

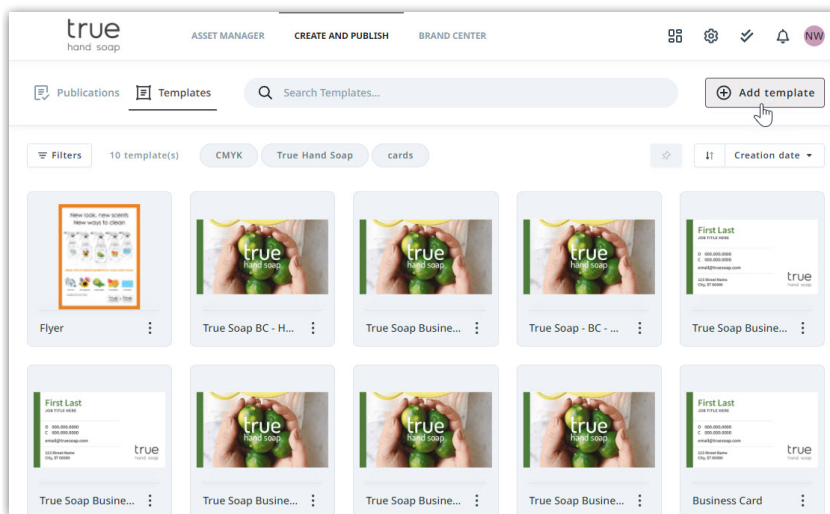
Creating Templates

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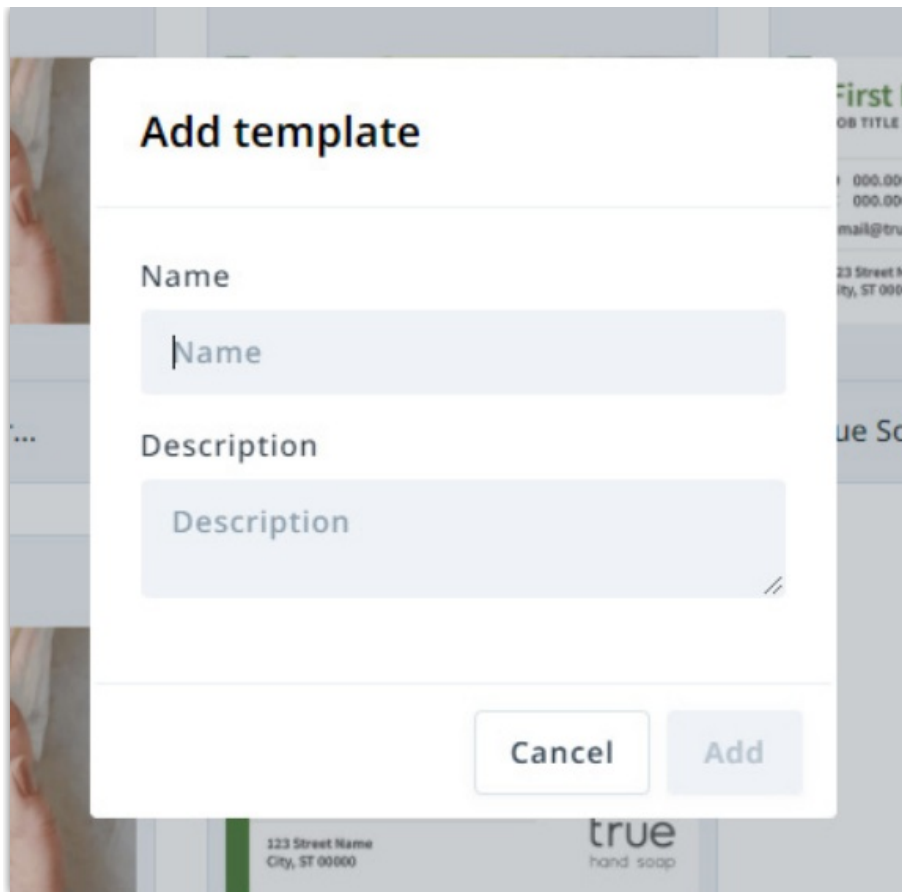
Before beginning, make sure you have uploaded the InDesign template to your Lytho environment with the [Lytho Template Builder](https://exchange.adobe.com/creativecloud.details.104361.lytho-template-builder.html) plugin in InDesign. Haven't done that yet? [Check out how to prepare a template](https://lytho.knowledgeowl.com/help/preparing-templates).

