Create a complete library plan

Create a complete library plan

Context

A library plan is an industry template: its structure and attachments will be reused in customer plans.

Starting point

Library → Plans → New plan

Prerequisites

- Prepare customer families, procedures and attachments.

Steps

1. Open and name the template

In Library > Plans, click New plan. Give it a name matching the industry or activity concerned.

2. Associate customer families

Select one or more families for which the template is intended. This association lets the template be suggested when creating a plan for a customer in the corresponding family.

3. Build the content

Go to the zone, surface and procedure entry step. Add useful equipment and use library procedures, copies and imports to avoid re-entry. See pages 9 to 20.

4. Add attachments

Go to the documents step. Drag the selected pages to the introduction or conclusion, then reorder them. In particular, check dynamic document content in the preview.

5. Check and save

At the template finalisation step, examine the layout. Click Save. The template is ready to serve as a basis for future customer plans.

6. Update the referenced procedures

First prepare the products in the required language, then assign them to the library procedures in that language. Next update the library plans using those procedures. After changing the procedures, open each affected template, wait for the # buttons to turn blue again, then use the # command to reset the referenced procedures. Check the result and save the template.

Expected result

The saved template can be suggested to customers in the associated families.

Remember

- The Company and Group libraries work in the same way when available. A complete template makes it easier to remove elements absent from the customer’s site.

See also

- Apply an industry template
- Place and organise attachments

Revision #3
Created 2026-11-23 11:25:49 UTC by eCare Content Studio
Updated 2026-11-23 11:50:24 UTC by eCare Content Studio