Save project as a template

File menu

Phase Manager 4 allows you to save the characteristics of a project in a .PMT (Phase Manager Template) file.

The following characteristics are stored:

- **Project properties** and **Gantt parameters**
- **Labels**
- **Customs fields** (*and therefore activity styles*)
- **Page layouts**
- **Calendars**

Creating a project template

To create a project template, go to the ***File*** menu and click ***Save as Template*** . Phase Manager will ask you to name your project template:



Then to select a folder:



After clicking ***Select Folder*** , the .PMT file is created there.

Creating a new project based on a template

When creating a new project:

- 1) Use the “+” button to select the folder containing your template
- 2) Choose the model to be used
- 3) The information from the model is used to update fields:



After clicking OK, a new project will be created in the selected workspace, and all template settings (see above) will be integrated into the new project.

Projet Linéaire
12 impasse Bernard Lyot
85 000 LA ROCHE-SUR-YON
Tél. : +33(0) 2 22 44 52 52
support@projetlineaire.com