Adding A New Template

Within Create and Publish select **Templates** to the left of the search bar to access your templates. Click **Add Template** to begin adding a new template.



Create a name for your template and add a description. These fields are required but can be updated any time. Click **Add** to continue.

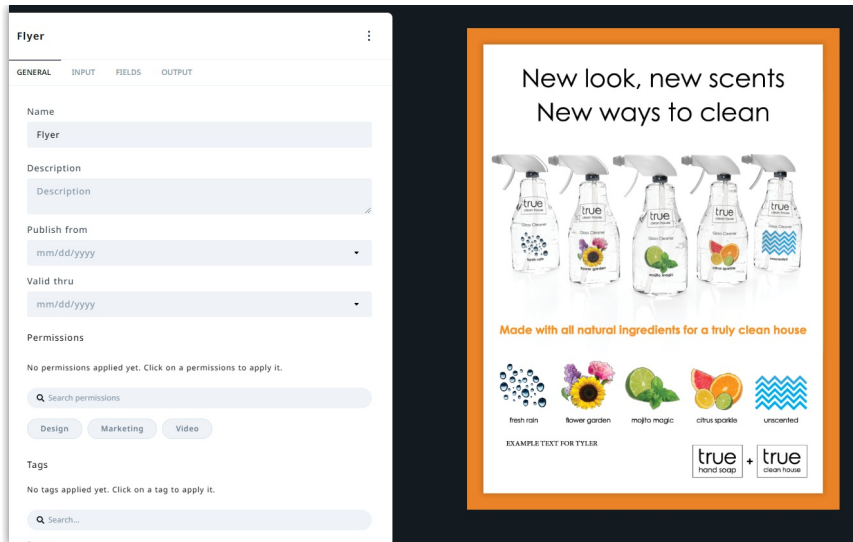


To publish your template you'll need to apply settings, input, output, and add any desired fields.

General Template Settings

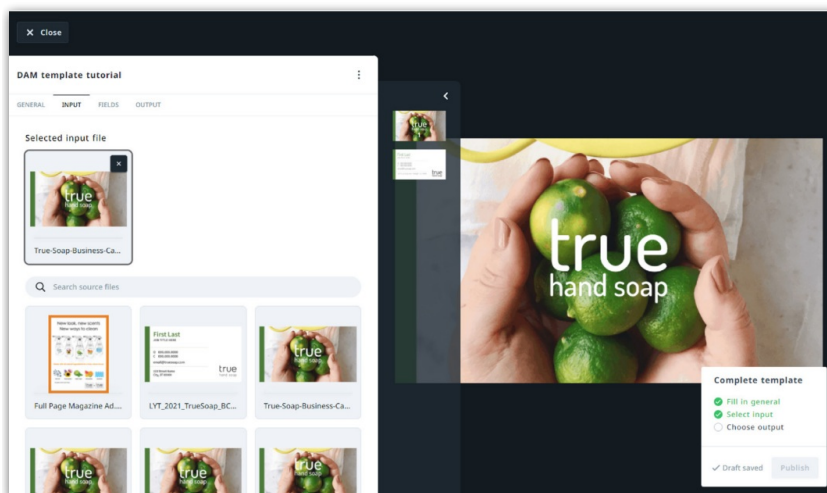
The general template settings allow you to change the name and description of the template as well as specify a range of dates for which it will be available to users. You can also add or remove permissions and tags.

- **Publish dates** will block the template being visible in your DAM while outside of the set dates. Leaving the date fields blank will allow the template to remain accessible with no time limitation.
 - **Valid thru** will determine the end date when your template will be hidden to other users. You would use this if you want a template to be inaccessible after a certain date.
 - **Publish from** will determine the initial date when your template will be visible to other users. You would use this if you want to schedule when a template will be available for others to access.
- **Permissions** can be used to make templates available for specific users or user groups. Note that you are only able to apply permissions that have been assigned to you.
- **Tags** help users find and filter templates. Search for existing tags in the input field and select the tag you want. If the tag you want is not listed yet, use the "Add as new tag" button to add it to your template.



