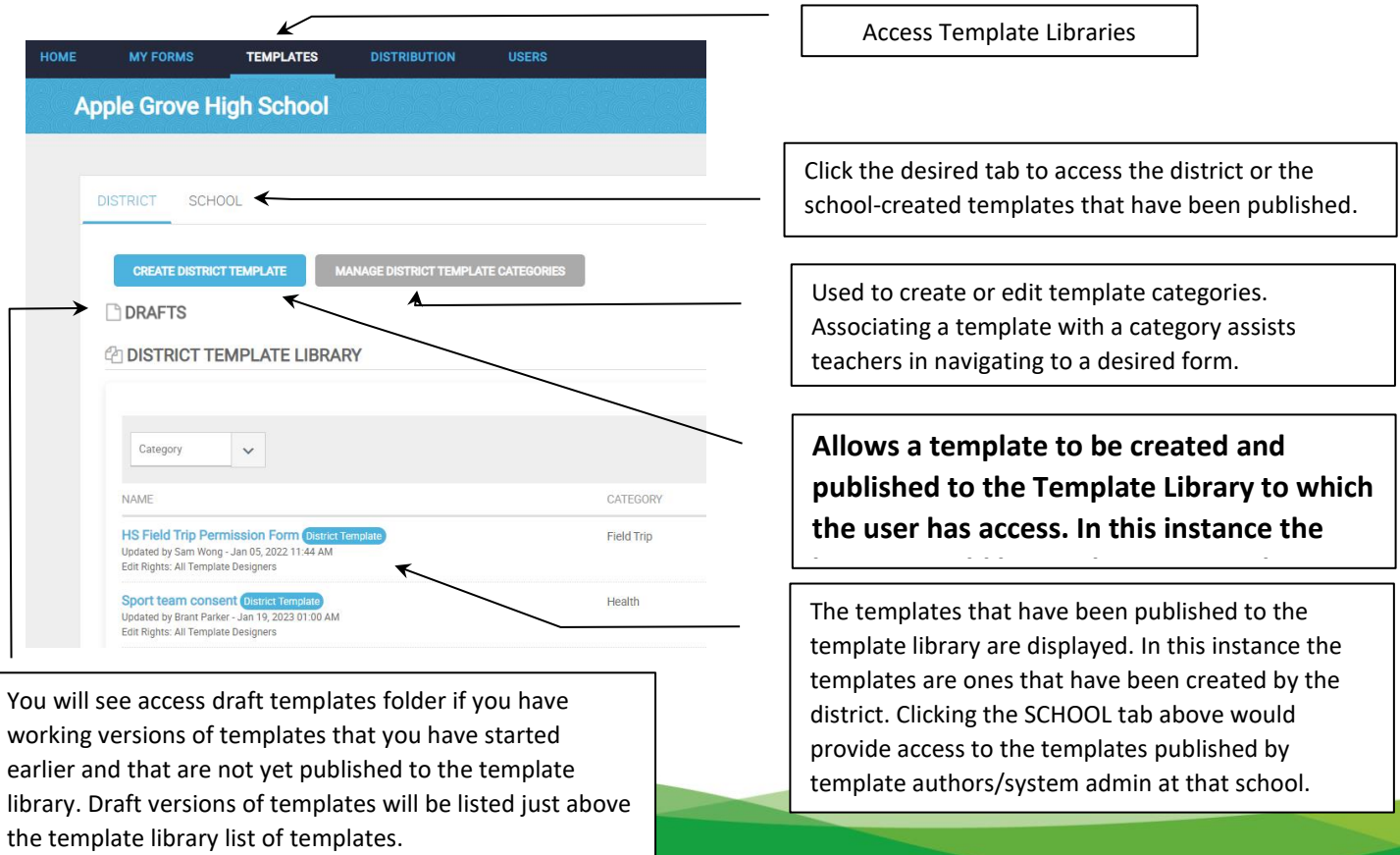# A Guide to Creating Templates

The SchoolSoft Form Manager uses templates as the basis for creating forms. This approach helps ensure all forms created from a template are consistent in terms of their content and format. A video overview showing how to create templates is available within the TEMPLATES page and clicking the 🎥 icon or you can view it now on YouTube by clicking here. Text help is available by hovering over the ℹ️ icon within the Form Manager.

