TOPIC A

Create a Project Plan Template

You have spent a lot of time customizing your project plan. It would be great if you could reuse your work in future projects. Project plan templates allow you to do just that.

Project Plan Templates

A *project plan template* is a special type of project plan file that you can use to create new projects with default data and other elements already defined. You can create your own project plan templates by saving a Project file as a template. Not only will this save you time on future projects, but using templates also helps ensure success by reusing strategies that worked in the past, such as default tasks and relationships. It also captures people or resources and reporting methods and views that worked for the previous plan.

Best Practices for Creating a Template from an Existing File

When you create a template that will be used for a new project, it should not have any information that is not needed for the new project. This includes data related to project progress (actual start and finish dates, actual work, actual costs, actual durations, and percent complete for all tasks) for the old project. You can remove all of this data manually by changing all percent completes to zero. You can then change all constraints to **Start No Earlier Than**, and remove all deadlines by changing them to **NA**).

You can then use the **Save As Template** feature to convert the file from a project plan (.mpp) to a project template (.mpt).

The Save As Template Dialog Box

When you save a project plan as a template, Project displays the **Save As Template** dialog box. This enables you to choose which data you want to clear from the file when it is saved as a template. For example, you will probably want to clear the actuals and baselines. You may also want to exclude team members' salaries or other cost data if you are planning to send the template to someone outside of your organization. If you are not using Project Online or Project Server, the last check box about Project Web App is irrelevant and you can leave it unchecked.
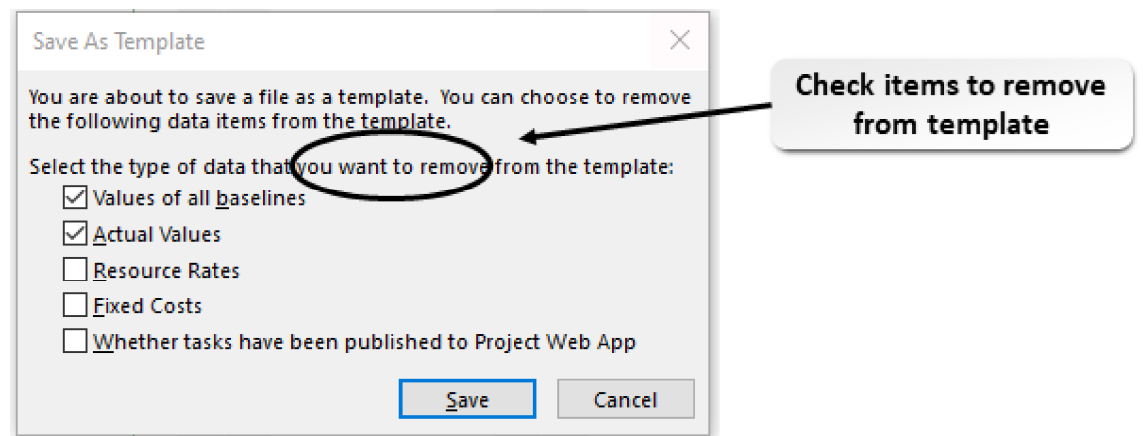

Figure 4–1: Clear data from a project plan template using the Save As Template dialog box.

You can find the **Save As Template** dialog box in the **Backstage View**.

