Template Management can be accessed from the top of any Degree Works Worksheet or from the main page. It will open in a new tab in your browser.
Flat View shows the list of Templates in alphabetical order. Note that Templates have different listing for catalog year and placement.
Tree View shows programs organized by College, Program, Degree, then Catalog Year. This may make it easier to find the program and year you need.
To start a new Template from scratch, click Create New Template. You will likely only create a brand new Template if a new major is created or significant changes are made to an existing program. In the dialog window, choose “COMPLETE_SCHEDULE_SEMESTERS.”
For a new or updated template, the Description should include the catalog year so it is easy to identify from the list. It may also include placement information, if there are multiple templates based on placement.

The college, Degree, Major, and Catalog Year will also need to be filled out accurately.
You will need to completely fill out the top of a new Template before Saving. After you have Saved, you can add in courses to each semester or make changes to update an existing major.

To allow a Template to be used, it must be marked as Active.

It is recommended that you leave the Summer sessions in place, even if they are empty, so classes can be added for an individual student’s plan.

The Name of the template should include the major and catalog year. You may also choose to created different templates based on math placement, if applicable.

Required Template Tags should be filled out to reflect the correct information about College

Degree

Major

Catalog Year

Each will have a drop-down menu to choose from.

If a Template isn’t showing in the list, but you believe it has been built, check in Template Management to make sure that it has been marked Active.
To create an updated Plan for a new catalog year, open the previous year’s plan, make the necessary changes to the title and catalog year tag, and click “Save As” to create a new version of the template, while leaving the old one intact.

If any courses have changed number of credits, for example, from 3 credits to 4, this will need to be reflected in the Template or it will not open and save correctly.

If there are no changes between one catalog year and the next, all that needs to be changed is the title and catalog year.
When you open a new template, it will have empty blocks for each semester, Fall through Summer II for 5 years. You can click the arrow to show any hidden content in the semester, or click the “+” icon to add a Course, Choice, or other item.

It is recommended that you leave the Summer sessions in the Template, even if you do not intend to place any courses in those sessions at this time.
After the Template has been created and named, adding or changing course options is exactly the same as in the manipulation of existing Plans.

Please refer to the Plans User Guide for further information about the various options and tips for creating plans.

Remember to save your template often! You will only have the option to Save after you have made a change.