Composer Help

Diagram Templates

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Diagram Templates

Contents

You can save a diagram as a template and have it appear on the list of available templates when creating a new callflow diagram or creating a new workflow diagram. Diagrams saved as templates can exported to/imported from the file system.

Saving a Diagram as a Template

To save a diagram as a template:

1. In the Project Explorer, right-click the diagram in the Workflows or Callflows folder.
2. Select **Save** <Callflow or Workflow> **as Template**. The Add Template dialog box opens.
3. Name and describe the template.
4. Click **OK**. Upon a successful save the following message appears: Custom template added to your configuration.

Accessing Saved Diagram Templates

To view a diagram previously saved as template:

1. From the File menu, select **New** <Callflow or Workflow> **Diagram**. The New <Callflow or Workflow> dialog box opens. The template appears in the Main Workflow tab under Custom Templates.
2. Select the template and click one of the following:

    - **Next** to name the diagram, select the Project, and then click **Finish**.
    - **Finish** to keep the template name and save in the Workflows or Callflows folder under the current Project.

Removing a Diagram Template

To remove a diagram template from the Custom Templates list, use Customization Manager.

Exporting a Diagram Template to the File System

To export a diagram to the file system or another user's Composer:

1. In the Project Explorer, right-click the diagram in the Workflows or Callflows folder.
2. Select **Export**. The Export dialog box opens.
3. Under General, select **File System** and click **Next**.

4. In the File System dialog box, select the folder containing the diagram(s).

5. On the right, click check boxes to indicate the diagrams (s) to export.

6. Opposite **To directory**, select the Composer installation to export to or Browse for the destination directory.

7. Under **Options**, select one of the following:

   - Overwrite existing files without warning
   - Create directory structure for files
   - Create only selected directories (default).

8. Click **Finish**.

Importing a Diagram Template

To import a diagram previously saved as a template:

1. In the Project Explorer, right-click the diagram in the Workflows or Callflows folder.

2. Select **Import**. The Import dialog box opens.

3. Under **General**, select **File System** and click **Next**.

4. In the File System dialog box, opposite **From directory**, click **Browse**.

5. Open the workspace directory followed by the Project folder.

6. Within the Project folder, select the Workflows folder that contains the template to import and click OK.

7. In the File System dialog box on the right, click check boxes to indicate the template(s) to import.

8. Opposite **Into folder**, browse for and select the folder to import into.

9. Under Options, select one of the following:

   - Overwrite existing files without warning
   - Create directory structure for files
   - Create only selected directories (default).

10. Click **Finish**.

Editing a Diagram Template

Use Customization Manager: **Window** > **Show View** > **Other** > **Customization Manager**. Select **Workflow Diagram Editor** or **Callflow Diagram Editor.**