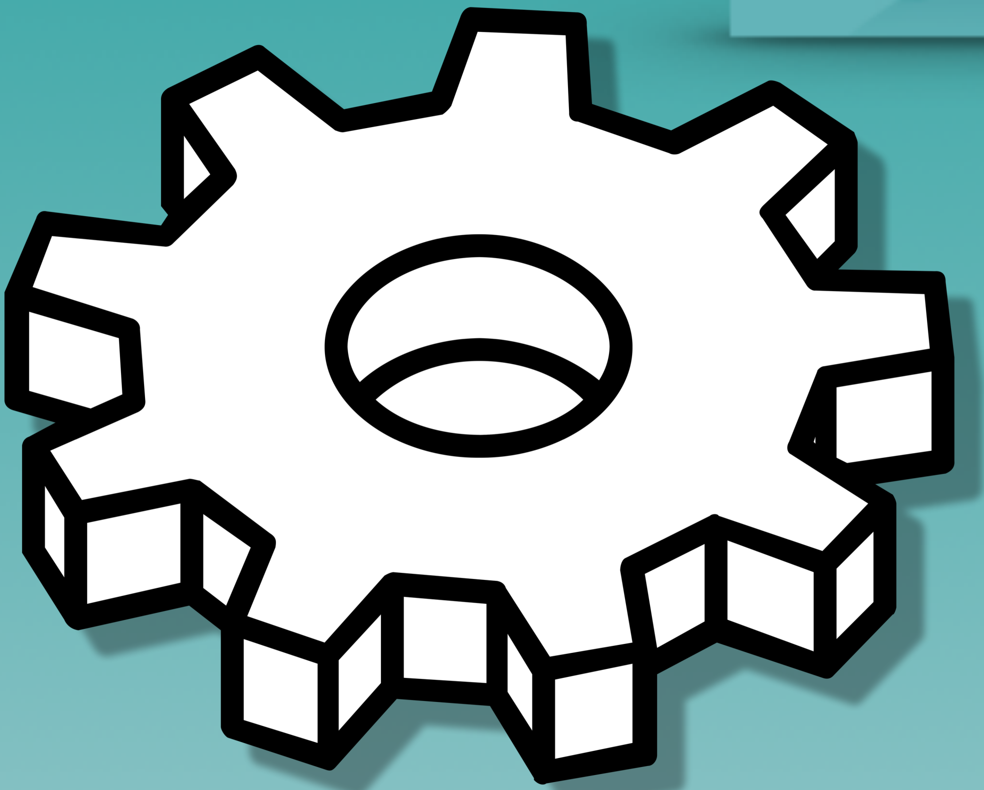
eWalk®



Building Templates

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Building Templates

Once you have created the Elements, Checklists and Value Lists required to collect the data you need, you can assemble them into the instrument or form that we call a Template. The Template is what you fill in with observed data, and upon which the reports are based.

The first step in creating any element is to navigate to the area where elements are created. This is done by selecting 'Build', and then 'Templates'. Figure 1 shows the traditional Build button and Figure 2 shown the location of Build when using 'Views'.

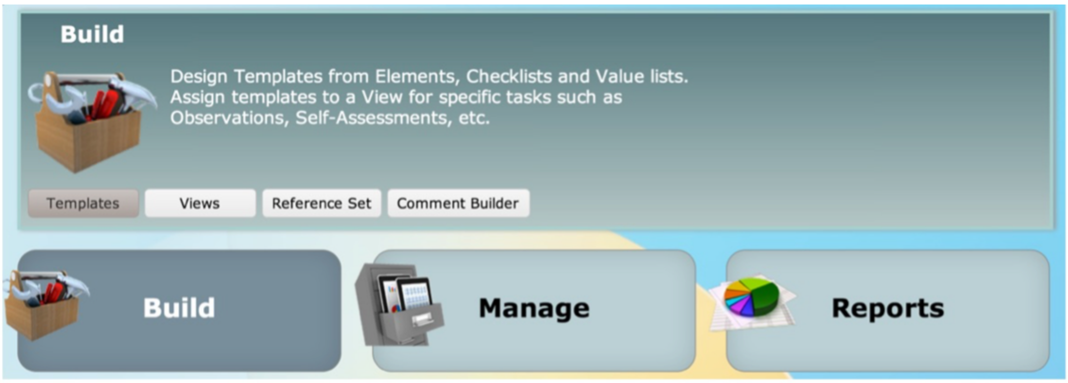

Figure 1 - location of Build in classic eWalk

Figure 2 - location of Build in the 'Views' version of eWalk

Templates are edited and created by selecting the 'Templates' which lists all of the current templates and has a a button to create new ones (Fig. 3)

