish, Dutch, English, French, German, Italian, Norwegian, Portuguese, Spanish and Swedish. When SharePoint has a not supported language, English is used instead.

### 1.2 REQUIREMENTS

To use *Templates Manager* you need to have SharePoint 2010 or higher (in-house or hosted) or Office 365 SharePoint Online.

Supported browsers are Microsoft Edge, Internet Explorer 9 and higher and the latest version of Google Chrome and Mozilla Firefox.

---

The SharePoint Sandboxed Code Services must be activated to install *Templates Manager*.  
[FAQ](#)

## 2 USER ROLES

*Templates Manager* users can have two different roles, templates publisher and templates user.

### 2.1 PUBLISHER

The people who publish, administrate or manage the templates in *Templates Manager* are called Publishers in this manual. They should have access to a site where the *Templates Manager Publisher* feature is activated, so that they can reach the *Templates Manager* settings and the TMTemplates library.

### 2.2 USER

Templates users are the people who use the templates distributed by the publisher. They use *Templates Manager* when they create documents and search for suitable templates.

The first time someone creates a document on a site where *Templates Manager User* has been activated, *Templates Manager* will ask the user to select from a dropdown which library to fetch templates from.

## 3 PUBLISHING

If the templates should be distributed to the whole SharePoint farm, *Templates Manager Publisher* only needs to be activated on one site in the SharePoint farm. All users should select to fetch their templates from the TMTemplates library on that site.

If you need to direct different templates to different users, activate *Templates Manager Publisher* on several site collections. Then there will be several TMTemplates libraries to select, and users can choose the one they should fetch their templates from.

## 4 INSTALLATION OF TEMPLATES MANAGER

### 4.1 INTRODUCTION

*Templates Manager* is installed as a SharePoint Solution in a site collection, and it needs to be activated for each site where it will be used. This can be done manually, as described below, or with a PowerShell script given to subscribers on request.

### 4.2 INSTALL AND ACTIVATE FOR SITE COLLECTION

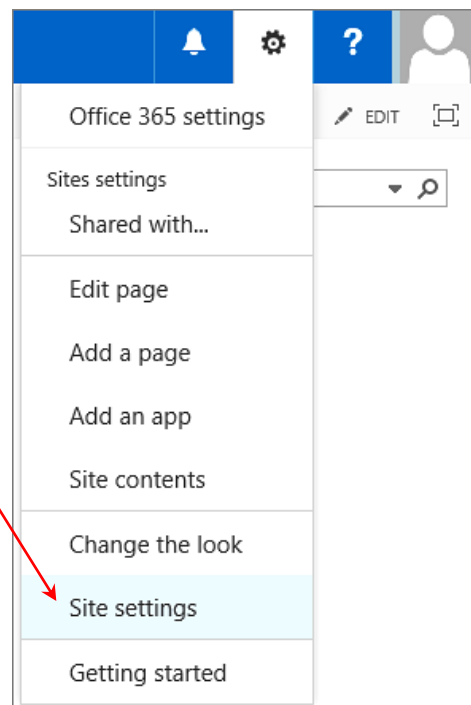
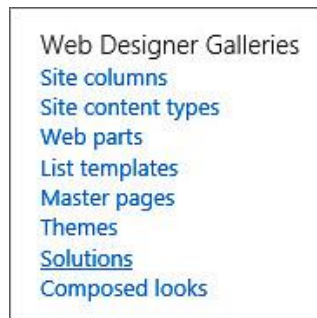
Download the file **TemplatesManagerSP.zip** from [the kalmstrom.com website](http://www.kalmstrom.com) to any folder on your computer and extract it.

Go to the root site of the SharePoint site collection where you want to use *Templates Manager* and click on the Settings icon at the top.

Select the Site Settings option.

(If you don't see this option, most likely you don't have the appropriate permissions. You need to be the **site collection Administrator** to install solutions.)

Under Galleries, select **"Solutions"**.



Next step is to upload the Solution – which is the .wsp file you downloaded from the kalmstrom.com website.

