



## Templates – Avoid the Pitfalls

- ▾ Leif Lodahl



## Short bio

- ▼ I have been contributing to the project in more than a decade as **translator** in Denmark and as advocate for open source and open standards. Since 2008 I have been **the lead** of the Danish localization project.
- ▼ Professionally I'm working as **project manager** and consultant in **Magenta** in Copenhagen, Denmark, working with, among many other things, implementation of LibreOffice in public and private sector.
- ▼ I'm both **teaching** professionals and end users as well as **developing templates** for business use.





- ▼ LibreOffice has a great system to create and maintain templates
  - ▼ It can be tricky to figure out
- ▼ Templates are the base for users to create great documents.
- ▼ This lecture is about avoiding some pitfalls.



# First step: Make solid templates



- ▼ I have written about how to develop good and solid templates here:

<http://lodahl.blogspot.dk/2014/12/making-good-and-solid-templates.html>



# Next step (today's agenda)



- ▼ Deploy templates
- ▼ Name the templates
- ▼ Inherit from templates
- ▼ Other advise



# Deploy templates



# Deploy templates



- ▼ Methods for deployment:
  - ▼ **Import** templates manually in LibreOffice
  - ▼ Store templates in the **users** template directory
  - ▼ Store templates in the **program** directory
  - ▼ Deploy templates via an **extension**
  - ▼ Register a **personal** folder as template directory
  - ▼ Register a **file share** as template directory



# Choose the right method



- ▼ Each method has pros and cons
- ▼ Choose the right method





# Import templates in LibreOffice



- ▼ Importing templates manually is in most cases not suitable
  - ▼ as this requires
    - ▼ Manual work.
    - ▼ End users to do it.



# The users template directory



- ▼ You can deploy templates simply by copying the ott-files into the user directory **/user/template/...**
- ▼ This path is also the default place to put imported template files.
- ▼ This requires the system administrator to deploy and maintain files in the user directory



# The program directory



- ▼ You can store the templates files directly into the program path **/share/template/common/...**
  - ▼ this is not the recommended way.



# Templates as an extension



- ▼ It's rather easy to wrap up your templates in a nice extension and submit that to your users.
  - ▼ You are able to keep track of versions and variations.
- ▼ You can find the details about making extension packages here:  
[https://wiki.openoffice.org/wiki/Non-code\\_extensions#Templates\\_Extensions](https://wiki.openoffice.org/wiki/Non-code_extensions#Templates_Extensions)



# Templates as an extension



- ▼ But
  - ▼ if you expect to make regular updates or even deploy more templates in the future, this might not be the best way
  - ▼ the packaging procedure is time consuming.



# Personal folder as template directory



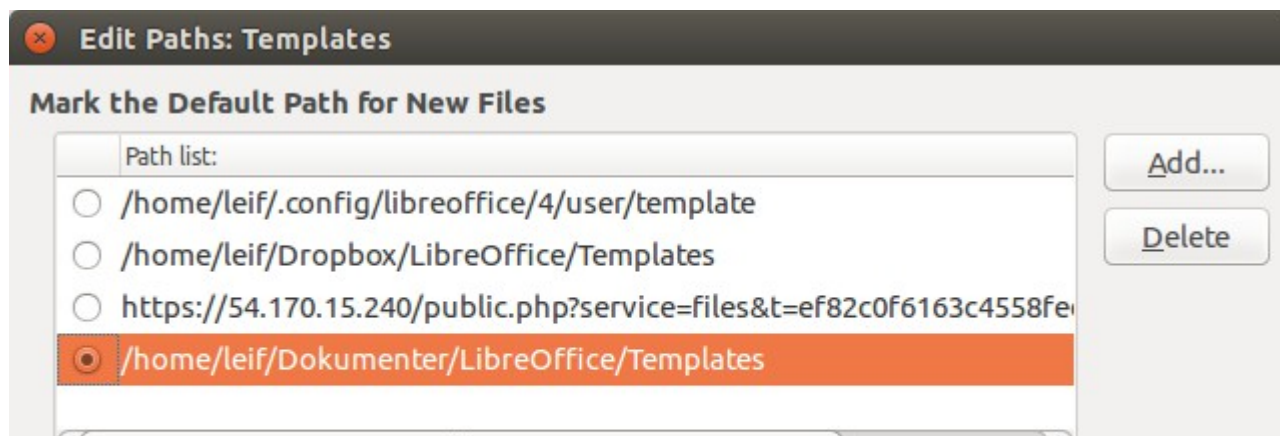
- ▼ This method is most likely one of the most commonly used methods. You need to create a folder somewhere on each local computer under the users personal directory.



# Personal folder as template directory



- ▼ Then you register that location as a new template location.
  - ▼ You can deploy changes to settings in many different ways.
    - ▼ As an extension, through Windows Registry etc.
    - ▼ You can do it manually in **Tools - Settings - Paths**. Select the **Templates** type and click **Edit**.



