

Templates:

3 Creating, managing and inserting templates.

Purpose: Create templates from existing projects or start a new project and create a template from it.

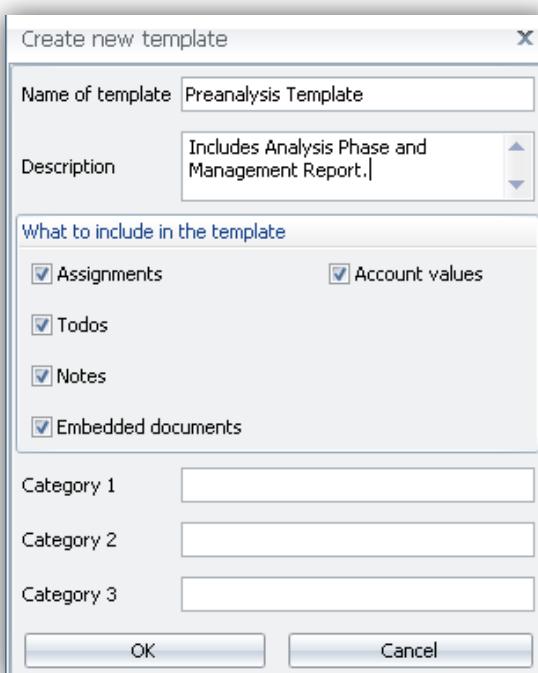
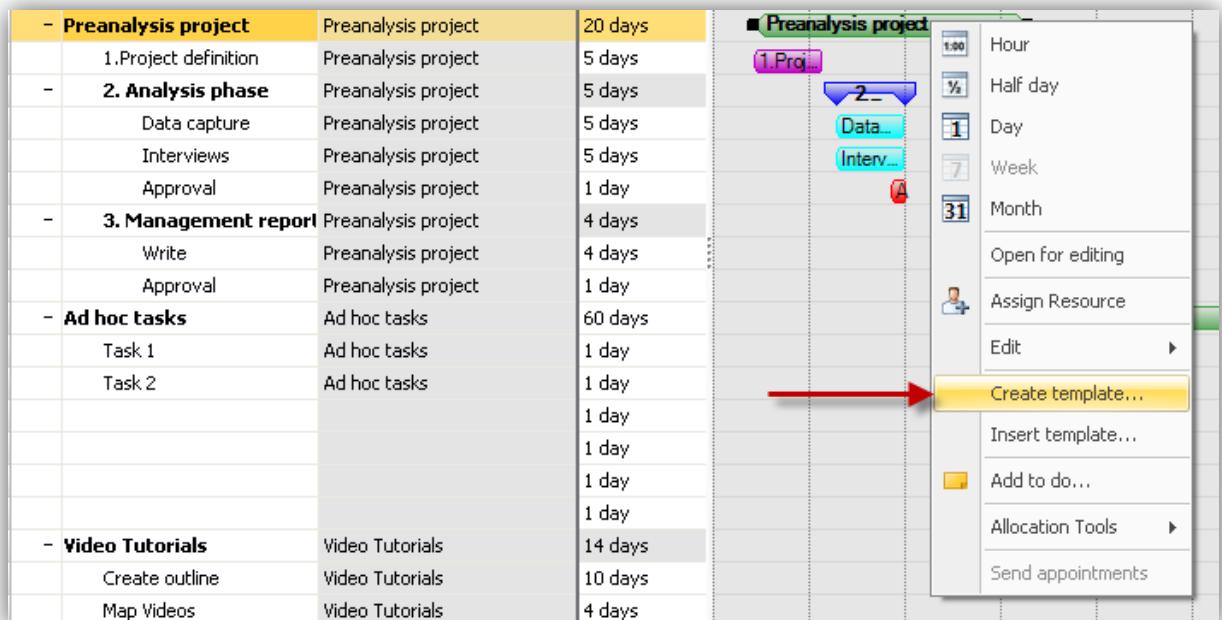
Perspective: “Managing Projects & Tasks” and “Templates”

There are four possible ways to work with templates: Creating a template from an existing project; creating a new template; starting a new project from a template; and, inserting a template.