Select Your InDesign Input

Each Lytho template needs an InDesign file as a source. We call this the input file (input files are uploaded into the templates library via the InDesign Lytho template builder plugin). All of your uploaded files are stored and can be selected from the input tab. Select a file to show a preview of the InDesign file on the right side of your screen



It is possible to add several input files to one template. This could be handy to create different output formats. For example, for a campaign, you want to enter the key message once and then create output files based on different InDesign documents built to meet specs for different channels, such as Facebook, Instagram, and LinkedIn. The precondition is that all InDesign input files have the same paragraph style naming for all linked fields in the InDesign elements.

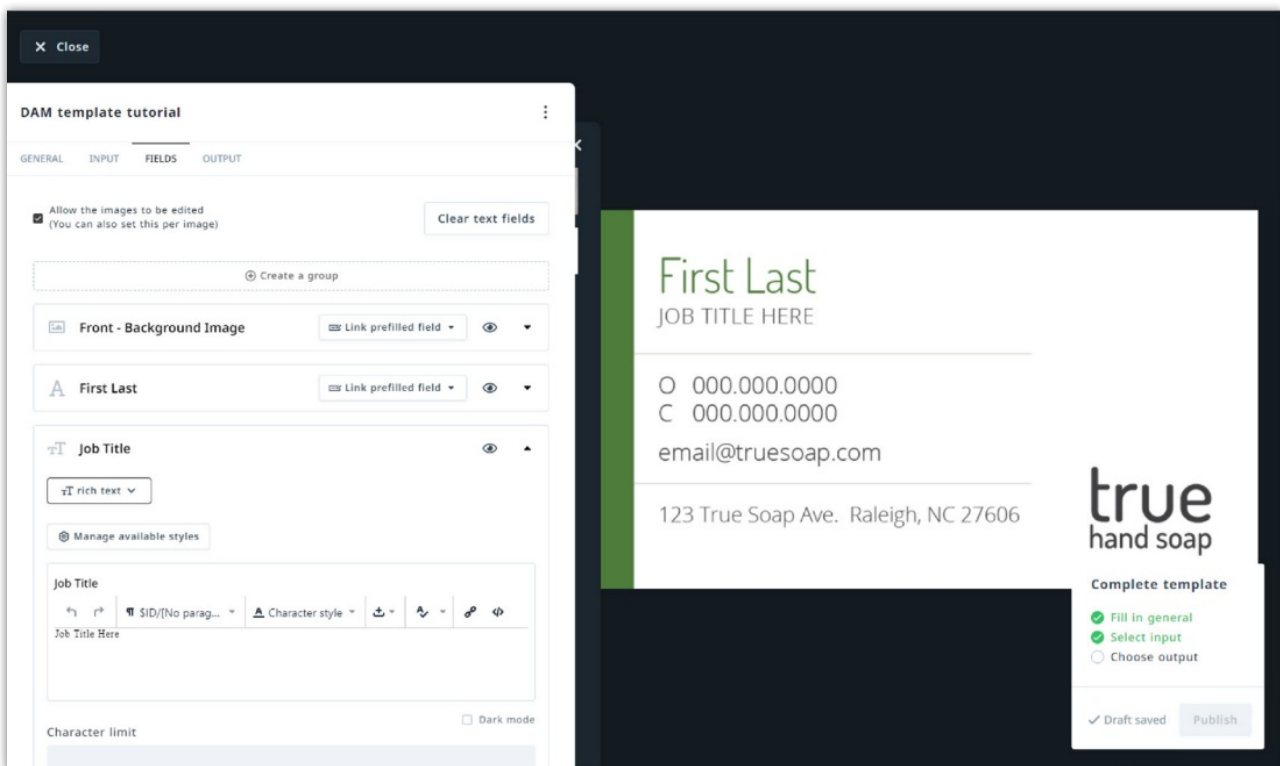
Manage Your Fields

Fields that can be edited by users are created based on the linked fields set when creating the Template within InDesign. In the fields tab, you can check if all fields are set/imported as desired. If required you can add some additional settings here.

- **Clear text fields:** All text fields by default are filled with the same text as has been set in the InDesign file. With this button you can clear all text fields so no default text is set for text fields when users are creating a publication.
- **Allow the images to be edited:** This toggle will allow or disallow images to be edited by the user with the Image editor.
- **Create a group:** It can be helpful to group input fields to help the users fill in the template. This button creates an empty group in which you can drag and drop input fields. You can also change the order of the fields presented to the users here.

