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Part 1 — Using Templates and Templater in Obsidian to Automate Your Workflows

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Templates are powerful tools for automating workflow and helping you get more done with more ease in any application. They are especially powerful as a workflow support in Obsidian.

In this series of articles, we'll be looking at the two most commonly used Template tools — the Templates Core plugin and the Templater Community plugin and digging into a myriad of ways that you can use them — focusing most heavily on the Templater Community plugin.

What's the difference between Templates and Templater?

The Templates Core plugin in Obsidian will allow you to build templates and you can insert dates and times automatically into them, along with the note's title. The Templates Core plugin integrates well with the Daily Notes Core plug-in and the Unique Note Creator Core plugin. The Templates Core plugin allows you to keep your vault in Restricted Mode if that is important to you. I'm going to write about the Templates Core Plugin assuming that you are using it predominantly because you wish to leave your vault in Restricted Mode and not add any Community plugins. I recognize that might not be the case for you and if so, you can certainly make use of Templates with other Community Plugins.

The Templater Community plugin is, according to its creator, "a template language that lets you insert variables and functions results into your notes. It will also let you execute JavaScript code manipulating those variables and functions." Templater is a Community plugin so it does require that you leave Obsidian's restricted mode to use it. That said, it includes many more features than the basic Templates Core plugin. Templater is, as I write this, the sixth most highly used Community plug-in with over 230,000 installs.

Which should I use?

My advice is generally to start with the "lowest" level of any tool that you can and then work up from there as you get more comfortable. That said, there are some pretty distinct functionality differences that would cause you to have to rework your templates if you switch so I actually recommend you start with Templater — but I will walk through how you can get the most out of the Templates Core plug-in before we get there. And, if you have no interest at all in learning the functions and commands in templater, then by all means, stick with Templates. You can certainly use Templates with other community plugins and build out the entire list of templates I include below — and anything else you can think of — simply using Templates. Templater just allows for a higher degree of automation.

What should I create templates for?

I get a lot of value out of looking at other people's templates and so I will provide you with several examples of templates here — and in upcoming posts — for things you might want to include in your templates. That said, I think what you put in a template — and particularly how you arrange it in a template — is very much about who you are as a person and so I don't see much value in simply copying and pasting someone else's templates and using them for yourself.

So, that means you have to create a lot of your own templates. By all means, do a quick google search and find links to starting points — but you will get more value if you customize these templates to the way you think.

Here are several examples of templates you could create in Obsidian (or really in any Tool for Thought):

Logs & Reviews

- Daily Note
- Weekly Note/Review
- Monthly Note/Review
- Quarterly Note/Review
- Yearly Note/Review
- Any other sort of regular planning tool that you use

Life Admin

- Recipe Template
- Weekly, Monthly, or Quarterly Financial Processes such as a list of monthly bills you pay (so you can check them off each month) — or this could go in your monthly note/review template
- Project Template (you can make one generic one or make specific ones for different types of projects)
- Meeting Notes Templates (you can make one generic one or make specific ones for each meeting)
- Standard Operating Procedure template

Streamlining Writing Process
Any text that I might use over and over again, I'll create a template for.

- Affiliate links
- definitions I use all the time (e.g. I write all the time about learning projects and so I created my own definition for this and that is a template named def-Learning Project)
- Journaling and Writing Prompts — I have several templates that include lists of prompts. If I'm feeling uninspired, I'll just randomly select one and insert it into the file I'm working in to try to get me writing
- Templates for the things you want to include in any kind of content you publish: tweets, articles, videos, and these could differ by platform and content type on the platform (e.g. one for tweets and one for threads)

Checklists
EVERY checklist you use makes for a good template. Here are a few of my favorites:

- Packing Lists
- Trip Planning Checklists
- Article Editing/Publishing Checklist
- Video Editing/Publishing Checklist

Obsidian Focused Templates

- If you use Obsidian for Task Management, various Task Queries
- Any query

Personal Knowledge Management

- Book Notes Template
- Literature Note Template
- Atomic Note/Zettelkasten Template
- Reference Note Template

So, now that you've gotten a few ideas of templates that you might use — and again, I urge you to comment with any other templates you think of — let's dig in first to the Templates Core plugin.

Series Overview

I wrote this series as a way to pull together my own knowledge about templates into a single place and to really refine my own core processes around template use. As an example, one of the things that has come out of this process is that I'm developing a new syntax for how I name templates and whether they are designed to be used in an existing file (they get the letter f at the front of their name) or they are designed to be used in a new file (they get the letter n in front of their name). While for some templates it really doesn't matter, for others it does and so this exercise of writing this and thinking in depth about Templates has allowed me to get really serious about making my templates as automated as possible for my specific use cases.

The article got SUPER long though so I decided I'd split it into parts. In the spirit of fairness, I'm releasing the entire series at one time — although I may come back soon and update the series with some videos to enhance the content. That said, in the next two articles, there are LOADS of screen shots.

Here is an overview of the series — you'll find this same list at the beginning and end of each article in the series so you can easily navigate your way through from any part.

- YOU ARE HERE — Part 1: Using Templates and Templater in Obsidian
- 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

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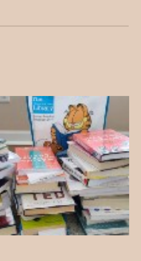

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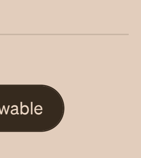

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