



2.4.8 Using the Content Library

The Content Library allows you to store commonly used items—such as vital signs or laboratory questions—and add them to forms as needed. Reusing library items saves time because you do not need to recreate the same content for each form.

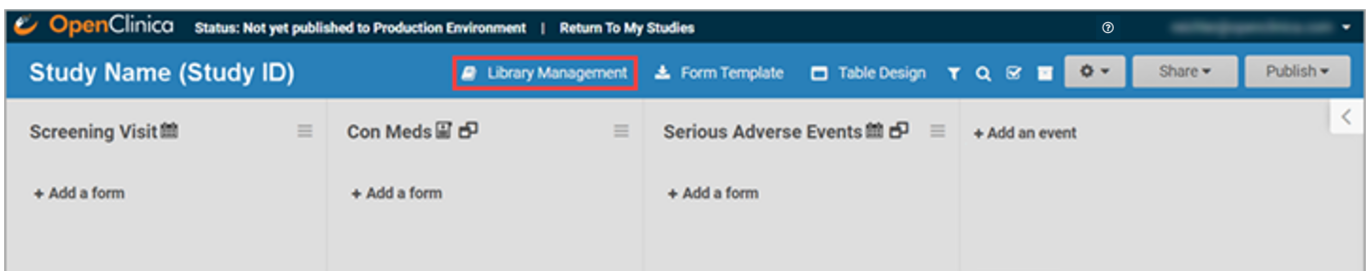
Only users with the **Administrator** user type can access Library Management. Other user roles do not see this feature.

Note: The Content Library is shared across all users with access to Library Management within the same customer domain. Items previously added by any user in your domain are available to you. Otherwise, the Library Management page will be empty. You can use the Content Library with **Form Designer** and **Form Templates**.

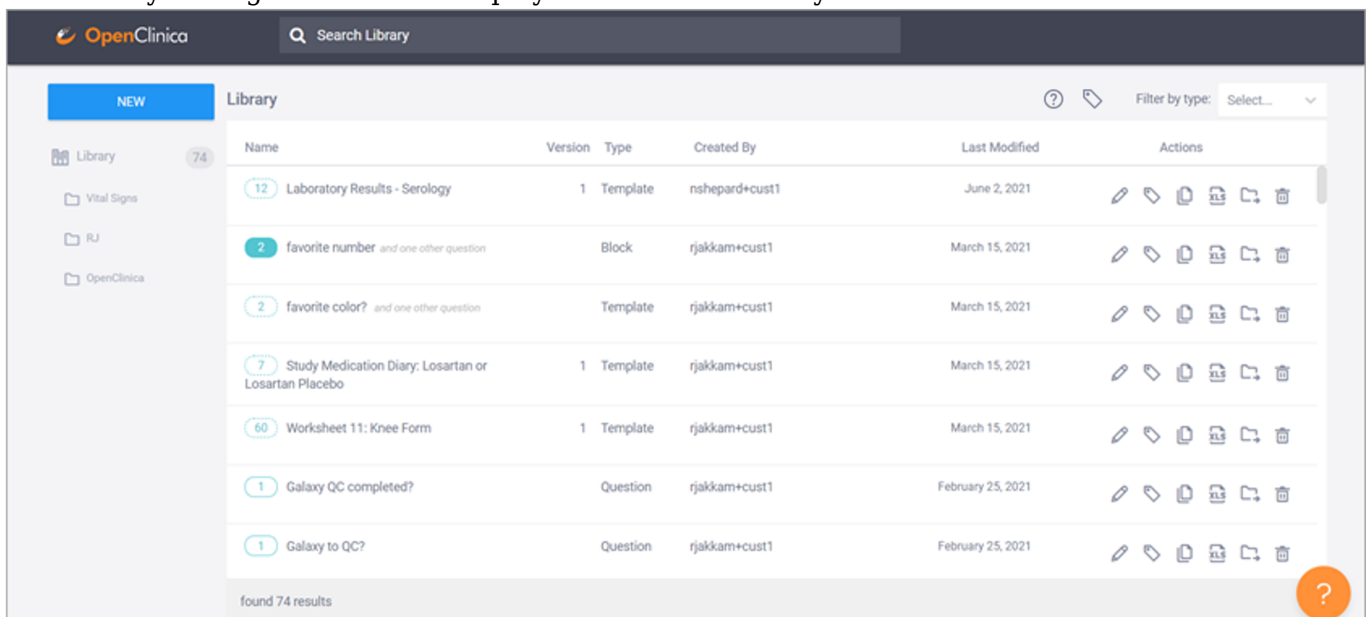
Access Library Management

To open Library Management:

1. In **Study Designer**, click **Library Management** in the header bar.



The Library Management screen displays all available library items.






