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Kara Monroe Follow
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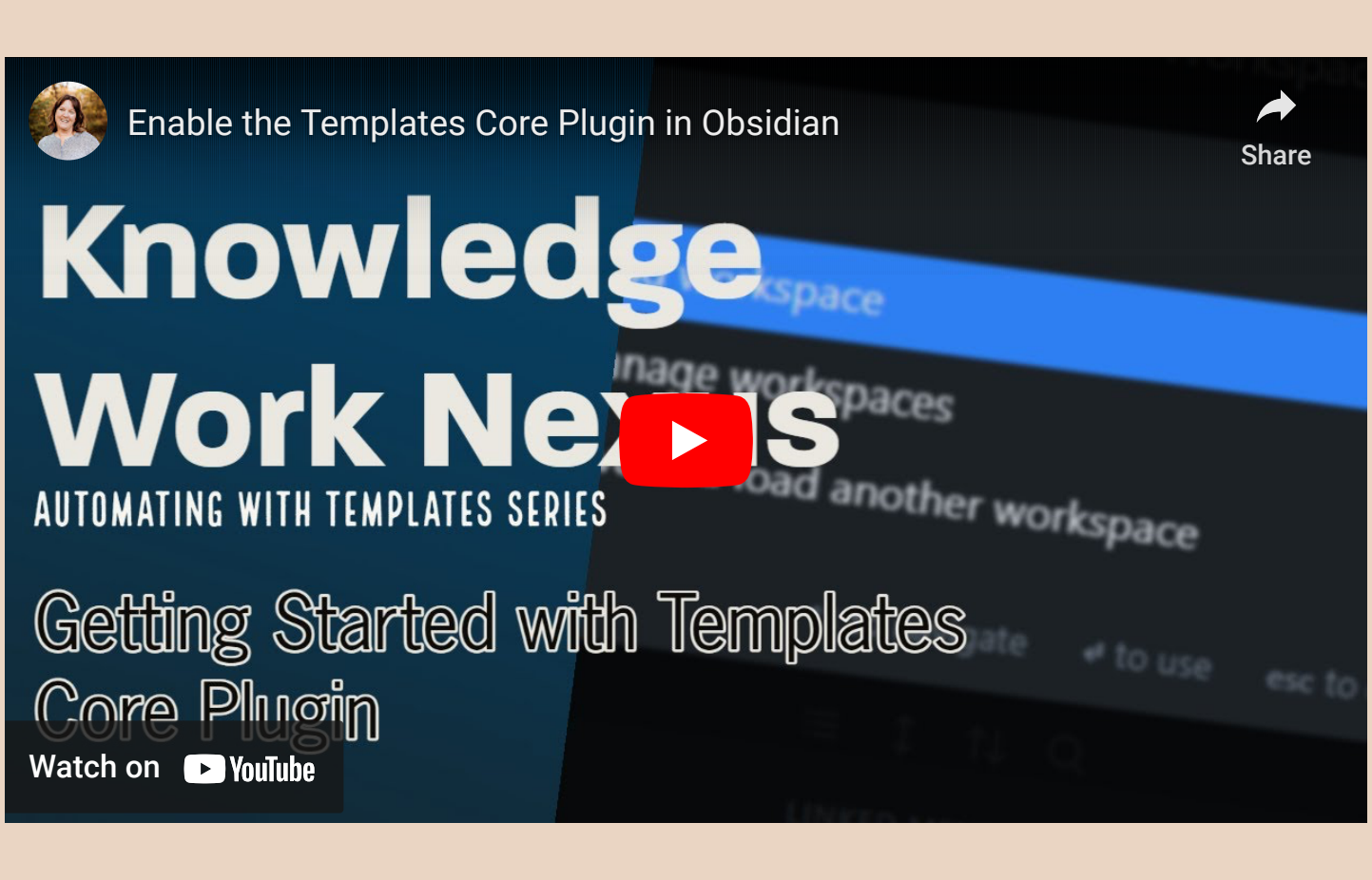
Part 2 — Maximizing the Obsidian Templates Core Plugin for Automating Your Workflow

Introduction

This is the second article in my series on automating your workflow with templates. Use these links to navigate through the series:
- Part 1: Using Templates and Templater in Obsidian
- YOU ARE HERE — Part 2: Maximizing the Templates Core Plugin
- Part 3: Using the Templater Community Plugin to Automate Files and Content
- Part 4: Other Things You Can Automate Using Templater Commands and Functions and Other Resources for More Inspiration

