

# 2019 Breakthrough User Conference

## First Friday *LIVE* | Templates

Today we are going to be covering the differences between Templates & Library Templates, as well as covering how to set them up from an Admin's perspective, and how and end-user can use them.

### Templates

- Allow you to use Fields and their information to either:
  - Create a Document alongside a new Container
  - Pull information *from* a Container to create a Document

### Library Templates

- Very similar in function to Templates
- The documents themselves can have formatting persist without additional set-up
  - *Italics*, **Bold**, Underlined, ALL CAPS, Font *Choices*
- Headers & Footers can have Templated Information

### Which to Use?

	Templates	Library Templates
<b>Requires Admin access to Enable</b>	Yes	Yes
<b>Created from within UCM</b>	Yes*	No
<b>Created Using a combination of programs</b>	No	Yes
<b>Requires a degree of HTML knowledge</b>	No	Yes
<b>Can be made by anyone and submitted to Admins</b>	No*	Yes
<b>Formatting Persists (<i>Headers &amp; Footers</i>)</b>	No**	Yes
<b>Template can be edited from within UCM</b>	Yes	No
<b>Requires a new File to be uploaded for any changes</b>	No	Yes
<b>Can be saved as a PDF</b>	Yes	No
<b>Requires additional Plug-In (<i>no extra costs</i>)</b>	No	Yes

\* A Word Processor CAN be used to help make the general design of your Template, but inserting the Fields into the document requires UCM and Admin Permissions.

\*\* Most Pre-Formatting done in a word processor will be lost when copied into UCM