Note: Version numbers apply only to templates. (see type below).

Content Library Item Types

Icons appear next to each item name to indicate the item type. The number shown on the icon represents the total number of items (including item groups) contained in the item.






Icon Item Type Description

	Question	A single item
	Block	Multiple items without a style or version number
	Template	A complete form template that can either be created/edited in the form design studio or uploaded with a form

Available Actions

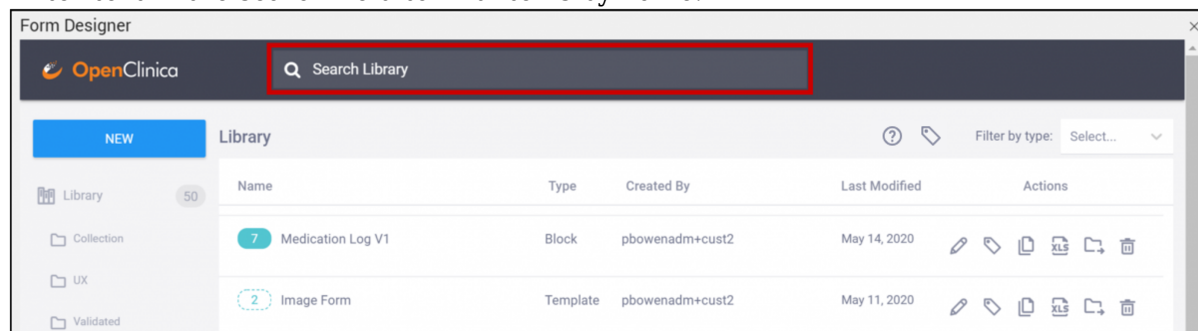
Action icons appear on the right side of each item:

Icon Action

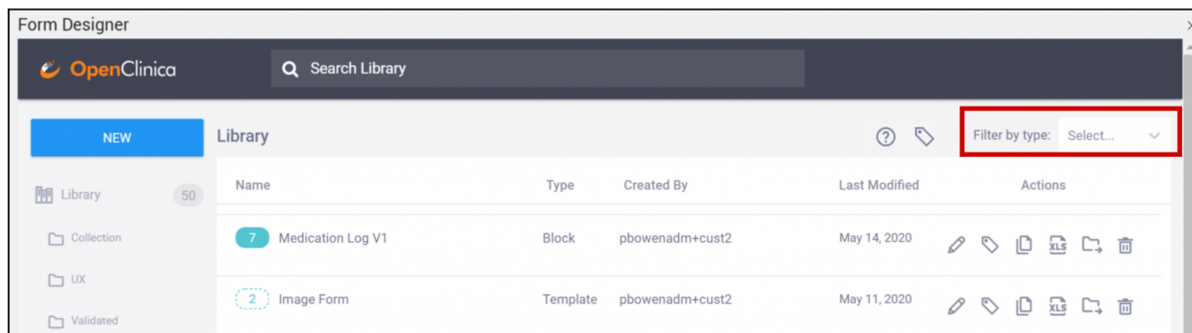
	Edit
	Label
	Clone
	Download XLS
	Manage Collection
	Delete

Search and Filter Library Items

Enter text in the search field to find items by name.