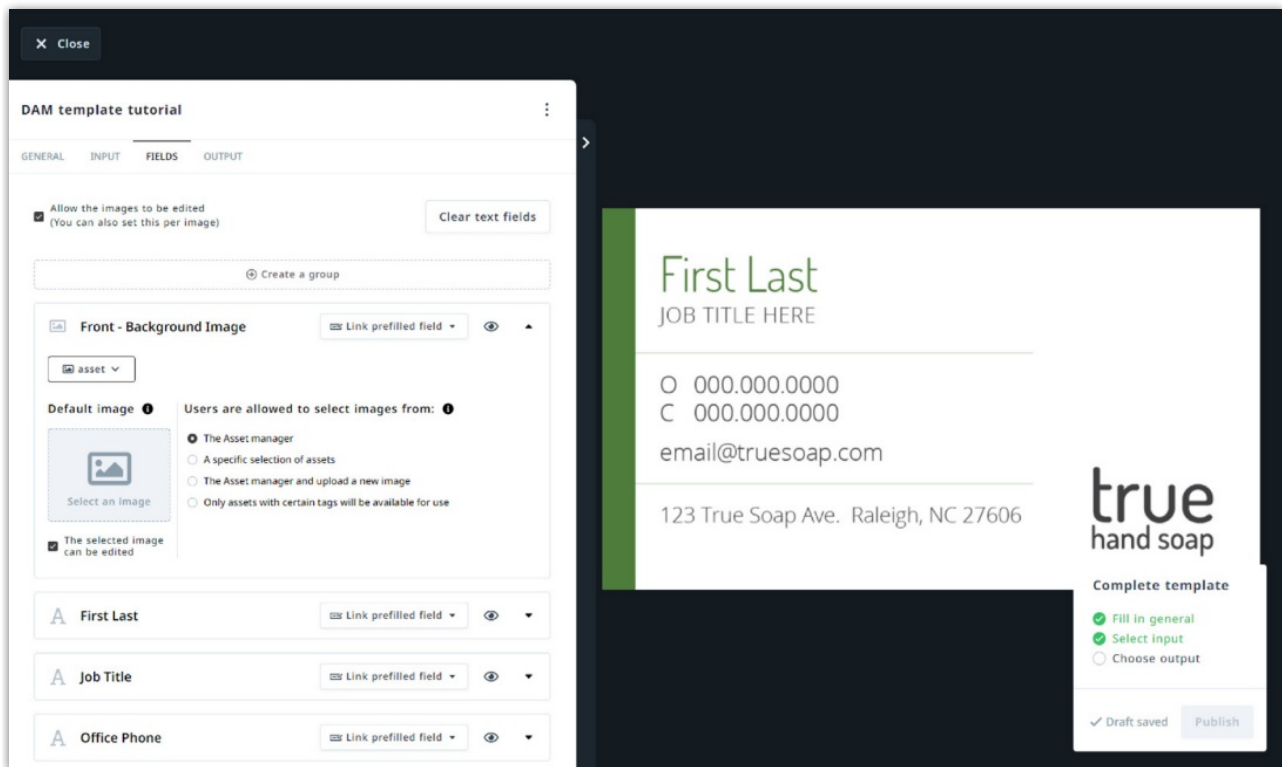
Text fields can be upgraded to Rich Text Fields when needed.

- **Text:** With this setting, the input will be always in the same paragraph style as defined in InDesign. The textfield will display the default placeholder text. Users can edit this when creating a publication.
- **Rich text:** This setting allows users to edit the layout of the text when creating a publication. Manage the available styles for the user by (de)selecting those that you would like to be available when creating a publication and select a default paragraph style for that specific field.



