

MICROSOFT PROJECT TEMPLATE ISSUES AND SOLUTIONS

1 Why Use a Microsoft Project Personal Template

It is natural to create a new project with Microsoft Project using the **File, New, Blank Project** command which will create a project with the **Global.mpt** file that has a lot of shortcomings. It is far better to use a **Personal Microsoft Project Template** with these issues resolved like the Eastwood Harris template that may be downloaded from the Eastwood Harris website.

The following attributes have been changed in the Eastwood Harris Microsoft Project template from the standard settings:

- ❖ **File, Options, Schedule and Advanced** have been edited in line with the Author's recommendations in his book.
- ❖ A new **View** titled "Gantt Chart Inc Negative and Total Float" has been added:
- ❖ **Columns: Total Float** added and **Resources** removed.
 - **Grid lines:** Middle and Bottom Timescale Tiers, Project Start, Project Finish and Status Date displayed and Current Date removed.
 - **Bars:** Total Float (Total Slack) and Negative Float added and all text removed from all bars.
 - When any task is made **Manually Scheduled** it will be displayed as a turquoise coloured bar. This was achieved by moving the Critical bar to the top of the list in the Bars form and creating a bar to display Critical Manually Scheduled bar.
 - **Bar display in the Legend:** Many bars have been hidden in the Legend (but not deleted) by placing an "*" at the front of the Bar description in the **Bars** form.
- ❖ **Printing:** some project information is drawn from the **Advanced Properties** form. Also all project data has been removed from the **Legend** so the **Legend** may be hidden if not required, thus leaving all project data displayed if the **Legend** is hidden.
- ❖ A **Custom Field** has been added to the **Tracking Table** titled **Status Check** indicates when activities have been updated correctly.

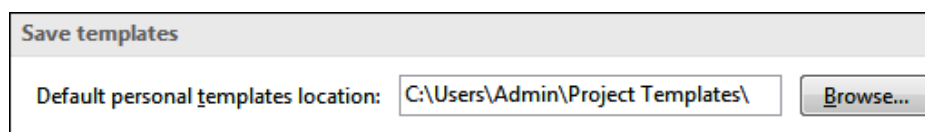
NOTES ON STATUS CHECK COLUMN:

1. You must set the **Status Date** in the **Project Information** form for this field to calculate correctly.
2. The **Summary Task** comments should be ignored.

2 Microsoft Project Template Functional Changes

Microsoft Project 2013, 2016 and 2019 templates operate differently to earlier versions of Microsoft Project and there are some important changes that need to be understood by users of earlier versions of Microsoft Project.

- ❖ **Templates** that are saved on your computer are now titled **Personal Templates** in Microsoft Project 2013, 2016 and 2019,
- ❖ A default location for your personal templates needs to be created and your software mapped to this location before the **Personal Templates** function will operate:



- ❖ Select **FILE, Options, Save** and set your **Default personal templates location:** here,
- ❖ At this point in time **Personal Templates** may now be saved and used to create projects.



Note: To use **Personal Templates** you **MUST** set your **Default personal templates directory** in **FILE, Options, Save**.

3 Understanding Templates

A template is a complete project that is saved and then copied in the process of creating a new project.

- ❖ ***.mpt** file format is used for saving Microsoft Project **Personal Templates**.
- ❖ The default location for **Personal Templates** is set in the **FILE, Options, Save** tab, **Save templates** section.
- ❖ Select **FILE, New** to open the start-up **Task Pane**. There are several options for template locations:
 - **FEATURED**, this provides a number of sample templates and the ability to search for available online templates.
 - **PERSONAL**, this will allow you to open templates on your computer. As mentioned earlier, a Template directory must be specified first for this option to become available.
- ❖ Organizational templates may be accessed by:
 - Allowing people to copy the organizational templates from a corporate location, or receive them by email, and save them on the local drive. This process is suitable when the users do not always have a network connection.
 - Mapping the **User templates** directory to a location on a corporate network drive.

4 Eastwood Harris Template

A Microsoft Project template in ***.mpp** format may be downloaded from the Eastwood Harris web site at from the www.eh.com.au, **Software & Downloads** page that has a number of the issues with Microsoft Project defaults and other setting resolved. The changes to the Global.mpt default settings are listed on the web site.

You may wish to download this file, open it and save it as a **Personal Template** and use this file instead of the **Blank Project** option as it has some formatting issues resolved.

5 How to Create a Microsoft Project Template

- ❖ Create or select a directory to save your Microsoft Project templates in Windows Explorer.
- ❖ Select **File, Options** to open the **Project Options** form.
- ❖ Select the **Save** tab and set the directory that your Microsoft Project Templates will be saved in:
- ❖ Download the Microsoft Project 2013, 2016 and 2019 template from www.eh.com.au - Software Downloads page.
- ❖ Unzip it by double clicking on the zip file and dragging the file to your desktop.
- ❖ Open the file with Microsoft Project.
- ❖ Select **File, Save As, Computer** and Browse, then, select from the drop down box to save as type Microsoft Project template (*.mpt). Microsoft will default to the directory you have selected as a Template directory, so save the file in the Template Directory.

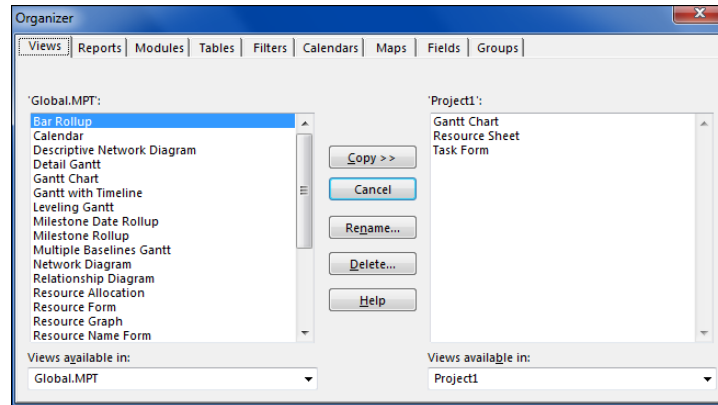
8. Select the defaults at the **Save As Template** form and click Save.

9. Close the Eastwood Harris template file and any other projects that may be open.

10. Select **File, New, Personal Tab** and you should see the Microsoft Project Template you have just created.

6 Copying Views, Tables and Filters

As part of creating a Template or working on a project you may wish to bring in **Views, Tables or Filters** from an existing project.



The **Organizer** function is used to copy information between projects or to update the **Global.mpt**.

- ❖ Select **FILE, Info, Organizer** to open the **Organizer** form.
- ❖ The projects you want to copy settings to and from will have to be opened in order to copy data from one schedule to another, except for the **Global.mpt** project.
- ❖ The **Organizer** function is used for renaming and deleting most items such as **Tables, Views** and **Calendars**.
- ❖ The two tabs with titles that are not self-explanatory are:
 - **Maps** – These are predefined tables for exporting data, and
 - **Modules** – These are Visual Basic Macros.

7 Footnote

To see more explanations like this then buy Paul Harris' Microsoft Project book by which is available in paperback, spiral, Kobo, Kindle and iTunes from:

<https://www.eh.com.au/MSP2019.html>

These books are intended to be used:

- As a self-teach book and a two-day training course handout.
- Instructor PowerPoint slide shows are available for purchase and free pdf versions are available to educational organisations.

Eastwood Harris Pty Ltd,

Planning and Scheduling books and training material:

- Microsoft Project,
- Oracle Primavera P6 and
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