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Easy Information Management

E:M

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What is EIM?

The **Easy Information Management** (further referred to as **EIM**) is a product of TECH-ARROW, providing several SharePoint templates. EIM consists of a web portal and a web-based service, which allow the customer to manage, deploy and activate his templates.

The EIM is complementary service for Office 365 customers. They can add templates pre-made for EIM sites, libraries and content types to their subscription. The EIM is providing easy UI portal from which the customer can easily deploy template to a SharePoint site.

The officeGATE integration into EIM can help a lot with working with SharePoint in Microsoft Outlook. The frequently used SharePoint sites and libraries can be made accessible directly from Outlook.

Overview

In this section we will answer some of the most common questions that users, template re-sellers and template designers may have.

How to log in?

- During the subscription activation process, you will be asked to log in to your Microsoft account, OR

- After changing the user/logging out, the EIM will ask you to log in with your Microsoft account

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EASY INFORMATION MANAGEMENT

EASY INFORMATION MANAGEMENT CONFIGURATION

Welcome back!

Please, login with Office 365 account
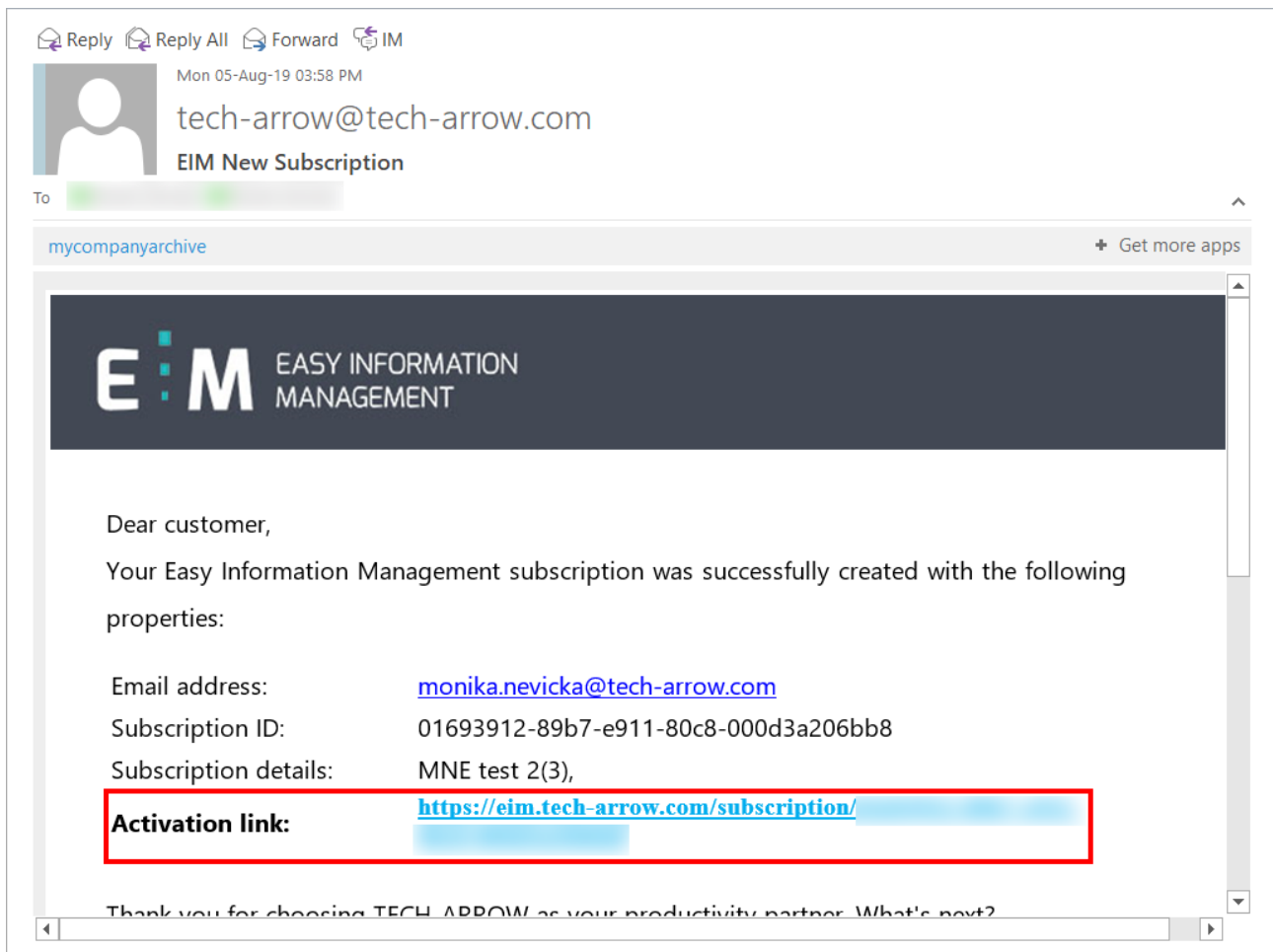
Login

Having trouble logging in?

Contact us

techarrow | info@tech-arrow.com | Legal Disclosure | Terms of use
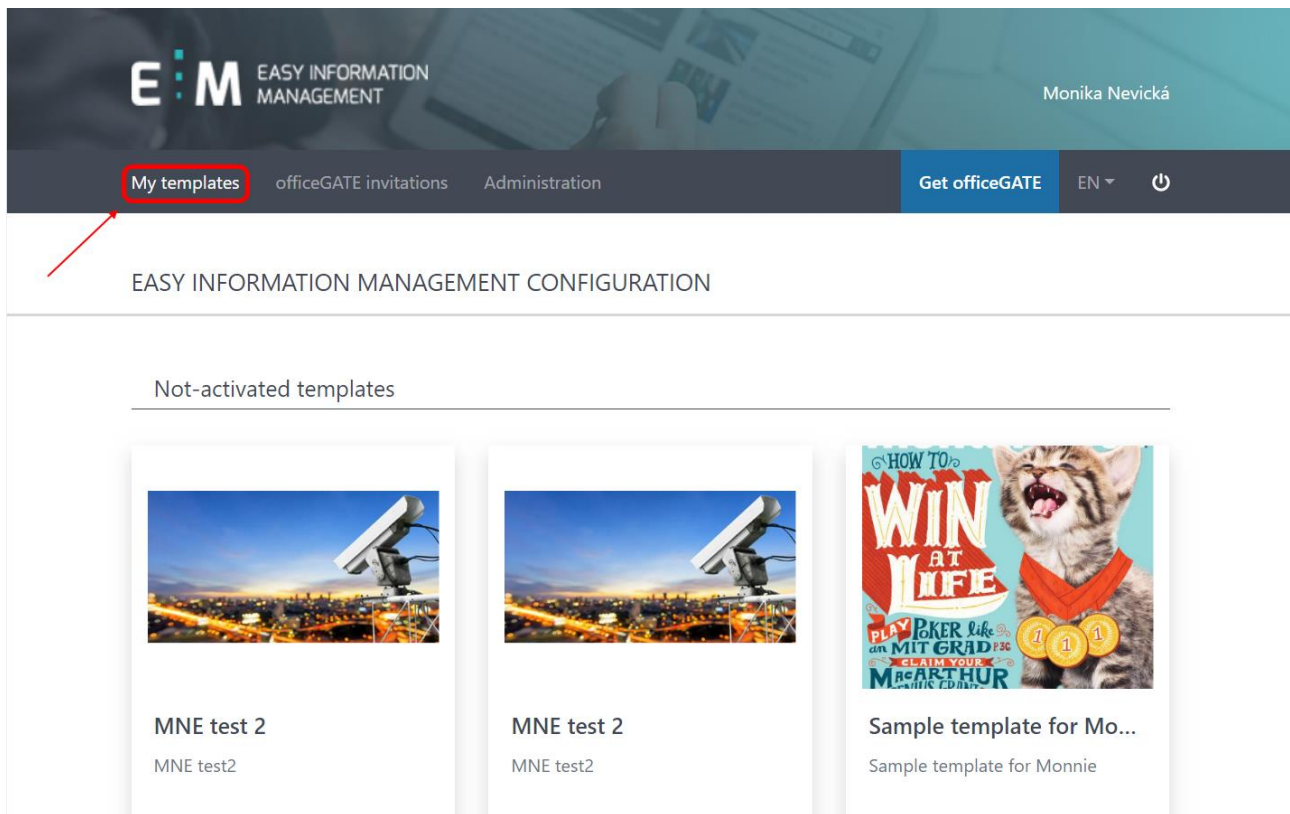
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How to activate a subscription?