The Personal Templates Folder

Microsoft gives you the option to save all of your Microsoft Office templates to a personal folder. If you wish to avail yourself of this option, from the **Backstage View**, select **Options→Save**. To open a template from this location, from the **Backstage View**, select **File→New**; your templates will be under **Personal**.
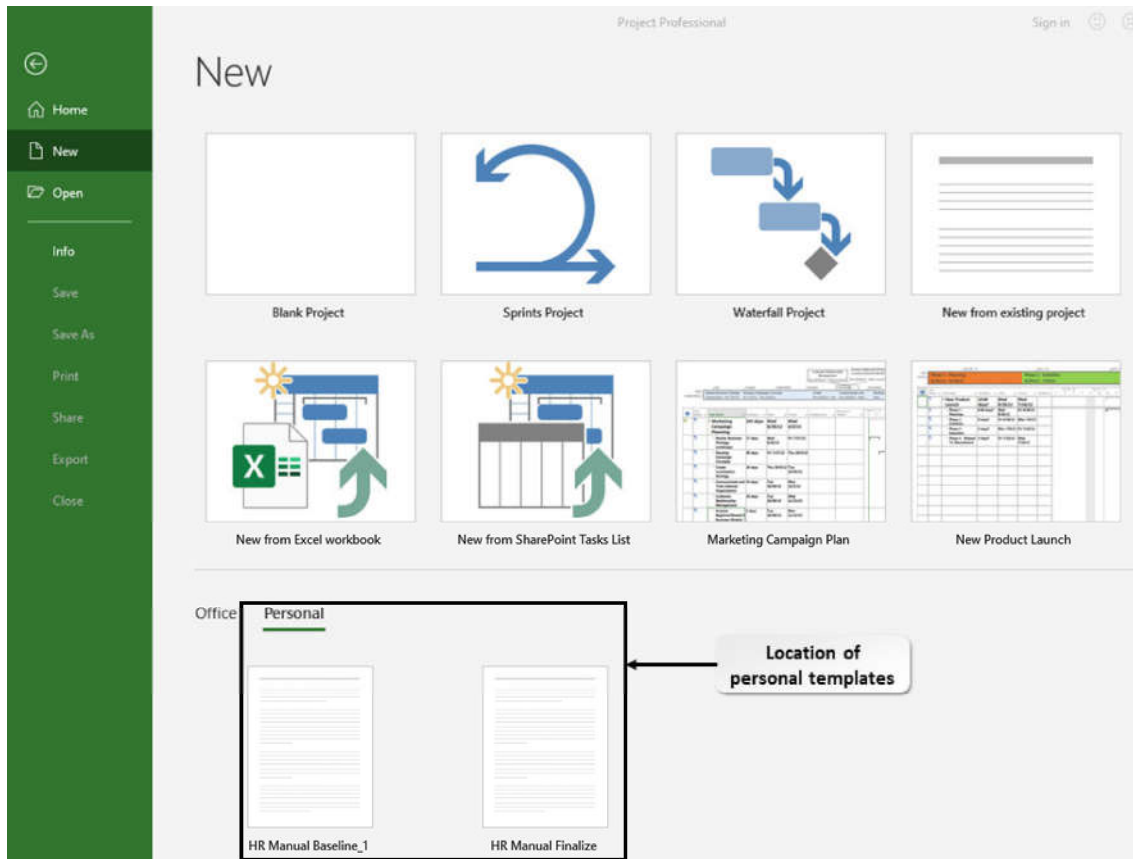

Figure 4–2: Personal templates are stored in a special folder.

> **Access the Checklist tile on your CHOICE Course screen for reference information and job aids on How to Create a Project Plan Template.**

ACTIVITY 4–1
Creating a Project Plan Template

Data File
C:\091099Data\Reusing Project Plan Information\HR Manual for Template.mpp

Before You Begin
Microsoft Project is installed on your computer.

Scenario
As your project nears completion, you realize that you might need to prepare another manual for another Greene City National Bank department. You decide to save your current project plan as a template so that your future projects benefit from your customizations.

1. Open the **HR Manual for Template.mpp** project plan file.
   a) Select **File→Open**, then select **Browse**.
   b) Navigate to the **C:\091099Data\Reusing Project Plan Information** folder containing your class files.
   c) Select **HR Manual for Template.mpp** and select **Open**.

2. Save the project plan as a template.
   a) Select **File→Export**.
   b) On the **Export** screen, select **Save Project as File**.
   c) In the **Save Project as File** list, select **Project Template**.
   d) Select **Save As**.
   e) In the **Save As** dialog box, navigate to **C:\091099Data\Reusing Project Plan Information**.
   f) In the **File name** field, type *My Departmental Manual*
   g) From the **Save as type** drop-down list, make sure that **Project Template (*.mpt)** is selected, and then select **Save**.
   h) In the **Save As Template** dialog box, check the **Values of all baselines** and **Actual Values** check boxes, and then select **Save.**

3. Close the template file.

4. Open a copy of the template to use for another project.
   a) Select **New→New from existing project**.
   b) Select the **Reusing Project Plan Information** folder.
   c) From the **Projects (*.mpp)** drop-down, select **Project Templates (*.mpt)**.
   d) Select **My Departmental Manual**.
   e) Select **Open**.

   > **Note:** Verify that the project plan file opens with no check marks in the **Indicators** field, signifying that no tasks have been completed.

5. Save the file as a Project (*.mpp) file.
   a) Select **File→Save As**.
   b) Navigate to the **C:\091099Data\Reusing Project Plan Information** folder.
   c) In the **Save As** dialog box, change the file name to *My Finance Manual*

d) Select **Save** and leave the file open.