Enable and Set Up to Use the Templates Core plugin

To get started with the Templates Core plugin you need to make sure it is enabled in your vault. (Note — if you'd prefer to watch this as a video you can do that here)


Enable the Templates Core Plugin in Obsidian
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Getting Started with Templates Core Plugin
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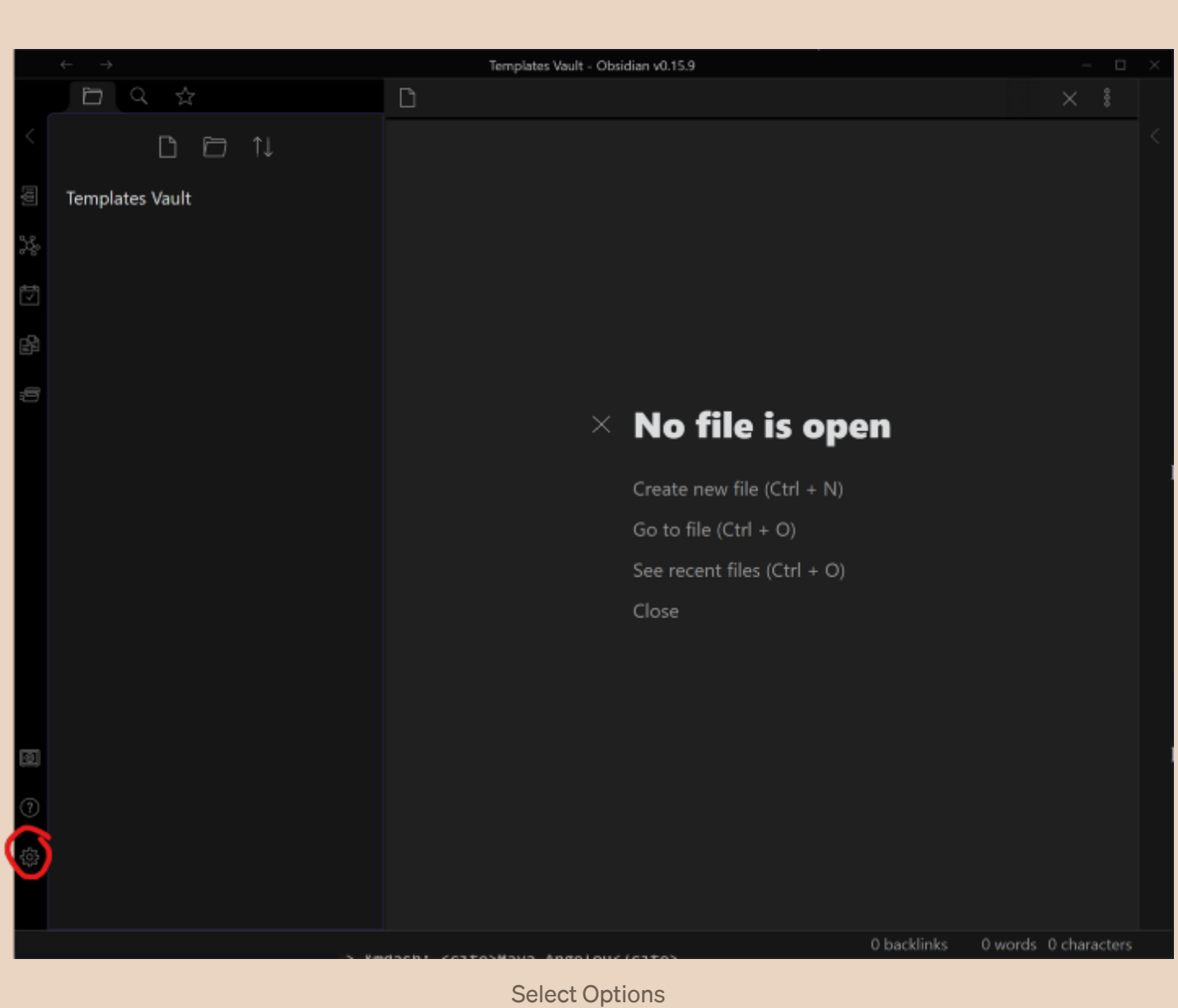
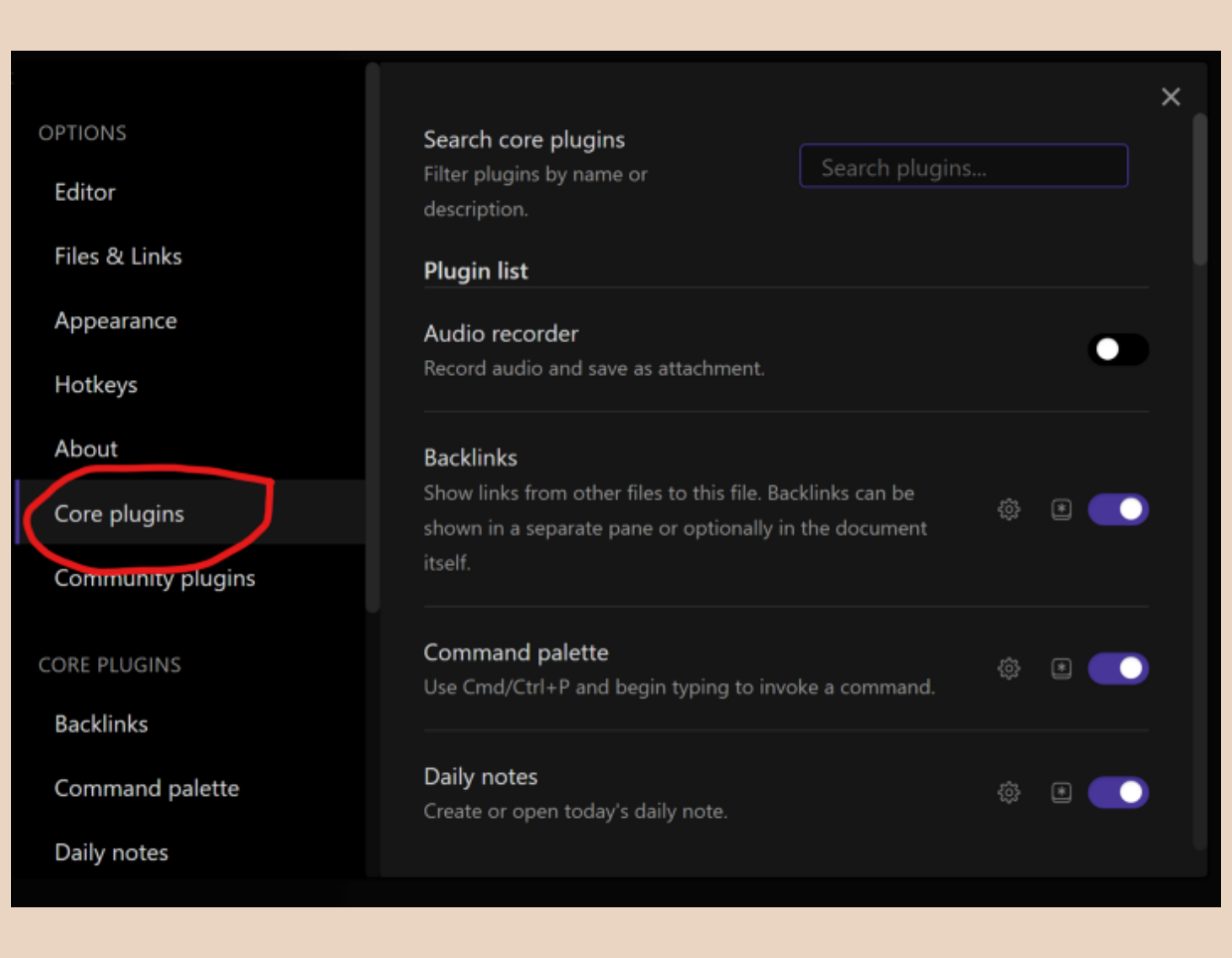
1. Open your vault and go to settings.