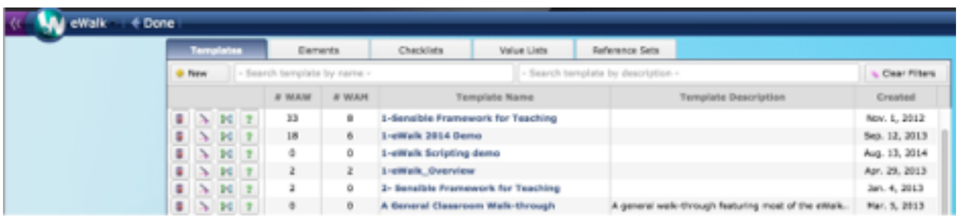

Figure 3 - the template list

Selecting 'New' to create your template will popup the New template window (Fig. 4)

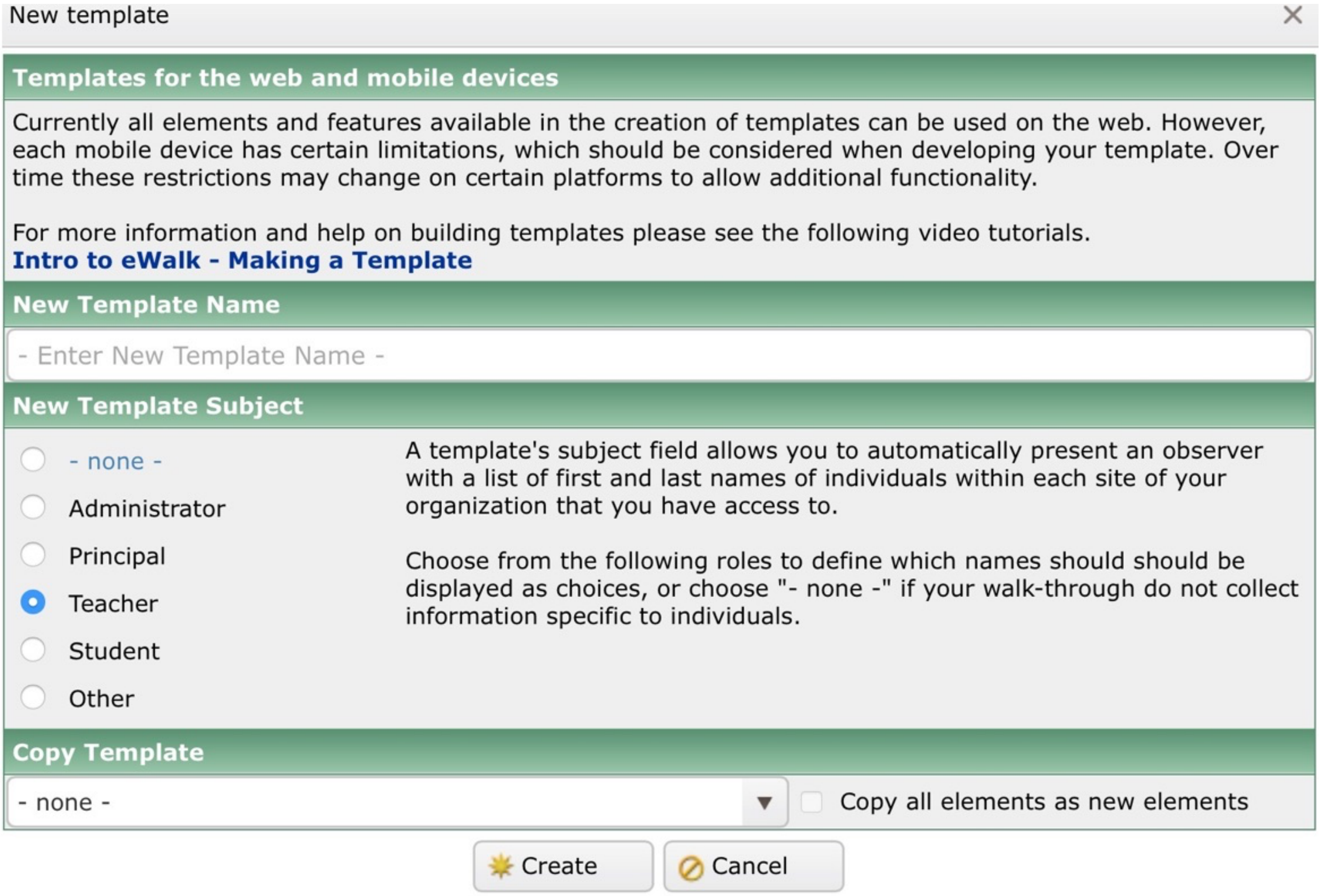

Figure 4 - the new template window

Before you can begin to build your template, you give it a name and must indicate if there will be a 'subject' (identifiable person) for the walkthroughs that this template will make. If there will not be anyone identified (i.e. an anonymous walkthrough), then you should select **<none>**. Otherwise select the appropriate subject (Teacher, Principal, Administrator or Student). Of course you need to have the teachers or students etc. available for access in your site(s). Figure 4 shows 'Teacher' selected as the subject.

