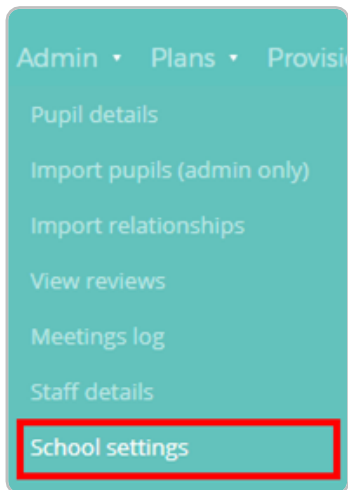# ProvisionMap

Part of **tes**

Quick start guide

Getting started with Templates

## Custom learning plan templates

In addition to the standard plan structure, you are also able to create your own custom learning plan templates. Templates allow you to control what information is displayed within a plan and can also include custom sections which contain user created fields and text areas .

To access custom templates, mouse over the Admin tab, select Schools Settings from the drop down menu and scroll down to the Templates section.

Creating a template

To create a new template, click on the add template button. Enter a template label into the popup text field and click on the OK button.

Once templates have been created, you can select a template from the Default template drop down menu to apply it to all new plans.
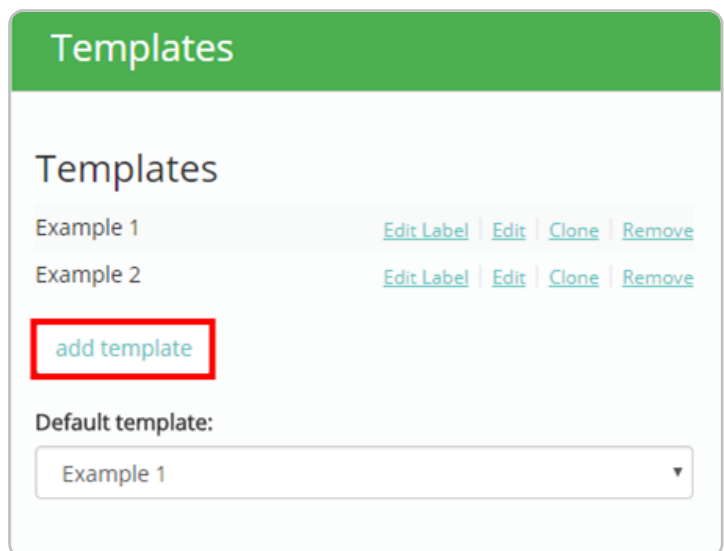
Each template has several options available:

Edit label: This option allows you to change the name of the template

Edit: This option allows you to change the contents of the template

Clone: This option creates a copy of the template, so that it can be modified without affecting the original template.

Remove: This option deletes the template. Any existing plans that use the template will permanently lose information that was added to custom sections. Information held in core sections (e.g Stage, Assess, Files) will remain however.

To start customising the content of your templates, click on the Edit option next to the template of your choice.

You will be presented with a mock plan filled with dummy data. The blue banner at the top indicates which template you are making changes to.

Changing section labels in the template

Each section that makes up the template can be retitled to the label of your choice. Sections can also include an optional description, which can be used to explain the purpose of the section to the user.

Default fields that appear within core sections (e.g. Areas of concern) can also be renamed.

Adding a custom section to a template
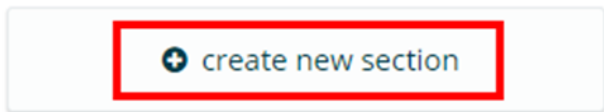
To add a new section to the template, scroll down and click on one of the create new section buttons that are located between core sections throughout the plan.

New section

Name

Example custom section

Custom Learning Plan Fields

	Name	Type	Actions
☑	Reading age	Text	edit | remove

add field

Custom Learning Plan Text Areas

	Name	Actions
☐	Additional information	edit | remove

add textarea

Close   Confirm

The New section popup menu will appear. Here, you can name the new section and choose which fields and text areas it should display.

If fields and text areas have been previously created via the add field and add textarea buttons, they will appear as selectable options here. If not, use these buttons to add additional information to the section.

Click on the Confirm button once you have finished to add the new section to the template.

The section can then be edited by clicking on the pencil icon.

