Content Templates

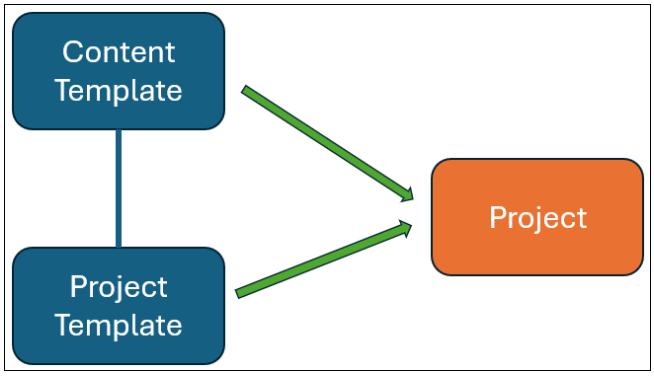
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Project Management Context

The Actual Project Manager of the source project and users given the BrightWork PMO Manager security role have the option to create a special type of template from an existing project that will include the content from that project; these templates are called Content Templates. The content copied over to the template will include data from the tabs Stages, Deliverables, Tasks, Issues, Risks, and Project Settings.

Work assignments for Gantt Tasks, Issues, Risks, etc., are not copied over as part of the content template creation process. However, Gantt Task assignments can be manually added to content templates after they have been created and these will be copied over to new projects.

The content template itself will not be used to create new projects - new projects will need to be created from a Project Template that is associated with the Content Template. To create the new project template that can then be used to create new projects, continue with the instructions for creating templates in the template configuration article.



Content Templates are a great way to give your project manager colleagues a head start using best practice templates from other similar projects.

Note

- The Project Manager of a content template is initially set to the person who created the content template; this value is ignored when the content template is reused.
- Tasks in projects created from content templates with Gantt tasks are automatically assigned dates relative to the newly created project's creation date, starting with the task that has the earliest start date. This is an approximate date calculation based on start and end date - weekends, lack of project exception days carryover, etc., will impact the outcome.

- Project task offsets and multiple dependencies are supported in content templates and will be carried over to created projects.
- Although Content Templates will include any custom Form Tabs, Sections, and Columns, data from these custom elements will not be passed on to any newly created projects that are associated with the Content Template.

Caution

- If you delete a content template from the Projects section of the Projects Area, the content template will also be removed from any templates that are referencing it.
- Project Override Settings, Project Exception Days, Resources, and Resource Units are not copied to content templates from their reference projects.
- If you plan on creating a new project from a project that was itself created from another project (daisy chaining with Content Templates), do not click into a Deliverable from a task form (e.g., from a Stage listed in the Stages tab). To remove an existing document folder, create a copy of the item and then delete the item with the document folder reference.

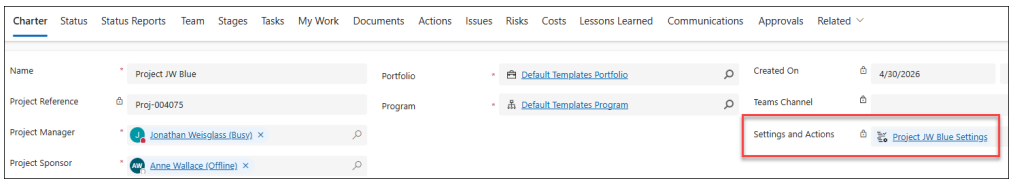
Create a Content Template from an Existing Project

Note

- For release 2026-3 and newer: When creating a Content Template, ensure that the original project's name does not exceed 205 characters so as to avoid exceeding the name field's 255 character limit after the creation process automatically adds its additional characters to the Content Template's name. Otherwise, the process will fail.
- For release 2026-2 and older: When creating a Content Template, ensure that the original project's name does not exceed 50 characters so as to avoid exceeding the name field's 100 character limit after the creation process automatically adds its additional characters to the Content Template's name. Otherwise, the process will fail.

To create a Content Template from an existing project:

1. In the reference project's Charter tab, click the **Settings and Actions** link.

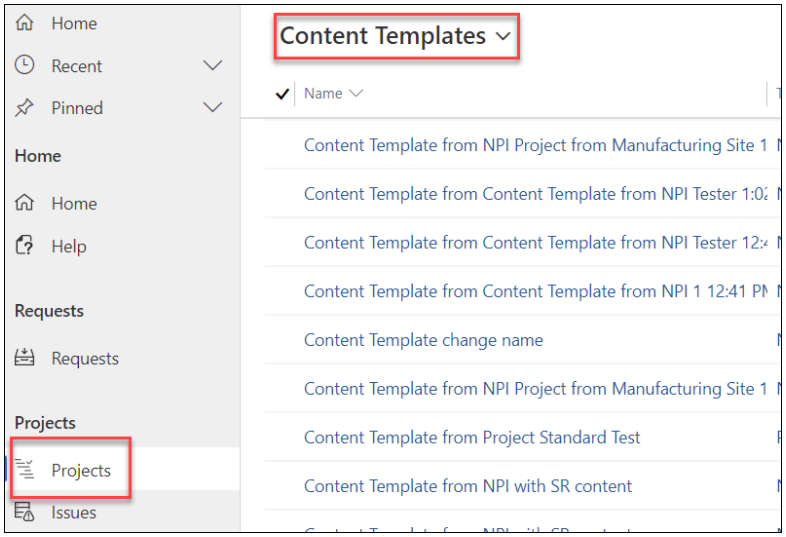


2. Set the **Copy to Content Template** slider to **Yes**.



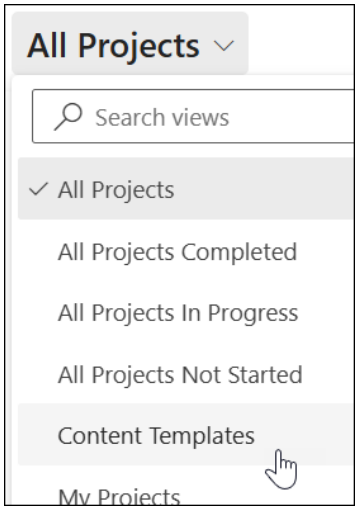
3. Click **Save & Close** at the top of the window.

You will find the new template in the **Content Templates view** in the **Projects Area** once the associated workflow has run. When the content template is ready to be used, the user that initiated the creation process will receive an email.



Edit a Content Template

1. Click the **Projects** link in the main nav.
2. Switch the current view to the **Content Templates** view.

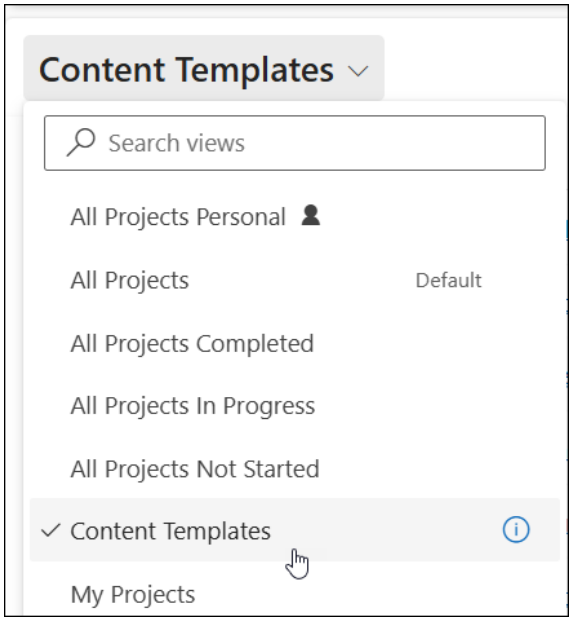


3. Choose the relevant content template and edit as necessary.
4. Save and close the updated content template.

> **Note**
> - For users who do not have the BrightWork Template Editor security role, the following Content Template tabs will be hidden: Documents, Issues, My Work, Risks, Stages, Status, Team. Additionally, the Gantt control will be disabled, and all other controls will be read-only.
> - Edits to an existing content template will not be propagated to projects created prior to the new edits.

Rename a Content Template

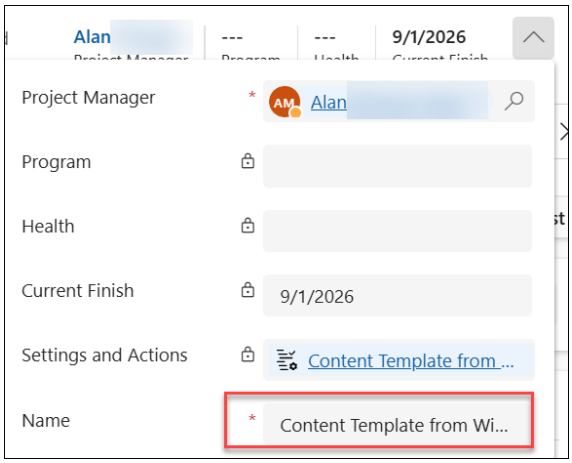
1. Click the **Projects** link on the main navigation.
2. Change the Projects view selector to **Content Templates**.



3. Select the content template.
4. Click the header dropdown.



5. Edit the Name field entry.

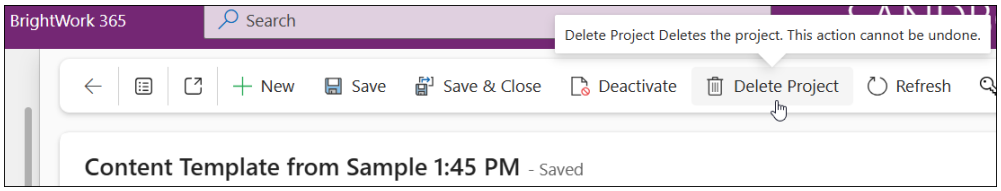


6. Click **Save & Close** at the top of the screen.

Delete a Content Template

Caution If you delete a content template, the content template will also be removed from any templates that are referencing it.

1. Click the **Projects** link in the main navigation of the Projects Area.
2. Switch the current view to the **Content Templates** view.
3. Select the relevant content template you wish to delete.
4. Click **Delete Project** in the top menu bar to delete the content template.



Share a Content Template with Business Units

If you have implemented a Portfolio Security & Access model utilizing different Business Units, it is possible to make a Content Template available to Business Units (and their associated users) that would not otherwise have access to it. This includes restricted child Business Units that cannot access Content Templates that have the top parent Default Business Unit as their Owning Business Unit. This can be accomplished by using the 'Share' feature to share the record with the Dynamics Team for each Business Unit, and granting them 'Read' and 'Append to' permissions.