Creating Templates

It is important to understand that all forms that are created, distributed and collected in the Form Manager are based upon a template. Therefore, a form template must exist in the Template Library before a form can created and distributed. Templates can only be created by the following users:

- District Admin – Can author templates for a group of schools and then and selectively publish the template to one or more schools' Template Library, which will then be displayed under the District tab.
- System Admin – Can author templates and publish the template to the Template Library under the School tab for the school at which they are a System Admin user.
- Teacher and Template Author – a teacher (or other staff member) with this designation can author templates and publish them under the SCHOOL tab for the school at which they are a Teacher and Template Author user.

Access Template Libraries

Click the desired tab to access the district or the school-created templates that have been published.

Used to create or edit template categories. Associating a template with a category assists teachers in navigating to a desired form.

Allows a template to be created and published to the Template Library to which the user has access. In this instance the
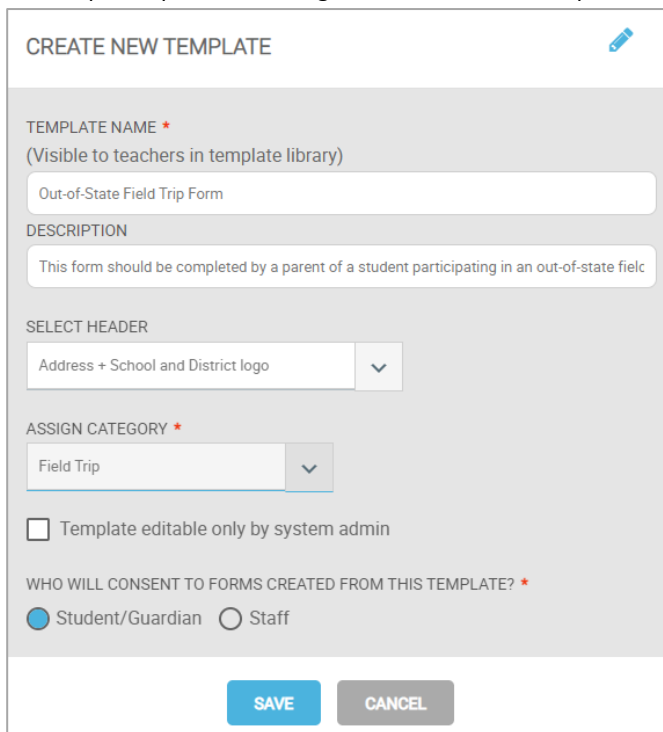
The templates that have been published to the template library are displayed. In this instance the templates are ones that have been created by the district. Clicking the SCHOOL tab above would provide access to the templates published by template authors/system admin at that school.

You will see access draft templates folder if you have working versions of templates that you have started earlier and that are not yet published to the template library. Draft versions of templates will be listed just above the template library list of templates.

The process of creating a form is a structured process in that a template first is given a title, brief description and be categorized. Once that is done, the user enters the Template Builder, which allows form elements to be added to the template in a stacked manner. In other words, the template is created by the template author selecting form elements to be included one at a time. The first element will be at the top of the template the next form element below it, the next form element selected will be added below it, and so on until the template is complete. One limitation of this approach is that form elements cannot be horizontally beside each other. However, form elements can be re-ordered in the template by clicked the top of the form element and dragging it to the desired location.
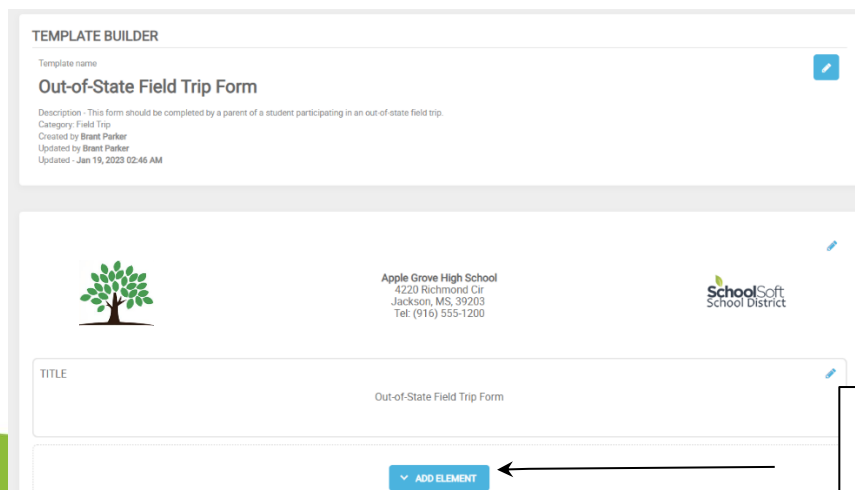
Steps to Creating a Template