- By redirecting to the **Activation URL** that gets displayed after the subscription has been successfully generated (more info here), OR

- By clicking on the **Activation link** received via email

Screenshot: Activation link received via email

Where can I view My templates?

Click on the **My templates** button in the upper left corner. On this page, all your not-activated and activated templates will be displayed.

How to deploy a template - what permissions are needed?

The template deployment process is described in [this](#) section of the documentation.

The necessary permissions are as follows:

User - can see his templates and the officeGATE page

Administrator - can see his templates, officeGATE page, Administrator page - he can fetch and deploy templates

Template administrator - can see his templates, officeGATE page, Administrator page - he can fetch and edit templates, but can't create a subscription

Subscription administrator - can see his templates, officeGATE page, Administrator page - he can create subscriptions from existing templates, but can't edit, delete, nor add templates

How to deploy officeGATE?

officeGATE can be easily deployed by creating an **invitation group**, which will contain the email addresses of users that you would like to deploy officeGATE for, and then simply pressing the **Invite** button. The users will get an email containing the **download link for officeGATE** within few minutes and can install it with just a few clicks.
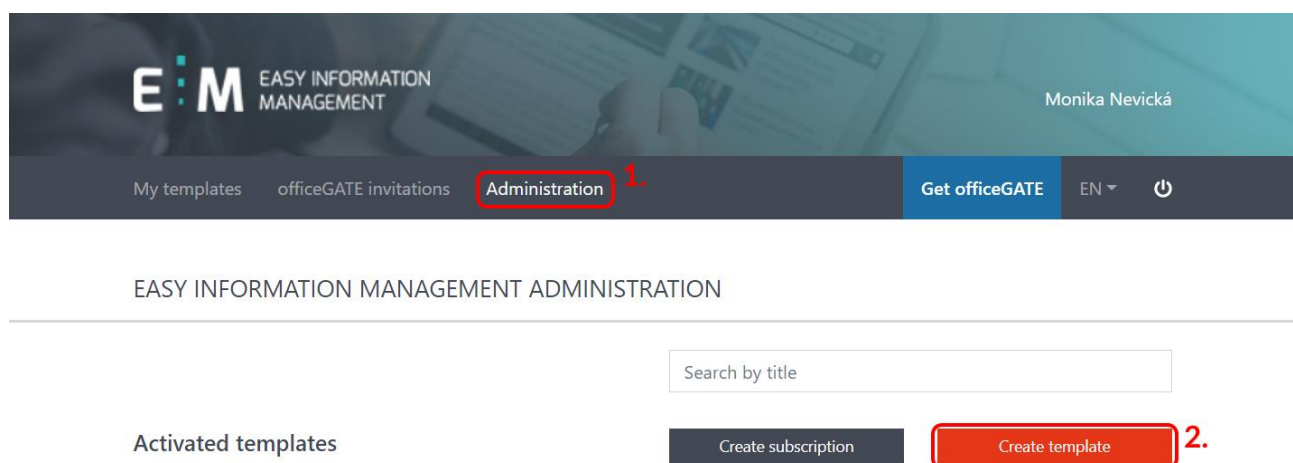
How to create a subscription?

A subscription can be created on the **Administration** page.
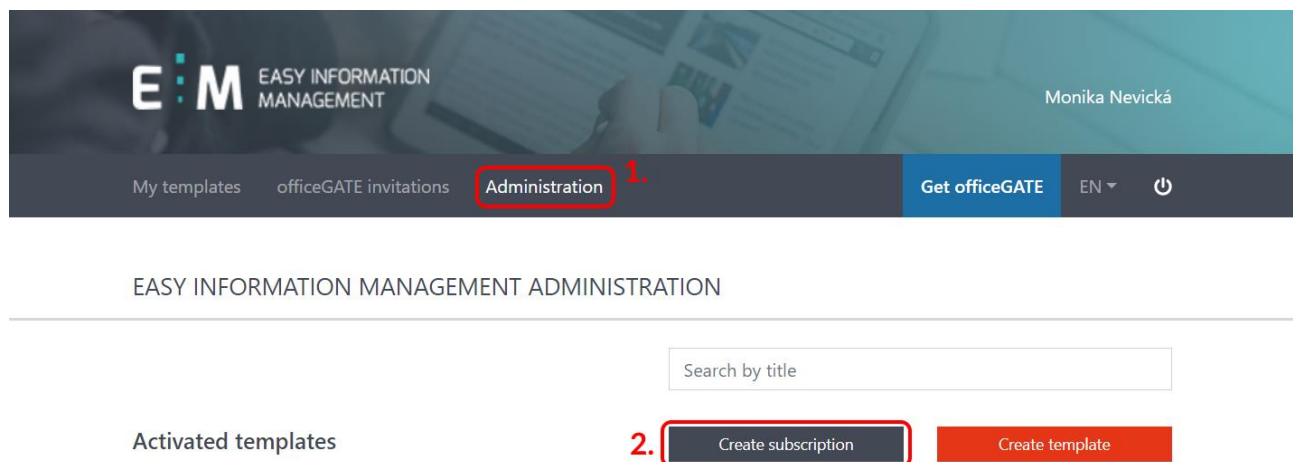
How can I design a new template?