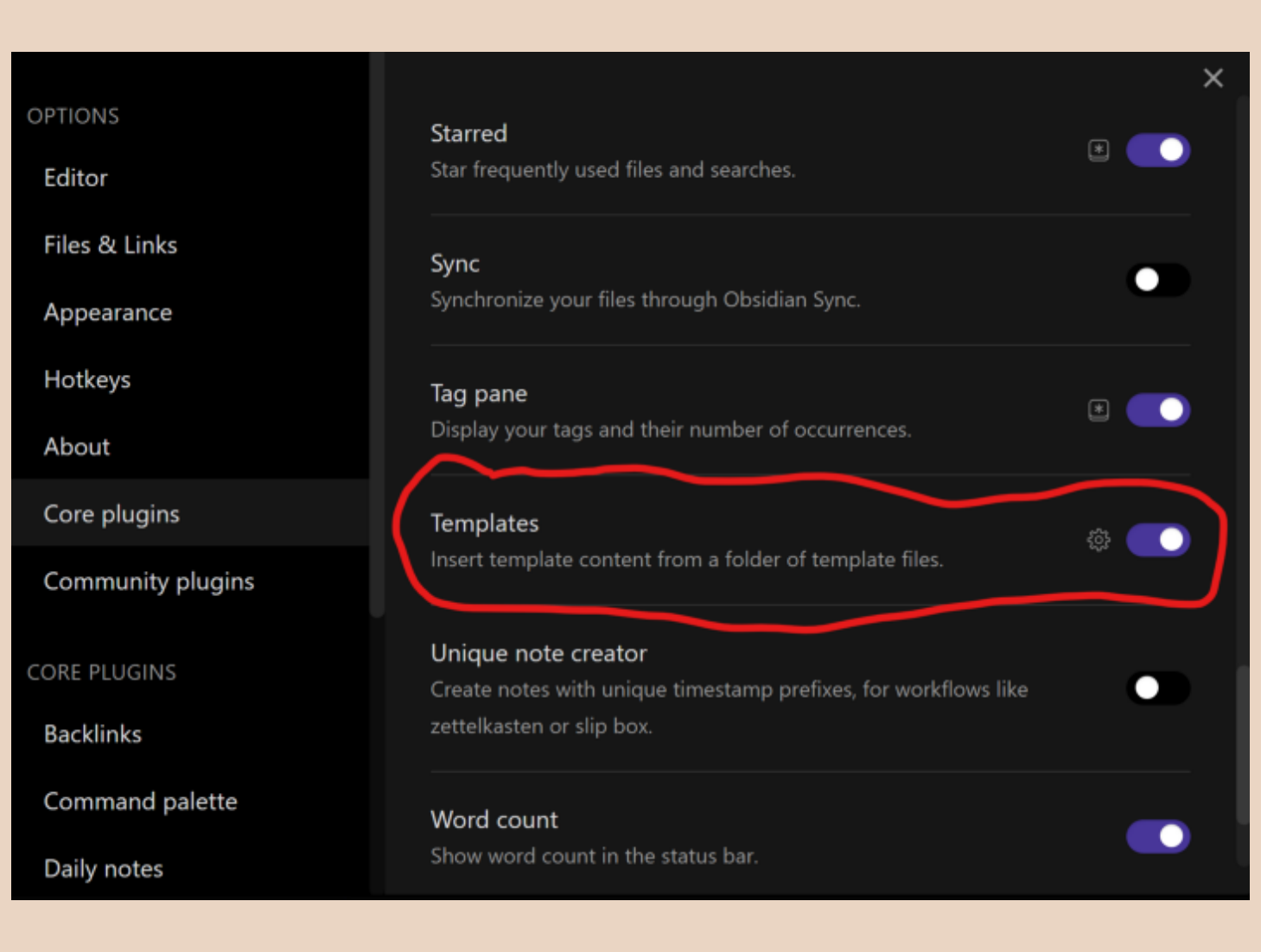

Templates Vault - Obsidian v0.15.9
Templates Vault
No file is open
Create new file (Ctrl + N)
Go to file (Ctrl + O)
See recent files (Ctrl + O)
Close
0 backlinks 0 words 0 characters

Select Options

2. Select Core plugins on the left.


OPTIONS
Editor
Files & Links
Appearance
Hotkeys
About
Core plugins
Community plugins
CORE PLUGINS
Backlinks
Command palette
Daily notes
Search core plugins
Filter plugins by name or description.
Search plugins...
Plugin list
Audio recorder
Record audio and save as attachment.
Backlinks
Show links from other files to this file. Backlinks can be shown in a separate pane or optionally in the document itself.
Command palette
Use Cmd/Ctrl+P and begin typing to invoke a command.
Daily notes
Create or open today's daily note.

3. Scroll down in the right hand portion of the Core plugins box until you see Templates. Make sure its toggle button is pushed to the right to indicate that it is on.