Creating a template from an existing project:

Perspective: “Manage Projects & Tasks”

Choose a project and right click on the green project Gantt bar, select “Create Template”.



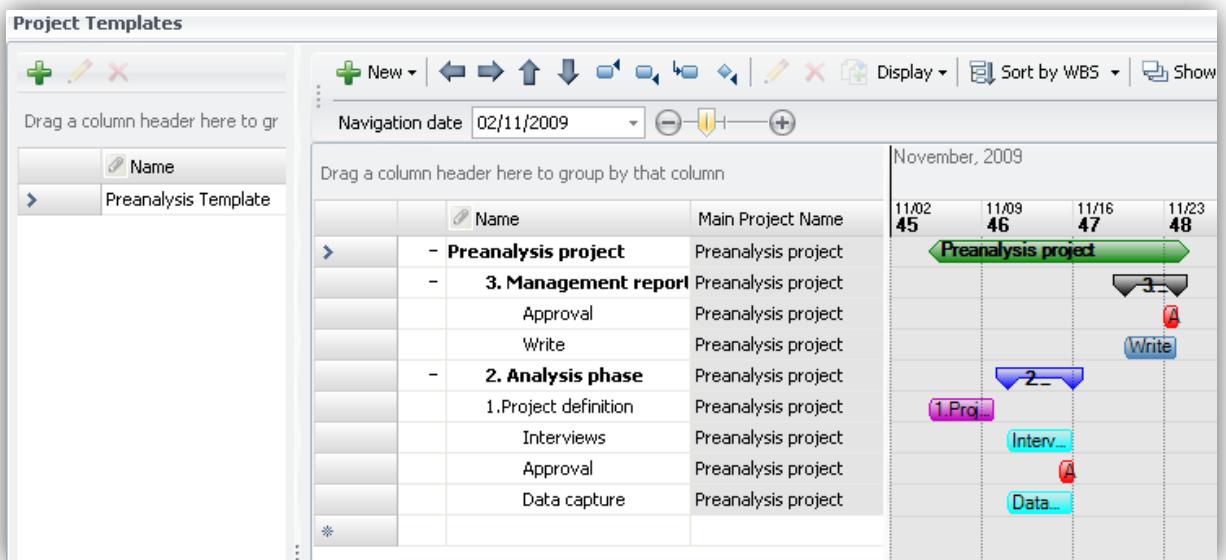
Here you can give the template a name and description.

You can choose to include assignments (resources assigned to the project including account values, such as hours). You could choose to just have assignments, the people assigned, and not their hours (account values) so when you use the template you can fill in new hours. Or you can choose to have account values and not have to re-enter hours or other account values for assigned resources.

You can also choose to include, if they exist within the project: To-dos, Notes, and Embedded Documents. You can also define custom Categories to sort your templates into.

Once you press “Ok” the template is created.

Perspective “Templates”



The screenshot shows the 'Project Templates' perspective. On the left, there's a tree view with a root node 'Preanalysis Template'. Under it, there are three main categories: '- Preanalysis project', '- 3. Management report', and '- 2. Analysis phase'. Each category has several sub-tasks listed under it. On the right, there is a Gantt chart for November 2009. The 'Preanalysis project' task is shown as a large green bar from November 2nd to November 23rd. Below it, there are three smaller bars: 'Approval' (purple), 'Write' (blue), and 'Data capture' (cyan). The 'Approval' and 'Write' tasks have red 'A' markers above them. The 'Data capture' task has a red 'A' marker below it. The Gantt chart has columns for dates from November 2nd to November 23rd, with row numbers 45, 46, 47, and 48 corresponding to each day.