A completely new template can be designed **directly in SharePoint** (more info about how to do it here), or you can edit an existing one directly in EIM (more info here).
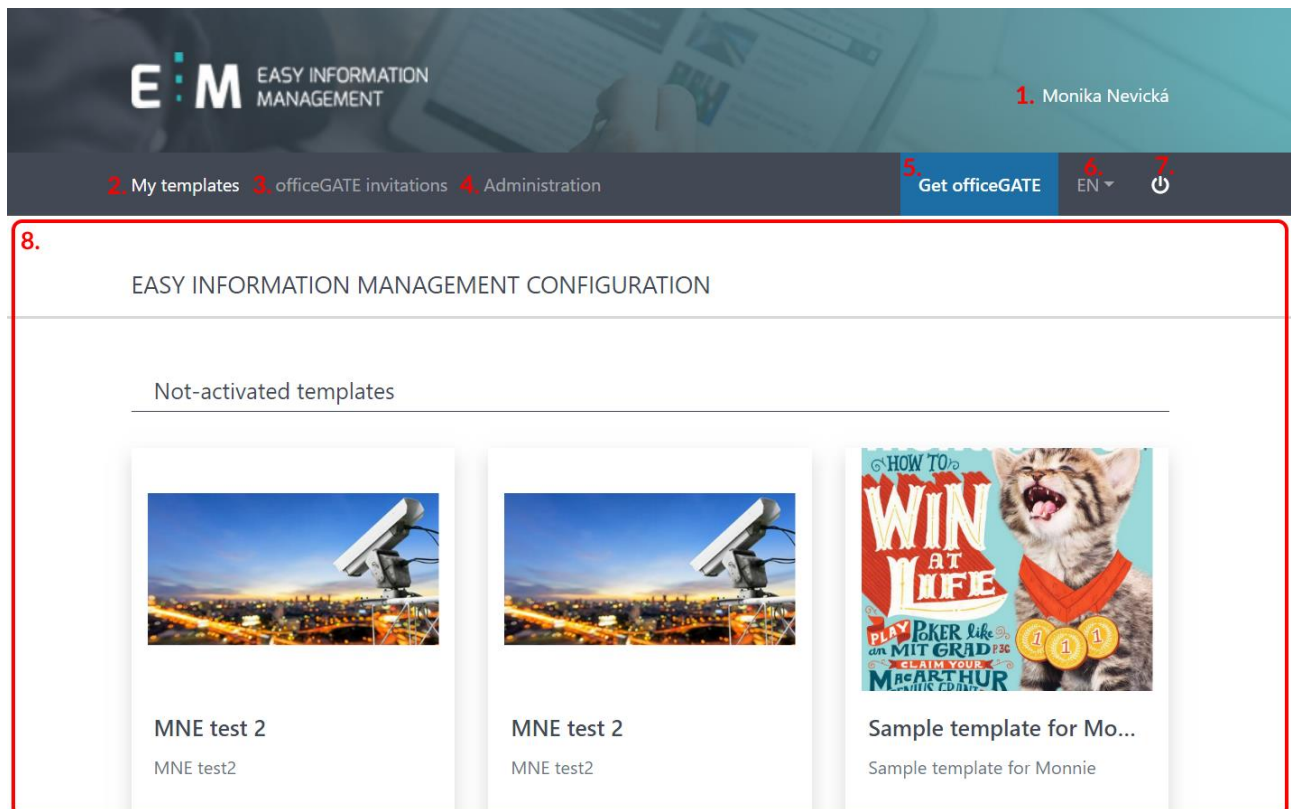

Screenshot: Where to edit template directly in EIM

EIM user interface

Welcome!

The EIM interface is divided into the following sections:

- **1. User** – the name of the logged in user is displayed here
- **2. My templates** – the list of activated and not-activated templates (more details [here](#))
- **3. officeGATE invitations** – the list of activated and deleted officeGATE invitations (more info [here](#))
- **4. Administration** – the list of activated and deleted templates (more info [here](#))
- **5. Get officeGATE** – creating officeGATE invitation (more info [here](#))
- **6. Language** – select between EN (English) and DE (German) language
- **7. Logout button**
- **8. EIM pane** – content of the selected section is displayed here

Administration page

On the **Administration** page, templates and subscriptions can be managed.
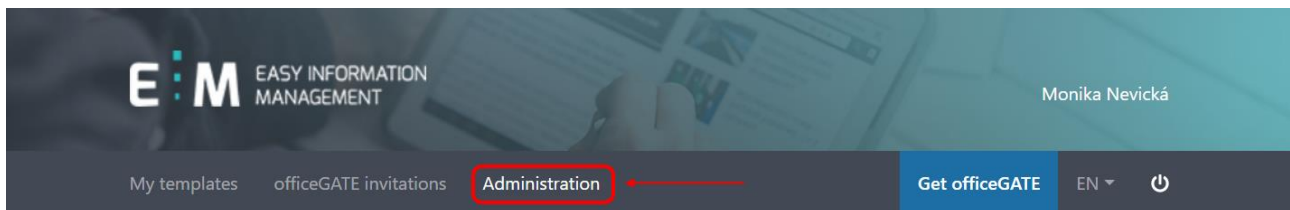
<u>Templates</u>

- can be created (more info [here](#))

- can be edited and deleted; possible to undo the deletion here, too

<u>Subscriptions</u>

- can be created (more info [here](#))

It is also possible to search for the desired template by its name, or sort the list of the templates by their activation date.

How to create a template

To create a template, click on the **Administration** button on the toolbar.
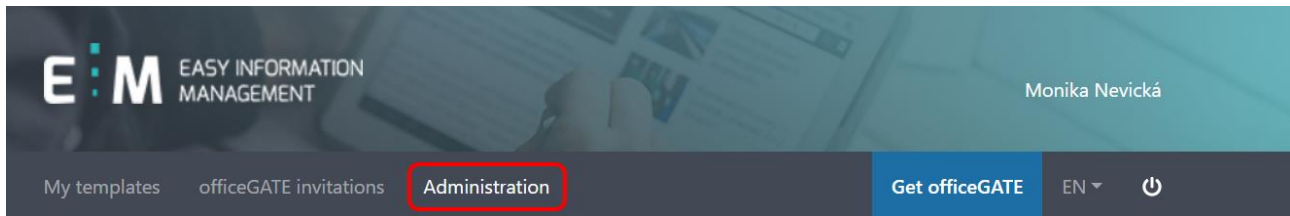
Now, click on the **Create template** button.
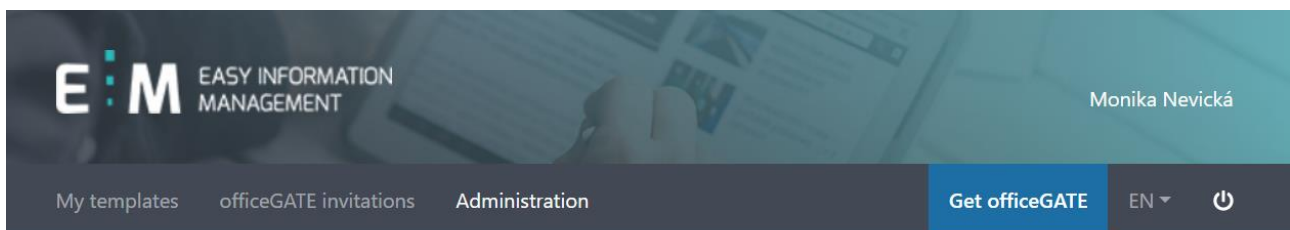
The **Edit template** page opens. Here you have to specify the following:

- **Code:** code of the template, a short name **without spaces**
- **Name:** name of the template
- **Description:** a short description of the template
- **Upload logo:** upload the desired logo for the template, the most suitable size is written under the upload field. The logo will be seen in the **My templates** list.
- **Summary:** longer, more complex description of the template, the languages