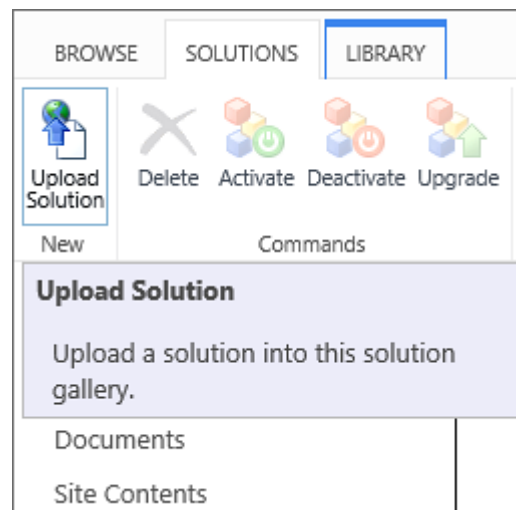
Click on the 'Upload Solution' button and browse to the file **TemplatesManagerSP.wsp** on your computer.

(Click on the SOLUTIONS tab if the 'Upload Solution' button is not visible.)

When the file has been uploaded, you will be shown a dialog where you can **activate** the solution. (Don't worry if you get a warning message. *Templates Manager* is intended for moderate modification of data, but the solution will do what you tell it to do, nothing more.)

Now *Templates Manager* is available for all sites in this site collection

If your SharePoint farm has many site collections, you need to do this for each site collection. On request kalmstrom.com Business Solutions can provide PowerShell scripts that can be run to mass-deploy *Templates Manager*.

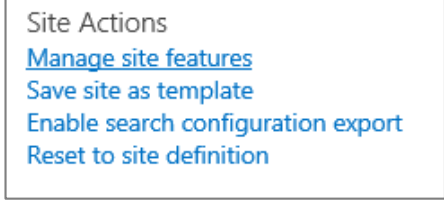


### 4.3 ACTIVATE FOR SITE

When *Templates Manager* has been installed in the site collection, you need to activate the solution for each site and subsite where it should be used.

Go to the site where you want to activate *Templates Manager* and once again select Site Settings.

Then select **“Manage site features”** under Site Actions. (If you don't see this option, most likely you don't have the appropriate permissions. You need to be a **site owner or site designer** to manage site features.)



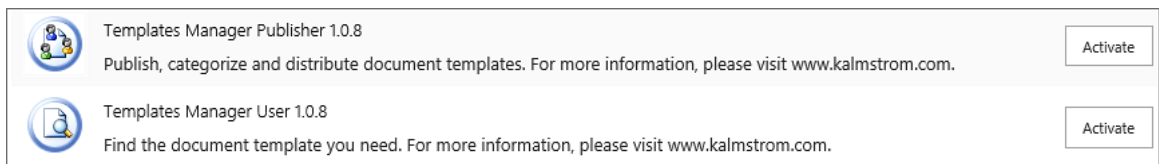
NOTE that you have to activate *Templates Manager* this way if you want to use the solution on the root site of the site collection, even though you activated it when you uploaded.

Find the *Templates Manager* entries in the list of Site Features. You will see two entries to activate.

**Templates Manager Publisher** to publish and distribute document templates. When this feature is activated on a site, a TMTemplates library and a *Templates Manager* settings page will be created.

**Templates Manager User** to search and use document templates. When this feature is activated on a site, all document libraries on that site will show the templates and a search field when a user starts creating a new document.

Click on the **Activate** button to activate both or one of these features.



### 4.4 PERMISSIONS

Standard SharePoint permissions are used for *Templates Manager*.

#### 4.4.1 USERS

People who should use templates must have at least **Contribute** permission over the *Templates Manager* document library. They must also have Read permission on the site where the Publisher feature is activated.

