Program Setup

In order to build Programming templates, you may first setup your category headings, philosophies and theorists within the 'Program Setup' window.

This tip sheet will walk you through:

- **Creating Program Categories**
- **Create Program Philosophies**
- **Create Program Theorists**
- **Troubleshooting**

Summary

Create Program

1. Click on Program & Practices menu
2. Select Program Setup
3. On the Program Categories tab click on +Create
4. Enter name
5. Click Save

Create Philosophies

1. Click on Program & Practices menu
2. Select Program Setup
3. On the Program Philosophies tab click on +Create
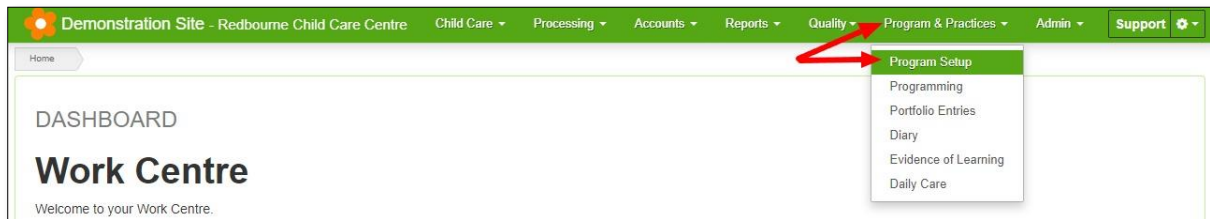4. Enter philosophy
5. Click Save

Create Theorists

1. Click on Program & Practices menu
2. Select Program Setup
3. On the Program Theorists tab click on +Create
4. Enter theorist
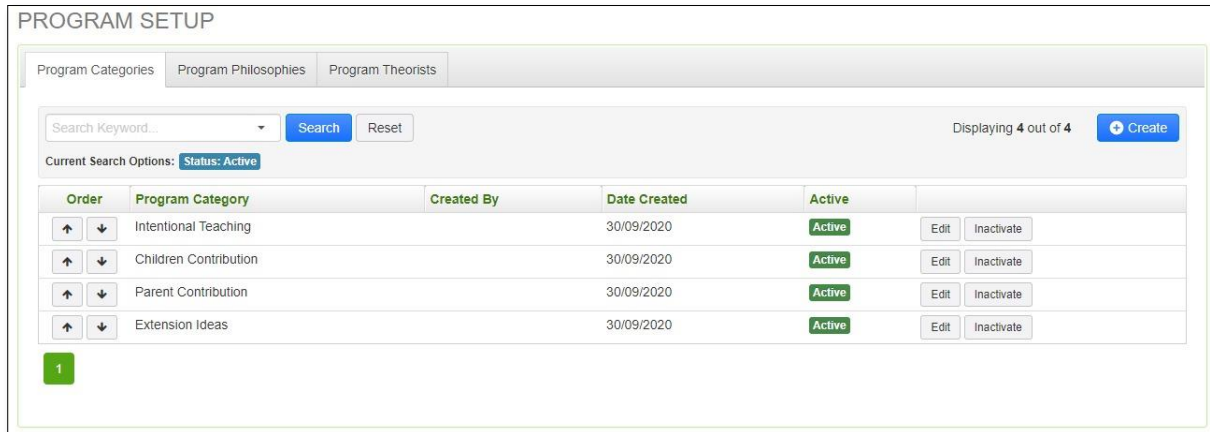5. Click Save

Program Setup

Detailed

To open this window, navigate to **Program & Practices** menu and select **Program Setup:**
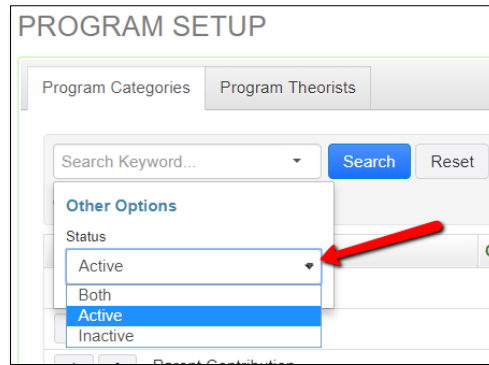

Program Categories

The Program Categories are the main headings to be written to within programming templates.