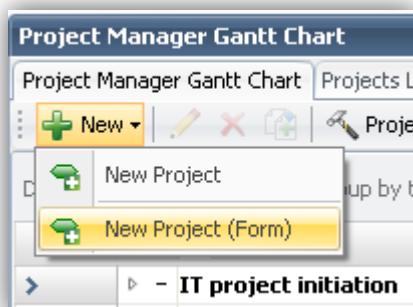
In the image above, the Preanalysis Template exists in the “Templates” perspective. Here one can edit the details, add or remove tasks or make changes such as renaming aspects. If there were people assigned to this project, they could be removed here or given hours. The template can be inserted into an existing project or created as a template for a new project as outlined in the steps below.

Creating a new Template:

In the Templates Perspective, you can create a new template. Here, you can follow the steps from Creating a New Project. The Gantt chart works the same way and you can add a Project, then tasks and sub tasks, and move the various elements in time on the Gantt chart and affect their duration.

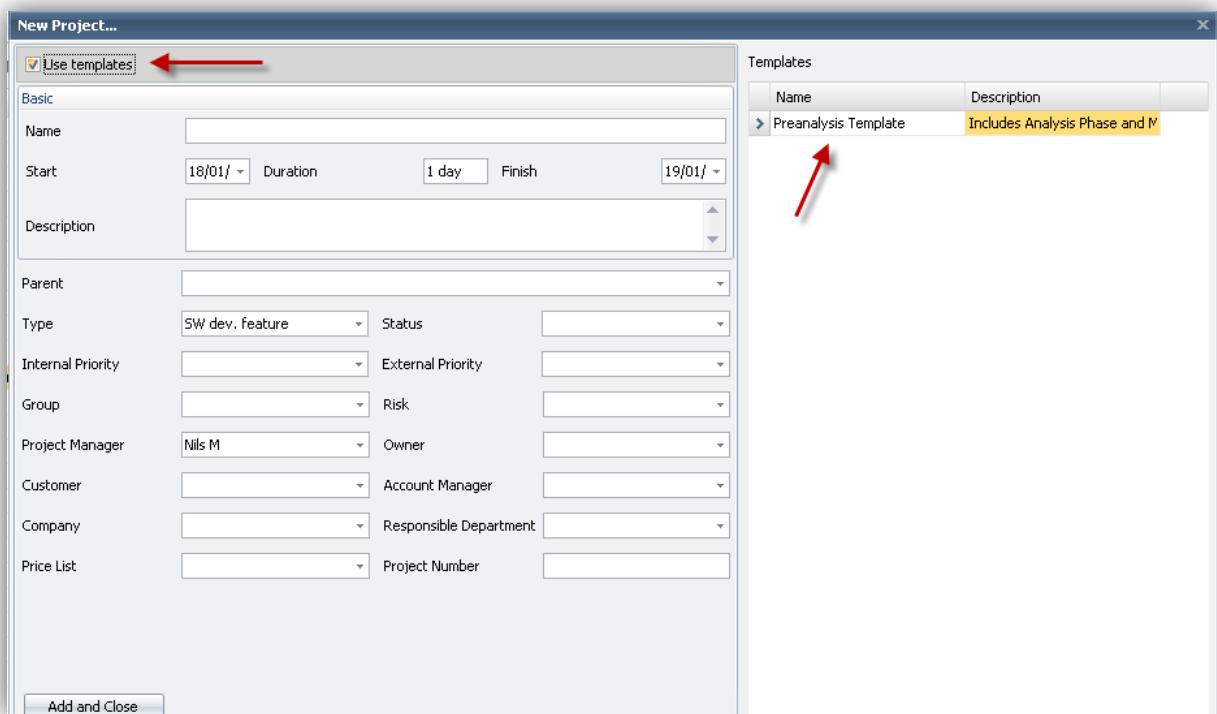
Starting a new project from a template:

From the Manage Projects & Tasks perspective, make a new project from form.