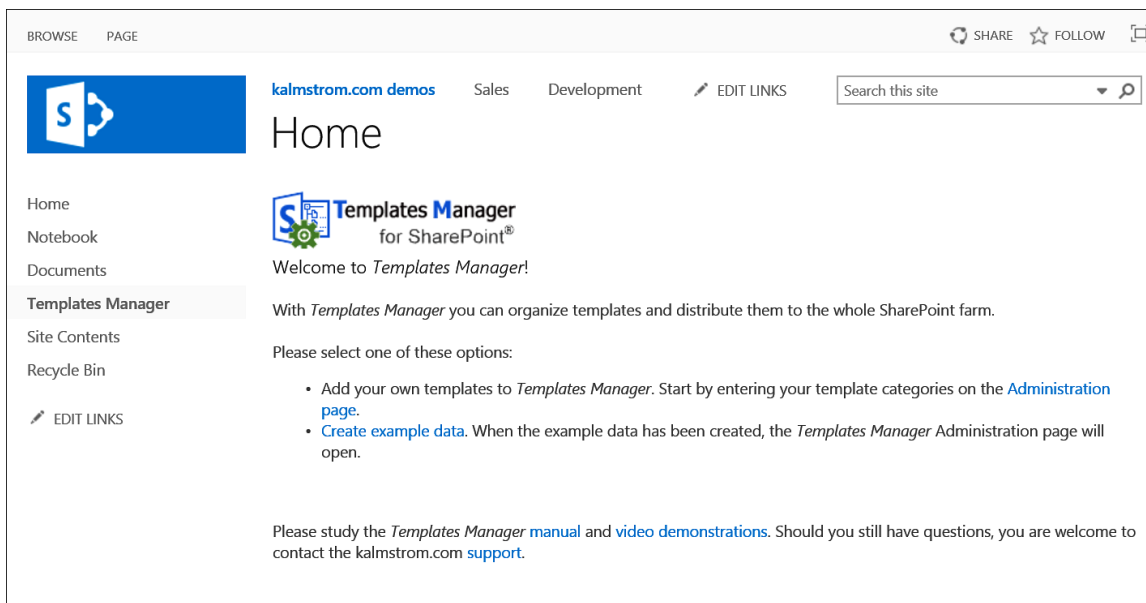
#### 4.4.2 PUBLISHER

The *Templates Manager* publisher must have **Full control** over the **site** where *Templates Manager Publisher* is activated.

## 5 PUBLISHER SITE FIRST TIME USAGE

When *Templates Manager Publisher* has been activated but no categories have been entered in the settings and no files uploaded to the TMTemplates library, a "Get Started" page is shown when you click on the "Templates Manager" link in the Quick Launch.

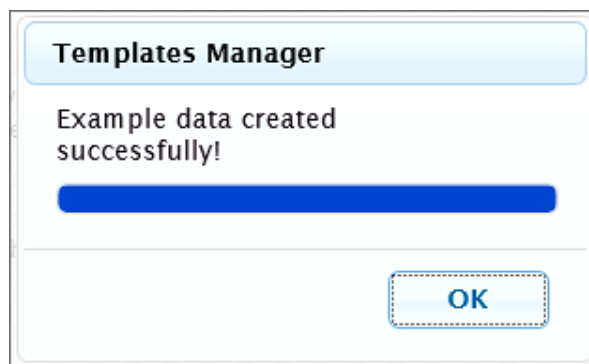
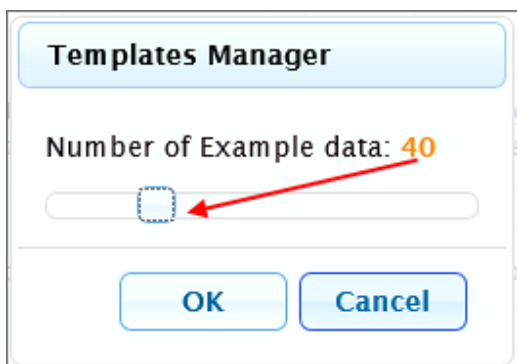
From the "Get Started" page you can either generate Example data or open the Administration page to enter your own template categories and then upload template files to the TMTemplates library. You can also reach the Manual web page, to download this manual.



### 5.1 EXAMPLE DATA

If you choose to first generate Example data for the evaluation, click on the 'Create example data' link in the "Get Started" page.

Use the slider to indicate how many templates you want to create. You will get a confirmation message when the example data has been created.



## 5.2 REMOVE EXAMPLE DATA

When you create Example data, you will have to remove them before you start using *Templates Manager* with your own templates. To remove the Example data, open the LIBRARY ribbon tab in the TMTemplates library. Click on Library Settings and delete the library.

LIBRARY tab > Library Settings > Delete this document library

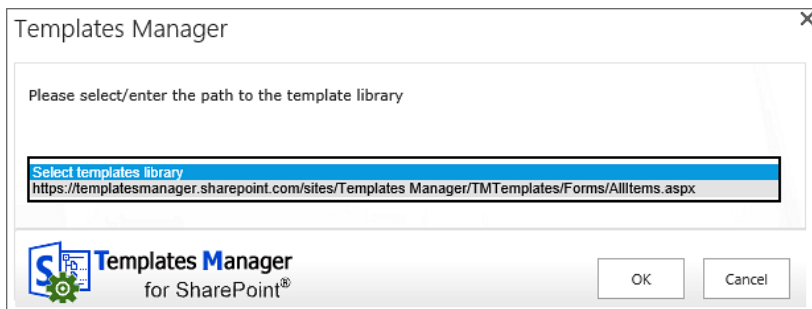
## 6 USER SITE FIRST TIME USAGE

The first time someone clicks on New to create a new document in a library on a site where *Templates Manager User* has been activated, the library to fetch templates from must be selected or entered. In SharePoint 2013 and above the farm's existing TMTemplates libraries are shown in a dropdown.

