

# Navigate: Content Templates

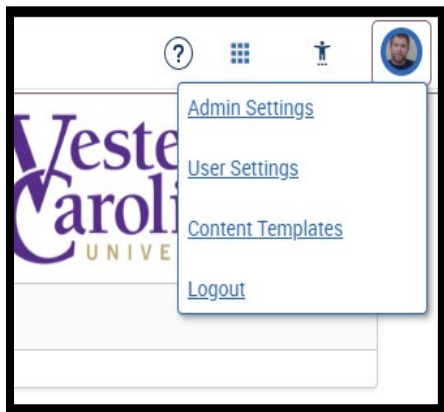
## Summary:

Content Templates give users the ability to create a library of reusable templates that can be saved or shared. This helps users who have frequent types of messages, such as appointment instructions, to send communications to students more quickly without any glitches or errors caused by copying and pasting a template from another source.

## How-To:

**Task:** Creating and using templates in Navigate

## Instructions



1. Access Content Templates by going to **User Menu >> Content Templates**
2. The Content Template page has two tabs - **My Templates**, which is for any template the user has created, and **Public Templates** which is for any templates that have been shared for all Navigate staff users. The tables on each page are searchable so users can find the template they want.

## Creating a Template:

1. Select the **Add Template** button on the My Templates tab to create a new template.

The following fields are available.

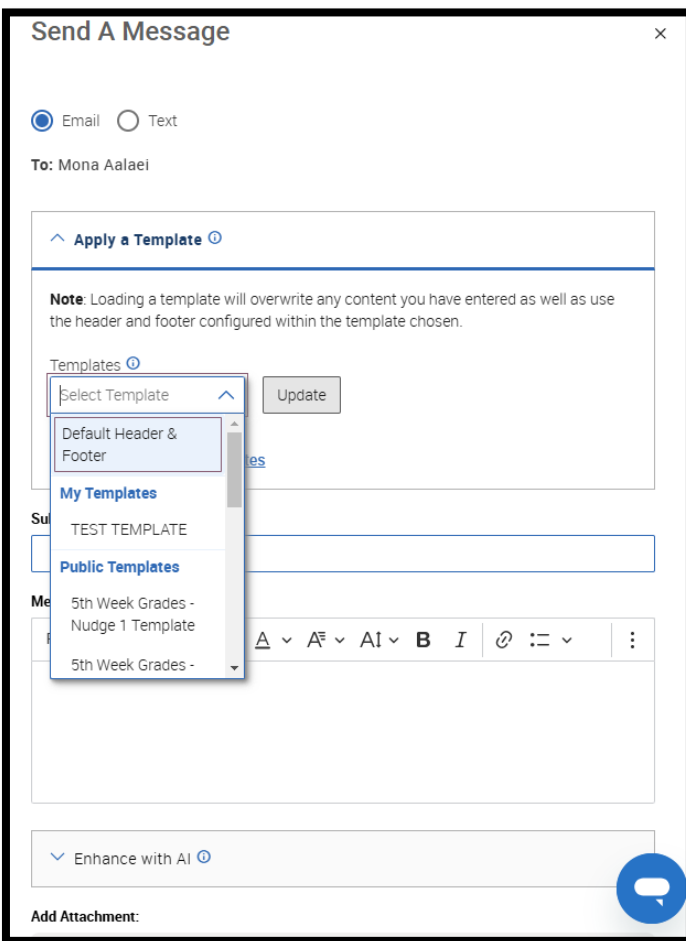
- **Template Name (Required)** - Name of the template. Make this memorable and brief, especially if it is going to be public.
- **Template Is Active** - Check this box to allow for users to select the template when composing email or text messages in the platform.
- **Template Description** - A brief description of the template that can be used to find templates when searching results.
- **Template Type** - Templates can be either for email or text. Text message templates are limited to 300 characters
- **Subject (email messages only)** - The subject line for the email message.

- **Message** - The template message. For emails, rich text formatting is available, including links, images, lists, and tables. Text message templates are limited to 300 plain text characters. Email messages can also include attachments.

2. On the right side of the page, the content preview displays. Previews can display the frame of a Mobile Device, Tablet, or Desktop.
3. After configuring the template, click **Save Template**.

### **Using Content Templates in Navigate for Student Success**

1. Once users have access to at least one content template, the **Apply a Template** option appears when users are composing an email or text message throughout the Navigate platform.



### **Outcome**

Users can now build and use their own templates as well as any that are public.