

Project Template Switcher

Project Management Context

The needs of a project can change over time. A template ideal for the initiation phase, that focuses on high-level goals and stakeholder alignment, may later require a more structured template that allows for more granular task dependencies, specific quality-control gates, precise resource tracking, and/or the incorporation of Lessons Learned. As a project progresses, the team gains critical knowledge about their processes, and the modification of the underlying project template using BrightWork 365 functionality allows the team to scale the project and adapt its scale and complexity.

Tip See also [Starter Project Templates](#).

Note

- When switching templates, data not relevant to the new project form will be hidden (but not deleted), and tabs and views not part of the new template will be removed from the project; if the project is later switched to a template where this content is relevant, the content will once again display. All existing records, including the hidden content, will still roll up to reports associated with the content. For example, when switching from a Project Structured template to a Project Light template, Actions, Issues, Risks, and Costs will be hidden from the project, but this data will still roll up to corresponding reports.
- If "Send Stage for Approval" was activated in a project that has approval stages, and then the project's template is switched to [Project Tracker](#), the Project Tracker project will temporarily be set to inactive, the approval flow will cancel automatically, and the user will receive an email informing of such.
- [Content templates](#) are in scope. Approvals are out of scope.
- Custom templates are out of scope; project template switching is designed to work best with out of the box templates.

Caution After switching project templates, the Business Process Flow will reset in the project.

How to Switch Project Templates

The project's Actual Project Manager and users granted the BrightWork PMO Manager security role can switch a project's template as follows:

1. Click the project's **Charter** tab.
2. Click the **Settings and Actions** link on the Charter tab.
3. On the Project Settings window that opens, click the search icon of the Project Template field.

4. In the new window that opens, click the search icon in the Project Template field.
 5. Select the project template from the drop-down list and click **Confirm** (only project templates that are selectable will be displayed).
 6. After reading the dialog information, click **Switch Template**.
 7. Click **Save & Close** on the Project Settings screen that opens.
 8. The project will refresh and the selected template will load.
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