If you own an existing template, or have been given permission to copy someone else's, you can copy the template and then edit it. When making a copy, you can select 'Copy all elements as new elements' which will give you a completely new set of elements (with the same names as the original) and this is not usually recommended as you could then have many elements with the same names and not be sure which is being used where.

After indicating who (if anyone) the subject of the walk-throughs will be, you enter an appropriate name for the template and then select **'Next'.**

The next step brings you to the Template Building Screen which is organized with tabs (Figure 5).

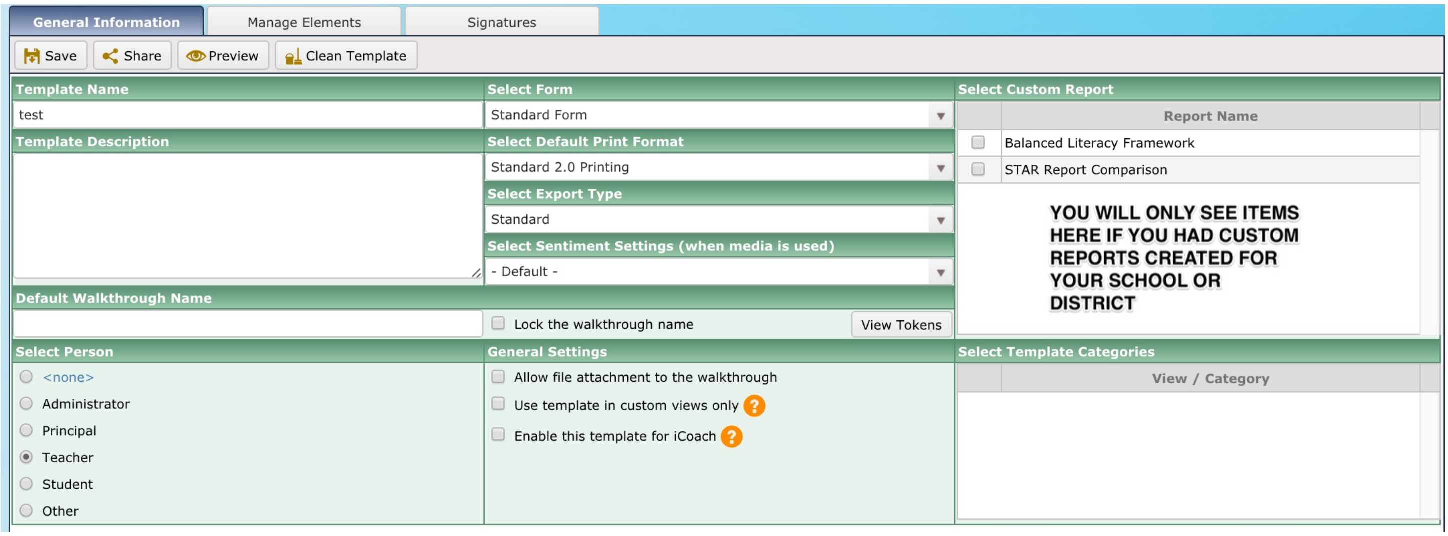

Figure 5 - the new template building screen

The ***General Information Tab*** is where you provide some basic information about how the template will operate, the ***Manage Elements Tab*** is where you build your template, and the ***Signatures Tab*** is where you can enable and control up to 3 electronic signatures on your form - controlling who can sign, if signing locks the form, what text is displayed to someone signing, and who if anyone should get an email when the form is signed. To begin your template creation, you would select ***General In- formation***.

You can change the name of your template by editing the ***Template Name***. If you intend to share the template with others, you may wish to enter a ***Template Description***.

The subject of the of the observations has already been selected a 'Teacher', but it can still be changed in the ***Select Subject*** box.

Select Form, ***Select Default Print Format*** and ***Select Export Type***, are usually left as-is as in most cases they will not be any options. If there have been any custom reports created for you, they will be available for selection in the ***Select Custom Report*** box.

In the ***General Settings*** box, you can choose to allow users to attach files to their forms, and if you have purchased iCoach (a Private, video-based instructional coaching system), you can select this template to be made available for rating videos.

The ***Select Template Categories*** box will list any categories that you have access to that are of type ***Template Builder***. Usually you will not have this type of structure and the box will be empty, but if you do, you can select the view and category to attach your template to. See the ***Creating Views*** document for more information about categories of type ***Template Builder***.

The Select Sentiment Settings (Fig. 6) is used for templates that will be used with videos and are used when providing feedback.

