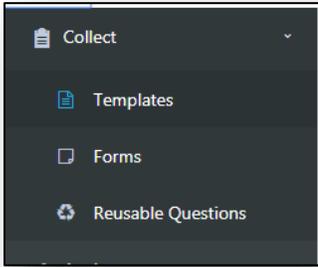


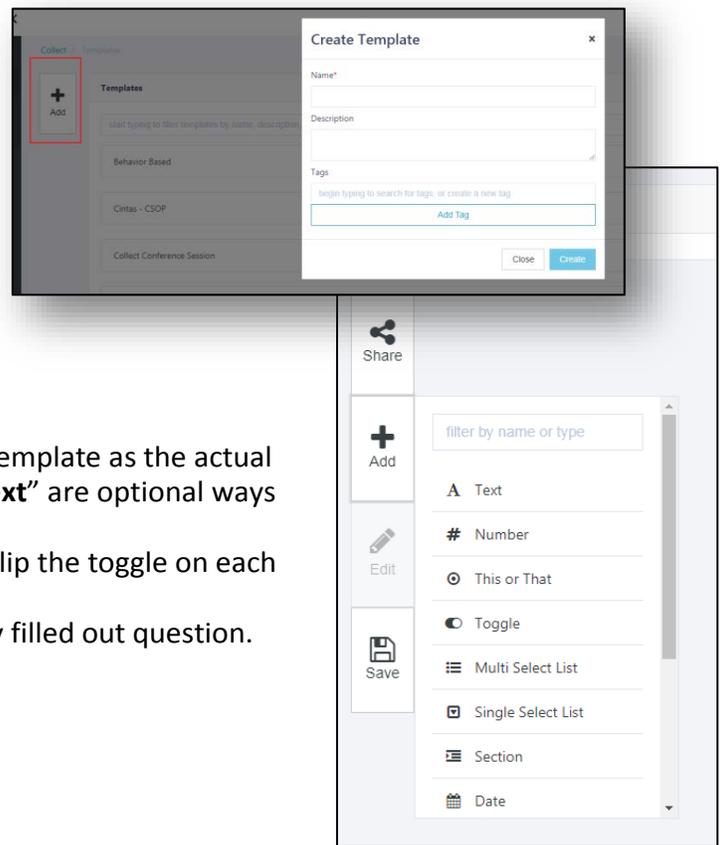
## How do I create, edit, and delete templates?

Within Collect, authors create reusable *templates* which are forms to be completed. A *form*, or completed template, contains the template's data for reporting purposes in Analyze.

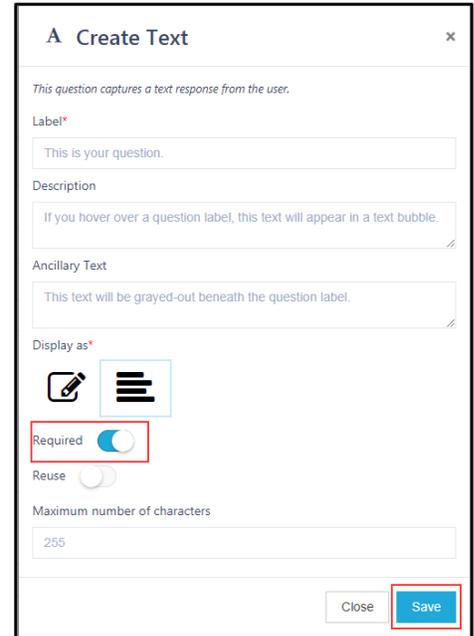


### Creating Templates

- From the home screen, select “**Add**”. Name your new template and add a description.
- Select *questions* from the left to populate your template. Questions are the building blocks of your template. During template completion, the observer answers these questions. There are several different types of questions to choose from, such as text-based, numeric, and single/multiple choice.
  - The “**Label**” will be what is shown on the template as the actual question. “**Description**” and “**Ancillary Text**” are optional ways to add context to a question.
  - If you’d like to make a question required, flip the toggle on each individual question.
  - Click the “**Save**” button at the end of every filled out question.