All active Program Categories will display in the list. You may view inactive categories via the advanced search function.
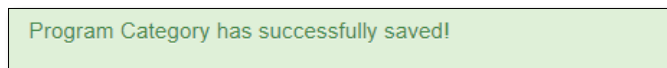
To create a new Program Category, click the **+Create** button.

Enter the category name in the **Add Program Category** window:
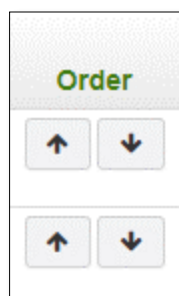

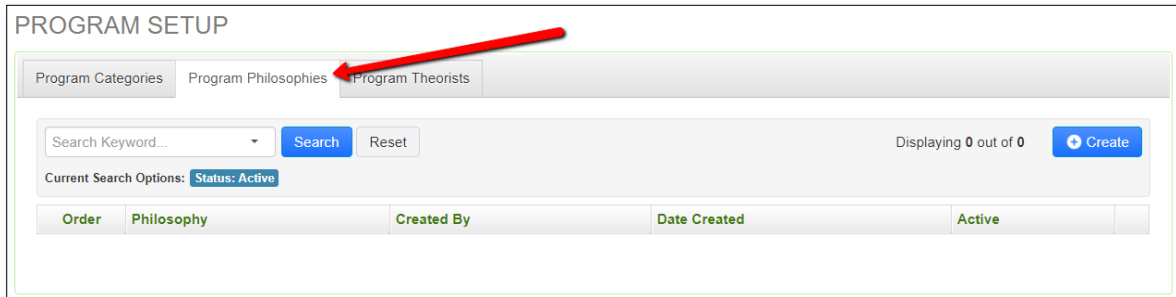Click the **Save** button to save the record and you will get a successful message:

You may also click the **Inactivate** button to inactivate the record if the Program Category is not in use.

To change the ordering in which these items will be displayed within your templates, move them up and down using the arrows:

Program Philosophies

Program Philosophies are the philosophies you wish to link to within programming records.
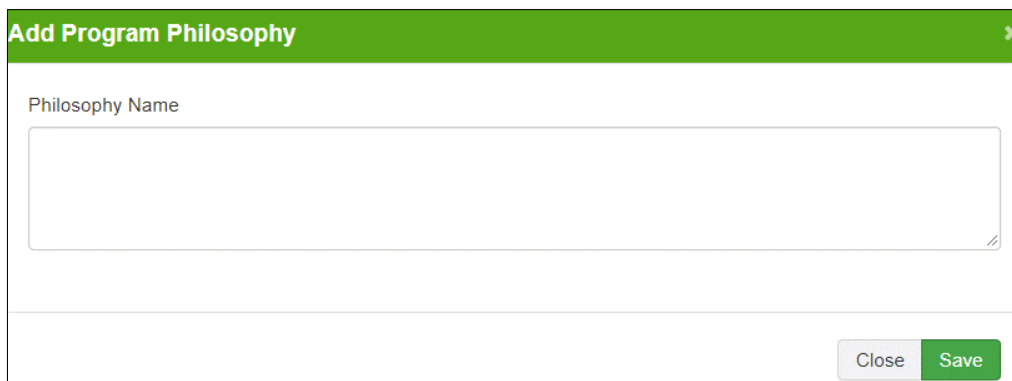
All active Program Philosophies will display in the list. You may view inactive Philosophies via the advanced search function.

You may also use the advanced search function to filter records created by service or a specific educator.

To create a new Program Philosophy, click the **+Create** button.

Enter the philosophy in the **Add Program Philosophy** window:

Click the **Save** button to save the record.

The Philosophy will be saved. You may then edit or inactivate the Philosophy entries as required.

You may also hover your mouse over the text for a quick view:

To change the ordering in which these items will be displayed within your templates, move up and down using the arrows:

Program Theorists

Program Theorists are the theorist entries you wish to link to within programming records.

All active Program Theorists will display in the list. You may view inactive Theorists via the advanced search function.

To create a new Program Theorist, click the **+Create** button.

