

TOPIC B

Share Project Plan Elements with Other Plans

You can use project plan elements such as calendars, custom fields, custom tables, and custom reports in other plans. You could add the element to a template, but in many cases it is more efficient to simply copy it from one plan to another. In this way, information will be displayed exactly as it was in the original plan.

The Global Template

The *Global template* is a collection of default settings, such as views, tables, macros, and custom fields, that are available to all projects on your system. These settings exist within a special project on your computer (Global.MPT) and are used in all of your projects. You can modify the settings used in the Global template to provide new and updated project standards across your projects.

The Organizer

The *Organizer* is a tool you can use to copy reports, calendars, and other elements to other projects or to the Global template (Global.MPT). Copying an element to the Global template makes it available to all your projects. However, you may not need to use the **Organizer** to accomplish what you want. In fact, Project's default behavior is to automatically copy all new views, tables, filters, and groups you create to the Global template. If you want to copy other elements to the Global template, or if you want to copy an element from one project to another, you'll need to use the **Organizer**.

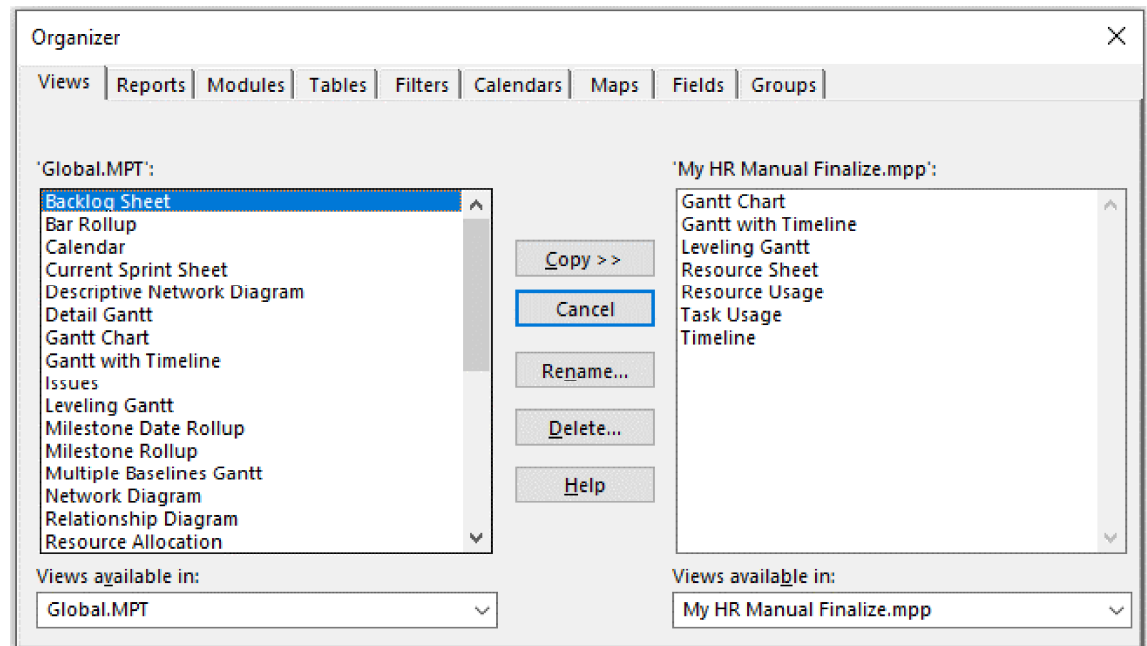


Figure 4-3: Use the Organizer to copy custom elements to the Global template or between project files.

Accessing the Organizer

The **Organizer** can be accessed in a number of ways:

- File→Info→Organizer

- From any **More** dialog box (Views, Tables, Filters, or Groups)



Access the Checklist tile on your **CHOICE** Course screen for reference information and job aids on How to Share Project Plan Elements with Other Plans.