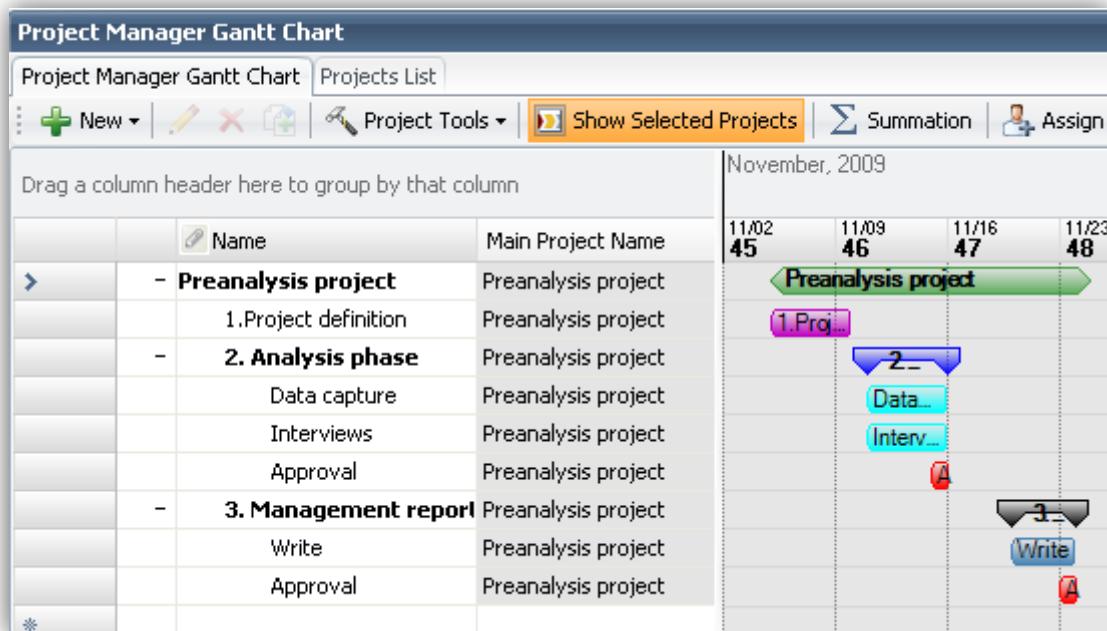
The screenshot shows the 'Project Manager Gantt Chart' perspective. At the top, there are tabs for 'Project Manager Gantt Chart' and 'Projects List'. Below the tabs, there are buttons for 'New', 'Edit', 'Delete', and 'Project'. A dropdown menu is open, showing two options: 'New Project' and 'New Project (Form)'. The 'New Project (Form)' option is highlighted with a yellow box. At the bottom, there is a list of projects with the first item being 'IT project initiation'.

A dialogue will pop up, click “Use Templates” and select the template you want to use.



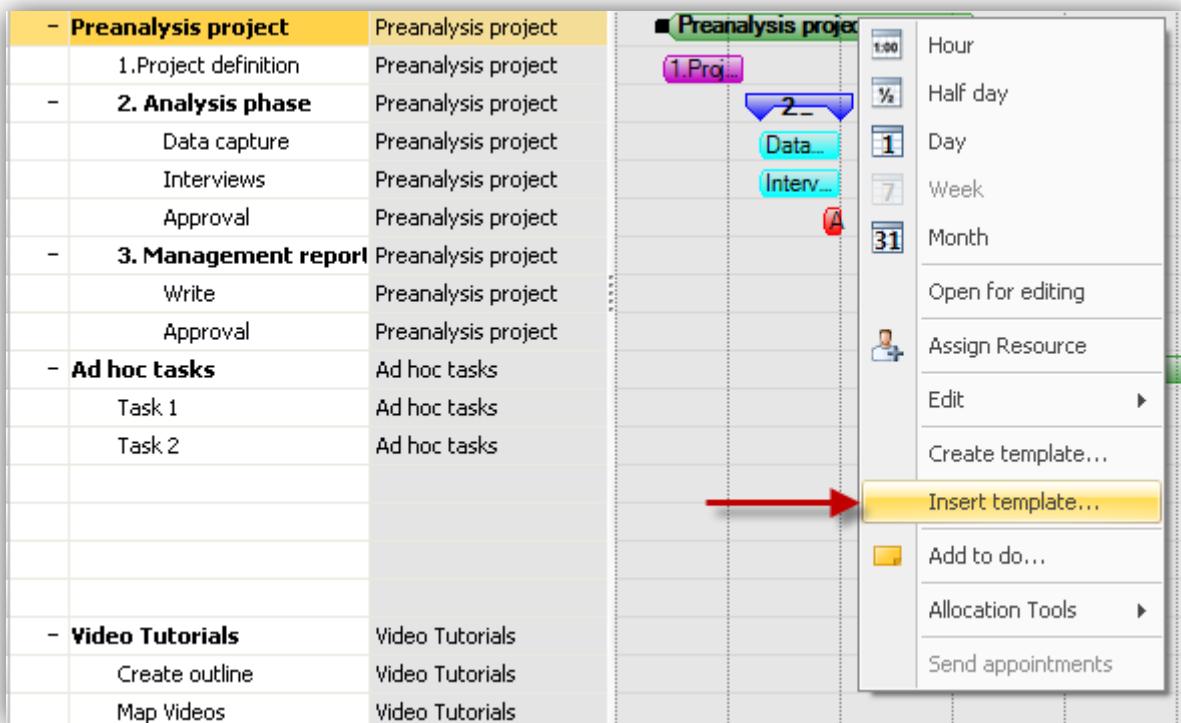
Fill in the details and click “Add and Close”.