In SharePoint 2010 the path to the *site* that has the TMTemplates library must be written or pasted into the field.

After this first selection, all libraries on that site will fetch templates from the selected templates library.

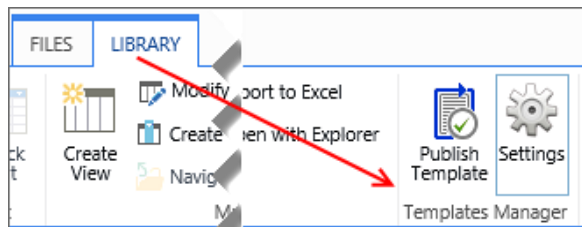
In the image below the whole farm uses the same templates, so there is only one activation of *Templates Manager Publisher* – and therefore only one TMTemplates library.



## 7 PUBLISHER ADMINISTRATION

The *Templates Manager Publisher* has three tasks: to manager the template categories, to upload templates to the TMTemplates library and to publish any changes in the categories or templates library. Templates are uploaded to the TMTemplates library just like any other files, refer to [the kalmstrom.com Tips section](#).

The templates categories and the publishing are managed via buttons under the LIBRARY tab in the TMTemplates library.

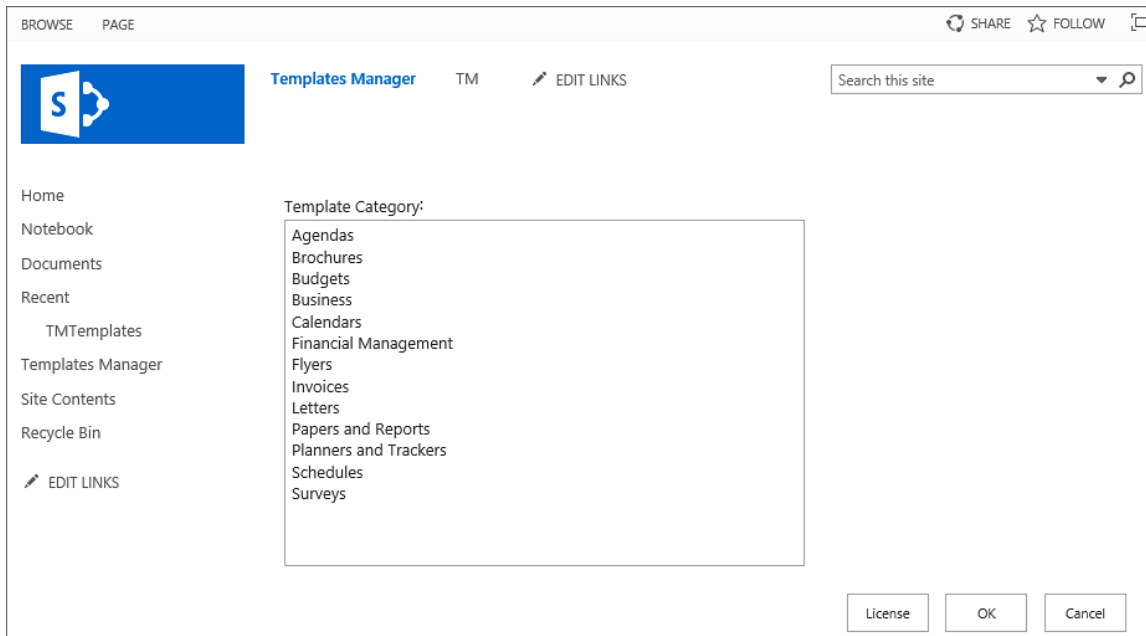


## 7.1 TEMPLATE CATEGORIES

To make it easier for users to find the right template, the templates should be grouped in categories. This is done on the settings page, where a simple textbox contains all category names. In the textbox you can write in, paste, edit and remove categories.

To reach the *Templates Manager* settings page, open the LIBRARY tab in the ribbon of the TMTemplates library and click on the *Templates Manager* Settings icon.

SharePoint automatically orders the category names alphabetically.



