

Templates

Dynamically updated idea space templates

Master Idea Space Templates

A master idea space template is one that is private to your project and, if the master template is updated, then those changes are immediately broadcast and applied to instances of the template.

If you're familiar with Keynote or PowerPoint then master idea space templates are similar to the master slide feature in those apps, where you can change a particular master slide and throughout your presentation all slides based on that master are updated to reflect the new changes.

Note that while a style only defines the look of an idea space, an idea space template includes style information and any figures located on the idea space. When you use a template then you are essentially creating and using an exact copy of the original idea space template.

Sample Workflow

1. Create an idea space with an appearance and containing the boilerplate figures you would like to use repeatedly throughout your project.
2. Right-click on the idea space in the Organizer and choose "convert to master" to instantly save the idea space as a master template and then automatically convert the selected idea space into an instance of that master. Alternatively you can do the same thing via the "save as template" option from the context menu to show the standard save template dialog.
3. Note that the icon for idea space instance now has a little master-broadcast icon so you know it inherits changes from a master template.
4. Add new figures to this idea space instance, as you would work with a normal idea space.
5. When you want to create another instance simply click the Add toolbar button and choose the master from the pick list where all masters are listed at the bottom with the little masters icon, or drill down in the idea space gallery and choose it from the masters repository.
6. To edit an idea space's master template, you can
 - (a) hold Option and double-click the idea space in the Organizer to zip right to it, or
 - (b) right-click on the Organizer item and choose "edit master", or
 - (c) click the Masters button on the Organizer header and find the master to edit it.
7. Change the look and contents of the master idea space template then click Done at the top of the Masters Organizer.

Instantly the changes to the template are broadcast throughout the project to any instances, which could include other master templates that are based on this master template.

Overrides

You can make some changes to your idea space instance and they won't be replaced when you change the master.

- Idea Space Dimensions — Changes made to the dimensions of a master idea space are broadcast and applied to instances, unless you manually change the dimensions of an instance. Note that width and height are tracked separately so you can grow the idea space instance vertically and still inherit the width from the master, for example.
- Figure Position — Changes made to the positions of figures on the idea space master are broadcast and applied to instances, unless you manually change the size of an instance. This is handy if you need to change the size of an instance to accommodate more text, for example.
- Figure Size — Changes made to the size of figures on the idea space master are broadcast and applied to instances, unless you manually change the size of an instance. This is handy if you need to change the size of an instance to accommodate more text, for example.
- Figure Text — Changes made to the text contents of figures on the idea space master are broadcast to instances, unless you manually change the text of an instance.
- Figure Style — Changes made to the style of figures on the idea space master are broadcast to instances, unless you manually change the style of an instance including font and font size.

Limitations

While master idea space templates are quite powerful they do have some limitations:

- Newly added or removed items found within collection figures, such as nodes within a mind map, will not be broadcast to instances.

Using the Add Button

Assuming you're viewing the normal Organizer, click the Add toolbar button you'll notice that any master template are listed at the very bottom of the popup, with the masters "broadcast" symbol on the right side. Choose one and a new idea space instance of that master template will be added to your project.

Notice when you use a master template to create an idea space, the preview image for the new idea space in the Organizer will show a little masters broadcast symbol in its lower-right corner. This way you know it's based on a master template.

Nested Masters

If you create a new master based on an existing master, via the Add toolbar button with the Masters Organizer is active, then that new master will inherit changes made to its "parent" master. You can continue this process so that changes to Master A go to Master B go to Master C go to...

This might be useful if you define a "Background" idea space master then create duplicates that define "Chapter" and "Slide" masters. Change the background of Background and instantly all masters change and thus all instances of all of those masters change.

Using the Masters Organizer

Click the new Masters button in the Organizer header to view the Masters Organizer. The Masters button looks like a broadcast symbol since changes to a master are broadcast throughout your project.

The header area will change so you see the blue masters header and Done button. Underneath is pair of buttons you can use to switch between your master idea space templates and your master figure stencils.

You can make changes to any of your templates then click the Done button when you're ready to broadcast the changes throughout your project.

In general working in the Masters Organizer is similar to the normal Organizer, but here are some notes:

- Master templates and stencils can be rearranged, renamed, and deleted, but they cannot be indented or color-coded.
- Right-click to copy, paste, duplicate, rename, or delete a selected item.

Using the Galleries

When you click the Add toolbar button and go into the idea space gallery, you'll find a Masters pseudo-repository there which contains all master idea space styles and templates. Select a master template and click the Choose button to add a new instance of the master to your project. If you later update the master template then this instance will be updated as well.

Other gallery changes related to masters include:

- Copy to Masters — Right-click on an idea space template, figure stencil, or style that's not in the Masters repository and choose Copy to Masters.
- Drag and Drop — Drag-and-drop an idea space template, figure stencil, or style from another repository into the Masters repository folder to make a copy. You can also drag from Masters to Personal if you wish.
- Delete — Right-click on an idea space template, figure stencil, or style in Masters repository and choose Delete. You may also simply press the Delete key. Existing instances of a template or stencil will remain as-is.
- Edit — Right-click on a master idea space template or stencil and choose Edit Template / Edit Stencil to switch the Organizer to masters, select the appropriate master item, and display the template or stencil in the main viewing area for editing. Click the Done button in the Organizer header area to end editing.

Tagged Sets of Master Idea Space Templates

If you create a whole series of master idea spaces for a project and want to re-use them it's super easy! Just select all the master idea spaces in the Masters Organizer, right-click and choose to save them to a named tagged set in your personal repository, such as "Portfolio". You can choose an existing tag or enter a new name.

Later when you want to use that set, simply choose File > New, select the name of your personal tag set, "Portfolio" in this case, and click the Use Tagged Set as Masters button. A new project will be created with all the idea spaces in that tagged set preloaded as master idea space templates.

Master Styles via Master Templates

Say you define that "Heading" master figure style then you apply it to figures on several master idea space templates. Change the master style and then all master templates update and thus all instances of those master templates update.

Next, say you save your master idea space as a personal idea space template (or perhaps as a tagged set in your personal repository) then you use that template in another project. If that template becomes a master template then any master styles embedded within the template will be automatically recovered and available as master styles in the new project.

Note this only happens if the idea space template becomes a master again, simply inserting an instance of the personal template into your Organizer won't recover the master styles. You could do this via tagged sets, described above, or the convert to master idea space template right-click option in the Organizer.