Project Templates

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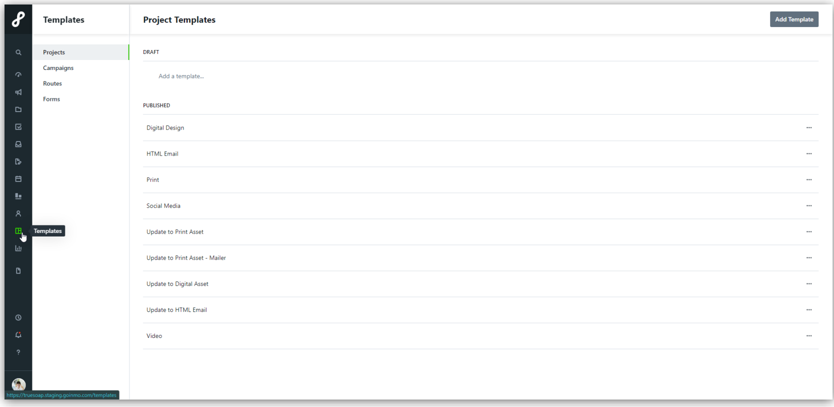
Project templates help you kick off Projects easily with little effort, saving you time and reducing the potential for human error. Use Project templates to pre-populate Tasks, Proofs, Tags, assigned team members, and so much more!

> Project templates can also be incorporated into your team's request forms, making it incredibly simple to map the correct template to each request. Want to discuss adding Project templates into your request forms? Contact us! (https://support.lytho.com/support/tickets/new)

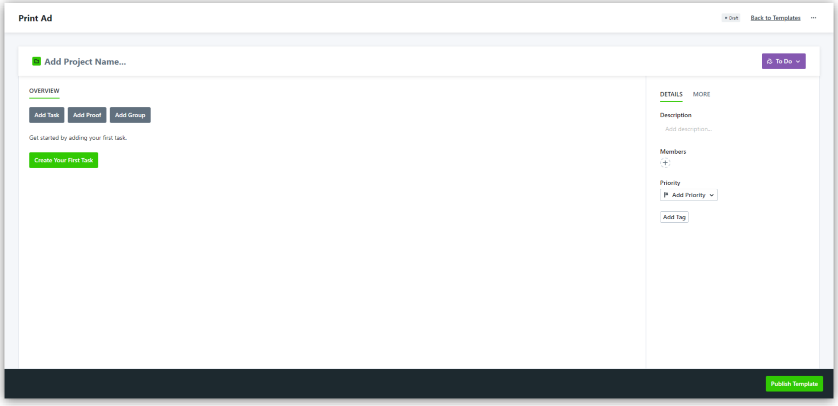
Getting Started with Project Templates

Users with the "Manage Templates" permission (https://guide.lytho.com/help/managing-roles-and-permissions#assigning-permissions) can create, edit, and publish Project templates. Navigate to the **Templates** page from the left sidebar, then **Projects**, to manage Project templates for your team.

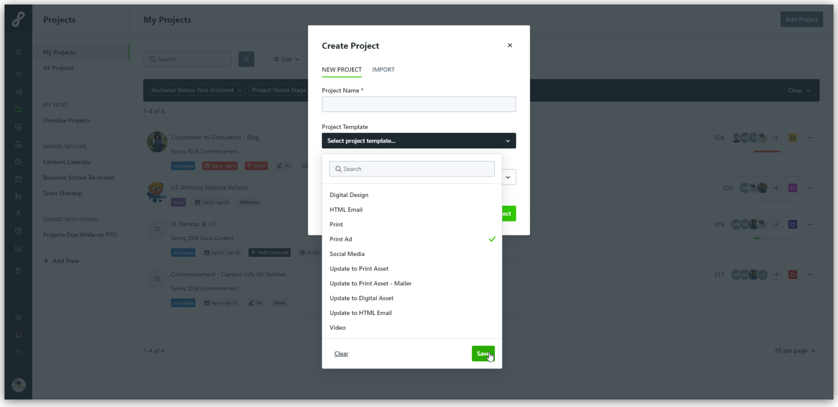


> Until they're published, all Project templates will be saved as a draft.

To create a new Project template, click **Add Template**, name it, then click **Create Template**.