Enter the theorist entry in the 'Add Program Theorist' window:

Click the **Save** button to save the record and you will receive a successful message:

The theorist entry will be saved. You may also edit an entry if required:

You may hover your mouse over the text for a quick view:
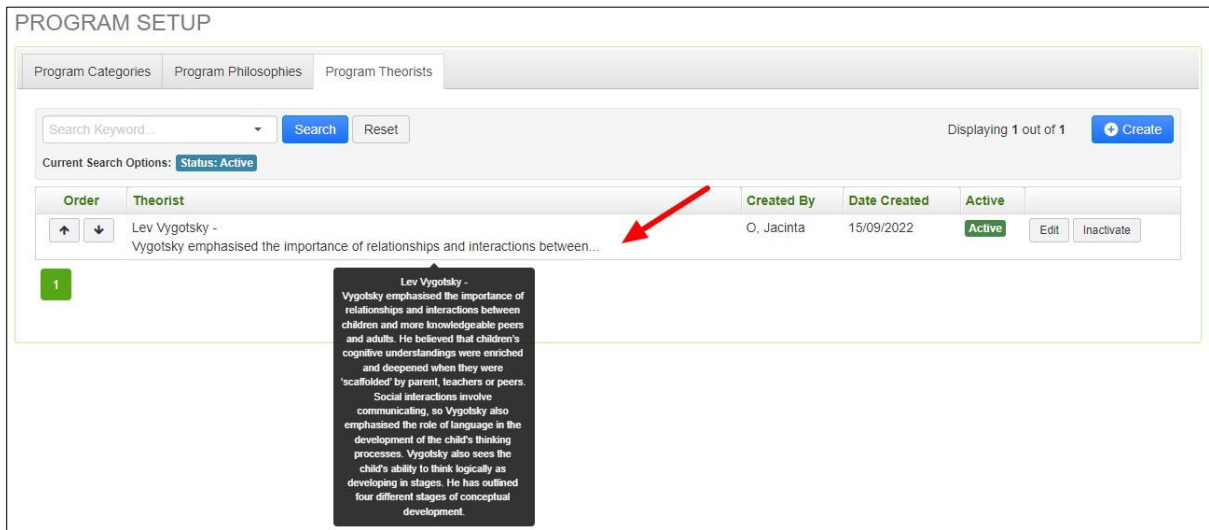
You may also click the **Inactive** button to inactivate the record if the Theorist entry is no longer in use.
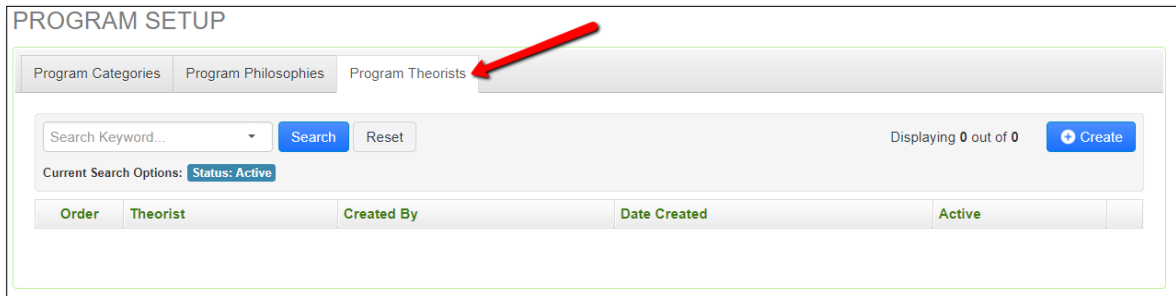
To change the ordering in which these items will be displayed within your templates, move up and down using the arrows:

Program Setup

Troubleshooting

Issue: I cannot see the Program & Practices menu.

Why? This will be due to the permissions that have been applied to the role which is assigned to the user.

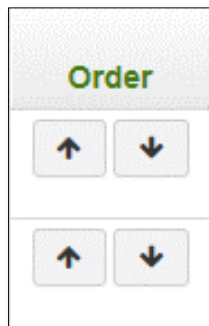**Resolution:** The user will need to have the option called **Program & Practices** set to edit (to enable the user to make changes) or view (to enable the user to see but not make any changes).

To fix this please follow the steps below:

First you need to find what type of permission the user has:

1. Click on the cog settings
2. Select user/personnel
3. Find the user within the list and click edit
4. Click on the Sites tab
5. View the role name assigned to the user:

Next, change permissions for that role:

1. Click on the cog settings
2. Select setup
3. Click on the roles tab
4. Next to edit, click on the down arrow and select Permissions
5. Select the component **Program & Practices**
6. Scroll to find the sub-component Program & Practices
7. Drop down the permission type to select either edit or view
8. Click save