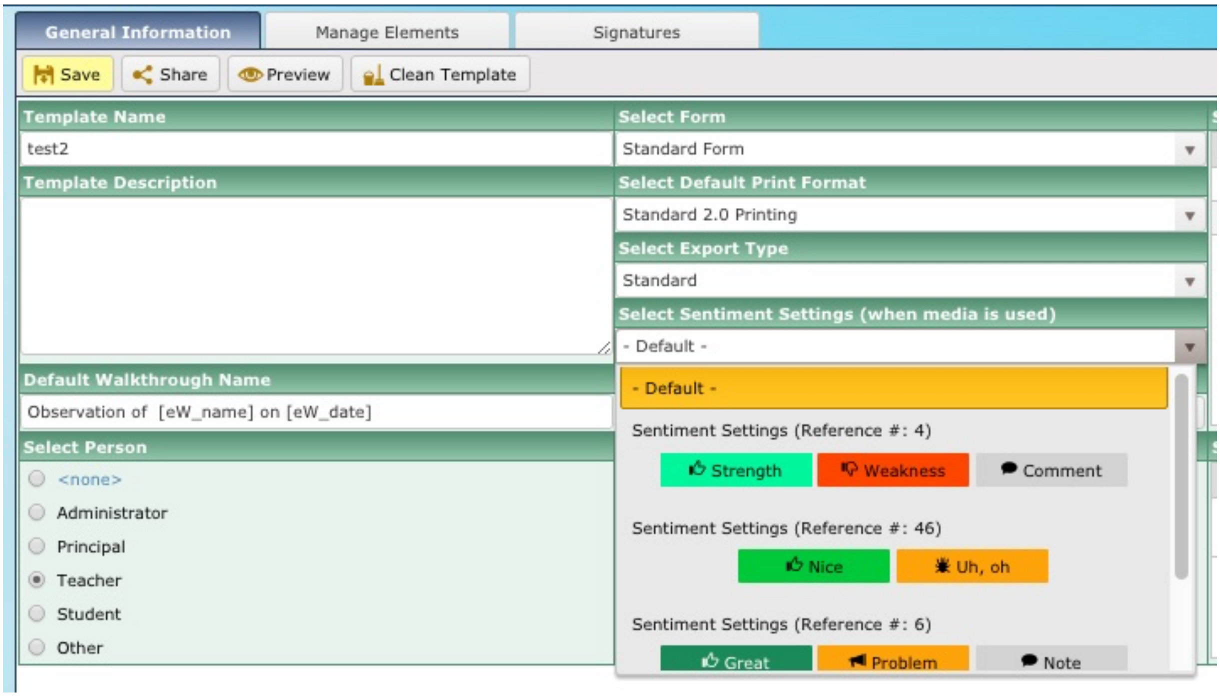

Figure 6 — selecting sentimats

The Default Walkthrough Name is where you customize the naming convention of your observations. Figure 7 shows a default name constructed by typing in ‘Observation of’ and then selecting the token ‘Replace the token by the person’s name’, typing in ‘on’ and then selecting ‘Replace the token with the current date’. The result is: ***Observation of [eW_name] on [eW_date]*** and Figure 8 shows the result of creating the default name for the template. Selecting ‘***Lock the walkthrough name***’ disables editing the name.