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Add template

Code

MStest ✔

Name

Microsoft testing template ✔

Description

Microsoft testing template for MNE ✔
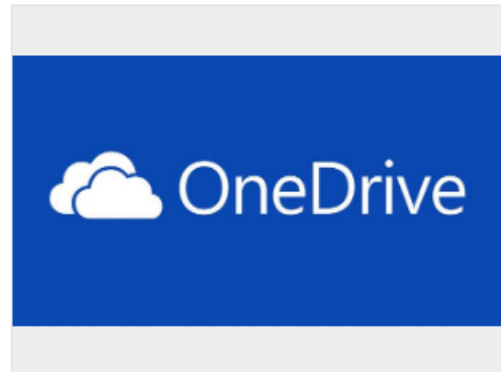
Note: Logo looks best in 285px ✏ 🗑
x 215px

Summary

Normal ↕	**B** *I* U̲ S̶	𝟗𝟗 ‹/›	H₁ H₂	½≡ ☰	X₂ X²
⇤ ⇥	≡	𝑇ₓ	🔗 🖼		

Microsoft testing template for documentation purposes

Template

Upload new template   OR   Fetch from SharePoint

Cancel   Save

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After specifying and filling all the points mentioned above, you have to add a template. The template is a ZIP package, which contains the list, library, style definitions and all necessary files required by the template. Template adding can be done by either way uploading a template (button **Upload new template**) or fetching a template from SharePoint (button **Fetch from SharePoint**).
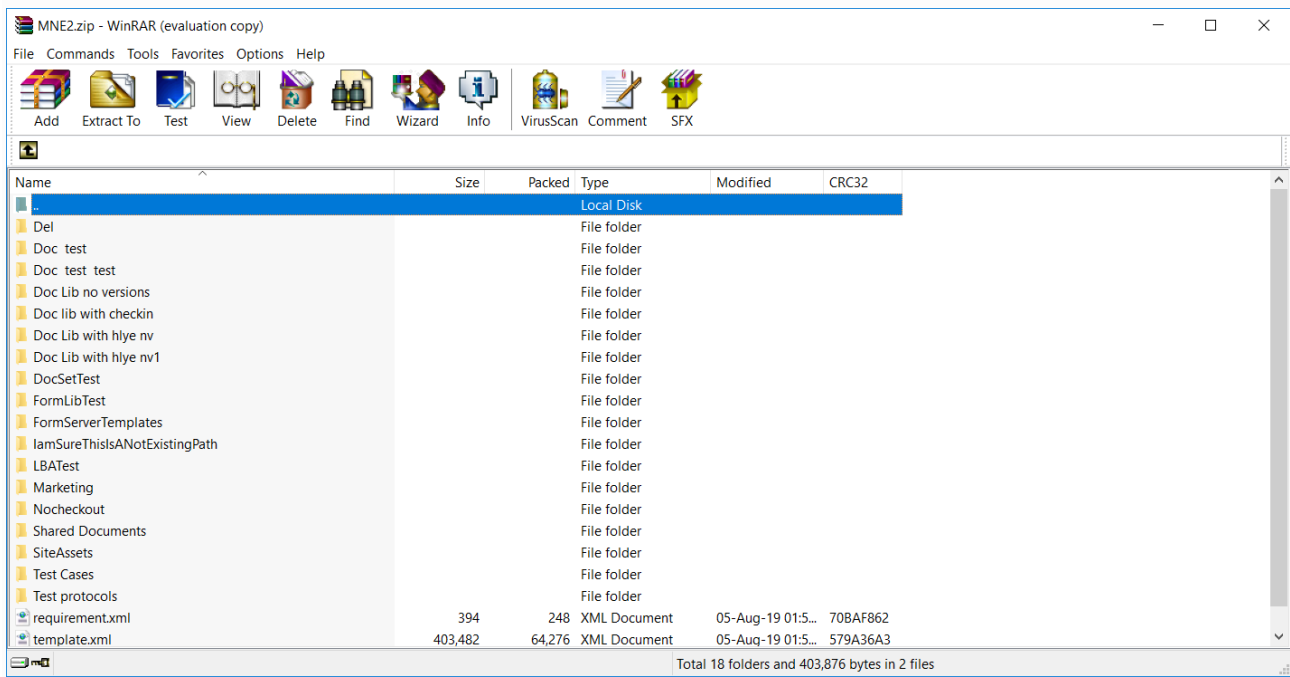
Screenshot: The template ZIP file
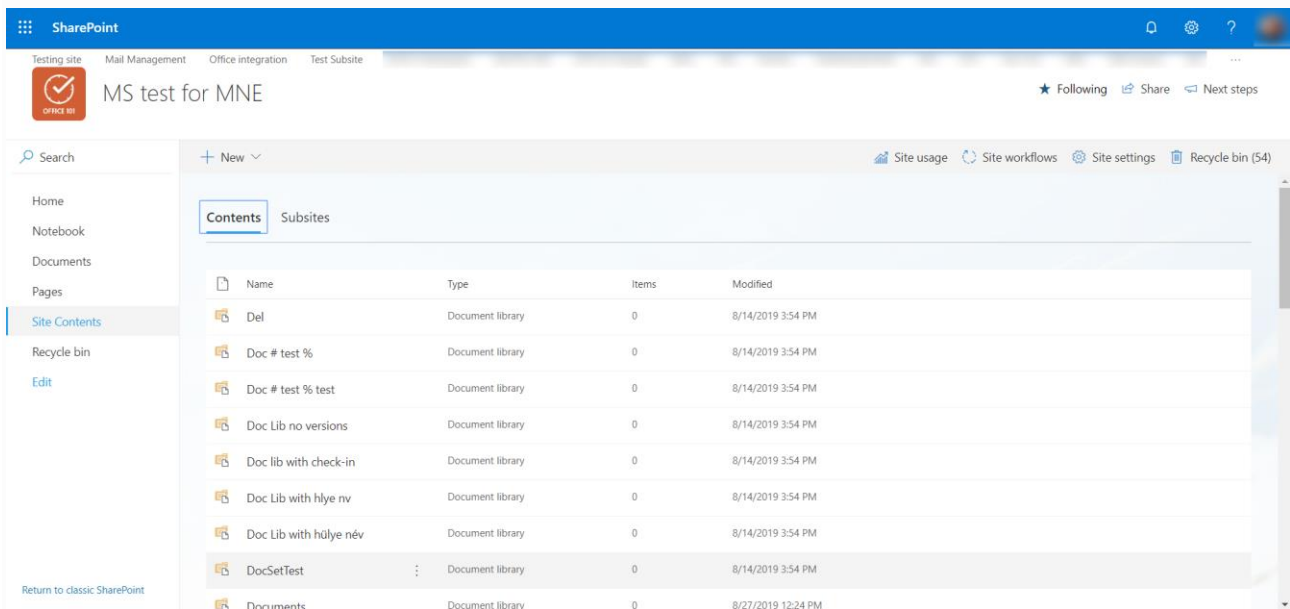
Screenshot: Deployed template

Upload new template

Use this option if you have the template to be used already saved. Simply click on the **Upload new template** button and select the desired template.

Fetch from SharePoint

In case you have already designed a template in SharePoint, you can create a template from it directly. During this process, EIM will download all necessary files and structures from the selected SharePoint site and will create a template definition from it.

To achieve this, click on the **Fetch from SharePoint** button. The **Fetch template** window will open. Here you have to specify the desired SharePoint site and the account you are using to log in to it. It is also possible to select the SharePoint site from the list of available sites, based on the account you are logged in with.