When you add a new category in the settings, that category is shown in the Properties dialog dropdown where you select category for each template. But the new category is not shown in the TMTemplates library until you have selected the category for at least one template.

(The first time you click on the *Templates Manager* link in the Quick Launch after *Templates Manager Publisher* has been activated on a site, a link in the "Get Started" page opens the Settings page, refer to Publisher Site First Time Usage.)

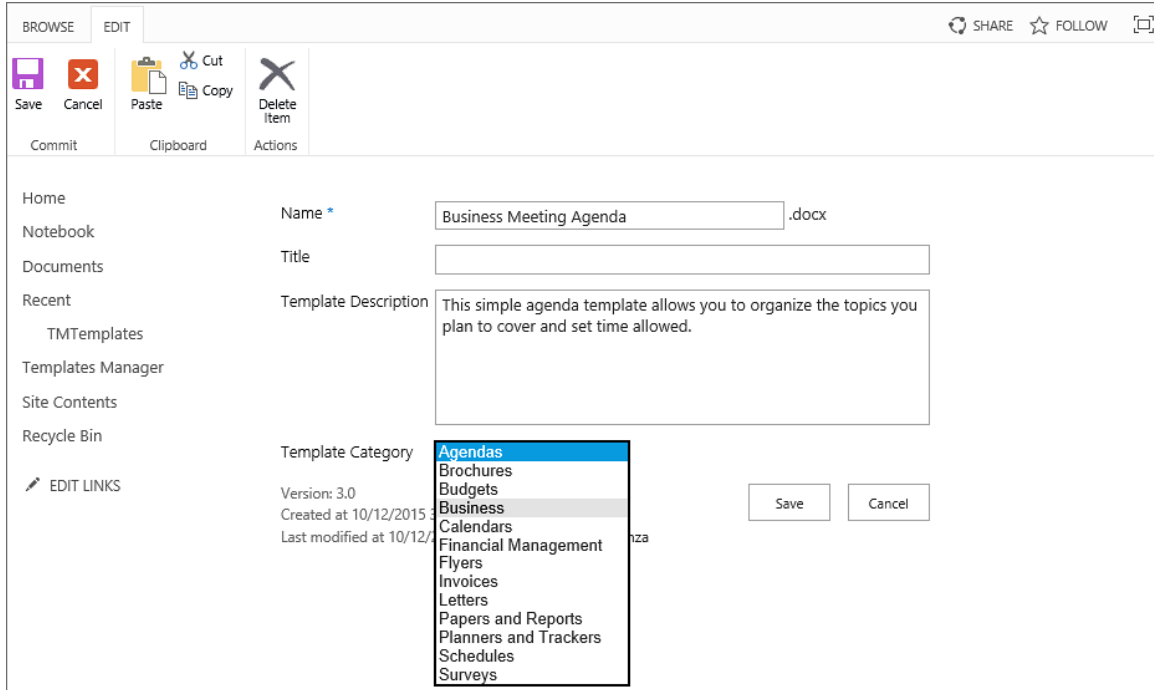
## 7.2 UPLOAD TEMPLATE

Create a new template by uploading a Word, Excel or PowerPoint file to the TMTemplates library. This library is created by *Templates Manager* and can serve the whole SharePoint farm.

In SharePoint you don't have to create a real template. You can use any document of the same type that have the background, header and footer, font, colors and so on that you wish to use in new documents.

When the document is uploaded, right click on the file and select Properties. In the dialog that opens, select a category for the template from a dropdown. The categories you have entered in the *Templates Manager* settings will be displayed in this dropdown. You should also enter a name, (a title) and a description.





The screenshot shows the 'EDIT' tab of the Templates Manager interface. On the left is a navigation pane with links to Home, Notebook, Documents, Recent, TMTemplates, Templates Manager, Site Contents, and Recycle Bin. The main area contains a form for editing a template. The 'Name' field is 'Business Meeting Agenda.docx'. The 'Title' field is empty. The 'Template Description' field contains the text: 'This simple agenda template allows you to organize the topics you plan to cover and set time allowed.' The 'Template Category' dropdown menu is open, showing a list of categories: Agendas, Brochures, Budgets, Business, Calendars, Financial Management, Flyers, Invoices, Letters, Papers and Reports, Planners and Trackers, Schedules, and Surveys. The 'Business' category is selected. Below the dropdown are 'Save' and 'Cancel' buttons. The top ribbon shows 'BROWSE' and 'EDIT' tabs, with icons for Save, Cancel, Paste, Copy, and Delete Item.

