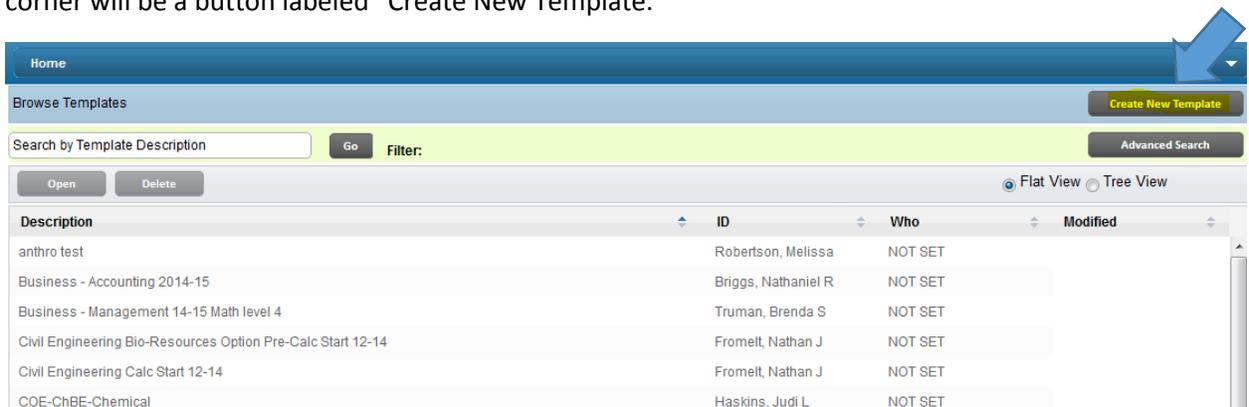In order to create a template, first open the Template Management tab. On the right, next to the "Exit" button, will be the Template Management tab. Refer to this screenshot:
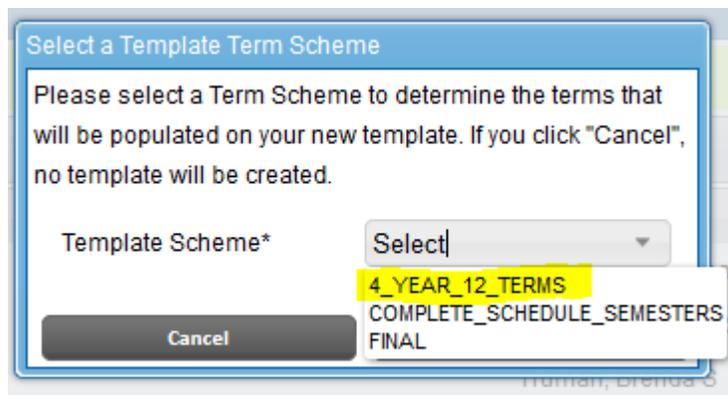

Upon opening the Template Management page, you may encounter an error. Please disregard this for the moment unless it interferes with your activities within the page.

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."

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 **"<Major> <Catalog Year Created> <Optional Math Placement Score>"** 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.

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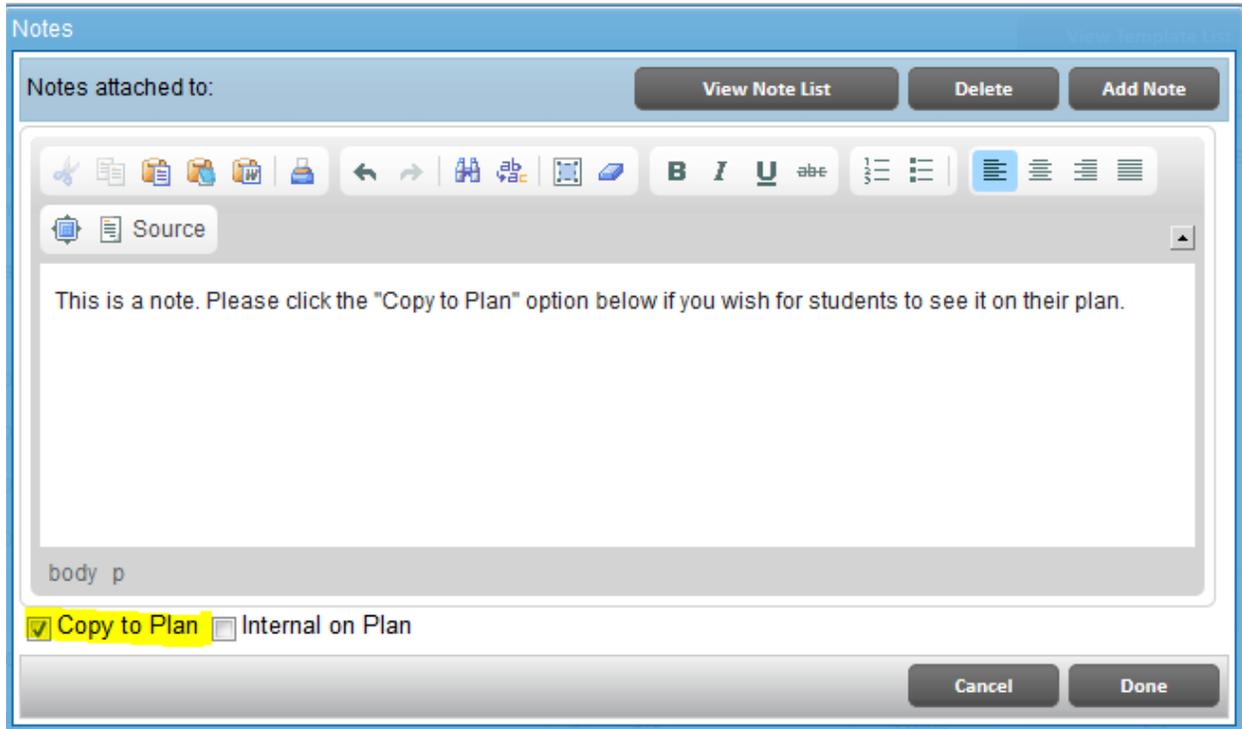
Once you click the "Add Note" button, you will be able to create your note. The text box has standard editing features, and is fairly straightforward. Once you are finished with your note, you need to decide whether or not you want the note to be shown to students who use the template for a plan. If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

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 _not_ 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:

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…"

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.