Note: To be able to fetch a template from SharePoint, you need to have site collection administration rights.

Fetch template from SharePoint

Office 365 account

monika.nevicka@tech-arrow.com

Password

••••••••••••

SharePoint URL

https://techarrow.sharepoint.com/sites/testing   Select

Back   Next

Screenshot: Specifying the SharePoint site manually

Screenshot: Picking the SharePoint site from the list of available sites

Click on **Next**. Here you will see the structure fetched from the site that will be included in the template. If you want to include not only structure, but also all data from the lists and libraries (including the folder structure), check the checkbox next to their name, or if you want to include the content of all lists and libraries, check the **Select All** checkbox.

Click on **Next**. Now you will have to wait a moment while EIM fetches the template. After the fetching is done, you can continue with the configuration (button **Use template**) or download the template for a later use (button **Download template**).

The downloaded template can be modified manually (for advanced users) and re-used for creating other templates in the future.
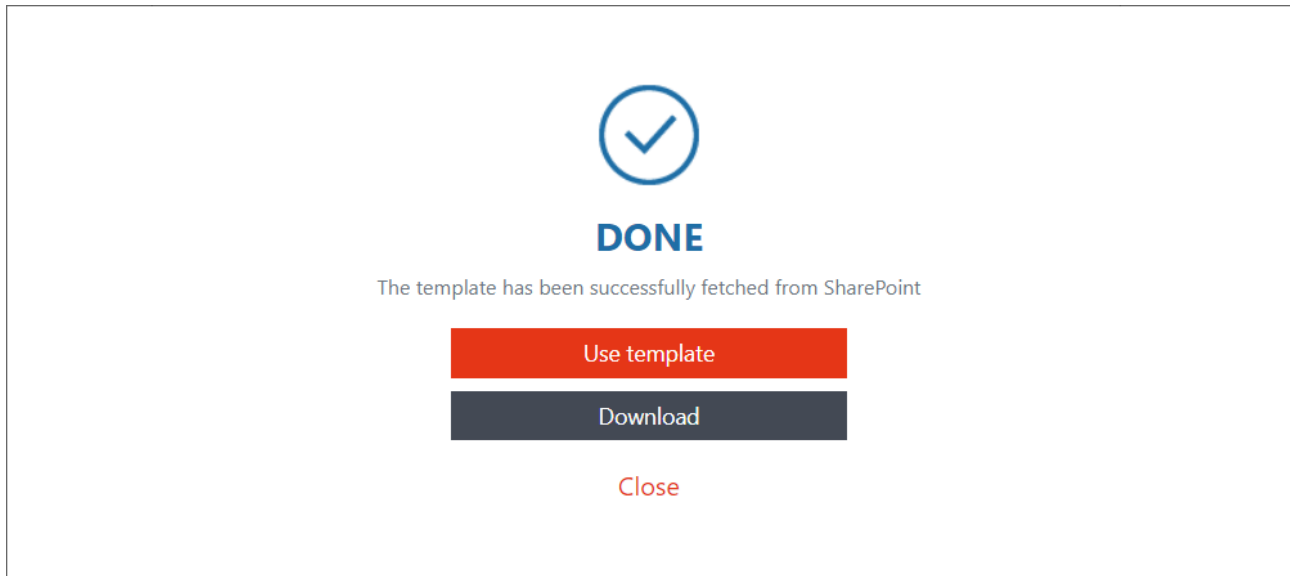
When you are finished with configuring your template, click on **Save**.

How to create a subscription

A **subscription** is a set amount of money that you pay regularly (most commonly every month or every year) to receive a product or service. As mentioned in the first section, **EIM is complementary service for Office 365 customers**, thanks to which they can add templates pre-made for EIM sites, libraries and content types to their subscription.

To create a subscription, click on the **Administration** button on the toolbar.
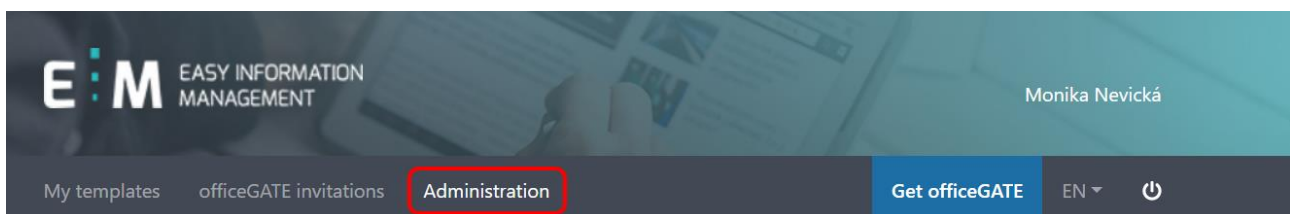
Now, click on the **Create subscription** button.

Enter the **email address of the customer** you are creating the subscription for. Select the templates (sites) you want to add to the subscription by checking their checkboxes on the left and specify **the number of activations** of each template.

Scroll down to the end of the list. Specify the number of **officeGATE licenses** to be associated with this subscription. If you would like to send the subcription activation link by email, check the **Send subscription link by email** checkbox and **Enter additional email addresses** of the people that should receive the subscription link via email - the customer, whose email address was already entered in the subscription creation form, will be automatically included in the recipient list (no need to enter his/her address again). Click on **Create**.

Note: The EIM integration with officeGATE is explained in this section.

CREATE SUBSCRIPTION

☐	Veterinárske služby (with data)	ARO-38	–	0	+
☐	Veterinárske služby (without data)	ARO-39	–	0	+
☐	Virtueller Einrichtungsberater	ARO-08	–	0	+
☐	Vonyarcvashegy	ARO-42	–	0	+
☐	Why SharePoint? SharePoint Benefits and Advantages	ARO-16	–	0	+
☐		JAD-03	–	0	+
☐	🗄 Deux Huit Huit	ARO-17	–	0	+

Number of officeGATE licenses   – 10 +

☑ **Send subscription link by email**   Email language: **EN** | DE

mne@tech.internal ✖ mne_ms@tech-arrow.com ✖ ✔

Create

Cancel

After the subscription has been successfully generated, a window with summary about it will appear. The subscription is activated by opening the activation link. If you check the **Send subscription link by email** option, the link is automatically sent by the system to the specified email addresses. Otherwise, you need to provide the link to customer directly.

CREATE SUBSCRIPTION ✕

✓

Subscription successfully generated

Activation URL

https://eim.tech-arrow.com/subscription/   📋

Summary
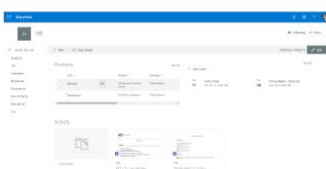
Customer:	monika.nevicka@tech-arrow.com
Templates:	ABAL HR Demo (with data) (1), Microsoft testing template (2)
officeGATE licenses:	10
Sent to:	monika.nevicka@tech-arrow.com,
	mne@tech.internal,
	mne_ms@tech-arrow.com

Close

After the subscription has been successfully activated, the templates added to the subscription will appear in the **My templates** tab.