OPTIONS
Editor
Files & Links
Appearance
Hotkeys
About
Core plugins
Community plugins
CORE PLUGINS
Backlinks
Command palette
Daily notes
Starred
Star frequently used files and searches.
Sync
Synchronize your files through Obsidian Sync.
Tag pane
Display your tags and their number of occurrences.
Templates
Insert template content from a folder of template files.
Unique note creator
Create notes with unique timestamp prefixes, for workflows like zettelkasten or slip box.
Word count
Show word count in the status bar.

From here you can actually go ahead and also set your options for the Templates plug in. The one you must set is a folder for all of your Templates.

To do that from here, just click the cog button right by the toggle switch. If you want to access that page at any time, you can also do so by scrolling down on the left and locating Templates under the Core plugins section.

So, clicking this cog wheel

or scrolling down under Core plugins to Templates both give you the Templates option screen

4. Let's go ahead and say our templates will be in a top level folder called Templates (again, so creative, I know). Just type Templates in the Template folder location box and then close that window using the X just above where you typed Templates.

5. And, finally, we need to create our Templates Folder. Click the New Folder button.

And then type Templates

Create Your First Template

We're going to use a Meeting Notes Template as our first template. You can watch how I did it, and then you can follow along step by step below.

Creating a Meeting Notes Template with Obsidian Templates Plugin
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1. In the templates folder, create a new note and name it Meeting Notes. You can do this by right clicking the templates folder and selecting New Note or by making sure the templates folder is selected in the file explorer and then pressing Ctrl+N on the keyboard.

2. We're going to use a little piece of code to indicate that we want the title we give our note to be included as a header in the note. So, type # {{title}} on the first line and then press enter.

Now, when you run this template you'll enter a title and it will automatically get added to this spot in the template when you accept the title. Don't worry if that doesn't make sense — we'll walk through it again in a moment.

3. We're also going to add the date to the file. The date will be in the format of YYYY-MM-DD because that was the format we set in the Template options screen. If you include this little date script inside of a pair of double brackets you will automatically create a backlink between your daily notes for this day and the meeting notes you take.

4. Now that we've got our tiny bit of scripting out of the way, you can add your remaining headers. I'm going to add # Agenda, three dashes to make a horizontal row, # Attendees, # Notes, and # Action Items as my main sections.

The image above shows the template in Source Mode. As you can see, I also added a single check box under action items so that is already there for me to start adding action items. This is what it looks like in Reading Mode (if you're not sure how to toggle between those modes, click the three dots on the top right side of any note and you'll see these toggles in that menu.)

Using Your Meeting Notes Template

Now that you've made your template, it's time to use it. Let's create a note for today's Team Meeting. I personally include the date in the note meeting title — how you name your notes is up to you.

1. Open a new note. Name your note Team Meeting Date (so mine will look like Team Meeting 2022–08–30).
2. Hit enter. This will save the note with that name and will put your cursor at the top of your note.
3. To run your template, press Ctrl-P (to bring up the command palette) and then start typing Te for Template. Once you see "Templates: Insert template" is highlighted just press enter. For now, because you only have one template created, that template will run.

4. You should now see your Template on the screen — already pre-filled for you.

As an alternative to the Templates command in the command palette, you can also use the Templates button on the left to add a template to a page.

Using Templates Plugin to insert Time and Date

You can also use the Templates Plugin to insert the time and date into any note. We'll demonstrate this with time.

To do this, place your cursor where you want the time inserted.

Using Ctrl+P again, bring up the command palette. Start typing te for Template. This time, select Template: Insert Time

As soon as you hit enter on that line, the current time will be inserted into your file where your cursor was.

You can also set this up as a Hotkey to make it a little faster to apply. Let's walk through that process.

1. Open up the Settings panel using the cog wheel.

2. Select "Hotkeys" from the left hand menu. Scroll down to Templates or type tem in the Search box to locate templates.

3. Click the "Customize this command" button on Templates: Insert current time

4. Press the keyboard command of your choice using some combination of command, shift, and alt as well as letters, numbers, and symbols. I used Ctrl+Shift+t for the Insert current time command.

5. Once set, close the hotkey window and try it out. Place your cursor somewhere in a note that you want the time inserted and select Ctrl+Shift+t (or whatever key combination you chose) to insert the time.

Using Other Date Formats In Your Notes

There are many different types of notes that you could use a template for. Among these are the very commonly used daily, weekly, monthly, quarterly, and yearly notes. Lets use these common note types to look at other ways you can use date and time formatting within your templates to streamline note creation.