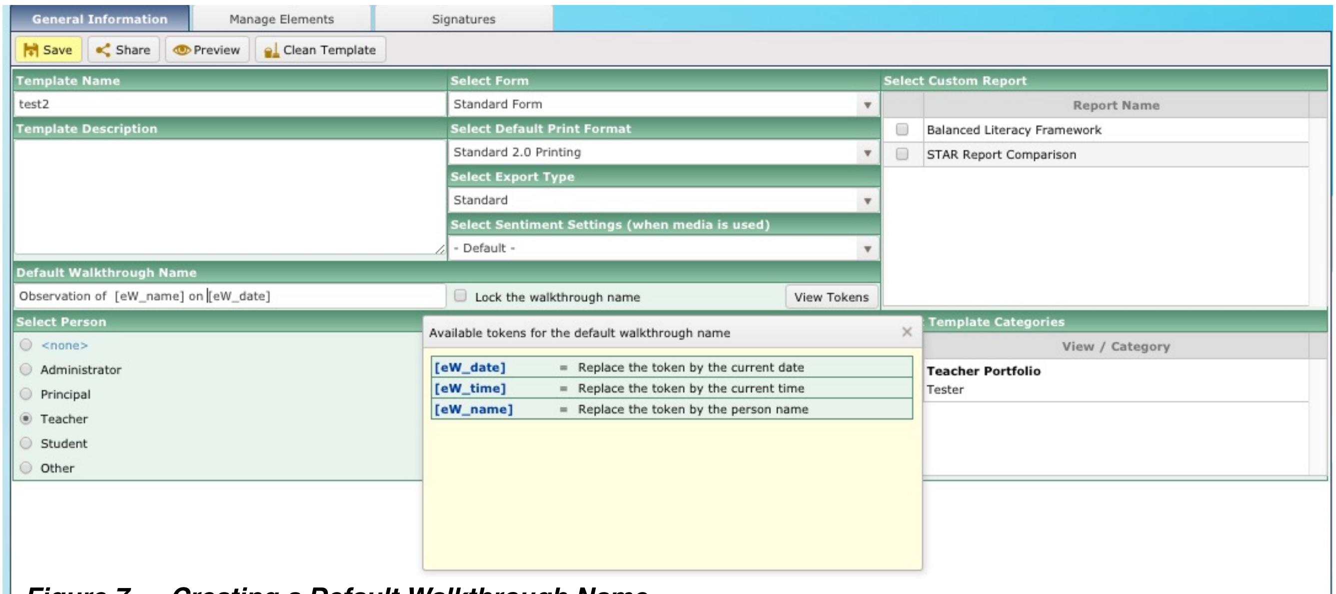

Figure 7 — Creating a Default Walkthrough Name

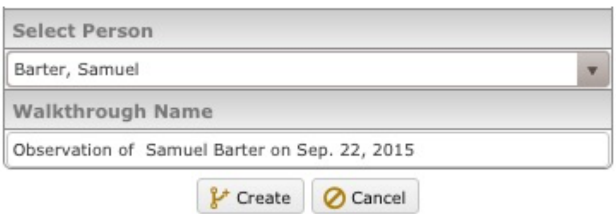

Figure 8 — Default Walkthrough Name when using the template

Once ***General Information*** has been entered, the ***Manage Elements*** tab is selected, and you are shown the screen where you assemble the contents of your template. The left side of the screen shows you all the elements you have already created, and the right side of the screen shows all the elements that have been used to build your template. Figure 9 shows the initial ***Manage Elements*** screen when creating a new template and the Template Elements side is empty.

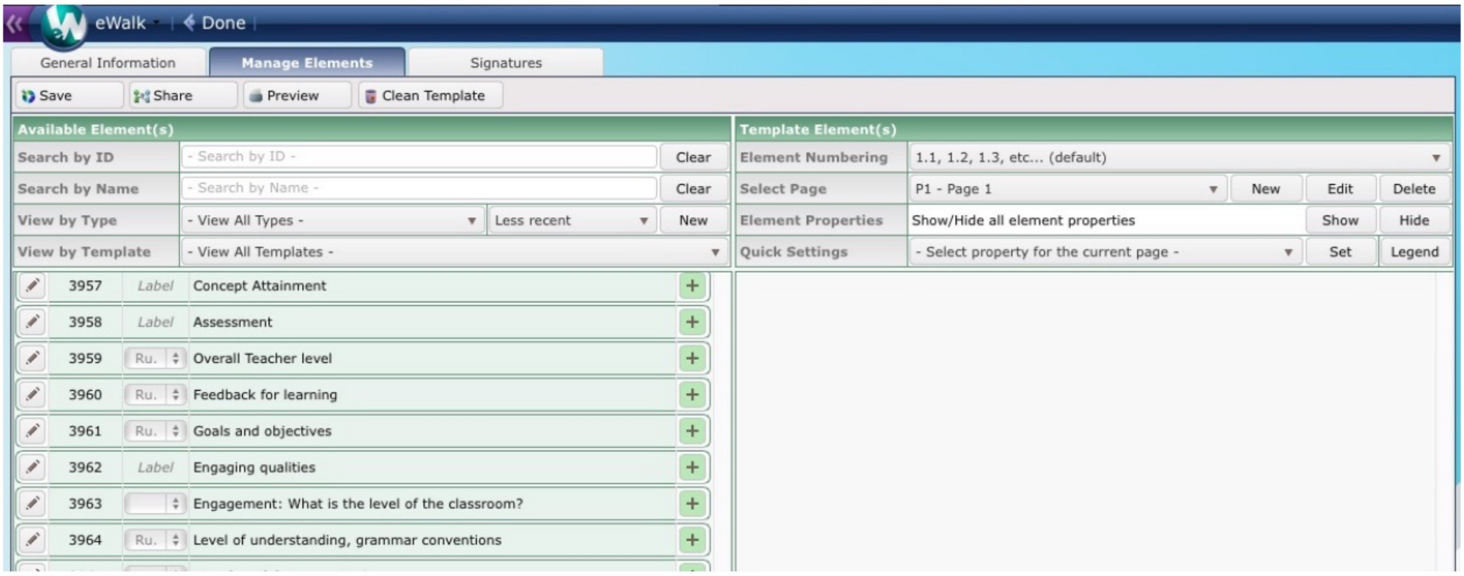

Figure 9 - the Manage Elements screen

If you have created or been given a large number of elements, it could be difficult to locate the ones you wish to use since initially, as everything is shown in the list. Figure 11 shows Labels, Rubrics and Drop Lists for example. A handy feature is the '***View by Type***' selector as shown in Figure 10, which will only show a single type of element, making it much simpler to locate what you want, and once selected, only that type of element is listed. Figure 10 shows the Manage Elements screen with Drop Down Lists as the selected type of element.

