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 functionlity allows the team to scale the project and adapt its scale and complexity.

Switching a project to a different project template applies the project template's Form Template (plus its Form Configurator settings) and Business Process Flow to the project. This is primarily a layout change, it can include hiding or exposing tabs, sections and columns - no data is ever lost.

Tip See also Starter Project Templates.

Note

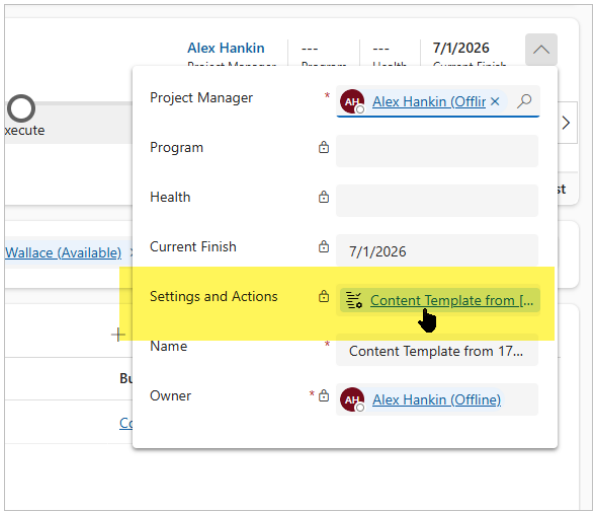
- When switching templates, data not relevant to the new project form will be hidden (but not deleted), and tabs and views not part of the new template will be removed from the project; if the project is later switched to a template where this content is relevant, the content will once again display. 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.
- Project Template defaults such as Project Manager, Approval Coordinator, etc., are not applied - these defaults are for new projects only.
- Approvals are out of scope.

Caution If a new Business Process Flow is used on the project after a project template switch, it will be reset to the first stage. If the Business Process Flow was used previously on the project, it will revert to the previous stage.

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:

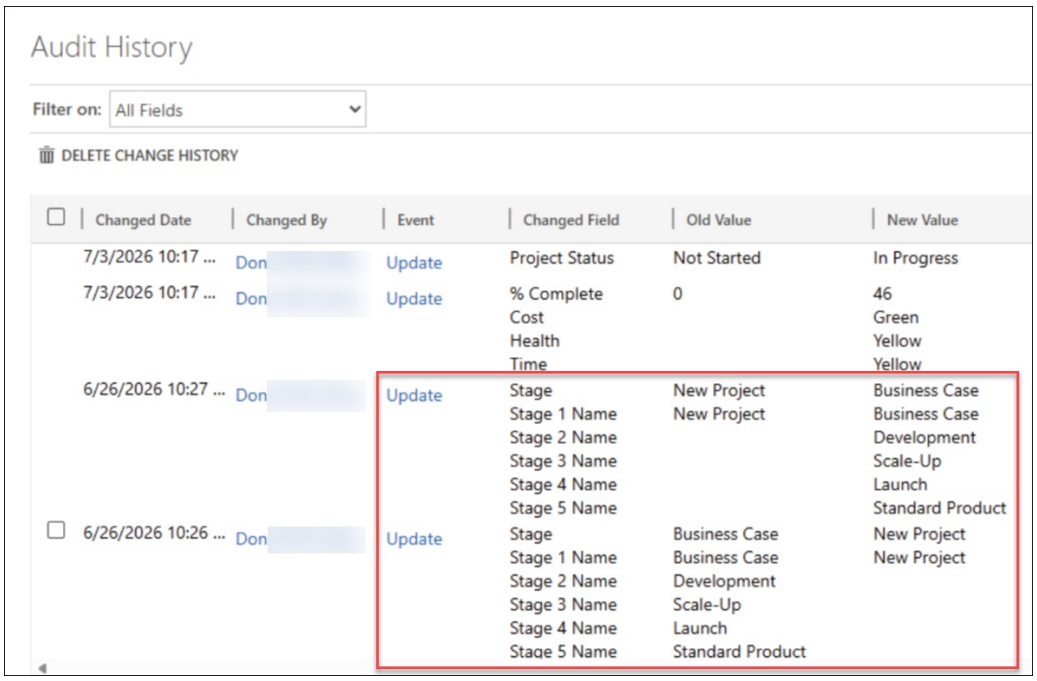
1. In a project, click the **Charter** tab. In a Content Template, click the header dropdown:



2. Click the **Settings and Actions** link.
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.

Audit History

If you open a project that uses a different form to one you opened previously, the project's audit history will note that the Stage temporarily changed to New Project.


Audit History
Filter on: All Fields
DELETE CHANGE HISTORY
Changed Date
Changed By
Event
Changed Field
Old Value
New Value
7/3/2026 10:17 ... Don Update Project Status Not Started In Progress
7/3/2026 10:17 ... Don Update % Complete 0 46
Cost Green
Health Yellow
Time Yellow
6/26/2026 10:27 ... Don Update Stage New Project Business Case
Stage 1 Name New Project Business Case
Stage 2 Name Development
Stage 3 Name Scale-Up
Stage 4 Name Launch
Stage 5 Name Standard Product
6/26/2026 10:26 ... Don Update Stage Business Case New Project
Stage 1 Name Business Case New Project
Stage 2 Name Development
Stage 3 Name Scale-Up
Stage 4 Name Launch
Stage 5 Name Standard Product