

Through templates, Windchill has the ability to make object and context creation quick, easy, and accurate. There are many different template types available, which are classified as either administrative or user templates. Note, all templates are created and managed by the administrator. The class simply defines what type of user benefits from the template. This section covers the different types of templates that can be created and used to manage consistency and administrative efficiencies within Windchill.

USER TEMPLATES

User templates enforce standards across the corporation and provide a single point for changes or updates to layout, structure, and style. These templates are geared towards the end user and are created, maintained, and accessed by the administrator at Templates on the **Organization** level.

- **CAD documents:** Used for standardizing modeling practices and often are called start parts. These types of templates provide initial settings for CAD documents and can be created for all types of CAD **objects** (*parts*, assemblies, drawings, etc.). If no CAD document templates are created, then users will be unable to create CAD documents in their workspaces and will have to create them within their CAD tool.
- **Documents:** Used to standardize reports and documents with letterhead, sections, standard verbiage, etc.
- **Notes:** Used to standardize text and fields that should be filled out to annotate and convey additional information for a part in a product structure.
- **Reports:** Many report templates are available **out of the box**. Others can be created to allow users to generate custom reports on demand.

CAD Document Templates
 Document Templates
 Library Templates
 Life Cycle Templates
 Note Templates
 Organization Templates
 Product Templates
 Program Templates
 Project Templates
 Report Templates

TEMPLATE LIST

Organization > Templates

NOTE: ACCESS TO USER TEMPLATES

Upon creation, templates are automatically restricted to specific users. Access to these templates is determined by the context container of which a user is a member. Furthermore, the user is restricted based on the following:

- Users who can create documents have access to document templates.
- Users who can create CAD documents have access to CAD document templates.
- Users who can create notes have access to note templates.

OUT-OF-THE-BOX PRODUCT AND LIBRARY TEMPLATES

Windchill provides out-of-the-box templates for both **products** and **libraries**. These can be used as a starting point and can be further refined by the administrator to fit specific business configuration needs.

PRODUCT TEMPLATES

- The **general product** template provides very basic **context** setup, which includes a set of access control rules for the **context team role**.
- The **product design** provides a template geared toward product design work, which includes **object Initialization rules** that reference basic **lifecycle** templates and versioning schemes.

LIBRARY TEMPLATES

- The **general library** template provides a very basic context setup, which includes a set of access control rules for the context team role, similar to the general product template.

BEST PRACTICE: HIDING TEMPLATES

After creating templates, it is useful to hide the out-of-the-box templates to ensure that users select the correct user and administrative templates. This can be achieved by selecting Hide from the Actions drop-down list at Templates on the Organization level.

ADMINISTRATIVE TEMPLATES

Administrative templates are restricted to administrators and provide initial business environment settings for products, libraries, and organizations. These initial business environment settings include folder structure, default access policies, user templates, default lifecycles, **workflows**, default **forum** topics, and context participation, such as roles, teams, and **groups**. Templates alleviate administrative burdens when creating new products or libraries.

- **Context** (organizations, products, libraries, **programs**, and **projects**): Allows for quick creation of contexts in a reliable and repeatable manner. It can include folder structure, roles, policies, etc.
- **Workflows:** Used to control and automate business processes. Refer to *Workflows* on page 19.
- **Lifecycles:** Used to designate major stages of object maturity. Refer to *Lifecycles* on page 18.
- **Teams:** Used to simplify the creation of standard contexts by providing template roles to principle resolutions. Refer to *Groups, Roles, Teams, and Profiles* on page 13.
- **Task Forms:** Controls the formatting and content of the standard objects including promotion notices, problem reports, change requests, change notices, change activities, and variances.

NOTE: ORGANIZATION TEMPLATES

It is not common practice to create new organizations, as it is recommended to manage only a single organization in a Windchill environment. However, organization templates are useful when exporting organization environments to other systems.

NOTE: ACCESS TO ADMINISTRATIVE TEMPLATES

Upon creation, templates are automatically restricted to specific users with administrative privileges.

- Users who can create products and libraries have access to create product and library templates.
- Users who can create organizations have access to create organization templates. This user is typically the **site administrator**.