### 7.3 PUBLISH

Before a change in a template or template category is shown to all users, it must be published. Also remember to publish when you have removed templates or template categories. Publish your changes by pressing the Publish Template button under the LIBRARIES tab in the ribbon of the TMTemplates library.



## 8 USING TEMPLATES MANAGER

### 8.1 SEARCH TEMPLATES

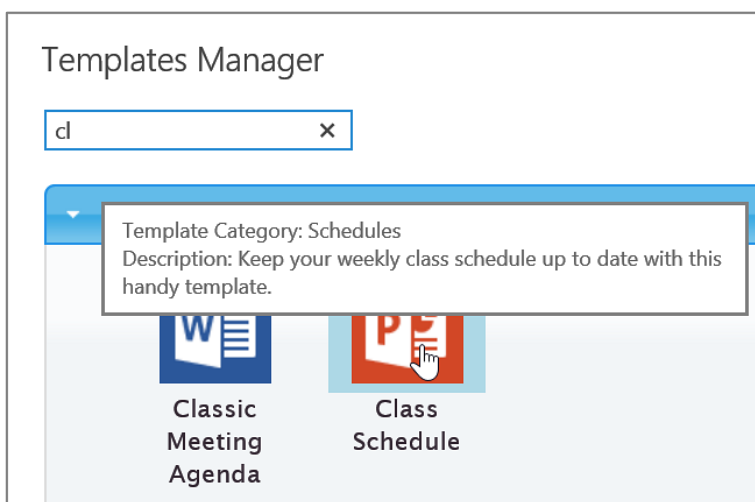
Click on "New" in a SharePoint library to create a new document. A search dialog will open. Here you can search for the template you need by starting to write in the Search field.

*Templates Manager* has instant search, so it begins searching immediately. When you write more in the Search field, the hits will be more exact.

When you delete the search text, the search filter is removed and all the templates become visible again. In Internet Explorer, you can also click on the x in the Search field to delete the text.

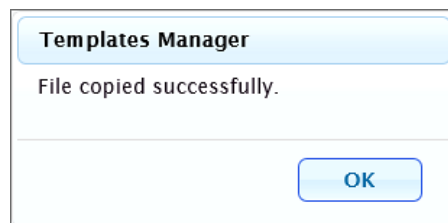
You can also browse among the templates. They are grouped by category and described in pop-up windows. When a category is expanded, all templates in that group are displayed. Icons show what kind of document the template is intended for.

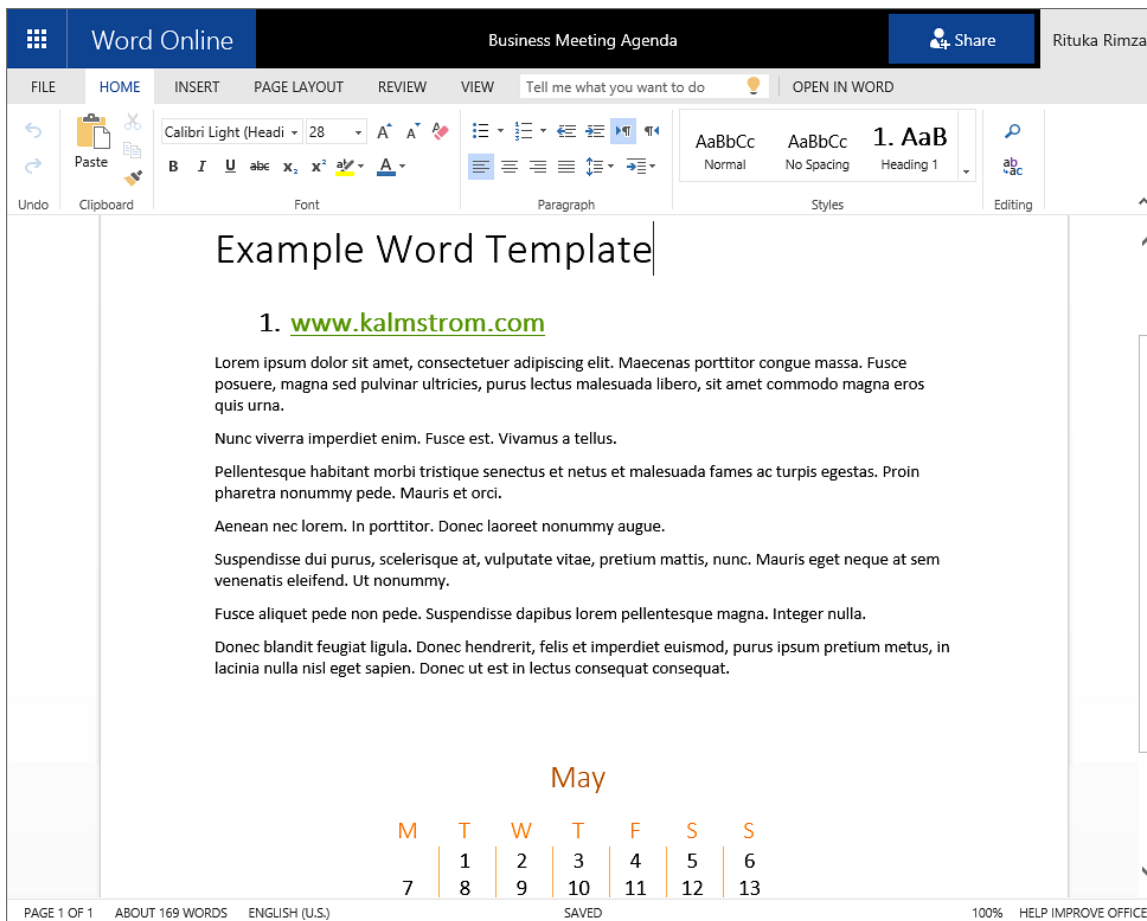
Hover the mouse over a template to see its description.



