

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:

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Then to select a folder:

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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:

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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.