The project will be inserted into the Project Manager Gantt Chart where you can begin to adjust tasks, duration, assignments and hours.

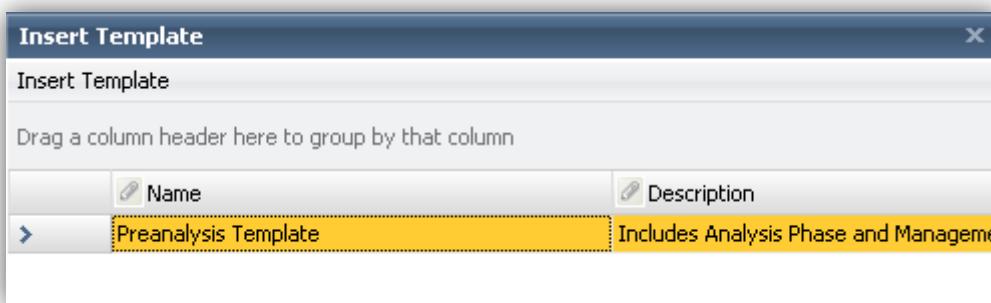


Inserting a template:

To insert a template into an existing project, right click on the green project Gantt bar in the Gantt chart and choose Insert Template.



A dialog will pop up with the templates you have available. Select the one you want and choose “Insert Template”.

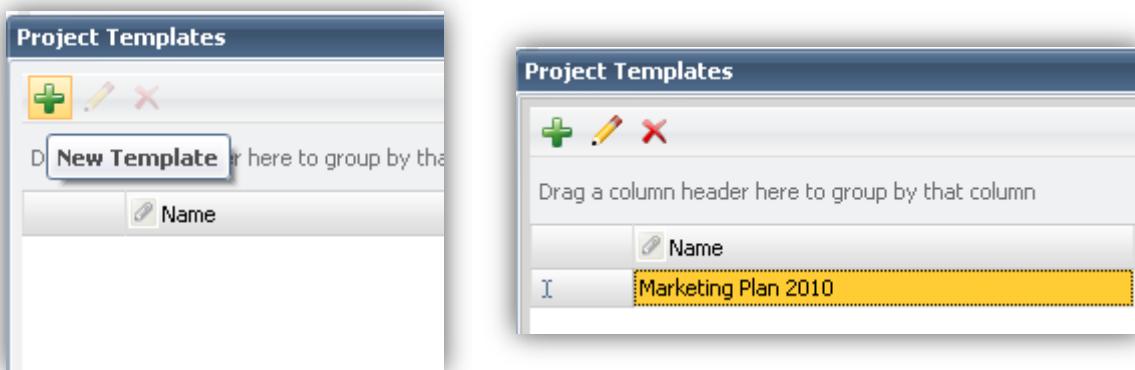


The template will be inserted below the project you selected.