# Shared server



- ▼ This is most likely the most common way to deploy multiple templates as its rather simple to manage when first setup.





# Shared server



## ▼ Benefits:

- ▼ If you have a lot of templates and you expect to make multiple new deployments and edits in the future
- ▼ If you need to deploy different template to different users in different departments





- ▼ How to:
  - ▼ You can create a folder for each department and simply dump the template files into each department folder.
  - ▼ Access to edit and use the templates can be managed through the access to each department folder



# Shared folder: downsides



- ▼ Be aware that this method over time can lead to conflicts if you use multiple templates with the same name.
- ▼ Also there is a risk that people with access to multiple department folders (e.g., the IT-department) ends up having problems loading any of the templates.
- ▼ The amount of templates simply overloads LibreOffice attempting to generate the template overview.



# Shared server



- ▼ The advantage of using a shared server is that its very easy for you to maintain the content.
- ▼ If you need to deploy a new template or change the content of another, you can simply just drop a new file on the server and it will be available for all users immediately.





- ▼ It is theoretically possible to register a HTTP-URL as template path
  - ▼ Personally I couldn't make it work most likely because of network latency on my ownCloud server.



# Other ideas



- ▼ To avoid network latency its possible to put templates on an ownCloud server and **sync** the files to individual computer.
- ▼ The local folder where ownCloud syncs can then be registered as template folder.
- ▼ That way you can distribute templates without thinking of network latency.



# Conclusion



- ▼ The method to use depends very much on the circumstances.
- ▼ If you have many templates
- ▼ If you expect to maintain them regularly in the future,
- ▼ then
  - ▼ the recommended way will be
    - ▼ to deploy the templates on a shared file server
    - ▼ add the path to the templates
      - ▼ with an extension or through Windows Registry.



# Naming templates





# Naming templates



- ▼ Each template has a name.
  - ▼ The name is what you see below the preview in the templates overview.
- ▼ The template name is given in the template file under **File - Properties - Description** tab in the **Title** field

The screenshot shows the LibreOffice Template Manager window. The 'Documents' tab is selected, and the 'All Templates' section is visible. Three templates are listed: 'Magenta rapport', 'PDF-brevpapirskabelon\_magenta\_...', and 'Testskabelon'. A green arrow points from the 'Magenta rapport' template to a detailed properties panel on the right. The properties panel shows the following information:

Type:	OpenDocument Text
Location:	/home/leif/Hentede filer
Size:	1,72 MB (1.802.615 Bytes)
Created:	04-09-2015, 09:15:14, Leif Lodahl
Modified:	04-09-2015, 12:10:13, Leif Lodahl
Title:	Magenta rapport
Digitally signed:	
Last printed:	
Total editing time:	01:23:13
Revision number:	32
<input checked="" type="checkbox"/> Apply user data	



# Naming templates



- ▼ Be careful about naming your templates.
  - ▼ If you have multiple templates with the same name
    - ▼ you will only find one of them in the templates overview and in the menu "New document from template".
- ▼ If you have a template in your environment but can't find it in the templates overview
  - ▼ its most likely because another template exist with the same name.
  - ▼ And you have no tools to identify the problem.



# Naming templates



- ▼ Be aware that when you create a new template from another template
  - ▼ the new template will automatically inherit the name from the original template.
  - ▼ This is very unfortunate as this results by default in a conflict.
- ▼ The second template (or the original) will vanish from the templates overview.



# Inherit from templates



# Inherit styles from the template



- ▼ Documents can inherit styles from their template.
- ▼ Templates can inherit styles from their (master-)template.
- ▼ When you create a new document from a template,
  - ▼ the document is still connected to the original template.
- ▼ In case you open the document at a later time,
  - ▼ If the template has changes to its styles in the meantime,
  - ▼ you will be asked if the document should inherit the changes (update styles from the template).



# Inherit styles from the template



- ▼ This can very useful
- ▼ Note that one template can inherit from another (master-) template.
- ▼ Unfortunately its not logical LibreOffice determines what template to inherit.
  - ▼ It seems to be based on the path- and file name alone and NOT with the template name.
  - ▼ Therefor its very important not to change file name or move any templates after deployment.



# Inherit styles from the template



- ▼ When it comes to inheriting styles from templates
  - ▼ I prefer NOT to inherit automatically from template to documents as I find it unreliable and confusing for the user.
  - ▼ In stead I load styles manually with **Load styles**.
- ▼ I often use to inherit Styles from one (master-) template to templates.



# Other advise





# Remove unused pre-installed templates



- ▼ LibreOffice comes with some pre-installed templates
  - ▼ some of them are in English.
  - ▼ A resume with English text and even pre-filled names are not suitable for a business environment and you might want to remove them in the first place.
- ▼ The templates are located in the program directory in the path **/share/template/common/...**
- ▼ Some templates and layouts for Impress are suitable to leave as they are.



# Aarhus 2015 CONFERENCE



Thank you for listening

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