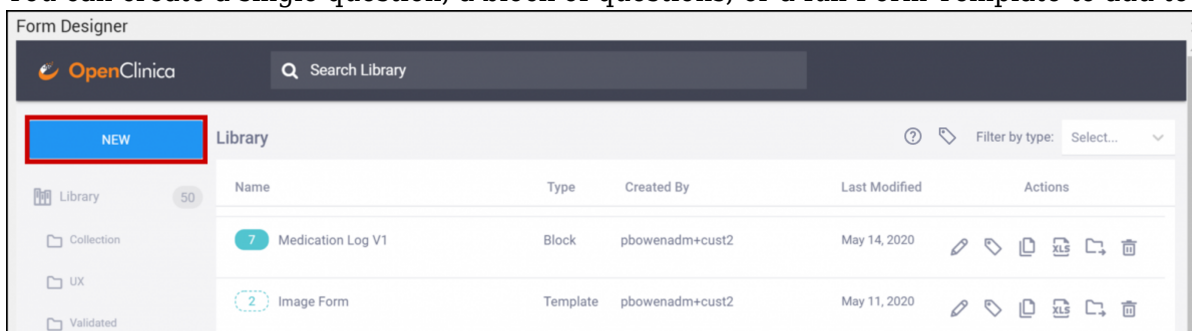


Filter the list by item type: **Question**, **Block**, or **Template**.



Create New Content Library Items

You can create a single question, a block of questions, or a full Form Template to add to the library.



To Create Content Library Items in Form Designer:

1. Click **New** in the upper-left corner of the Library Management screen.
2. Select **Question**.
3. Click the **+** icon.
4. Enter the question text.
5. Click **+Add Question**.
6. Select a question type.
7. (Optional) Complete additional question settings as you would in Form Designer.
8. (Optional) Repeat steps 3-7 to add more questions. Multiple questions are saved as a single **Block**.
9. Click **Create**.

Create a Form Template

1. When you click the new button in step 1 select **Template** from the options
2. Build a complete form as you would normally within the designer.
3. Name your template and save.

Edit Library Items

To edit a question, block, or template:

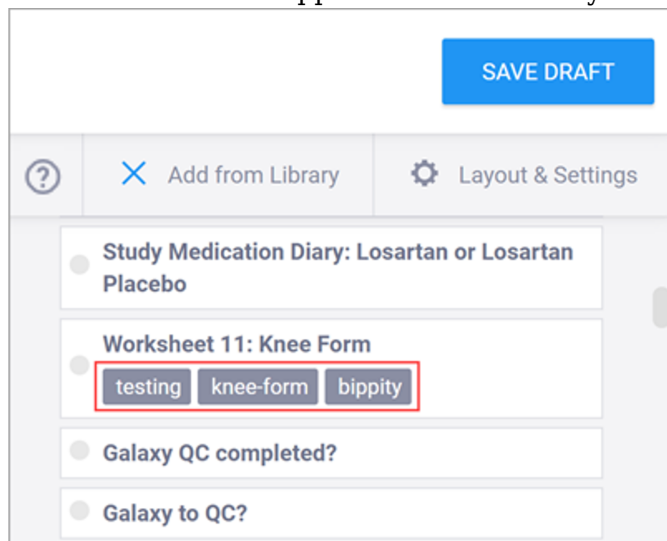
1. Click the **Edit** icon next to the item.
2. Make your changes in the designer.
3. Click **Save Changes**.

Delete Library Items

1. Click the **Delete** icon next to the item you want to permanently delete.
 2. Click **Delete** to confirm that you want to permanently delete the item.
-

Use Labels

You can use labels to categorize items beyond collections. Labels appear on items when you click the



Add from Library button in Form Designer.

Add a Label

1. Click the **Label** icon next to the item.
2. Click **Add Label(s)**.
3. Enter label text.
4. Press **Enter**.

Remove a Label

1. Click the **Label** icon next to the item you want to remove the label from.
 2. Click the **X** next to the label you want to remove.
-

Clone Items

1. Click the **Clone** icon next to the item you want to duplicate.
 2. Click **Ok** to confirm that you want to duplicate the item.
-

Download or Upload XLS Files

Download an XLS File

- Click **Download XLS** next to the item to download its **.xls** file.

Upload an XLS File

1. In Library Management, click **New**.
2. Select **Upload**.
3. Choose the XLS file to upload.

□ **Note:** Uploaded XLS files are automatically added as templates, even if they contain only a single question.