Creating a template from scratch:

Perspective: “Templates”

In the Templates Perspective, select the + sign for New Template.



On the right side of the Templates perspective, you can create a project and tasks (or just tasks!) that make up the content of your new template.

Drag a column header here to group by that column

	Name	Main Project Name
	- Marketing Plan	Marketing Plan
	Market Analysis	Marketing Plan
>	Competitor Research	Marketing Plan
	SEO Planning	Marketing Plan
	Collaborators	Marketing Plan
*		

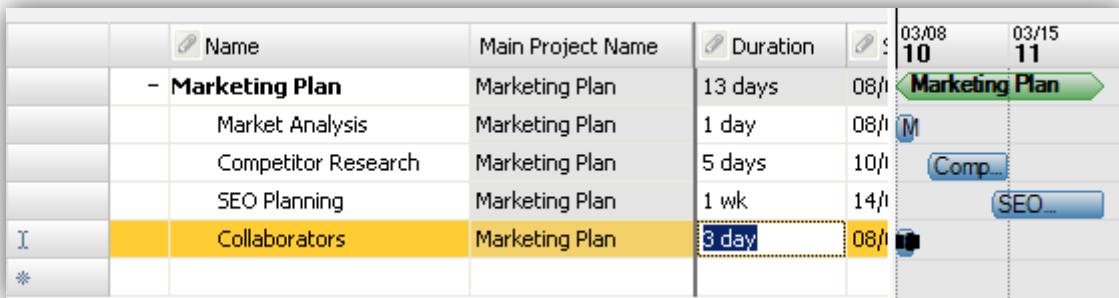
March, 2010

Date	Task
03/08 10	M
03/15 11	M
	C → C
	S
	C



Add tasks and move them in time using the Gantt chart (by dragging and dropping them) to schedule when they should happen.

You can set their duration using days, weeks or months. Enter 1 day or 1d for one day. Enter 1 week or 1w for one week. Enter 1 month or 1m for one month.



You can also indent a task to create a sub task. The main task will be a grey bar in the Gantt chart; summarizing information about the tasks below it.

The screenshot shows a ProjectWise interface with a Gantt chart on the right and a task list on the left. The task list has columns for Name, Main Project Name, Duration, Start Date, and End Date. A context menu is open over the 'Collaborators' column header, with the option 'Indent Task' highlighted. Red arrows point to both the 'Indent Task' button in the toolbar and the 'Collaborators' column header.

	Name	Main Project Name	Duration	Start Date	End Date
-	Marketing Plan	Marketing Plan	7 days	08/03/10	03/11
	Market Analysis	Marketing Plan	1 day	08/03/10	08/03/11
	Competitor Research	Marketing Plan	5 days	10/03/10	03/11
-	SEO Planning	Marketing Plan	3 days	08/03/10	03/11
>	Collaborators	Marketing Plan	3 days	08/03/10	03/11
*					

Once you have created your new template project, return the Perspective, Manage Projects and Tasks and make a new project from form, choosing your template as the base for the project.

The screenshot shows the 'New Project...' dialog box. On the left, there are basic project settings like Name, Start Date, and Description. On the right, there is a 'Templates' section with a list of available templates. A red arrow points to the 'Use templates' checkbox at the top of the dialog. Another red arrow points to the 'Marketing Plan 2010' template in the list.

New Project...

Use templates

Basic

Name: Marketing Plan
Start: 08/03/ Duration: 1 month Finish: 09/03/
Description: Marketing Plan for 2010

Parent:
Type: Status: Order, planned
Internal Priority: Normal External Priority:
Group: Risk:
Project Manager: Lillian G Owner:
Customer: Account Manager: Jon B
Company: Responsible Department:
Price List: Project Number:

Templates

Name	Description
Marketing Plan 2010	

Add and Close

Your template is now a project in the Project Manager Gantt Chart and you can begin scheduling people and assigning hours to it.

