

## Creating Form Templates

A form-level template includes all the fields and pages in a form, and all data entry validation logic. Follow the steps below to create a form-level template from your Epi Info 7 project:

1. Open your Epi Info 7 project using the Form Designer module. This should load the form and/or forms in the project.
2. Right-click the form name on the Project Explorer (for example Survey). A context menu appears. (**Survey** is the name of the form.)
3. Select **Save Form as Template** from the context menu (Figure 1). The **Save Form as Template** dialog opens.
4. Type a name for the form template, for example CaseReport, into the **Template Name** field. It is always recommended to use the name of your form as your form template name.
5. Click **OK**.

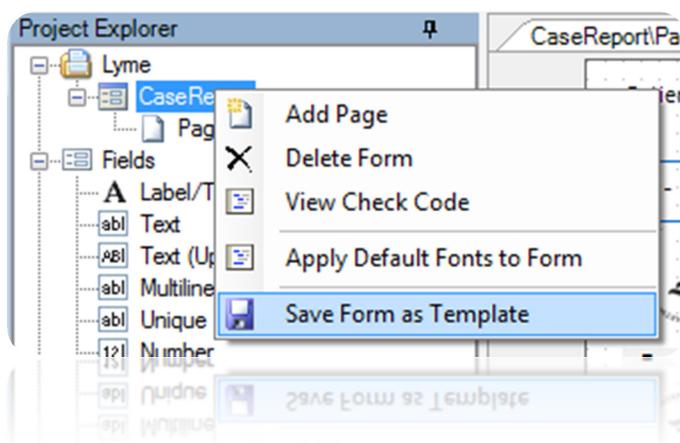


Figure 1

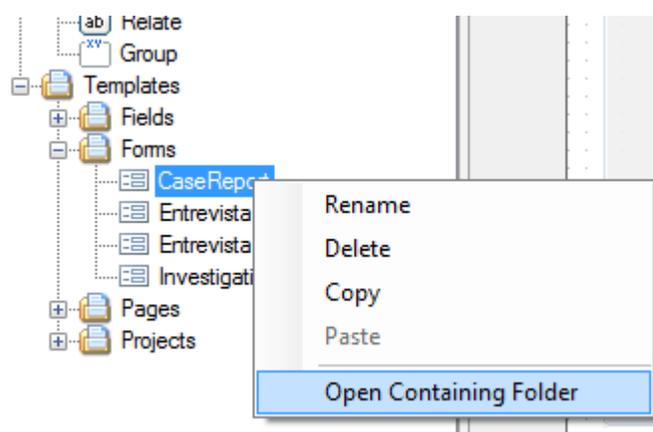
### *Sending a form template to a colleague or yourself*

After completing step 5, the form template will appear underneath the **Templates>Forms** section in the Project Explorer. You will then be able to send the template to yourself via email.

Follow the steps below to find the form template file so it can be attached to an e-mail message or copied to a thumb drive.

1. Find the **CaseReport** item underneath **Forms** in the **Project Explorer**. You may have to scroll down in the Project Explorer pane to find it.
2. Right-click the **CaseReport** item. A context menu appears (Figure 2).
3. Select **Open Containing Folder** from the context menu. A File Explorer window opens.
4. Find the file called **CaseReport.xml** from the list of files in the Windows Explorer window. This file represents the template.

Once you've located the template file using Windows Explorer, you can attach it to an e-mail message using the e-mail client of your choice.



**Figure 2**

### *Downloading a form template from a colleague*

Once the colleague receives the file, through your health department e-mail account, your colleague will need to import the form template into Epi Info 7. You can follow the steps below to load the template into Epi Info™ 7 and create a project from it.

1. Download the file attachment from your e-mail client to the desktop.
2. Open the Epi Info™ 7 Form Designer module.
3. Navigate to **File > Get Template...** (Figure 3). A Windows Open File dialog appears.
4. In the Open File dialog, navigate to the desktop.
5. Select the file that was just downloaded from the e-mail client.
6. Click **Open**. After the above process has been completed, the template will be loaded into Epi Info™ 7
7. To create a new project using the project template, double click on the form template name located in the **Templates>Form** folder tree in the Project Explorer.

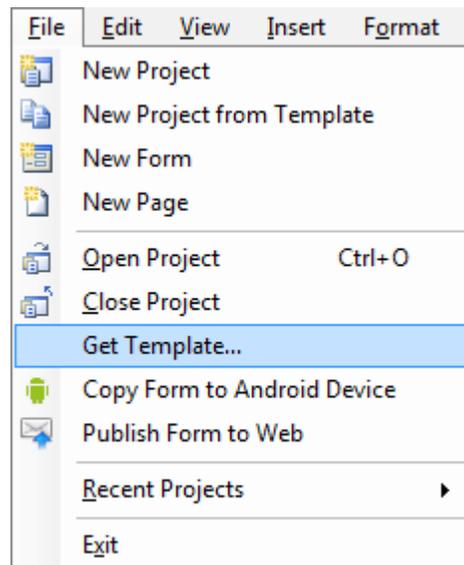


Figure 3