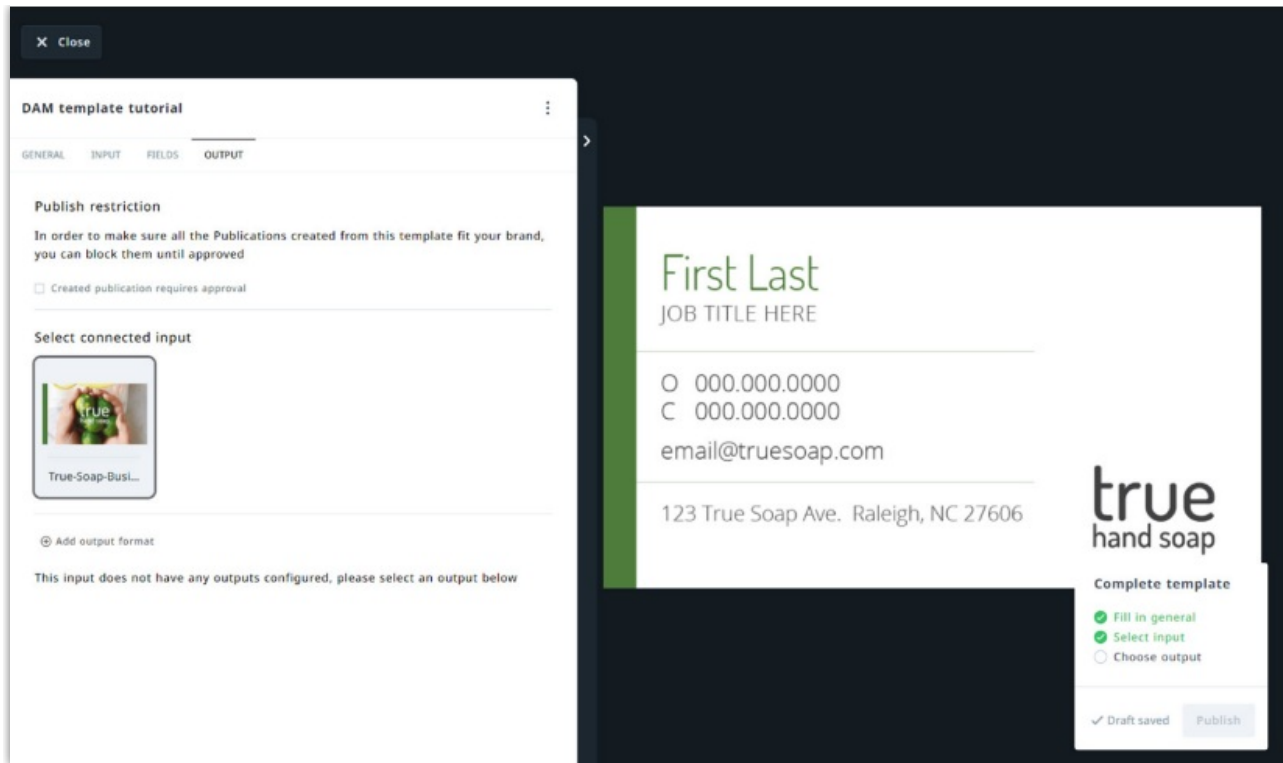
- **Asset:** Lytho will set all image fields automatically to this setting for you. You can set a default image by selecting which images can be chosen, and choose if this image can be edited or not. When configuring which assets can be chosen, you have four options:
 - All available assets in the asset manager
 - A specific selection of assets set by you as an admin

- All available assets in the asset manager and manual upload by a user as well
- Only assets with certain tags



