Template Customization Checklist

Use this checklist to ensure you've replaced all placeholders and customized the template for your course.

Placeholders to Replace

Search and replace the following placeholders throughout the repository:

- `COURSE_NUMBER` - Your course number (e.g., "STAT 109", "MATH 101")
- `COURSE_TITLE` - Full course title (e.g., "Introductory Biostatistics")
- `SEMESTER_YEAR` - Semester and year (e.g., "Spring 2026", "Fall 2025")
- `INSTRUCTOR_NAME` - Your name (e.g., "Dr. Jane Smith")
- `INSTRUCTOR_EMAIL` - Your email address
- `GITHUB_USERNAME` - Your GitHub username
- `CANVAS_COURSE_ID` - Your Canvas course ID (found in Canvas URL)
- `CANVAS_API_TOKEN` - Your Canvas Personal Access Token (keep secure!)

Files to Customize

Core Configuration Files

☐ `_quarto.yml` - Replace `COURSE_NUMBER` and `COURSE_TITLE` in title
☐ `README.md` - Already has template note, customize course-specific content
☐ `.github/workflows/quarto-publish.yml` - Replace `COURSE_NUMBER-public` with your public repo name

Main Pages

☐ `index.qmd` - Replace all placeholders, customize course description, instructor info
☐ `syllabus.qmd` - Replace all placeholders, customize course information, policies
☐ `schedule.qmd` - Replace semester, customize all dates and weeks
☐ `assessments.qmd` - Review and customize assessment structure
☐ `lectures.qmd` - Review structure, customize as needed
☐ `resources.qmd` - Customize resources for your course
☐ `license.qmd` - Replace instructor name and course reference

Scripts

☐ `scripts/create_canvas_assignment.py` - Replace `CANVAS_COURSE_ID`, `CANVAS_API_TOKEN`, and `PUBLIC_SITE_URL`
☐ `scripts/create_canvas_modules.py` - Replace `CANVAS_COURSE_ID`, `CANVAS_API_TOKEN`, and `PUBLIC_SITE_URL`
☐ `scripts/README_CANVAS_API.md` - Review and update with your Canvas instance URL

Documentation

☐ `GITHUB_SETUP.md` - Replace `COURSE_NUMBER` and `GITHUB_USERNAME` with your values

Additional Customization Tasks

☐ Customize course description in `index.qmd` and `syllabus.qmd`
☐ Update schedule dates in `schedule.qmd` to match your semester
☐ Customize assessment structure in `assessments.qmd` if different from template

☐ Update Canvas assignment dates in `scripts/create_canvas_assignment.py` if needed
☐ Customize resources page with course-specific materials
☐ Update license information if using a different license
☐ Review and customize navigation in `_quarto.yml` if needed
☐ Add course-specific content to assessment files (labs, quizzes, projects, exams, lectures)

Testing

☐ Test local rendering: `quarto preview`
☐ Test full build: `quarto render`
☐ Verify all links work correctly
☐ Check that PDFs render correctly
☐ Test GitHub Actions workflow after setting up repositories
☐ Verify public site displays correctly

GitHub Setup

☐ Create private repository: `COURSE_NUMBER-private`
☐ Create public repository: `COURSE_NUMBER-public`
☐ Set up GitHub Pages for public repository
☐ Create GitHub Personal Access Token (PAT) with `repo` scope
☐ Add PAT as secret `GH_PAT` in private repository settings
☐ Push code to private repository
☐ Verify GitHub Actions workflow runs successfully
☐ Verify public site is accessible

Canvas Setup (Optional)

☐ Get Canvas course ID from Canvas URL
☐ Create Canvas Personal Access Token
☐ Update Canvas API scripts with course ID and token
☐ Test Canvas assignment creation script
☐ Test Canvas module creation script
☐ Create Canvas assignment groups if needed
☐ Set up Canvas modules

Notes

- Use your editor's "Find and Replace" feature to quickly replace placeholders
- Remember to keep `CANVAS_API_TOKEN` secure - don't commit it to git (it's in `.gitignore`)
- Test everything locally before deploying
- Keep a backup of your customized files