

Using Project Management Templates

Introduction

This document contains instructions and tips for effectively using Project Management Methodology templates.

Instructions and Tips

- Click the desired template name.
 - PDF documents will open in a new browser window.
 - Word and Excel templates will generate an empty browser window with a **File Download** prompt. Either save the template directly to your project directory, renaming it as desired;OR

Open the template. Notice it opens in read-only status. Immediately perform a **Save As**, rename it with the desired file name to your new project directory, and edit as needed. *Note:* In this option, the empty browser window serves to launch the Word or Excel application. Simply close the empty browser window once the template opens.
- In Word templates, you must manually update the footer file path to reflect the new document name. Once you have saved the template with its new project directory file name:
 - Double click on the footer to enter the footer field.
 - Select and highlight the file path name only (do not highlight the template number and name).
 - On the highlighted file path name, right click your mouse.
 - Select **Update Field**; the new file path will display.
 - Exit the footer by double clicking anywhere outside the footer box.
 - Save your document to confirm the change.
- In Excel templates, the footer file path is automatically updated when you perform a **Save As**.
- Update all document headers with the project name. In some Word templates, this will mean updating header fields in multiple places:
 - Double click on the header to enter the header field.
 - Select and highlight **<Project Name>**.
 - Overwrite the highlighted field with the project name.
 - Exit the header by double clicking anywhere outside the header box.
 - Save your document to confirm the change.
- Do not update the Document Change Control boxes in any template. Document Changes Control boxes are a separate page of Word templates and are included on the Version Control page (tab) of Excel templates. This change control references the version of the actual template being used, not your project document.
- In all Excel Templates, complete the project information tables on the Version Control pages (tab).

Need Help?

- Contact [MAIS Project Support](#) if you are experiencing problems using a template.