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My templates   officeGATE invitations   Administration   Get officeGATE   EN ▾   ⏻

EASY INFORMATION MANAGEMENT CONFIGURATION

Not-activated templates

ABAL HR Demo (with data)

COntains sample data

Activate

Show details

Microsoft testing template

Microsoft testing template for MNE

Activate

Show details

Microsoft testing template

Microsoft testing template for MNE

Activate

Show details

How to activate a template

To activate a template, click on the **My templates** button on the toolbar. Here, all templates (activated and not-activated) of your activated subscription are listed.

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E:M EASY INFORMATION MANAGEMENT

Monika Nevická

My templates   officeGATE invitations   Administration   Get officeGATE   EN ▾   ⏻

EASY INFORMATION MANAGEMENT CONFIGURATION

Not-activated templates

MNE test 2

MNE test2

Activate

Show details

MNE test 2

MNE test2

Activate

Show details

Sample template for Mo...

Sample template for Monnie

Activate

Show details

Microsoft Office Specialis...

Get hired, demonstrate clear
business impact, and advance your
skills. With the Microsoft Office...

Activate

Show details

Project Management Te...

Project Management Template

Activate

Show details

Veterinárske služby (with...

Venujeme sa prevencii, diagnostike
a liečbe ochorení, ale aj urgentnej
veterinárnej medicíne. Veterinárn...

Activate

Show details

Choose the not-activated template you would like to activate. Click on its **Activate** button.

On the Template tab, it is possible to view a quick overview of the template. It is also possible to view the folder structure of the template by clicking on **Show contents** button. Click **Next**.

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EASY INFORMATION MANAGEMENT CONFIGURATION

1. Template

The following template will be deployed during the activation wizard.

Name

Microsoft testing template

Show content

Code

MStest

Description

Microsoft testing template for MNE

Back   Next

Screenshot: Overview of the template
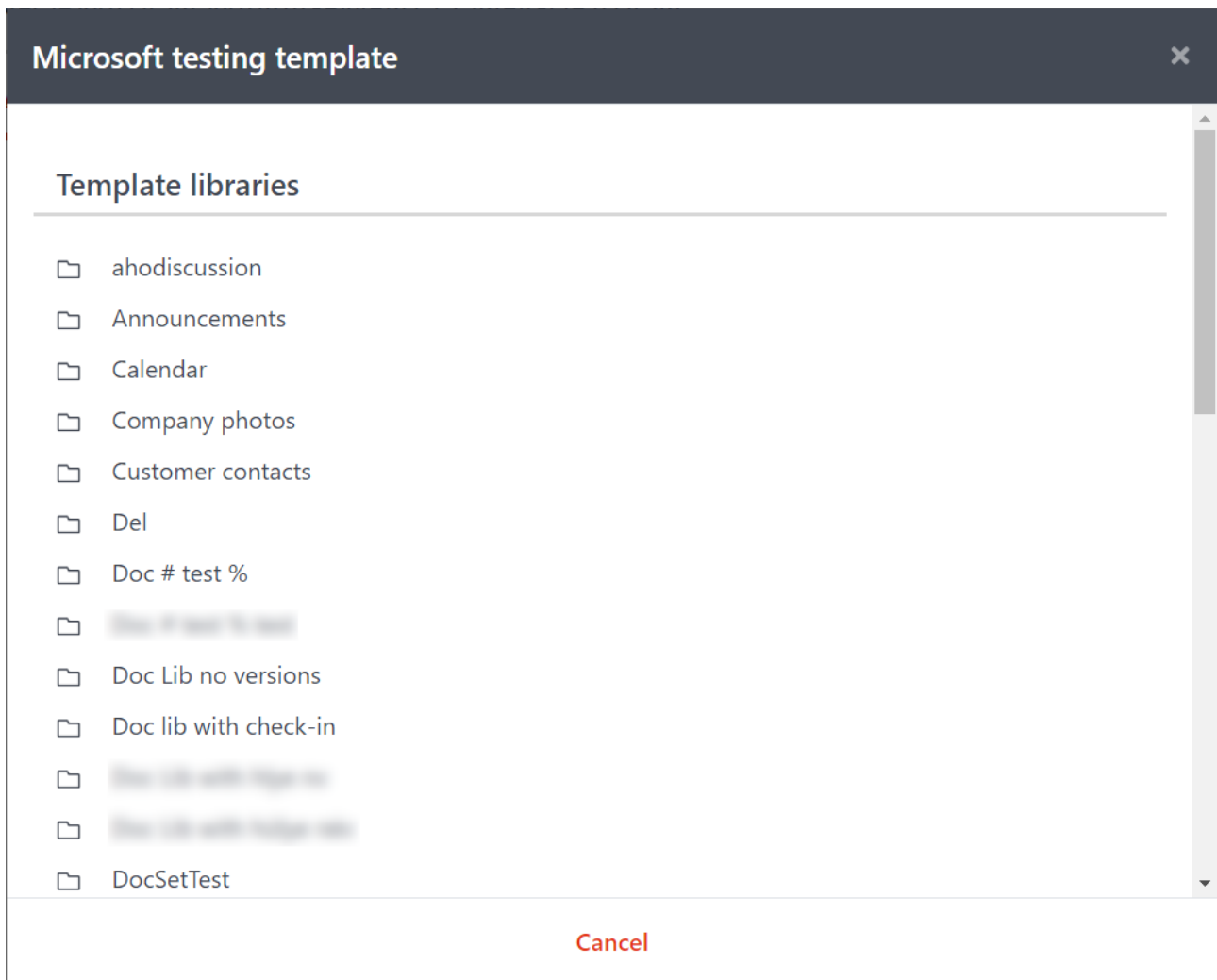
Screenshot: Folder structure of the template

On the **Enter Credentials** tab, you will be able to specify the Office 365 site collection administrator credentials and your parent SharePoint site collection URL. It is also possible to select the SharePoint site from the list of available sites, based on the account you are logged in with. Click **Next**.

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EASY INFORMATION MANAGEMENT CONFIGURATION

2. Enter Credentials

Please, enter your Office 365 site collection administrator credentials and your SharePoint site collection URL. The exact target site for the deployment will be selected later in the wizard.

Office 365 account

monika.nevicka@tech-arrow.com

Password

••••••••••••

SharePoint URL

https://techarrow.sharepoint.com/sites/1   Select

Back   Next

Screenshot: Specifying the SharePoint URL manually

SHAREPOINT URL   ✕

Search by title

Title	URL
AAN	https://techarrow.sharepoint.com
albacross	https://techarrow.sharepoint.com
Community	https://techarrow.sharepoint.com
contentACCESS mobile	https://techarrow.sharepoint.com
DKLazuretest	https://techarrow.sharepoint.com
edgewaveadmin	https://techarrow.sharepoint.com
LBATestGroup	https://techarrow.sharepoint.com
marketing	https://techarrow.sharepoint.com
MASATEST	https://techarrow.sharepoint.com

Cancel

Screenshot: Picking the SharePoint site from the list of available sites

From the list, select the **target site**, where the template will be deployed. Click **Next**.

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EASY INFORMATION MANAGEMENT CONFIGURATION

TEMPLATE > ENTER CREDENTIALS > **SELECT TARGET SITE** > TEMPLATE CUSTOMIZATION > SET ACCESS RIGHTS

3. Select Target Site

Please, select the target site for the template deployment.
During the template deployment process, a new subsite will be
created under the selected site.