Once you've built out your Project template, click**Publish Template** to make it available in your team's account. New Projects created from the template will pre-populate everything you've incorporated.



If there's a Project you've already built that you'd like to use as a framework for future Projects, you can easily turn it into a Project template! Open the action menu on the Project details view and click **Publish as Template** to copy the Project information, badge colors, assignments, Tasks, and Proofs.

Badge Color

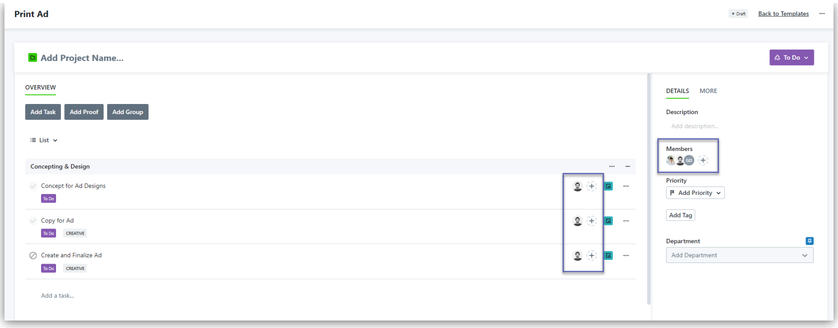
Any Admin or Team Member with access to a work item canchange the badge color (https://guide.lytho.com/help/color-story) by selecting the **Badge Icon**, using the color slider, keying in the**Hex** value or providing the **RGB** values, and selecting **Save**. In Project templates, this can be done for both the Project and the associated Tasks and Proofs.

> Lytho ProTip: As you select a color for your Projects, think in categories. Do you want to categorize it by Project team or specialties, brand, deliverable type, or requesting department? Programming these into Project Templates ensures consistency!

Assigning Team Members

We can assign team members at the Project template level if we know we'll always have the same people working on a certain type of Task or Proof.

In our below screenshot, we have one print designer, so we already know we'll want to route all print design Tasks to them. We've added them as a member to all related Tasks. If we also want to assign additional members who won't necessarily be involved with individual Tasks, we can add them at the Project level on the right side under **DETAILS**.



Adding members from the Project template ensures that the relevant teammates are immediately notified of new work.