Use Collections

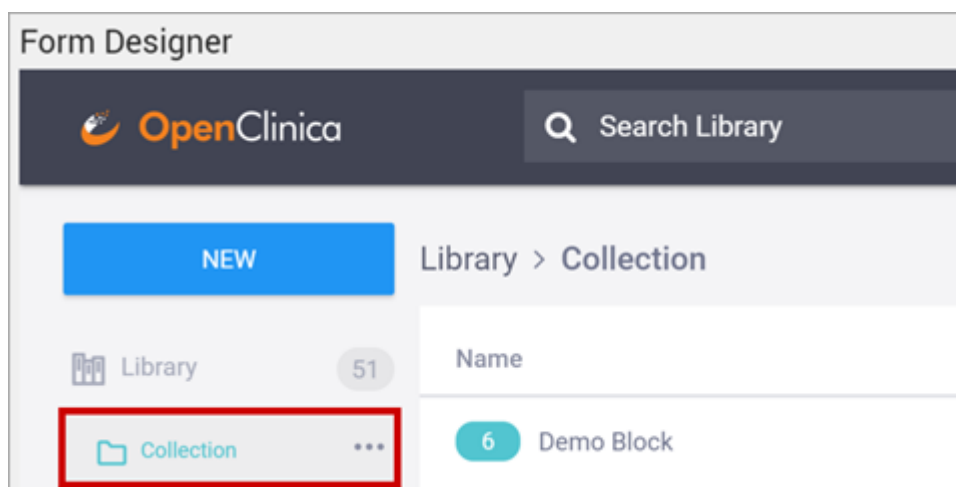
Collections allow you to group related library items.

Create a Collection:

1. Click **New** in the upper-left corner of Library Management.
2. Select **Collection**.
3. Enter a collection name.
4. Click **Create Collection**.

Rename a Collection:

1. Click the collection.
2. Click the **ellipsis** (⋮).
3. Select **Rename**.



Delete a Collection:

1. Click the collection.

2. Click the **ellipsis** (⋮).
3. Select **Delete**.

Add an Item to a Collection:

1. Click the **Manage Collection** button next to an item you want to add to the collection.
2. Select the collection you want to add the item to. If there are no available collections, the selection box will say none available.

□ **Note:** You can only add an item to a single collection.

Use the Content Library in Form Designer

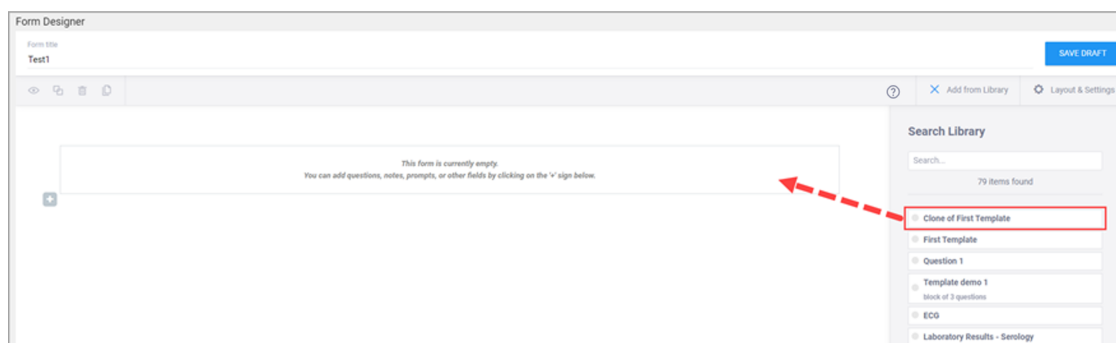
When working in Form Designer, click **Add from Library** to access library items. You can search the library or select items from the list.

If available, items display their labels and the number of questions included in a block or template. You can also add new items to the Content Library while working in Form Designer.

Add Items from the Library to a Form

To add an existing item to a form:

1. Click **Add from Library**.
2. Select the question, block, or template.
3. Drag the item onto the form and drop it when the dotted outline shows the placement location.



Add Items from a Form to the Library

To add items to the Content Library:

- Click **Add Question to Library** next to a question, or
 - Select multiple items or groups and add them as a single block.
-

Add Groups or Multiple Items to the Library from a Form

When editing a form, you can add multiple selected items or groups to the Content Library in a single action.

- Selecting an entire group adds the group and all its contents as a single **Block**.
- Items are added to the block in the same order they appear on the form.
- Items do not need to be consecutive.

The resulting block appears in the Content Library the same way as blocks created directly in Library Management.

Use Library Items in an XLS Form Template

To use a library item in an XLS Form Template:

1. Click **Download XLS** next to the item.
2. Edit the XLS file as needed, or upload it without changes.

You can also download or upload XLS templates in **Study Designer** and then add the form template to the Content Library.

Approved for publication by Kate Lambert. Signed on 2026-02-11 2:43PM

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