Creating a Daily Notes Template and Setting up the Daily Notes Core Plugin

A Daily Note is used by many in the Tools for Thought page as their daily log file to record all of their thoughts, tasks, and information for that day. We're going to start by creating a simple template that uses a few of the alternative date formats for our daily note.

1. To begin, create a new file in the Templates folder called Daily Template
   2. In this file, enter all the text you want your daily note to start with each day. Here is a walk through of what I included:
   I wanted each note's top header to read Day of Week, Month, Day Year Daily Note so I used the {{date}} script and customized the output for the script so it wouldn't return the standard YYYY-DD-MM format and instead generated my custom format.
   On the next line, I wanted the text Day Number in bold and then I wanted the year's day number.
   Then, to conclude the date section, I added the Week number, again using a custom format for the date.
   Note: in the image shown, I needed top put another line of space between the week number and the three dashes for the horizontal rule — that's why week number looks so much larger than everything else. I didn't see it when I took the screen shot.
   I then added the four sections I want to have in every daily note, each as level 1 headers.

Now, to give it a full test drive, let's set up the Daily Notes Core Plugin.

This will let us see how the Daily Notes template can be called by another plugin and automatically filed where we want it.

1. Open Settings

2. Make sure the Daily Notes Core Plugin is enabled from the Core Plugins Screen.

3. Now, under the Core Plugins section, select Daily Notes so we can set its options. We need to first confirm the date format. I like the format of YYYY-MM-DD so I'm going to leave it as is. If you'd prefer a different format, you can click format reference on the window to see the key for how to format various date formats. I'll be showing you several examples of this in the screens that follow. Now, we're going to choose where all of our daily notes get stored. I like to keep all of my time based notes in a folder called Logs and then divide them into separate folders by note type. As you can see, I entered Logs/Daily Notes in the New file location box. We'll create this file location right after we finish the settings. And, then, select the location To your Daily note Template. Finally, I turned on the toggle so that when I start up Obsidian, my Daily Note will open on startup just because I prefer that option.

4. Finally, let's go add the Logs folder and the Daily Notes folder inside of it.

5. You're now ready to test your first daily note. You can create the daily note using the Command Palette (Ctrl+P and then Da for Daily) or by clicking the Open Daily Note button on the menu bar.

This is what my first daily note looks like. If you used my template, you should get something similar but with the correct dates filled in.

You're now ready to start using your daily note.

You can do a lot of additional customization with the date and time scripts if you want to. Full documentation for that is located on the moment page.

One More Plugin with Templates

If you want to push the Templates Core Plugin to its limits without adding any Community plugins then you may also want to use the Note Composer Plugin.

Note: You might also want to use the Unique Note Creator Plugin which lets you create a template for Zettelkasten style notes. That said, I personally can't make sense of a Zettelkasten file structure based on date codes so with the information you already have you'll be able to use this plugin and I hope some day you'll help me see how a Zettelkasten based on date and time codes can make sense to someone.

The Note Composer Plugin allows you to specify a few additional pieces of data in your template using your script. Let's create that template first and then we'll give the Note Composer Core plugin a run for its money.

1. Create a new note in your template folder. Call it Extracted Note.
   2. In your Extracted Note, you can use commands like {{fromTitle}} {{newTitle}} {{content}} and, of course, date and time. This is the simple template I set up for an Extracted Note

Note that I used double brackets outside of the double curly braces for fromTitle and date in order to create automated links back to the original file and to the daily note.

Now, you need to turn on the Note Composer plug in and set its template location. Again, this is just as we've done before so this time I'll just show you what the options screen for Note Composer looks like when you're done.

Now, to use this new functionality, you need two files.

The first is the file that has all the text. I used a short extract of the text of this article and created that note.

Then, you need to create a new note that uses the Extracted Note template. I named that file Zettelkasten Plugin.

Now that you have both of those files created, you can go back to the One More Plugin File and select the text in that middle paragraph, then right click the text, and select Extract current selection….

A file window will open and ask you what file you want to put this text into. Choose your Zettelkasten Plugin file.

Your One More Plugin file will now have a link to Zettelkasten Plugin where that text was and your Zettelkasten Plugin file will include the link to the original file, the date formatted as a link, and the extracted text.

These two images show what that looks like in its final form.

You can create a sea of additional templates with the Templates plugin, but I think time is better spent learning more about the Templater plugin and really focusing on ways we can automate routine tasks with our notes.

Conclusion & Navigating The Article Series

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