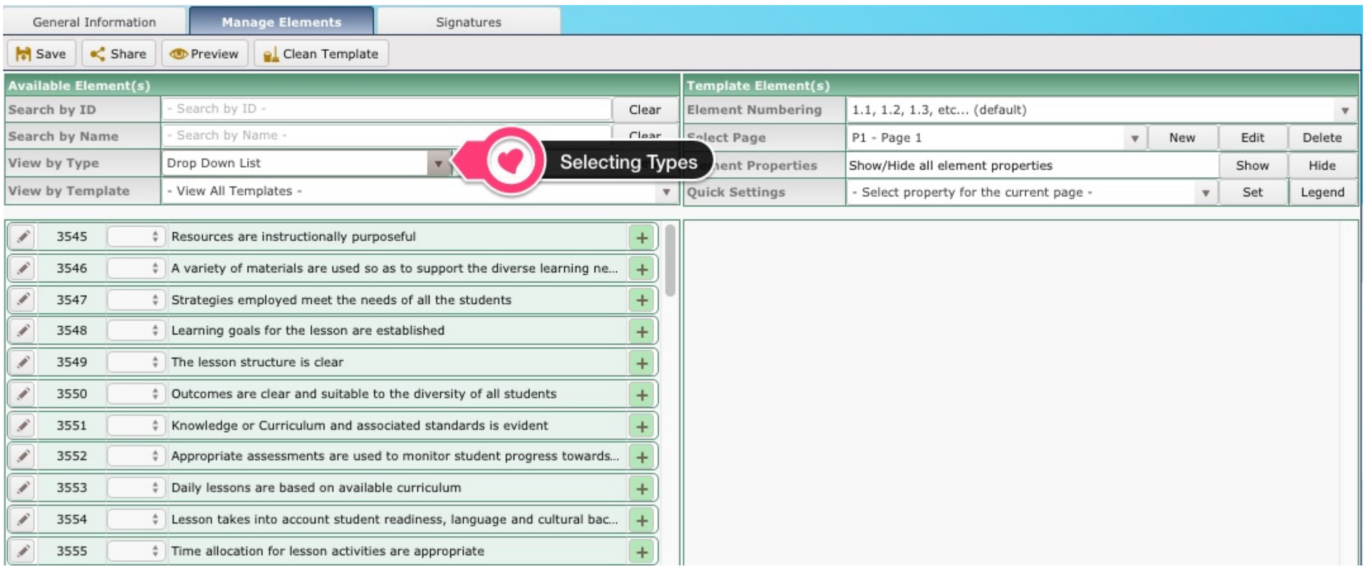

Figure 10 - Selecting an element type to view

You select an element to include in your template by clicking on the '+'. This moves it from your list of Available Elements (you can only use an element once in any template), and places it on the right side of the screen as a Template Element (Fig. 11), with the properties for the element shown. The element description is highlighted in yellow (as is the ***Save*** button) until the template is saved so you will always know what is only on your computer screen and what is permanently a part of your template. Figure 11 shows how you can ***Remove*** an element (move it back to the list of available elements), ***Edit*** an element, ***Change the page*** an element is on (when you have more than a single page in your template), ***Change the order*** of the element on the page, and ***Collapse*** the properties listing.

