Templates – Avoid the Pitfalls

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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 Templates

- 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.
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
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**.
This is most likely the most common way to deploy multiple templates as it's 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.
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 it's 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.
Web server

- 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 it's 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.
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, it's most likely because another template exists 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 it's 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.
  - Therefore it's 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.
  - Instead, 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.
Thank you for listening

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