Example custom section
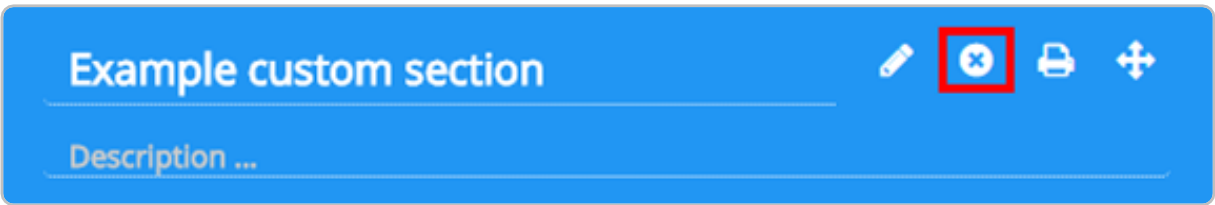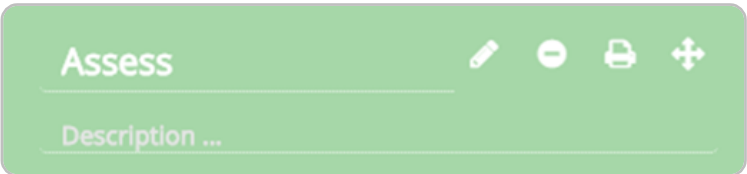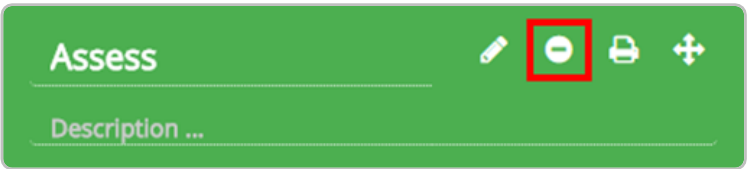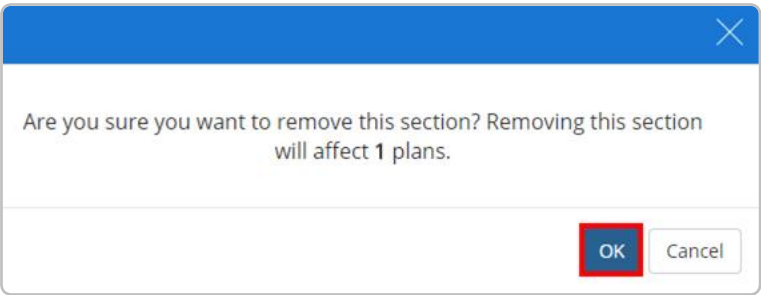
Description ...

Reading age

Removing a custom section

Provision Map also allows you to remove specific sections of a plan template. To remove a custom section, click on the cross icon for the section you wish to delete.

A popup message will appear, warning you that removing the section will permanently affect existing plans.

Click OK to remove the custom section.


Removing a core section

Whilst core sections cannot be deleted, they can be hidden so that they do not appear on plans that use the template.

To hide a core section, click on the minus icon. The core section will appear faded, to indicate that it is hidden on plans. To reinclude the section, click on the minus icon again.

Hiding a section from printouts

Even if you choose to include a section as part of your custom learning plan template, you may not necessarily want to display it on plan printouts. Custom templates allow you to select which sections to include on plan printouts.

To prevent a section of the template from appearing on printouts, click on the printer icon.
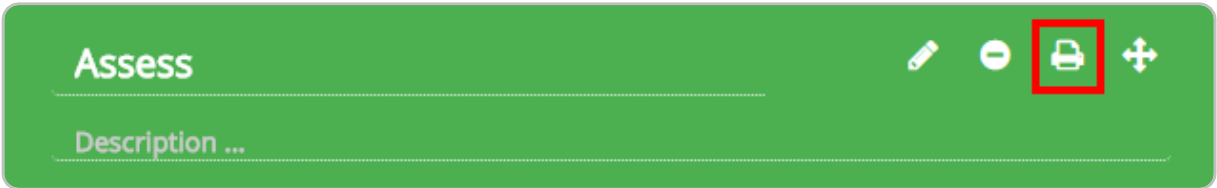
The printer icon will appear faded, indicating that it will not show up on printouts. To include the section on printouts again, click on the faded printer icon to bring back the original icon.
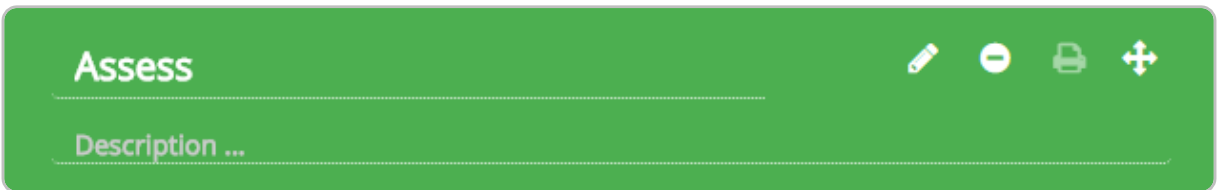
Moving a custom section