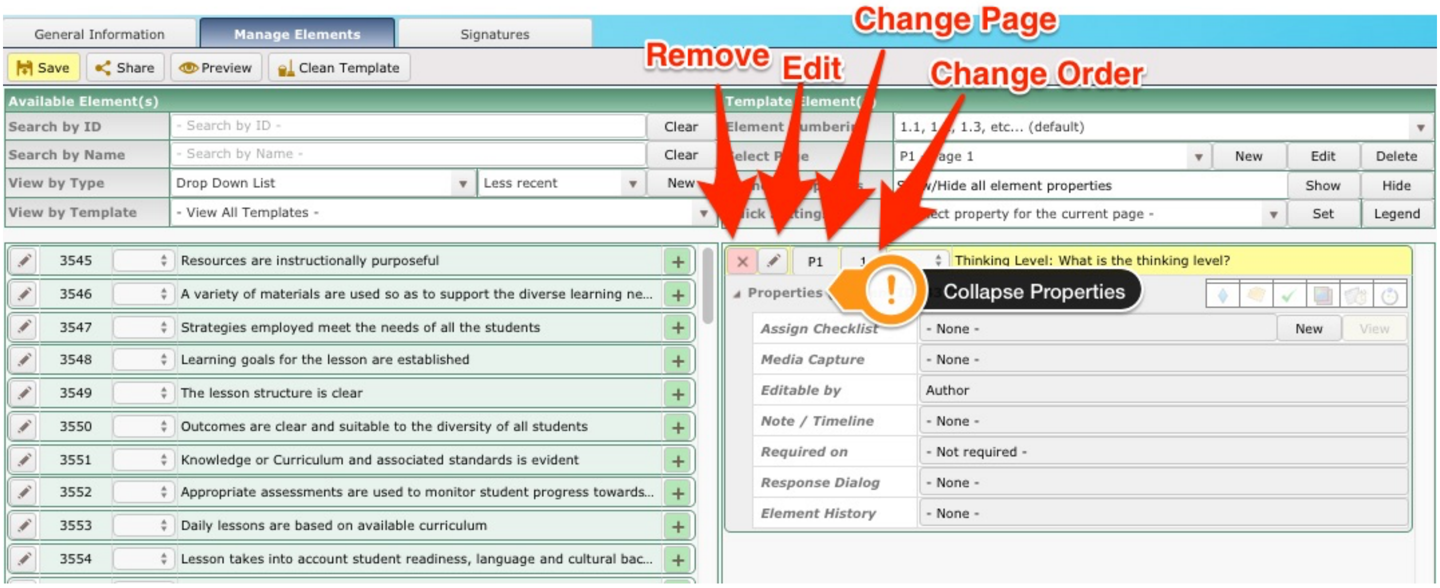

Figure 11 - the Manage Elements screen with an element selected from the left panel

The element properties themselves let you attach an existing checklist (or create a new one without leaving the template), add a ***Media Capture*** option (image, document or audio), to the element, control who can ***edit*** the element, add a ***note box*** or enable ***timeline (scripting)***, require the element to have a value before the observation is saved, enable ***a dialog box***, or show the element's ***history***. Figure 12 shows the ***Quick Settings*** that can be applied to all elements on a page, and Figure 13 shows the legends for the element.

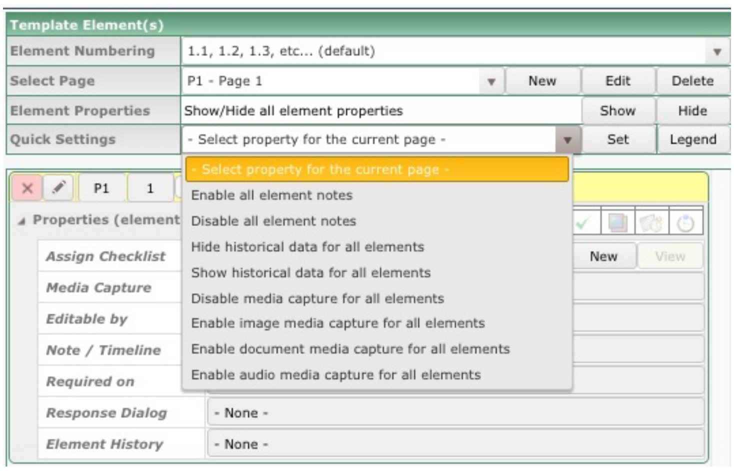

Figure 12 - Element Properties

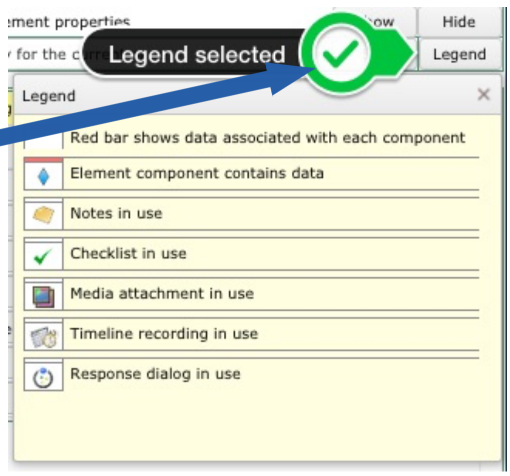

Figure 13 - Element Legends

In addition to the ***Quick Settings*** and ***Element Properties*** control, you can also control the ***Element Numbering***, adding pages, deleting pages and editing page names (Fig. 14)

