

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.