In order to create a template, first open the Template Management tab. On the right, next to the "Exit" button, will be the Template Management tab. Refer to this screenshot:



Upon opening the Template Management page, you may encounter an error. Please disregard this for the moment unless it interferes with your activities within the page.

Once you are in the Template Management page, you will see a variety of options. You can search for, open, create, and delete templates. These directions are solely for template creation. In the top right corner will be a button labeled "Create New Template."

Home			
Browse Templates			Create New Template
Search by Template Description Go Filter:			Advanced Search
Open Delete			● Flat View Tree View
Description 🗢	ID ÷	Who	Modified
anthro test	Robertson, Melissa	NOT SET	
Business - Accounting 2014-15	Briggs, Nathaniel R	NOT SET	
Business - Management 14-15 Math level 4	Truman, Brenda S	NOT SET	
Civil Engineering Bio-Resources Option Pre-Calc Start 12-14	Fromelt, Nathan J	NOT SET	
Civil Engineering Calc Start 12-14	Fromelt, Nathan J	NOT SET	
COE-ChBE-Chemical	Haskins, Judi L	NOT SET	

You will be prompted with a pop-up box to select a Template Scheme. The scheme you should choose is the 4_YEAR_12_TERMS option. This scheme is for four-year plans, starting in the fall term. A term for each semester, including summer, will be created for the template.



After this, you are finally ready to begin creating the template. The first field is the Description field. This will be the name of your template. The naming convention for now is <u>"<Major> <Catalog Year Created></u> <<u><Optional Math Placement Score>"</u> without the angle brackets. An example of this naming convention is: "Business – Marketing 2014-15."

After this are the Optional Template Tags. These tags are not required, but we **strongly** recommend filling out the <u>College</u>, <u>Degree</u>, <u>Major</u>, and <u>Catalog Year</u> fields at the very least.

From here on, the Template Creation process is much like creating a plan. Courses populate in the sidebar and can be dragged into the terms in which you wish for the student to take the class. Some of the old rubric names are still populating in this area, such as the MKTG courses. These do not prevent the current courses from appearing, so if you do not intend to use old courses, just ignore them.

In this next screenshot, there is an example of what should be in the "Description" field. In addition to this, it highlights the Note feature provided by DegreeWorks templates.

Template Manageme	nt				/iew Template List	
Template ID:				Template	e Note>-1	
Description <mark>*</mark>	Business - Marketing 2014-15				Active?	l
Term Scheme:	4_YEAR_12_TERMS					l
Required Template T	ags					
Optional Template Ta	ags					
Catalog Year	None	-	College	None	*	=
Concentration	None	-	Degree	None	-	l
Level	None	-	Major	None	•	l
Minor	None	~	Program	None	•	l
▼ Fall Term 1	Total Credits: 0.0			Term No	ote> 🚹	
Critical Course	Requirement		Credits	Minimum Grade	Notes	
AGBE	210IS	Q	3.0	Course Note	>[]	
Spring Term 1	Total Credits: 0.0					
Summer Term 1	Total Credits: 0.0					
Fall Term 2	Total Credits: 0.0					Ŧ

These notes can be for the entire template (the one in the upper right corner), on the term, or on the course. Once you click on the note icon, it will bring up a window to create the note. Once you are in this window, you will want to click the "Add Note" button.

Notes			View Temp	late List	14	ew Template	
Notes attached to:			Edit Selected N	ote	Delete	Add Not	
Note	Author	Copy to Plan	Internal on Plan	Modified			
					Cancel	Done	

Once you click the "Add Note" button, you will be able to create your note. The text box has standard editing features, and is fairly straightforward. Once you are finished with your note, you need to decide whether or not you want the note to be shown to students who use the template for a plan. If you want the student to see the note, click the "Copy to Plan" checkbox.

Notes	View Template List
Notes attached to:	View Note List Delete Add Note
This is a note. Please click the "Copy to Plan" option belo	ow if you wish for students to see it on their plan.
body p	
Copy to Plan Internal on Plan	
	Cancel Done

When you are finished editing your note, click "Done." This will bring you back to your template. Where you clicked the note icon before should now be yellow, indicating that a note has been created.