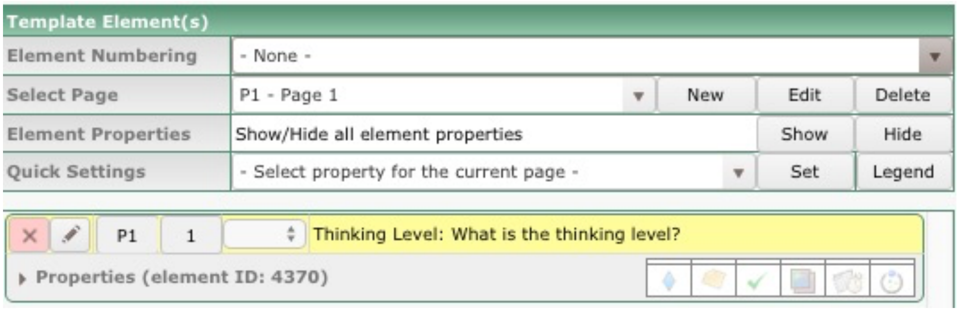

Figure 14 - Template properties with no element numbering selected

Once you have created your template, you need to Save it (Fig. 15).

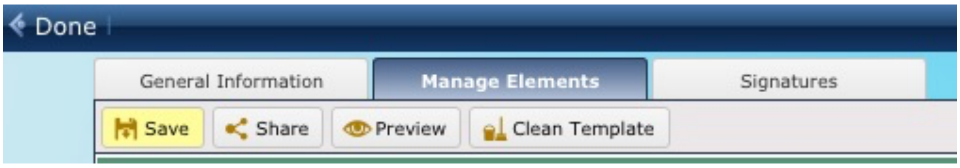

Figure 15 - Template saving and options

Once saved, you can ***preview*** your template, ***share*** it with others, and if you have made changes to an existing template and wish to delete all previous observations recorded using the template, you can ***Clean*** it.

If you wish to employ electronic signatures, select the ***Signatures*** tab (Fig 16), where you can control who can sign, the instructions given, and what occurs upon signature.

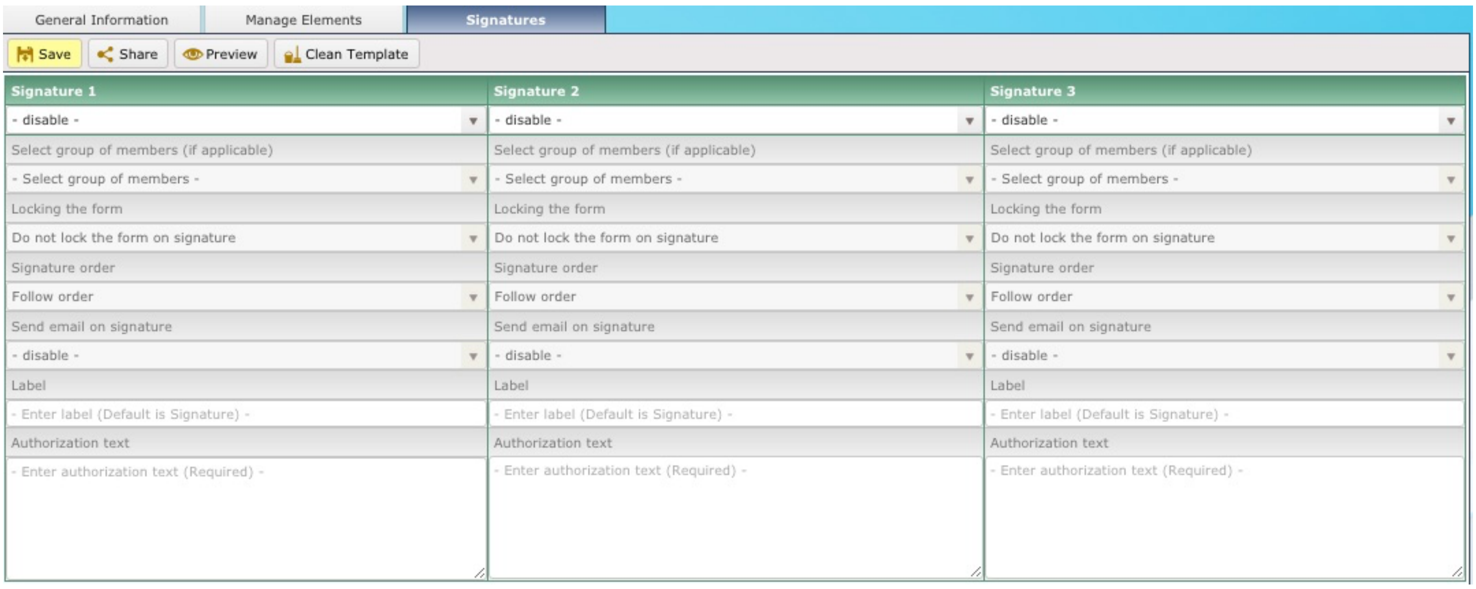

Figure 16 - Signature options

Note: If you are using eWalk with ***Views,*** your template will only be available in the ***Default View*** unless you Edit a custom View and link your template to one of its Categories.