**Online Template Instructions**

**Fill in your credentials when prompted.**
Use your network logon and password.

Trouble? Read the section “Tips for Getting Connected” at the bottom of this document.

**Click the + button next to the Status field to expand the list of templates.**
- You will see all function/program templates assigned to you by the Task Force.
- Templates are ordered by their status: Not Started, In Progress, Ready for Review, Published.

**Click the Edit icon to modify the template.**
The template may take a moment to load completely.

Warning! Clicking on the name of the template only lets you read and you cannot make any changes. Click the Edit icon to make changes.

**Fill in the template.**
- Type directly into the provided text boxes. The box will grow as you add lines of text.
- You can copy and paste text from other sources.
- Question sections have character limits. See how many characters you have entered by clicking the Update button at the bottom of each section.
- Use scroll bars on the right to move up and down the form.

**Share your form with others.**
- To share add a network id into the “Share this form with” field at the top of the form.
- Click the lookup icon at the end of the field if you do not know the network id for a person.
- You may add multiple network ids in this field.
- Revoke access to the form by deleting network ids you have added in the field.

**Have your Template reviewed.**
- **Ready for Supervisor Review.** For Support Function templates only, clicking this button will change the status of your template to “Under Supervisor Review”. The form will close and an e-mail will be sent notifying the supervisor. You can designate any reviewers in the area above the button by typing in their network id. If a reviewer requires more work on the template the reviewer will click the Return for Revision button which sets the status back to “In Progress” and closes the form.
- **Ready for Cabinet Member Review.** For Support Function templates only, clicking this button will change the status of your template to “Under Cabinet Member Review”. Clicking this button will close the form and notify the cabinet member. The name of the cabinet member is listed above the button.
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- **Submit for Review.** For Academic Program templates only, clicking this button will change the status of your template to “Under Review”. Clicking this button will close the form and notify the Reviewer. Enter a network id into the Reviewer field to designate a reviewer.

- **Publish.** Click this button to change the template status to “Published”. This will close the form and notify the Person Responsible for Support Functions or the Administrator for Academic Programs. Only the responsible Cabinet Member for Support Functions and the Reviewer for the Academic Programs have this option.

**End your Template session.** Once you are done filling out the form use the buttons on the bottom of the template. You have several options.

- **Cancel.** Click this button to exit the template without saving anything.
- **Save.** Click this button to save what you have entered. The status of the Template will change to “In Progress”. If you have filled in the Share this form with: field those people will now have access to view and edit your template.
- **Print this page.** Click this button to print a copy of the template.

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### Tips for Getting Connected

In the login box enter your login preceded by ‘umw\’, e.g. umw\jdoe. Then enter your netid password.

**Are you working from home or outside of the campus network?** If you're off campus you'll need to use VPN to access SharePoint. Here's a link on how to install VPN [http://technology.umw.edu/connecting/offcampus-network-access/vpn-windows/](http://technology.umw.edu/connecting/offcampus-network-access/vpn-windows/). If you have trouble with this installation, contact the Help Desk.

**Are you using Internet Explorer?** Try the following steps and see if that resolves the problem:

- You need to add some sites to the local intranet sites in Internet Explorer.
- Click on ‘Tools’ on the right side of Internet Explorer, then ‘Internet Options’ > ‘Security’ tab > ‘Local intranet’ > ‘Sites’ button > ‘Advanced’ button
- Type [https://*.umw.edu](https://*.umw.edu) in the ‘Add this website to the zone:’ box then click ‘Add’ button.

- Then do the same to add:
  - [https://*.umw.local](https://*.umw.local)
  - [http://*.umw.edu](http://*.umw.edu)
  - [http://*.umw.local](http://*.umw.local)

- Click ‘Close’ button. Click ‘OK’ button. Click ‘OK’ button.
- Then go to [https://sharepoint.umw.edu/sites/collaboration/SRA%20Data/SitePages/Home%20page.aspx](https://sharepoint.umw.edu/sites/collaboration/SRA%20Data/SitePages/Home%20page.aspx)
If you still have trouble getting connected, contact the UMW Help Desk at 654-2255 or HelpDesk@umw.edu