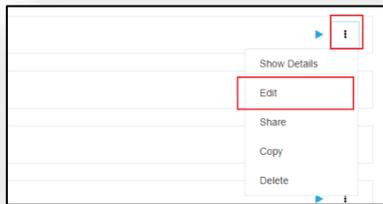
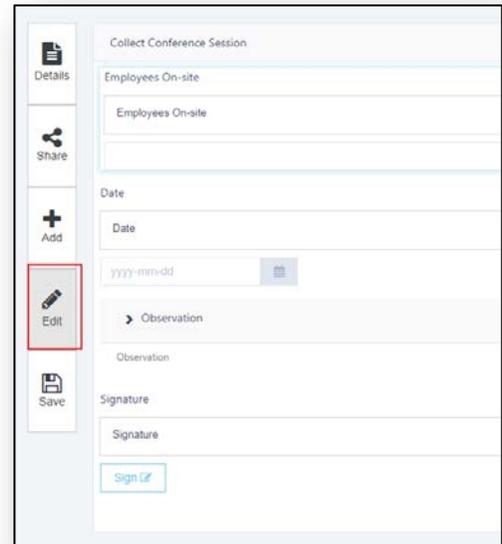


- For more information on the types of questions available and how they function, please see our Available Questions document, PSC-17:031
- Choose the Preview button to see how your template will look in the User Interface.
- Once you are satisfied with your template, click “**Save Template**”.



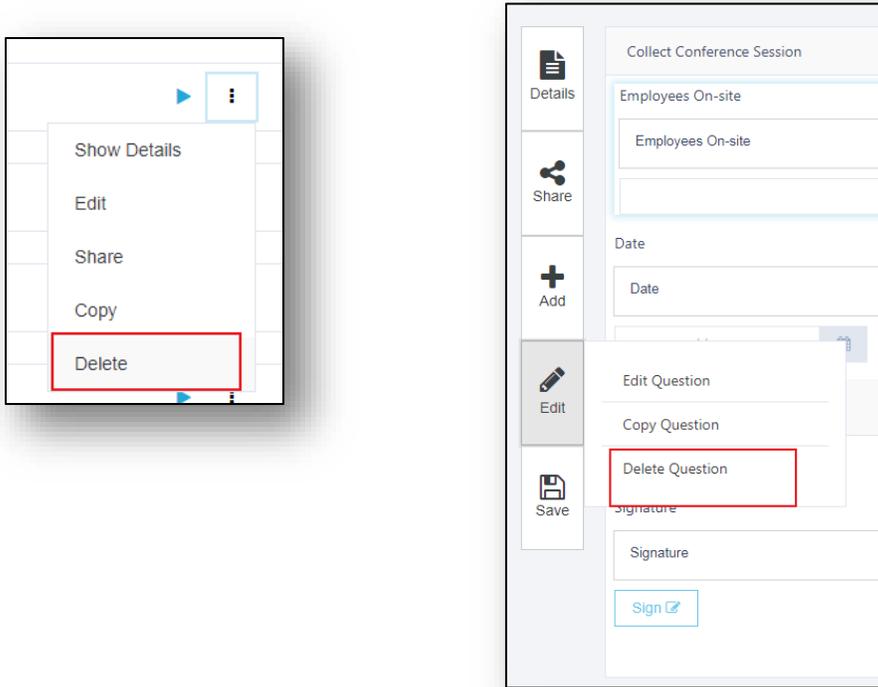
## Editing Your Template

- From the home screen, find the template you’d like to edit, and click the body of the Edit button on the far right side.
- You may edit individual questions within the template in the same fashion.

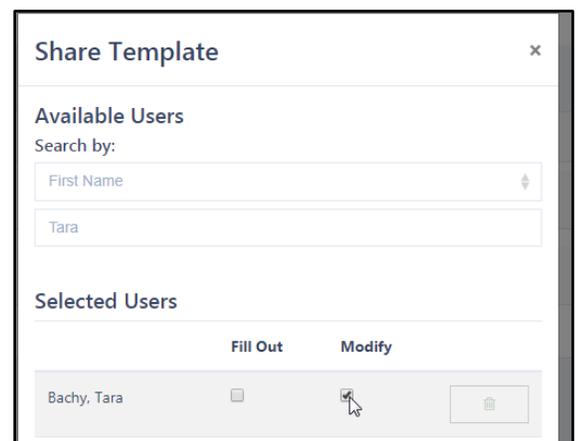
## Deleting Templates

- Templates and Questions may be deleted by selecting the down arrow next to the Edit button.



## Sharing Templates

- You may select one or more SmartWork users to fill out your templates and create forms.
- Users must have made their initial log in to SmartWork in order to be available to select.
- While editing your template, select Details, then Share Template.
  - You can search by first name or last name
  - You may allow a user to fill out or modify the template. If you give Modify rights, template ownership will transfer to that user. They will be able to edit the template, but you will lose your author rights.



## Export Templates

- Once forms are filled out, you may export individually or all at once into CSV format. Select the downward arrow next to the **“Fill Out”** button on the form you wish to export.
  - **“View Forms”** allows for individual export.
  - **“Export”** creates a CSV file of all available filled out forms.

