

What is the difference between linking and applying a control test template?

A control test template allows a user to easily configure the desired control tests and triggers to be used during data collection for multiple variables or attributes. Once a template is created and configured, it can either be applied or linked to have its associated tests and triggers used when collecting data.

An applied control test template simply copies its tests and triggers to the item it was applied to. For example, if a control test template is applied to a collection plan, all of the steps in the collection plan will then have the same tests and triggers configured as they are in the template. Once this action occurs, the control test template is not associated with those collection plan steps in any way. If the control test template is later modified, the changes to the control tests and triggers are not reflected in any collection plan steps the template may have been applied to. In this case, the user would need to re-apply the control test template to have the modified tests and triggers take affect. Control test templates can be applied to an item by right clicking on the item and selecting the "Apply Template" option. Applying a control test template will overwrite any previously configured (or applied) control tests or triggers.

A linked control test template creates a persistent relationship between the control test template and the item that the template is linked to. For example, if a control test template is linked to a collection plan, then all of the steps in the collection plan will use the control tests and triggers configured in the template. The link creates an association between the item and the control test template, so that any time the control test template is updated, the tests and triggers of any associated collection plan step are also modified. Multiple control test templates can also be linked to a single item. In this case, the control tests and triggers that are used in data collection for this item is the combination of all control tests and triggers in all of the linked templates.

In addition, linked control test templates function as an inherited item. This means that the control test template link will be associated with the linked item as well as any sub-items. For example, if a control test template is linked to a part folder, all sub-folders, parts, variables, and attributes contained within that folder will also be associated with that control test template. Newly created items (for example, if the user were to create a new part in the folder) will automatically be linked to the control test template as well. This allows the user to configure one or more 'default' control test templates to be used. To create a control test template link used by all collection plans, for example, simply link the the desired control test template to the root of the "Collection Plans" area.

Control test template links for an item can be managed by right clicking on the item and selecting "Properties" and going to the "Templates" tab. Control test templates can also be linked to some items, such as folders or parts, by clicking and dragging the template to the desired location.

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