Testing site > **MNE 2**

No subsites found

Back   Next

Here is possible to customize your template:

- specify the title of the subsite it will be deployed to
- upload the logo for the site, which will appear in SharePoint
- complete the URL of the subsite – when filling in the name, it will be filled in automatically together. It is possible to rewrite it and set a URL that will differ from the subsite title.
- choose one of the available SharePoint color themes from the dropdown list
- write a short description

Click **Next**.

4. Template Customization

Customize the template for your needs! All the other options can be changed later in SharePoint.

Title

MS test for MNE ✓

Upload logo

office-101-badge.png

Note: Logo looks best in 180px x 64px

Url

...nt.com/sites/testing/mne-2/   ms-test-for-mne ✓

Theme

Breeze ▾

Description

MS testing subscription

Back   Next

Select if the access rights will be **Inherited** from the parent site or if you want to set **Custom** ones later in SharePoint. Click **Finish**. Now the system will start deploying the template – it may take several minutes.

EASY INFORMATION MANAGEMENT CONFIGURATION

TEMPLATE > ENTER CREDENTIALS > SELECT TARGET SITE > TEMPLATE CUSTOMIZATION > **SET ACCESS RIGHTS**

5. Set Access Rights

Specify who will be able to access your newly deployed site.
The permissions can be changed later in SharePoint.

○ **Inherited**

○ **Custom**

Back   **Finish**

Screenshot: Setting access rights

EASY INFORMATION MANAGEMENT CONFIGURATION

working on it...

Deploying Fields (ListAndStandardFields)   **33%**

This might take several minutes

Screenshot: System deploying the template

After the template has been deployed, you will get two options:

- **Go to the site** – this will redirect you directly to the SharePoint site with your newly deployed template
- **Manage permission** – this will redirect you to the settings part of the SharePoint site, where you can manage its permissions

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EASY INFORMATION MANAGEMENT CONFIGURATION

✓

DONE

The configuration has been successfully deployed

Go to site

Manage permission

Note: You will not be redirected to SharePoint to change permission automatically if
popup is blocked. Click on "Manage permission" to change permission

My templates

To view the list of activated and not-activated templates available for the logged on user, click on **My
templates**.

| My templates | officeGATE invitations | Administration | | Get officeGATE | EN ▾ | ⏻ |

EASY INFORMATION MANAGEMENT CONFIGURATION

Not-activated templates

MNE test 2
MNE test2

Activate

Show details

MNE test 2
MNE test2

Activate

Show details

Sample template for Mo...
Sample template for Monnie

Activate

Show details

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Not-activated templates

Not-activated templates are templates that have been created and configured, but not yet deployed. From this page, it is possible to Activate the template or view its details.

To view the details of the template, click on the **Show details** button.

The **Template details** pop-up window opens. Here you can view the description of the template (**Summary** tab) or the structure and details of subsites and folders (**Content** tab).

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TEMPLATE DETAIL ✕

Microsoft testing template
MStest

Microsoft testing template for MNE

Summary Content

Microsoft testing template for documentation purposes

ACTIVATE

Cancel

Screenshot: Summary tab

Screenshot: Content tab

Screenshot: Folder details

Activated templates
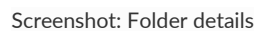
Activated templates are templates that have been already deployed for a SharePoint site. From this page, it is possible to:

- **Go to the site** – this will redirect you directly to the SharePoint site where your template is deployed
- **Manage permission** – this will redirect you to the settings part of the SharePoint site, where you can manage its permissions

# Integration with officeGATE

EIM provides **SharePoint templates** that can be deployed to SharePoint sites. These sites and contents of the sites can be managed in officeGATE. **officeGATE is an MS Outlook add-in** connecting your email client with your local file-system and with your SharePoint Online, contentACCESS and many other providers.

Click on **officeGATE invitations** button on the toolbar.
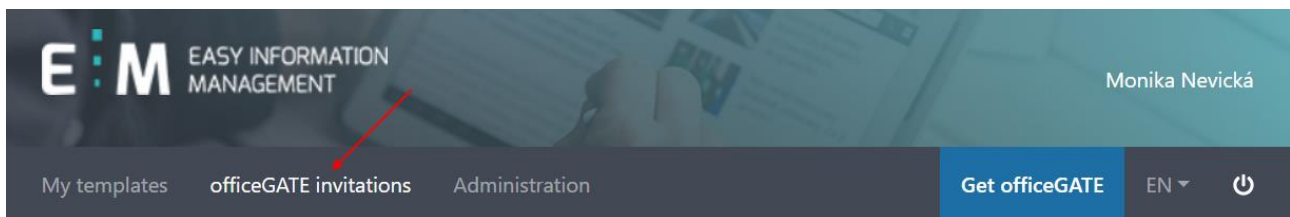
On this page, you are able to see your **Activated invitations** and **Deleted invitations** with their respective details. It is also possible to **Edit**, **Delete** them and **Undo deletion** from here. You can search for specific ones by entering the desired word or phrase into the **Search box** on the right. If you want to create an officeGATE invitation, you need to create an invitation group first. **Invitation groups** are used to organize users into multiple groups based on their roles in the company and which data/systems they should have access to. The SharePoint sites (where the templates are deployed) will be associated with the invitation groups. The list of associated sites may change later for a group.

An **Invitation group** can be created by clicking on the **Create invitation group** button. This button has the same function as the **Get officeGATE** button.

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My templates	officeGATE invitations	Administration		Get officeGATE	EN ▾	⏻

OFFICEGATE INVITATIONS

Search by name

Create invitation group

Activated invitations

Name ◇	My templates	Email addresses	Activation date ◇		
MNE EIM test		monika.nevicka@gmail.com	13.08.2019	✏	🗑

Deleted invitations

Name ◇	My templates	Email addresses	Deleted date ◇

First, **name your invitation group**. This may help a lot with administration. Then, **select the sites** you want to have pre-configured in My SharePoint sites in officeGATE. **Only activated/deployed templates** will appear in this list. Enter the **email addresses** of the people you want to invite to officeGATE and write a **Message** that will be included in the invitation mail for them. Click on **Invite**.

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GET OFFICEGATE

officeGATE invitation allows you to quickly deploy officeGATE for your users with a pre-configured list of SharePoint sites. The invited users and the assigned SharePoint sites can be changed any time.