1. Complete the fields that describe the template you want to create. It is good practice to provide a detailed description as it helps the person creating a form to find the template they are wanting to use.
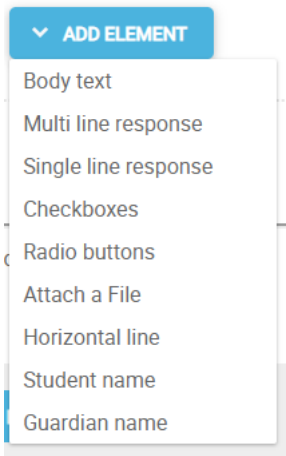

2. Use the Template Builder to edit the information about the template if desired and use the ADD ELEMENT button to add form elements that will contain the content in the forms that are created from the template.

The ADD ELEMENT button is used to add a new form element to template.

3. There are nine different form elements that can be used in the process of building the form.

ADD ELEMENT
- Body text
- Multi line response
- Single line response
- Checkboxes
- Radio buttons
- Attach a File
- Horizontal line
- Student name
- Guardian name

4. Many of form elements have properties that must be defined by the template author.

SINGLE LINE RESPONSE

DESCRIPTION *

Please provide the best number to reach you at in the event of an eme

OPTIONS

RECIPIENT

Guardian

RESTRICTION SETTINGS
☐ Teacher to edit   ☑ Required

SAVE   CANCEL

The description will be displayed as text above the form element. In this instance, the parent is being asked to provide the best phone number to be reached at in the event of an emergency.

You can make this a required form element by placing a checkmark here.

The *Teacher to edit* checkbox can be checked if the template author wants the teacher to be able to edit the content in the Description field or other aspects of the form element. In this example, the template creator did not want to allow the teacher to change that request for the best number to reach the parent at so the box is unchecked.

If the Teacher to edit is checked when a teacher uses the template to create a form the form element will display a tag as shown below.

Teacher to EDIT

B I U S x₂ x

The recipient is the individual to whom the form element is directed to. In this instance it is the parent or guardian. The other choice in the drop down is for students, which is used when a form is completed by both parent and student. However, students can only complete forms if they are able to log into PowerSchool.

5. Form elements are added one at a time in sequence from the top to the bottom of the form. When using the Form Builder, each form element is displayed within a grey frame. A form element can be edited using the pencil icon or it can be deleted by clicking the X in the top right of the form element frame. The ordering of form elements can be changed by grabbing the top of the frame and dragging it to the desired location.

6. A default Signature form element is included on all forms. This element can also be edited and added to. In the screenshot below the signature element has been edited to include a statement pertaining to acknowledgement of risk.

SIGNATURE

Acknowledgement of Risk

I HAVE READ THE ABOVE, AND UNDERSTAND THAT BY PARTICIPATING IN THE ACTIVITIES DESCRIBED HEREIN, I AM ASSUMING THE RISKS ASSOCIATED WITH DOING SO ON BEHALF OF THE STUDENT NAMED ON THIS FORM. THE RISK OF SUSTAINING AN INJURY OR DEATH MAY OCCUR FROM THE NATURE OF THE ACTIVITY AND CAN OCCUR WITHOUT FAULT OF EITHER THE STUDENT, OR THE SCHOOL BOARD, ITS EMPLOYEES/AGENTS. BY CHOOSING TO TAKE PART IN THIS ACTIVITY, YOU ARE ACCEPTING THE RISK THAT YOUR CHILD MAY BE INJURED OR KILLED.

○ I, #GuardianName, have read, understand and accept the terms of this document.

Guardian

7. When the template is complete the PUBLISH button can be used to publish the template to the Template Library. If the template is not complete and the template author is planning on having it remain in draft form so it can be worked on later, the CLOSE button is used.

Any draft templates can be accessed from the template authors TEMPLATE page. Only the template author will see the draft templates they have been working on. They do not get displayed in the Template Library until they have been completed and published. As shown below, the template options allow a draft template to be edited, previewed, published, copied or deleted.


