


ADVANCED FEATURES

Daily Plan Templates

 **PURPOSE:** To customize and use for routine daily planning to reduce repetitive work

HOW TO:

Step 1

1. Click global tab, **Templates**.
2. Click to +Add New Daily Plan Template.
3. In Setup form, type in Name and other fields similar to what you would do in a regular Daily Plan from scratch.
4. Save Changes

Step 2

On your Plan Details page in the Daily Plans section, there is a drop-down menu labeled, *Insert Template*. Use drop-down menu to select Template you want to insert for this day. This will automatically set the day in edit mode. Make any changes, and then click **Save Daily Plan** button to save your work.

EXAMPLE:

Situation: Primary instruction involves a textbook typically used every day or week.

Solution: Template includes a Description configured to the routine activity: “*Textbook Name, p.*” Then, when you insert that Template as a Daily Plan, simply fill in the page number, as applicable that day: “*Textbook Name, p. 43*”.

NOTE: When inserting a Daily Plan Template, the result is additive. This means that if you Insert Template into a Daily Plan that already includes rows of content, then the selected Template will be added to the bottom of the existing rows.