To rearrange a section in the template, click and hold the arrows icon and drag the section to a different position in the template. After letting go of the mouse, you will find that the section order has been successfully changed.
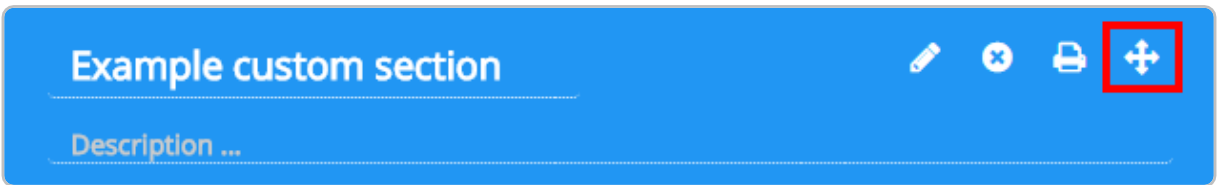
Applying a custom template to a new plan

Once custom templates have been set up in your school's Provision Map account, they can be applied when creating new learning plans. To do this, click on Create a plan as normal.

After selecting a pupil, a list of available templates for the plan will appear below the list of pupils.

If the pupil already has an existing plan for a specific template, an edit button will appear alongside it. Clicking this button allows you to make changes to the existing plan. To create a new plan under this template, archive the existing plan first.

Otherwise, click on the Create button to create a new plan.

Graham Abbess

Creating a new plan will archive the existing plan, making the new one active.

Learning Plan Edit

Behaviour Support Plan Create

EHC Plan Create

Attendance Plan Create

Once you click on the create button for your chosen template, you will be presented with the Edit plan page with the template already applied.

Behaviour Support Plan for Graham Abbess change template

Pupil Details
Core data section. Check if this is the correct student.

Stage	Date of birth	Gender
SEN Support ▾	29/9/2002	Male

If a pupil has multiple active plans, each plan will be listed separately on the Edit a plan / Review a plan pages.

⋮	☐	Learning Plan	B823432110001	Grenetta	Abbey
⋮	☐	Learning Plan	B820432109001	Jimmy	Abbey
⋮	☐	Behaviour Support Plan	B820432109001	Jimmy	Abbey

Applying a custom template to an existing plan

In addition to applying templates to new learning plans, they can also be applied to your existing plans. To change a plan's applied template, click on the change template button when editing a plan.

The Change template popup will appear. Here, you will be presented with a list of available custom templates. The plan's current template will be highlighted in blue with the word current displayed next to it.

If a template has already been applied to one of the pupil's active plans, a page icon will appear next to it. Clicking on the icon will allow you to view the plan which uses the template.

To apply a different template to the plan, click on the refresh icon next to the template of your choice.

You will see a popup warning, stating that any information entered into custom sections on the current plan will be lost. Additionally, selecting a template that has already been applied will archive the existing plan using the template.

Click on the OK button to confirm the change and apply the custom template.

Further support

Please do not hesitate to get in touch if you need more support or training. support@edukey.co.uk

Our Products

www.classcharts.com

Class Charts offers an easy solution to seating plans and behaviour management , reducing the workload for teachers.

www.literacyassessment.co.uk

This system quickly assesses the literacy standards of groups of pupils & tracks progress over time.

www.schoolrobins.com

School Robins is a powerful communications tool designed for school leaders. It removes the paper trail of round robins.