### 8.2 USE TEMPLATE

When you click on the template you wish to use, it will be copied to the document library where you clicked on "New". The copy will open automatically, so that you can start working with the document. It will have the correct formatting, metadata and everything else that is pre-defined in the template.





## 9 UPGRADE

To upgrade *Templates Manager*, replace the old **TemplatesManager.wsp** file with a new version of the file. Subscribers who do **not** use a Premium copy should download the new version from the kalmstrom.com Upgrade page. Premium Subscribers will get a message from kalmstrom.com when their setup file has been updated.

This is the upgrade process:

1. Deactivate the features *Templates Manager Publisher* and *Templates Manager User* from all sites where they are activated.
2. Deactivate the old *Templates Manager* .wsp file under Site settings > Solutions.
3. Delete the old *Templates Manager.wsp* file.
4. Upload the new *Templates Manager* .wsp file to the Solutions gallery.
5. Activate the new *Templates Manager.wsp* file.

When the .wsp file has been replaced and activated for the site collection, you need to re-activate the site feature(s) on each site where *Templates Manager* is used. A PowerShell script for this process can be provided on request.

## 10 REGISTRATION AND TRIAL INFO

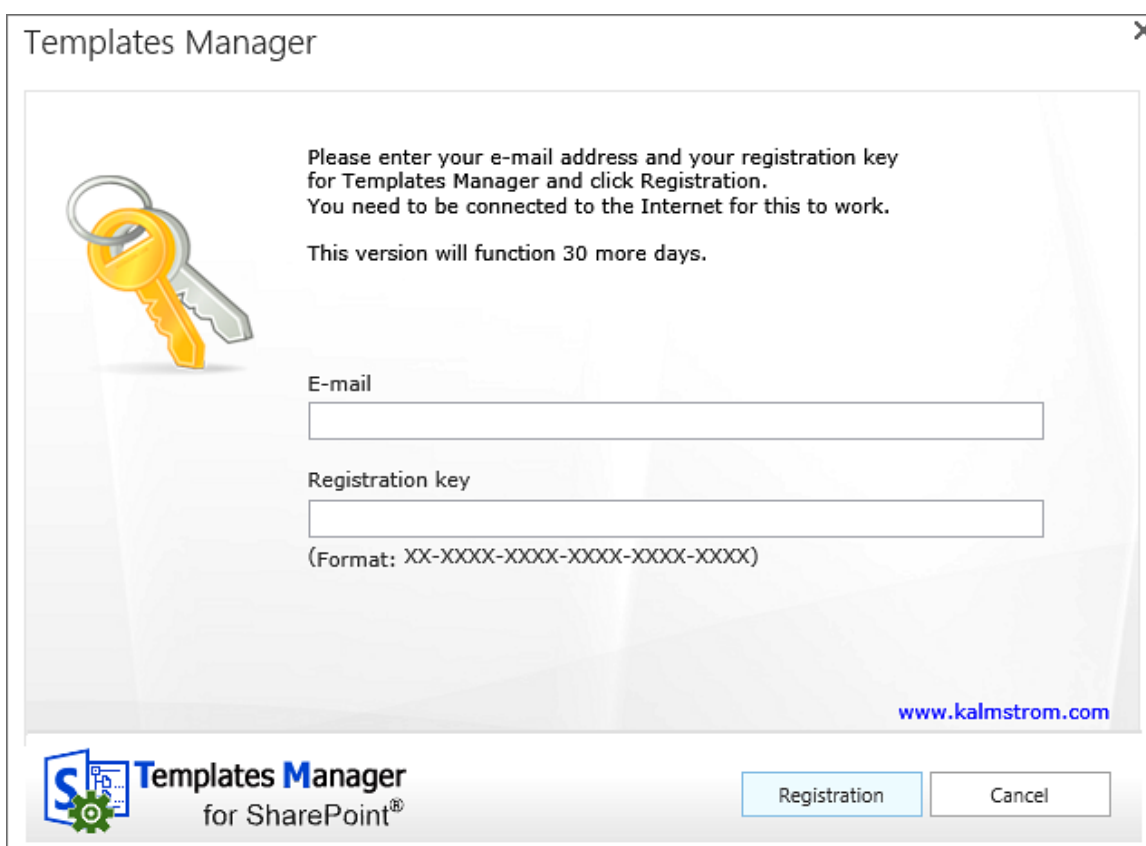
You may evaluate *Templates Manager* without cost and with full functionality for 30 days.

