Overview

A template is a group of courses that is frequently awarded together. Templates are used when initiating an eSpecial Credit request and allow the user to bring in predefined sets of courses.

After a template is created, updates can be made as necessary. It is important to understand that templates do not retain all rows and only one version is saved (previous versions are not retained). In some cases, it may be best to make the template inactive and create a new template depending on what updates are needed. Major changes, including institution, career, or authorizing school, will remove all courses from the template.

Updating the name of a template affects all historical occurrences of the template. The original name will not be retained.

Updating the ‘Available as of’ date to a date in the future will make the template inactive until the date is reached.

Only one version of the template is retained, but the application does store the user ID and date and time the template was created and when the template was last modified.

To create and maintain templates, users will need the SR E Initiator 2 SPCT role. If a new template or updates to an existing template are needed, please contact the Office of the Registrar.

Steps

Maintaining Templates

1. Log into one.iu.edu.
2. In the Search bar, type “special credit templates” and press ENTER.

3. Click on the eSpecial Credit- Maintain Templates (Administrative) task.
4. To search for an existing template, select the appropriate institution from the **Institution** drop down menu.

5. The **Template Name** list now contains all templates for the institution selected. To narrow down the results, select the appropriate **Career** and/or **Authorizing School**.

6. Select the appropriate template from the **Template Name** drop down list.
7. Make the necessary updates to the Template Information section:

- **Template Name** – The template name can be updated but all historical occurrences will reflect the new template name. Additionally, template names are unique by institution.
- **Institution** – Changing the institution will cause the template to reset and all courses will be removed. It may be best to inactivate the template and create a new template.
- **Career** – Changing the career will cause the template to reset and all courses will be removed. It may be best to inactivate the template and create a new template.
- **Authorizing School** - Changing the authorizing school will cause the template to reset and all courses will be removed. It may be best to inactivate the template and create a new template.
- **Credit** – Changing (or adding) the credit type default will only impact new courses added to the template. Any previously added courses will not be updated automatically.
- **Grade** – Changing (or adding) the grade default will only impact new courses added to the template. Any previously added courses will not be updated automatically.
- **Template Description** – The template description displays on the eSPC request document. The description can be updated or removed.

**NOTE:** If the template name is changed, you will receive the message: Name update affects all historical occurrences of this template. Previous template names are not retained. Name change will take affect upon saving.
8. Make the necessary updates to the Template Availability section:

- **Template Status** – The Template Status is a display only field and displays as “active” or “inactive.” It is controlled by the ‘Available as of’ and ‘Available through’ dates.

- **Available as of** – The Available as of date (start date) controls the date the template becomes available on the eSpecial Credit request document. Updating the available as of date to a future date will hide the template until that date is reached and you will receive the following messages:

- **Inactivate Template** – Checking the Inactivate Template box will allow the user to enter the Available through date (end date).

- **Available through** – The Available through date (end date) controls the date the template will no longer be available on the eSpecial Credit request document. The template will be available through this last date, then unavailable on the next day. This field is only displayed while the Inactivate Template box is checked.

**NOTE:** If a template has the Inactivate Template box checked, the Template Status will display “Active” until the Available through date has passed. Once the Available through date has been passed, the Template Status will then display “Inactive.”
9. Make the necessary updates to the Template Courses section:

- To remove courses from the template, select the 'X' icon in the course header bar.

  **NOTE:** At least two courses must be included for the template to be saved.

- To add courses to the template, enter the Course ID or use the lookup to search by subject and/or catalog number. Only courses with an active offering in the course catalog (as of the availability date for the institution awarding the credit) that also have the "Allow Course to be Scheduled" box selected will be returned. Courses unavailable for special credit will return the message "Course XXXXX is not available to award special credit. Please verify your search term and try again or use the lookup to find a course by subject or catalog ".

- The Credit Type, Grade and possibly Units can be updated for each course. Units can be updated if the course allows variable units in the course catalog.

- Notes can be updated or removed for each course.

10. Click Save Template to finalize the template.
You will receive one of the following messages:

11. To return to the template maintenance page, click Return to Template Search. If you are finished, close the browser window.