

An Introduction to Project Templates

Published on 12/30/2014

What are Project Templates?

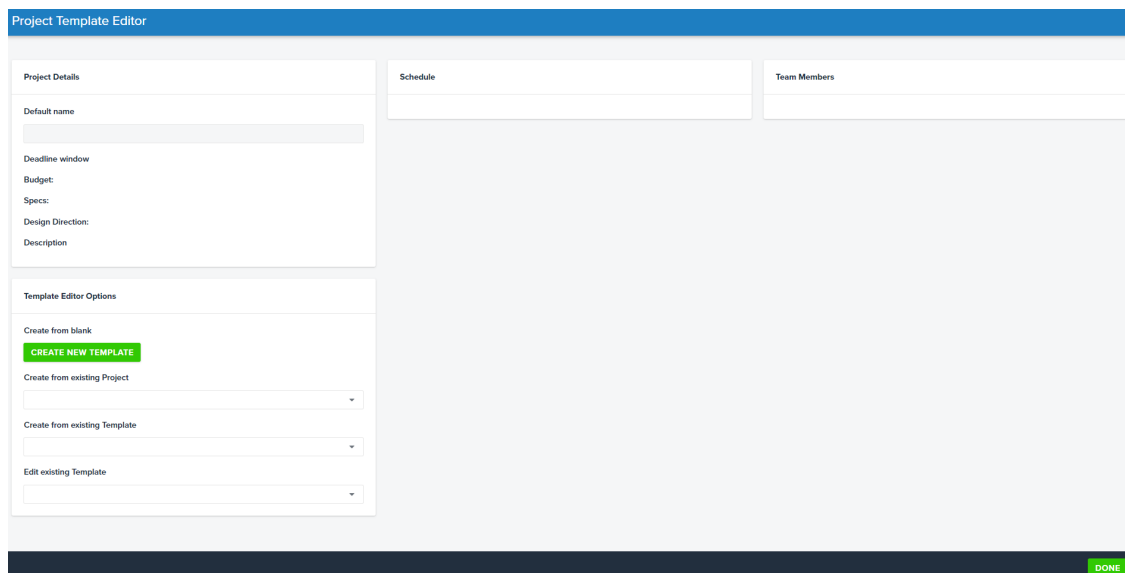
Project Templates help automate repeated projects including the creation of common tasks and milestones, which makes project setup and launch much faster. Since a project contains all of the project's assets, tasks, deadlines, and team members, this information can be captured with a project template.

Here are some helpful questions in determining what templates might be useful:

- What are the types of projects your team completes on a regular basis?
- What are the common tasks? How long does each task usually take?
- Which team members regularly work on each type of project?

Creating Project Templates

Navigate to **Account > Project Templates**. This takes you to the Project Template Builder.



The screenshot shows the 'Project Template Editor' interface. It features a blue header bar with the title 'Project Template Editor'. Below the header, there are three main sections: 'Project Details', 'Schedule', and 'Team Members'. The 'Project Details' section on the left contains fields for 'Default name', 'Deadline window', 'Budget', 'Specs', 'Design Direction', and 'Description'. Below these fields is a 'Template Editor Options' section with three options: 'Create from blank' (highlighted with a green button labeled 'CREATE NEW TEMPLATE'), 'Create from existing Project' (with a dropdown menu), and 'Create from existing Template' (with a dropdown menu). At the bottom right of the interface is a green button labeled 'DONE'.

There are three ways to create a new Project Template:

1. **Create from Blank** - This option opens a blank template. You'll need to manually



add all project details, tasks and milestones, and team members.

2. **Create from Existing Project** - If you have already set up a project and realize you use it frequently, make it a template. You can edit as necessary, give it a name, and save.
3. **Create from Existing Template** - This allows you to duplicate an existing template, make edits if necessary, give it a name, and save.

Project Template Tips & Tricks

1. **Naming the Project Template** - It is good idea to use the project name field to suggest naming convention for your project for ease of use.
2. **Establishing a Deadline** - You can also enter the number of days it normally takes to complete a project of this type. Try to think about task duration and anticipate how many hours from creation date you would typically need. The project will automatically calculate the due date based on the date of creation and the time to allow period.
3. **Assign Team Members** - Choose team members who routinely work on the type of project for which you're creating the template. If there is a team member routinely responsible for this type of project, use the dropdown menu and make them the Project Owner.
4. **Build a Task/Milestone List** - This is one of the most significant time savers with Project Templates. Add general tasks and then you can edit or add more project-specific tasks upon project creation. From the Task/Milestone list, you can drag and drop the tasks to change the order, and you can click into the task to edit or delete it.

Editing Project Templates

Assigning Project Templates to Existing Projects