

# Templates

Live Forms supports three basic types of templates:

- [Template String Variables](#)
- [Form Templates](#)
- [Control Templates](#)

Control and Form Templates make it easy to reuse existing work you have done in previously created forms and to share that work with other designers. This chapter discusses Control & Form templates.

Click this link if you are looking for information on [Template String Variables](#).

**On this page:**

- [Form Templates](#)
  - [Publishing Form Templates](#)
  - [Using Form Templates](#)
- [Control Templates](#)

## Form Templates

Users must be logged-in to Live Forms in an account with [frevvo.Designer](#) permission to use templates.

### Publishing Form Templates

You can make any of your existing forms into a template that you and other designers in your tenant can then use as a starting point when creating a different form. The forms you publish will be available to all users in your tenant with the [frevvo.Designer](#) permission.

From the Forms home page, click the Publish



icon next to the name of the form you want to publish as a template.

**Publish template**

Enter a name, category and tags to publish your template. Enter as many tags as you want - users will be able to search using the tag and find your template.

Template Name:

Tags (comma or space separated):

Categories:

- HR
- ITDev
- MKTG
- Sales
- TelephoneSupport

Description:

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The Publish Template wizard contains the following fields:

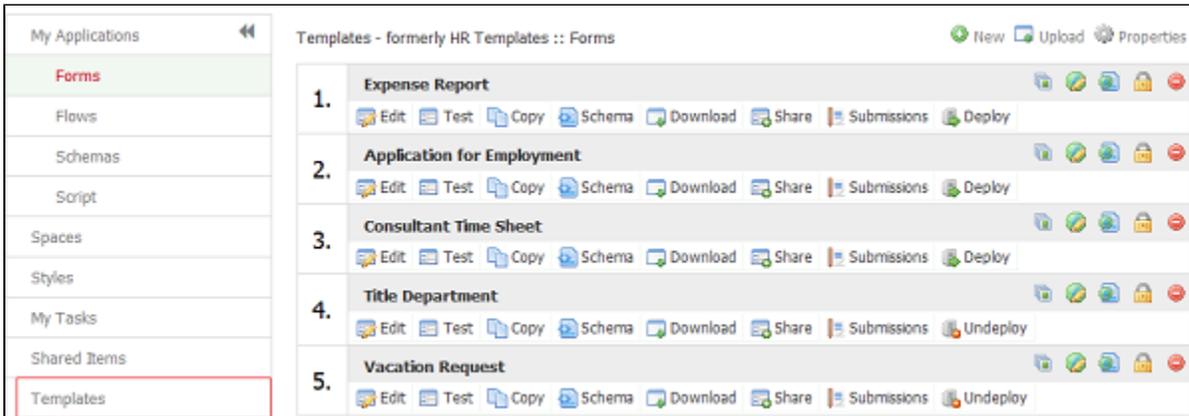
- **Template Name** – This defaults to the name of your form. You can keep this name or overlay it with a different one.
- **Tags** – Type at least one tag that will help you quickly find your template. Type as many tags as you like; if you type more than one, separate them with a comma or a space.
- **Categories** - Click on the category you want to assign the form to. If no categorizes appear in the wizard contact your tenant admin to [create Categories](#).

- Description – Enter a description of your form that will display when Forms By Category or Forms By Tag is selected.

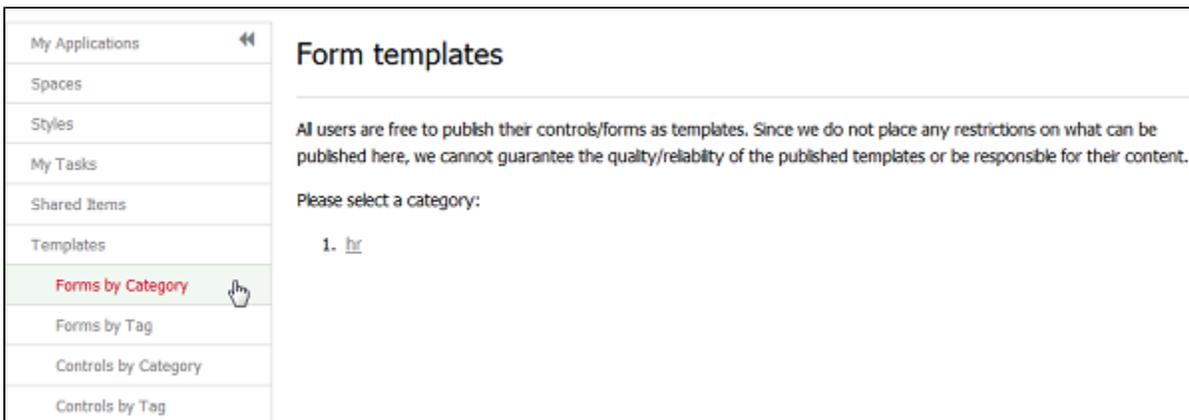
Click Submit to publish your template or click Reset to clear the three fields and start over. If you change your mind and don't want to publish your template, click the X to close the form. After you publish a template, you and all other logged-in Live Forms users can use it.