ACTIVITY 4-2

Sharing Project Plan Elements

Before You Begin

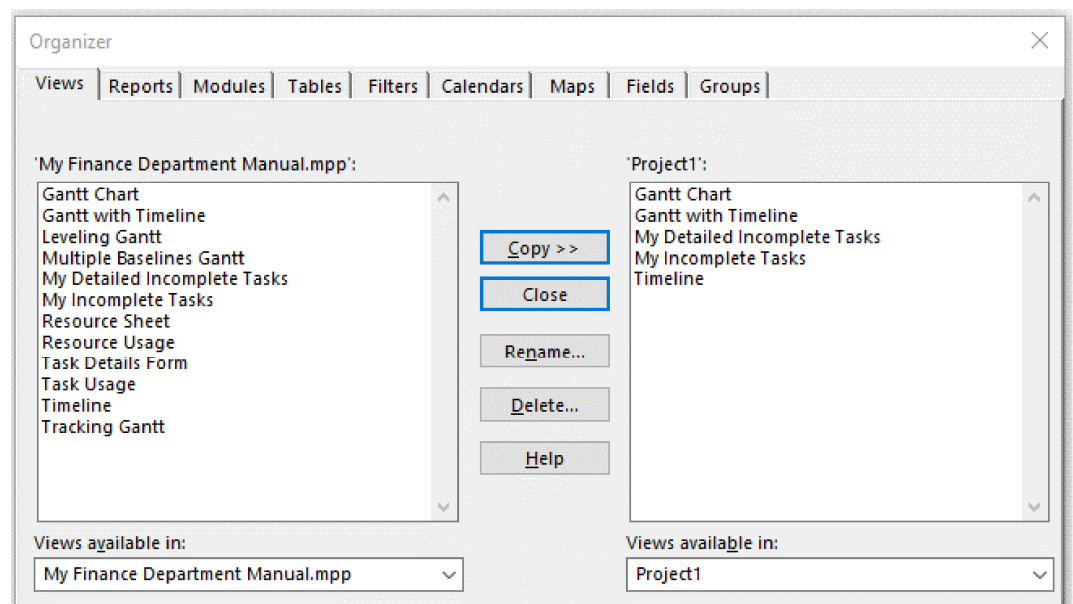
The **My Finance Manual.mpp** project plan file is open.


Scenario

One of the other project managers in the PMO would like to use the custom views that you created in one of her projects. You can do this by copying them into a new blank project plan (and sending the plan by email to her). She can then use the **Organizer** to copy the views to her Global template, where they will be available to all of her plans.

You also want to copy the GCNB calendar to your Global template so you can use it in other projects. This will save you the work of re-creating the calendar with all of its holidays for each project.

1. Copy the **My Incomplete Tasks** and **My Detailed Incomplete Tasks** views to a new blank project.
 - a) Select **File→New**.
 - b) Select **Blank Project** to open a new blank project.
 - c) Select **File→Info**.
 - d) Select **Organizer**.
 - e) In the left pane, from the **Views available in** drop-down, select **My Finance Manual.mpp**.
 - f) Select **My Detailed Incomplete Tasks** and then select **Copy**.
 - g) Similarly, copy the **My Incomplete Tasks** view to the new project (Project1).



- h) Select **Close** to close the **Organizer**.
- i) Select the back arrow  to return to the **Gantt Chart** view.

- j) Select **View→Other Views**.
- k) From the **Other Views** drop-down, select **More Views**.
- l) Scroll down and verify that the two views beginning with **My** have been added to the list.
- m) Select **Cancel**.



Note: If you had Outlook set up, you could send the Project file as an attachment to an email message.

2. Copy the GCNB Standard Calendar to your Global template.

- a) From the taskbar, open **My Finance Manual.mpp**.
- b) Select **File→Info**.
- c) Select **Organizer**.
- d) Select the **Calendars** tab.
- e) In the right pane, select **GCNB Standard Calendar**, then select **Copy**.
The calendar is now available for all projects.
- f) Select **Close**.

3. Close **My Finance Manual.mpp**.

4. Close **Project1.mpp** and do not save changes.

Summary

In this lesson, you learned to create a project plan template, and to share project plan elements with other plans.

What are the benefits of reusing project plan elements? What elements might you reuse?

What advantage do you see with using project templates?



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