DRAFTS

Consent of Guardian and "Acknowledgement of Risk" Out of State Trips and Activities

Description - This form should be completed by a parent of a student participating in an out-of-state field trip.
Updated by **Brant Parker**
Updated - **Jan 20, 2023 01:35 AM**
Category: Field Trip

∨ OPTIONS

✎ EDIT

👁 PREVIEW

➤ PUBLISH

⧉ COPY

🗑 REMOVE

8. Once a template has been published it appears in the Template Library. A teacher who is not a template author will be able to preview the template using the 👁 icon and can create a form from the template using the ⊞ icon.

📑 TEMPLATE LIBRARY

Category ⌄		Find a template...

NAME	CATEGORY	
Consent of Guardian and "Acknowledgement of Risk" Out of State Trips and Activities	Field Trip	👁 ⊞
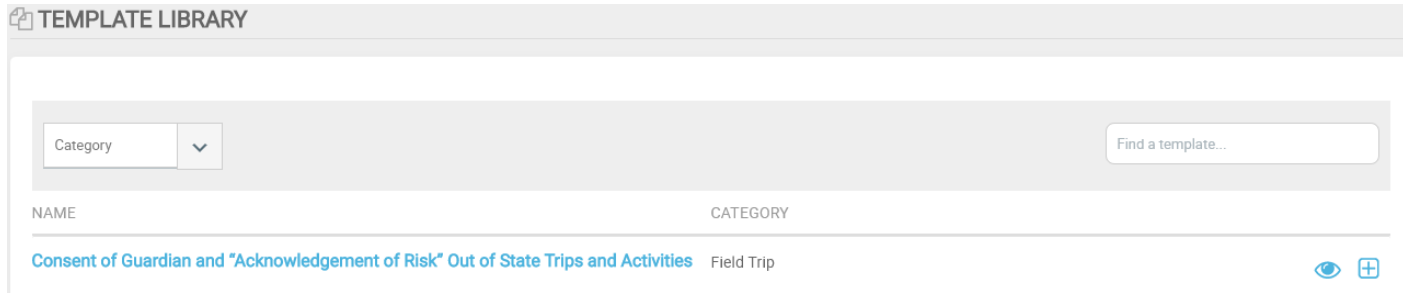
The template author will see additional icons, which will also provide the ability to edit, copy or delete the template.

NAME	CATEGORY	
Consent of Guardian and "Acknowledgement of Risk" Out of State Trips and Activities Updated by Brant Parker - Jan 20, 2023 01:38 AM Edit Rights: All Template Designers	Field Trip	👁 ✏️ ⊞ 📑 🗑
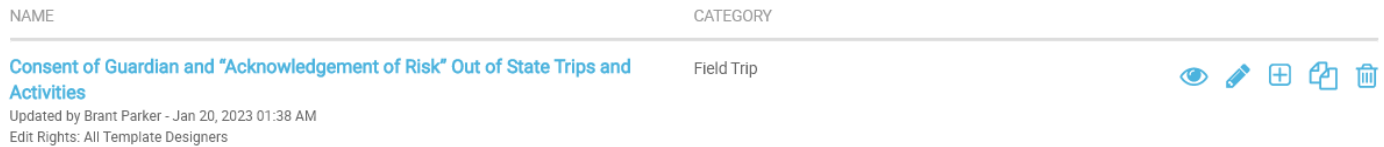
If a template author edits a template, the template is considered to be checked out for editing by the template author and is locked to any other template author who tries to edit it. This prevents two people making edits to the same template and having one person's edits over written by the changes made by the other.

9. A District Admin user will see an additional icon beside the forms they have created.

👁 ✏️ ⊞ 📑 🏠 🗑

Clicking the 🏠 icon will display the list of district schools and allows the District Admin user to publish the form they have created to selected district schools' Template Library. Clicking the DONE button will complete the process of placing the template in the Template Library under the DISTRICT TEMPLATE tab.

DISTRICT TEMPLATE - ADD SCHOOL

The following schools can view and use the district template - **Field Trip - Standard Form All Schools**

GRADE

Filter by grade... ⌄

SCHOOL

Apple Grove High School	☑
Peach Grove Middle School	☐
Orange Grove Elementary School	☐
Cherry Grove Elementary School	☐
Walnut Grove Middle School	☐