Working with WBS templates

Sun, 09/12/2010 - 11:00 — Chris

How do I share a template?

Please contact us via the website's contact [page] [1] and we will provide a way to get your WBS posted.

How do I create a template?

Using the [Organizer] [2] Add-in, go to Project Explorer and select the project you want to create a template for in the tree view. Select Import / Export from the Project menu. Then using the Wizard select 'Export project to a work breakdown structure template file'. Follow the prompts to create the file.

How do I use a template?

Using the [Organizer] [2] Add-in, go to Project Explorer and select the project you want to add the template to from the tree view. Select Import / Export from the Project menu. Using the Wizard select 'Import a work breakdown structure template file'. Follow the prompts to add the tasks and artifacts to the selected project.

Example:

I need to frequently set up speaking engagements for my boss. I do it the same way every time. I start the project 90 days ahead of the time the speaking engagement is scheduled to occur. How can I set up a template so that whenever a new engagement is to be scheduled, I can use a WBS template to map out the tasks for me.

Making this really simple, Let's assume I have a two task project:

1. Set up for speaking engagement – due date: 1/1/2011
2. Deliver speech – due date: 3/31/2011

Exporting those tasks will then create a relative WBS template.

Now let’s import our WBS template for ‘Speaking Engagement’

1) Import Speaking.WBS
2) Start Date = 6/1/2011

New tasks will be created and should be something like:

1) Set up speaking engagement – due date: 6/1/2011
2) Deliver speech – due date: 8/31/2011

ORGANZIATION › [3]

- Organizer Templates (WBS) [4]

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