Invitation group name

MS testing	✓

Select sites

	Site name	Template
☐	deww	
☐	MNE 2	MNE test 2
☑	MS test for MNE	Microsoft testing template

Email addresses   Email language: **EN** | DE

🔴 monika.nevicka@tech-arrow.com ✖	✓

Message

Hello!
Please, accept this invitation and try out officeGATE - it will ease your daily Outlook work and save you a lot of time.
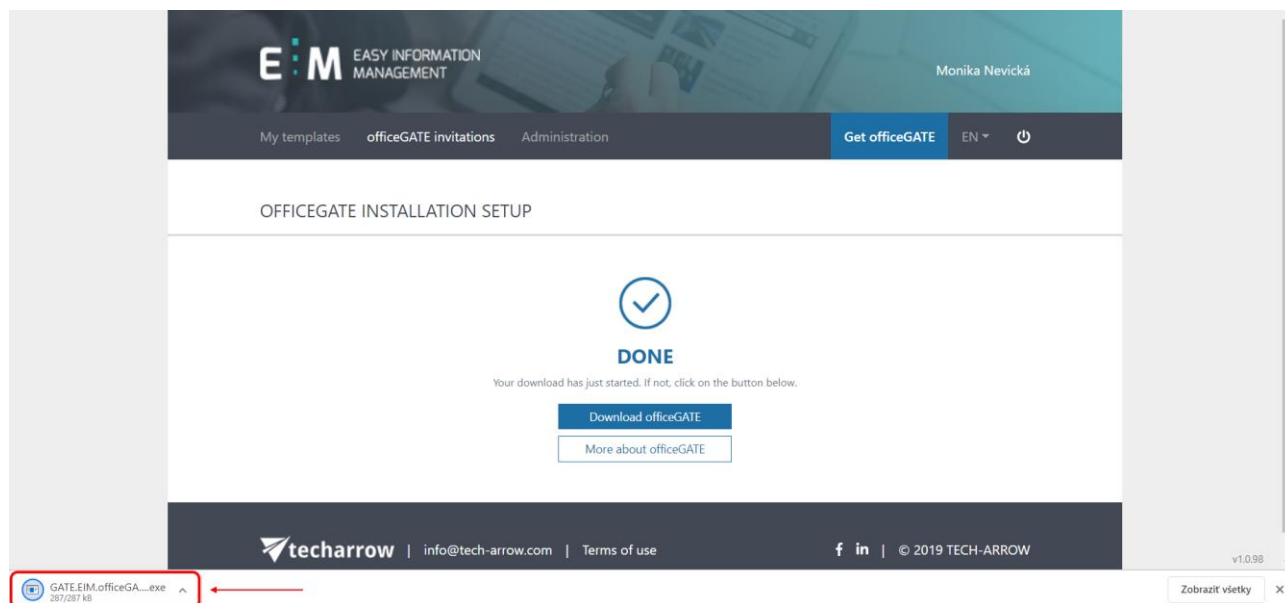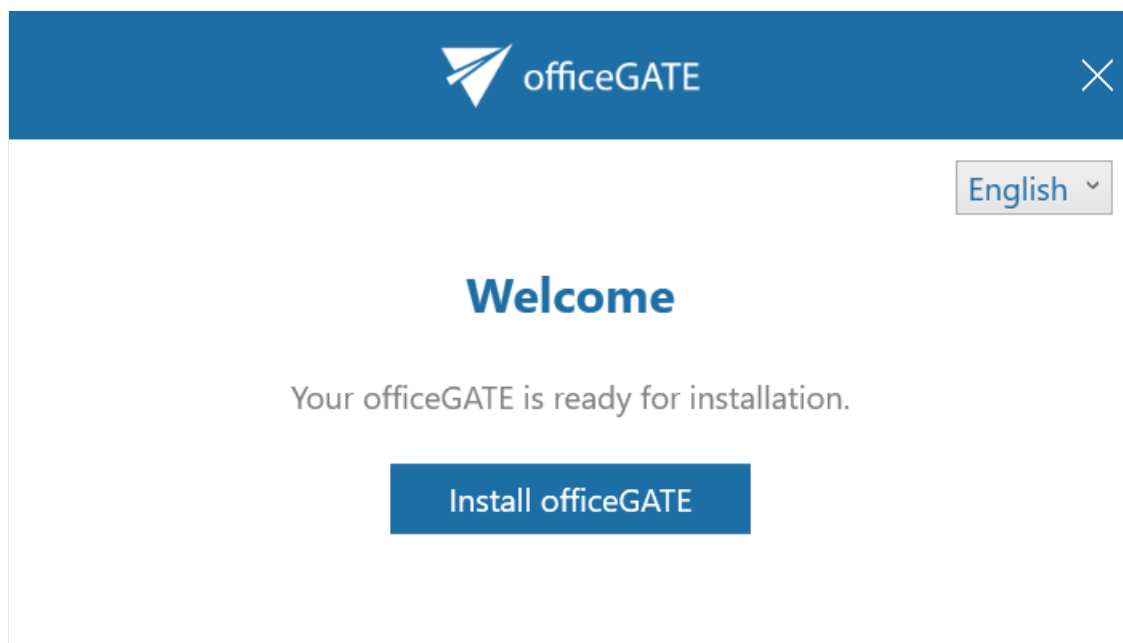
Invite

Invited people should receive the invitation email in a few minutes. Each user should click on the download link provided there. The download of the officeGATE setup should start automatically. If

![techarrow logo]

not, click on the **Download officeGATE** button. If you want to view more information about officeGATE, click on the **More about officeGATE** button.
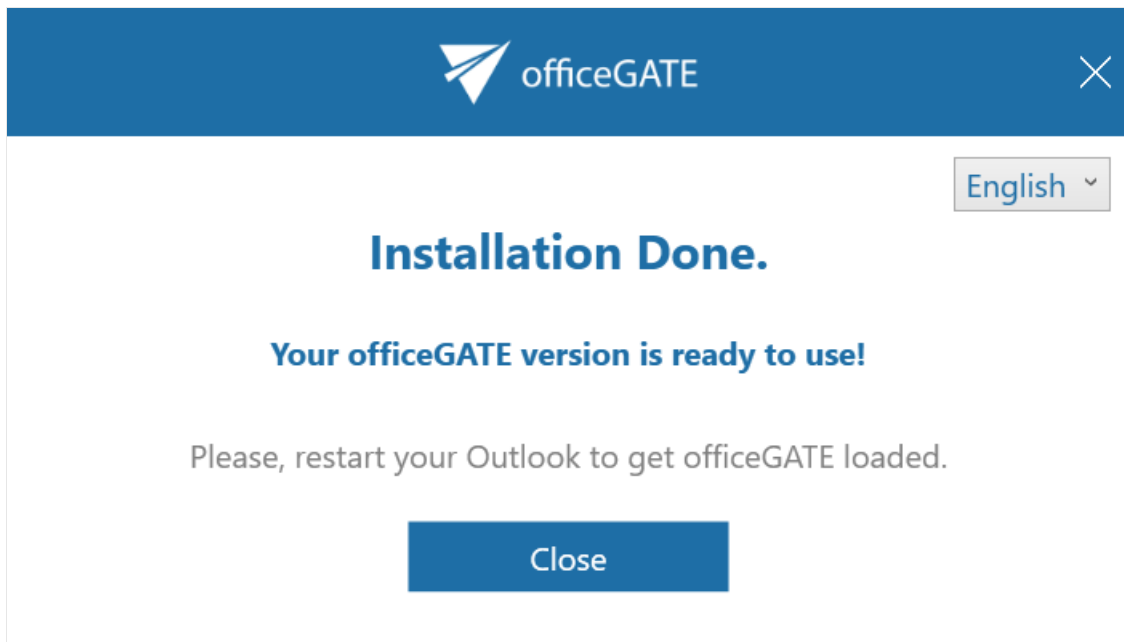

The welcome window will open. Choose the language (English or German) and click on **Install officeGATE**.

After a short while, the installation will be done. The installation wizard will ask you to restart your Outlook in order to complete the installation.

The sites (templates), which you chose for the invitation group from the list earlier during the invitation process, will be displayed under My SharePoint sites. Log in with the applicable user credentials and enjoy the amazing features of officeGATE!