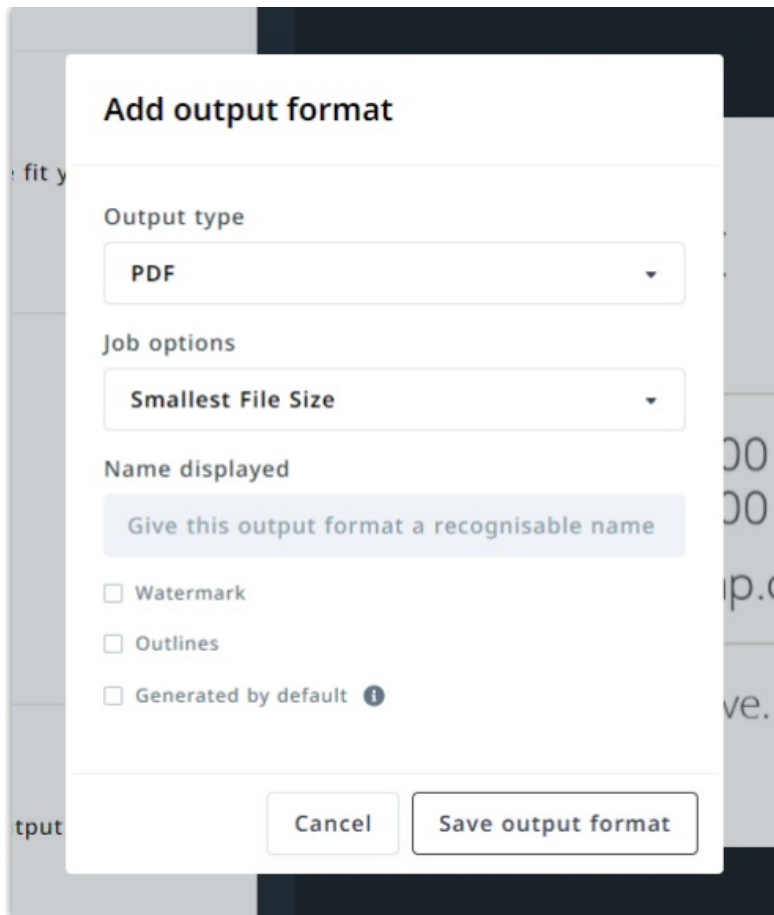
Choose & Set Output

To make sure all of the publications created from this template fit your (brand) restrictions, you can block them until approved by a user assigned the "Approve Publications" rule. Check **Created publications require approval** below **Publish restrictions** to set this restriction.



For each connected input you can set the required output formats that need to be created by Lytho. Select the respective input file and then click the plus icon to add an output. You can add several outputs per input file. The available outputs are: PDF, PNG, JPG, and EPS. For each selected output, you can set:

- **Output name** - Choose a logical name that will be recognizable to your users, for example, "PDF high resolution for print."
- **Job options** (pdf only) - Set predefined or manually uploaded InDesign job options.
- **Watermark** - Apply the Lytho watermark on this selected output.
- **Outlines** (pdf & eps only) - Convert all text to outlines. Print companies can ask for this to ensure all text will be printed properly, including exotic fonts and characters.
- **PPI** (jpg & png only) - Set the required InDesign output PPI (points per inch) for image quality.
- **Generated by default** - If you turn this toggle on, this output will be directly available for the user to download.