## Using Form Templates

To use a template when creating a new form, click the Templates tab on the [Forms Home Page](#). Choose **Forms by Category** or **Forms by Tag** which display along with **Controls by Category** and **Controls by Tag**.



You'll see the categories or tags you created when you published your templates. Some tags are in larger font; this means you've used these tags for more than one template. Click any category or tag to display a list of matching templates.



After the list of matching templates is displayed, you can:

- Test the template by clicking (the Try icon)— the template displays as a fully functional form so you can enter and validate data before deciding whether you want to use it.
- Use the template in a new form by clicking (the Add icon). By definition since this is a template you will be able to use it in as many forms

as you want. Once you've used it to create your form, you can customize your form without ever affecting the template.

My Applications

Spaces

Styles

My Tasks

Shared Items

Templates

Forms by Category

Forms by Tag

Controls by Category

Controls by Tag

## Form Templates

All form templates in category hr.

Name	Description	Categories
<b>TitleDepartment</b>	Department and Title form fields <small>Try Add</small>	<u>hr</u>
<b>ExpenseReport</b>	Expense Report <small>Try Add</small>	<u>hr</u>
<b>ConsultantTimeSheet</b>	Consultant Time Sheet <small>Try Add</small>	<u>hr</u>
<b>VacationRequest</b>	Vacation Request <small>Try Add</small>	<u>hr</u>
<b>ApplicationforEmployment</b>	Application for Employment <small>Try Add</small>	<u>hr</u>

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## Form Templates

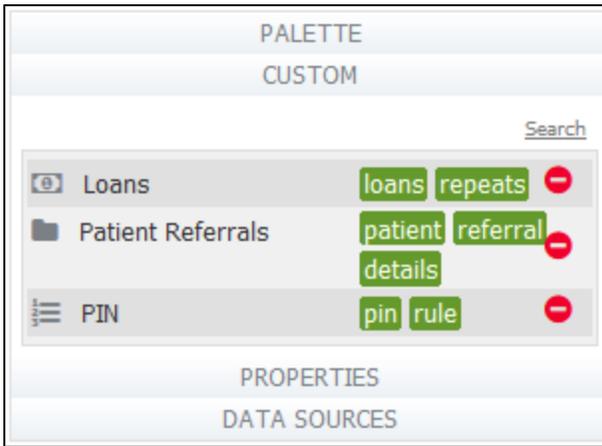
All form templates tagged with consultant.

Name	Description	Tags
<b>ConsultantTimeSheet</b>	Consultant Time Sheet <small>Try Add</small>	<u>consultant, time, sheet</u>

If you choose to add the template, you'll be walked through a wizard that allows you to make minor modifications before your new form is launched. If you like your template exactly as it is, skip the wizard by clicking Finish. This is the same wizard you see when you create a new form without using a template.

## Control Templates

A control template is a control or a group of controls that a user published in the Form Designer so that it can be reused in other forms and by other designers within the same tenant. You typically want to publish control templates after you spent hours working on a complex form with sophisticated layouts, field patterns, business rules, etc., and want to avoid redoing the work in a different form(s). You also may want to use control templates when you need to split the work among a number of form designers, where each designer is responsible for creating a subsection of a complex form and another designer is responsible for assembling these control templates into a final form or flow.



For more information about control templates, see the [Control Templates](#) topic.