Assigning Specialties*

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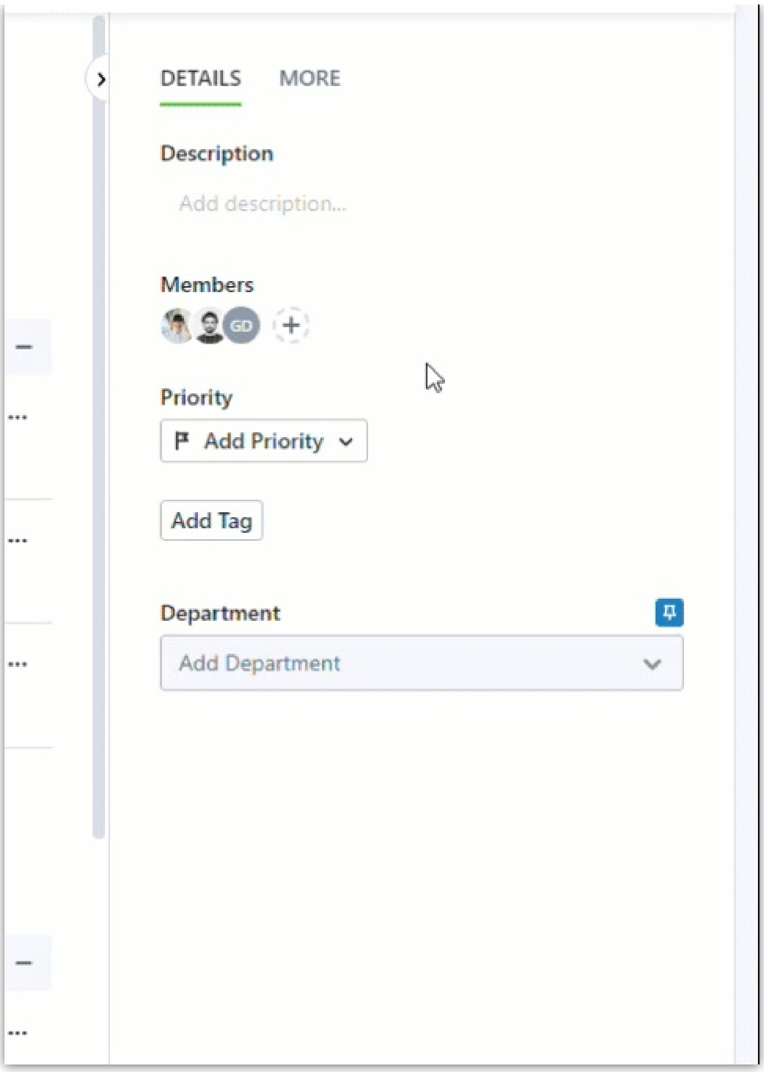
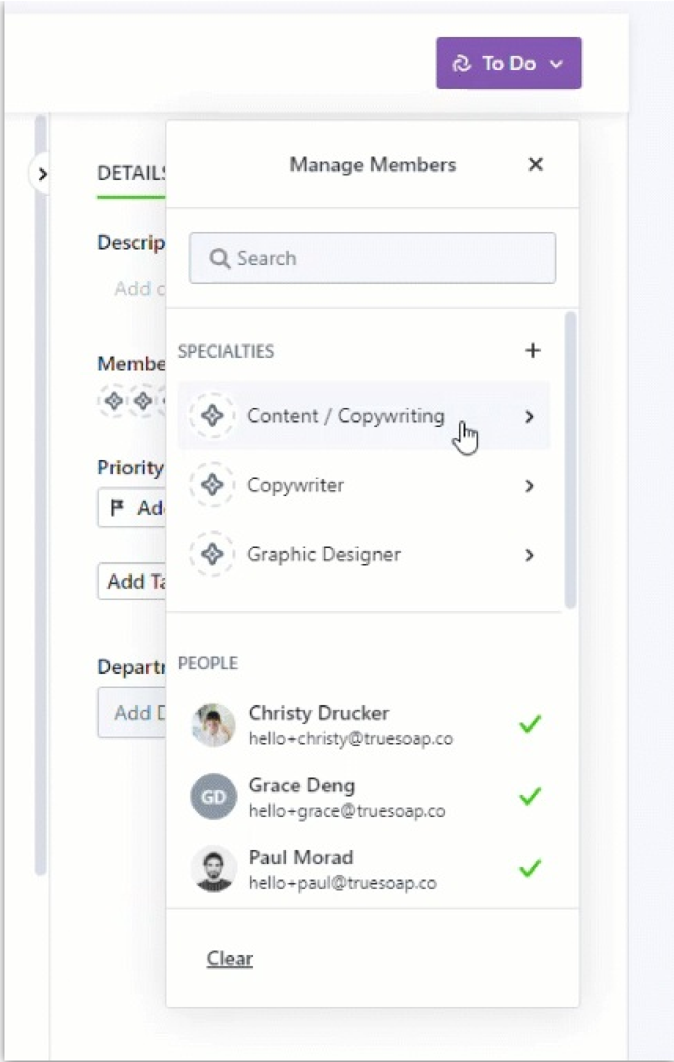
Specialties (https://guide.lytho.com/help/resource-management-specialties) allow you to assign your members to a group, for those situations where you know you need someone of a specific skillset, but aren't sure who that person is right now. For this section, rather than assigning a specific member to the Project template, we'll be assigning a specialty role.

To do this, in the **DETAILS** section of your Project template, click the **plus icon** below **Members** and select the **plus icon** to the right of **SPECIALTIES** to add specialties placeholders to the template. Select the **plus icon** next to the specialty needed. Once a specialty has been added, a number 1 and minus icon will appear. Add the number of team members needed with this specialty assignment.



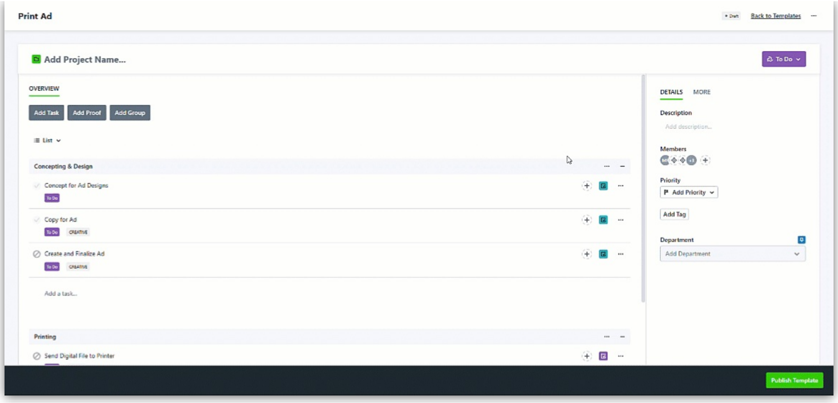
A placeholder flower image will appear in the Members section until a specialty member has been assigned.