Add output format

Output type

PDF

Job options

Smallest File Size

Name displayed

Give this output format a recognisable name

☐ Watermark

☐ Outlines

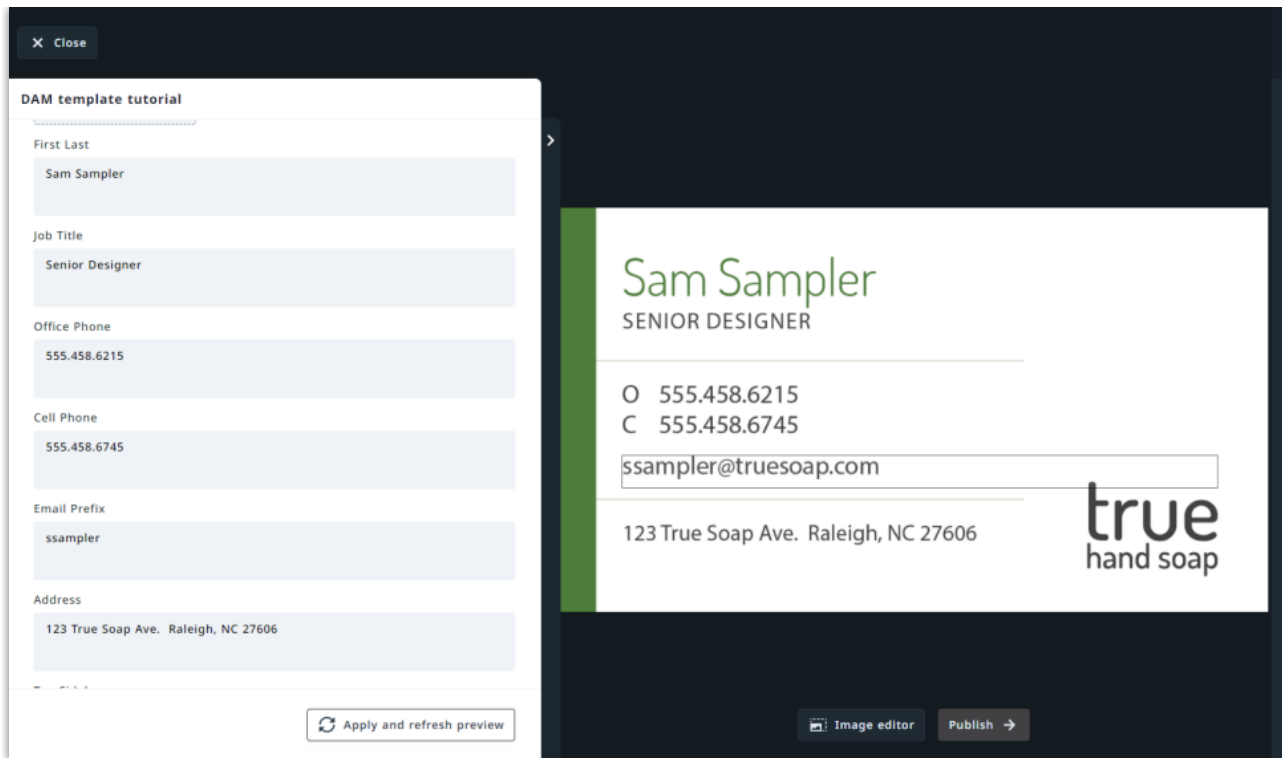
☐ Generated by default ⓘ

Cancel Save output format

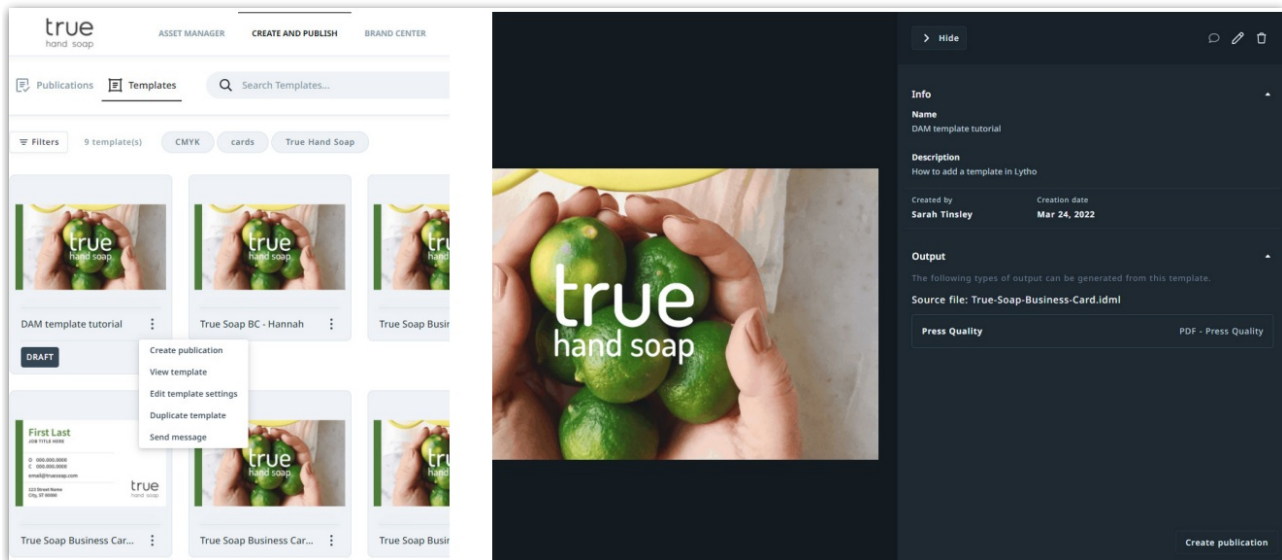
Check Your Template

Once you have configured all settings, we highly recommend checking your newly added and configured template from the user's point of view. To do so, click the **Close** in the top left corner of the editing window. Closing the window saves all your settings and configurations automatically in a draft version.

From the template library screen, click on your draft template, fill in all fields, and click the **Apply and refresh preview** button to verify that your settings are correct. If so, click **Publish** to test if your output works as desired.



If you ever want to go back and change template settings, go to the Create and Publish page and select **View template** from the actions menu. In the template screen, click on the edit pencil. From here you can change the respective settings and test again.



If all settings are correct, click the **Publish** button. Publishing a template will make it available for all respective users so they can create their own publications based on this template.

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