

Implementing Templafy



Divide and conquer

Ensuring compliance to reduce risk of brand devaluation is made simple with Templafy and to ensure a swift implementation, we divide the implementation into 2 parallel work streams

1 **Technical prerequisites**

Can you deploy Templafy enterprise wide?

- Office 2016 version 16.0.11629 (or later) or Microsoft 365
- Net 4.7.2 or later
- WebView2 runtime (Evergreen Bootstrapper) - check

2 **Authentication and Access**

Set up **SSO** and access Templafy

The first step is to configure this!

Templafy supports a range of SSO and Identity Providers. Read below for further info on which SSO is best for you.

[See the list of Supported SSOs](#)

3 **Deployment of Templafy**

Set up **SSO** and access Templafy

.msi repackaged, tested and ready for deployment

Web add ins needed for Office online/Mac?
Email Signature Server configured?

Templafy solution is tested from a technical perspective.

[How to Deploy Templafy Desktop](#)

1 **Scoping/Preparation**

What content do you need?

Does this content exist already? Or need to be created?

2 **Build your library in Templafy**

Upload – add relevant content to Templafy

Do you have the right content in the right place?

[See Library Management](#)

Organize – Give structure to your content

Will your employees know where to find what they need? And are any department specific folders filtered if needed?

[See how to filter folders](#)
[See how to tag](#)

3 **UAT/Test your content**

How does the content feel for an end user? Does that slide look right when inserted into a presentation?

[Watch how to use Templafy Library](#)

4 **LAUNCH TEMPLAFY**

Educate

Do your employees know about Templafy? Will they know how to use it?

[End User Training for Templafy](#)

Roll out

With IT, deploy Templafy to your users