If you want to continue using the solution after the trial period, you must subscribe to the solution. We supply a Premium version, which does not require registration, but organizations who select the Minimum or Medium Subscription must register their installations of *Templates Manager*.

Minimum and Medium Subscribers will be given a registration key which allows the organization to continue using *Templates Manager* for the duration of the subscription.

To register, open the Administration page and press the License button to open the Registration dialog. Enter an e-mail address with your company/organization domain and the registration key you have received from kalmstrom.com. Then click on Registration.

License



Templates Manager

Please enter your e-mail address and your registration key for Templates Manager and click Registration. You need to be connected to the Internet for this to work.


This version will function 30 more days.

E-mail

Registration key

(Format: XX-XXXX-XXXX-XXXX-XXXX-XXXX)

[www.kalmstrom.com](http://www.kalmstrom.com)

 **Templates Manager**  
for SharePoint®

Registration Cancel

The registration must be done once in every site collection where *Templates Manager* is used.

The registration key will continue to work as long as the company/organization is a kalmstrom.com Subscriber.

*Templates Manager* will automatically verify that your registration key is still valid every 30 days. No private information will be collected. There will be a count-down during 30 days and then an automatic renewal for another 30 days and so on, as long as the company/organization has a valid subscription. Should the subscription be cancelled, there will be no renewal.

---

## 11 SUBSCRIPTION

*Templates Manager* is licensed with a subscription. There are three subscription levels, Minimum, Medium and Premium. Support, upgrades and an unlimited number of users within the subscribing organization are included in all levels. Refer to the [Templates Manager Subscription page](#).

## 12 CONTACT

If you have any kind of problem or questions about *Templates Manager*, there are several ways of contacting us:

E-mail	support@kalmstrom.com – Technical issues
	sales@kalmstrom.com – Subscription and general issues
	finance@kalmstrom.com – Invoices, payments
Telephone	+46 739 206 106 Within USA: (800) 518-4155
Online chat	<a href="http://www.kalmstrom.com">http://www.kalmstrom.com</a>

## 13 DEACTIVATION AND REMOVAL

Should *Templates Manager* not be used anymore, there are two ways to remove it.

- **Deactivate** the features *Templates Manager Publisher* and *Templates Manager User*: Site Settings >Manage site features. This removes the functionality from the site, but as long as the solution is available in the site collection it may be activated again.
- **Remove** the *Templates Manager* WSP file from the root file of the site collection: Site Settings >Solutions. This removes *Templates Manager* from all sites in the site collection, and the solution can no longer be used or activated.

## 14 MORE SHAREPOINT TIPS

You surely have noticed that *Templates Manager* uses what is best in SharePoint, and that the *Templates Manager* library and pages may be handled just like other SharePoint libraries and pages. For tips on SharePoint usage in general, please refer to the [Tips section of the kalmstrom.com website](#).