At any point, you can save your template at the bottom right. This will <u>not</u> make the template available to students to use as their plan. In order to make the template go live, you will need to click the "Active?" checkbox and then click save. Refer to the screenshot below:

Template Manageme	nt					Template List		Ne	w Template		Change Term Scheme	
Template ID:						3	E 🗐 🔺	С	ourses			
Description*	Business - Marketing 2014	Business - Marketing 2014-15									Collapse A	
Term Scheme:	4_YEAR_12_TERMS							C	ourse	#	Title	
Required Template T	aqs								Accountin Accountin	ng (ACT) ng (ACC	G) T)	
Ontional Tomplato Ta	2								Activities	Genera	al (ACT)	=
Cotolog Voor	iys N	_	College	N		_	E		Activities:	Varsity	(ACTV)	
Catalog real	None	*	College	None		*			AGRE	21015	Economics of Ad Bus	
Concentration	None	Ψ	Degree	None		-		1	AGBE	290R	Undergraduate Rese	
Level	None	-	Major	None		*			AGBE	291	Special Topics	
Minor								Þ	AGBE	291Z	Sepcial Topics	
MINOF	None	Ŧ	Program	None		*			AGBE	292	Independent Semina	0
▼ Fall Term 1	Total Credits: 0.0							:	AGBE	315	Ag in a Global Conte	ĸ
								:	AGBE	321	Economics of Ag Mai	1
Critical Course	Requirement		Credits	1	Minimum Grade	Notes			AGBE	3/1	Farm and Ranch Mar	
	24010				M	a			AGBE	345	Ag Finance and Cred	
AGBE	21015		3.0		None *				AGBE	394	Seminar	
									AGBE	421	Advanced Ag Marketi	n
Spring Term 1	Total Credits: 0.0								AGBE	445	Agribusiness Manag	e
									AGBE	451RS	Economics of Ag Pol	i 🖌
Summer Term 1	Total Credits: 0.0								AGBE	467	Quantitative Method i	r /
									AGBE	490R	Undergraduate Res	
Fall Torm 2	Total Credite: 0.0					BB 4			AGBE	491	Special Topics	
									Delete	Sa	ave As Save	

In order to make a copy of your template to use as a starting point for another template, simply change the "Description" field and then click "Save As..."

Template Manageme	nt	\land		View	Template List		New Template	Change Term Scheme	
Template ID:		Ň			Ŧ		Courses		
Description*	Business - Accounting 2014-1	5			Active?			Collapse A	AII .
Term Scheme:	4_YEAR_12_TERMS						Course	# Title	
Required Template Tags							 Accounting Accounting 	ng (ACTG) ng (ACCT)	4 III
Optional Template Ta	ags					E	Activities	: General (ACT) : Varsity (ACTV)	
Catalog Year Concentration Level Minor	None None None	Coll Deg M Prog	ege Non ree Non ajor Non ram Non	e e e	*		Agricultur AGBE AGBE AGBE AGBE AGBE	ral Business and Econ (AGBE 210IS Economics of Ag Bus 290R Undergraduate Rese 291 Special Topics 2912 Sepcial Topics 292 Independent Semina) S B
▼ Fall Term 1	Total Credits: 0.0						AGBE AGBE	315 Ag in a Global Contex 321 Economics of Ag Mar	x rl
Critical Course	Requirement	Credits		Minimum Grade	Notes		AGBE	337 Agricultural Law 341 Earm and Ranch Mai	n
AGBE 2	210IS	Q. 3.0		None 🔻	۵		AGBE	345 Ag Finance and Cred 394 Seminar	di
Spring Term 1	Total Credits: 0.0						AGBE AGBE AGBE	421 Advanced Ag Marketi 445 Agribusiness Manag 451RS Economic o of Ag Pol	n Je li
Summer Term 1	Total Credits: 0.0					Ŧ	AGBE	467 Quantit ethod i 490R Und uate Rese 491 Sne prics	ir e 👻
Fall Torm 7	Lotal Cradite: 0.0						Delete	Save As Save	

When your template is created, saved, and active, it is ready for students to use in their plans tab on DegreeWorks!

If you have any questions, please contact the Registrar's Office.