If you have a team member who fills a specific specialty, you can assign them to the template by clicking the specialty and selecting their name.



You can modify any member or specialty assignment at the Project level once it has been assigned.

Now that you have the appropriate specialties assigned to the Project, begin adding specialties to your work items. Click the **plus icon** on the Task or Proof and select the specialty or specialties needed.



> If you later specify which member belongs to an assigned specialty, that member will auto-fill into all of the work items where that specialty has been assigned.

Adding Dependencies*

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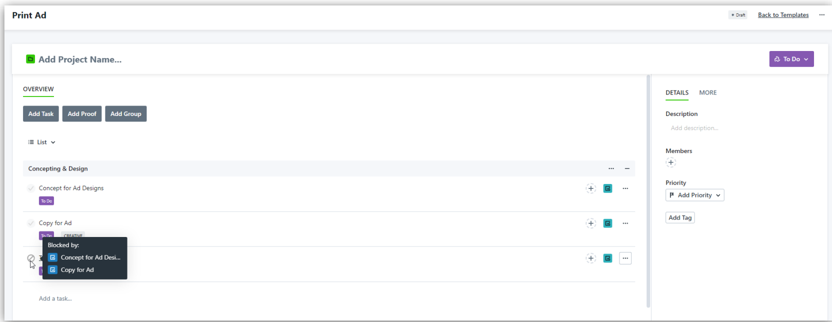
One of the most powerful things you can build into Project templates isdependencies (https://guide.lytho.com/help/dependencies). Dependencies let you add blockers to work items, notifying team members when all blockers are completed and work is ready to begin.

In this example, we've added dependencies (https://guide.lytho.com/help/dependencies#managing-dependencies-in-project-templates%C2%A0) for several Tasks, starting with the third item in our "Concepting & Design" workgroup, which will now be automatically created whenever a new Project is built from this template.

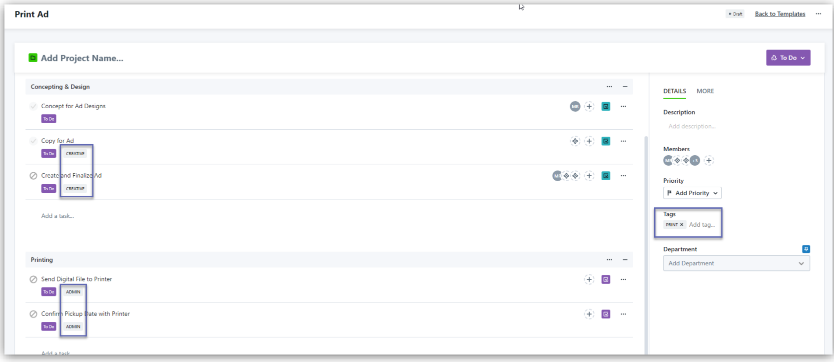


> Members can block notifications (https://guide.lytho.com/help/notifications#suppressing-notifications-for-blocked-work) based on active dependencies in their Personal Settings.

Adding Tags

[Tags](https://guide.lytho.com/help/managing-tags) (https://guide.lytho.com/help/managing-tags) are system-wide fields that can help categorize and filter Project, Task, and Proof data by things like brand, department, or client name. By adding tags into your Project templates, you'll have them automatically applied to Tasks, Proofs and the Project, streamlining the setup process.

In this example, it's important to our team to be able to report on how much time is spent on creative work vs. administrative work, so you can see we've added "CREATIVE" and "ADMIN" tags to our Tasks. We also want to be able to track how many print Projects we're working on, so we've added "PRINT" as a tag at the Project level.



By adding tags up front in the Project template, it saves our project manager quite a bit of time from having to manually add them every time a new Project is created.

Changing Default Custom Fields*

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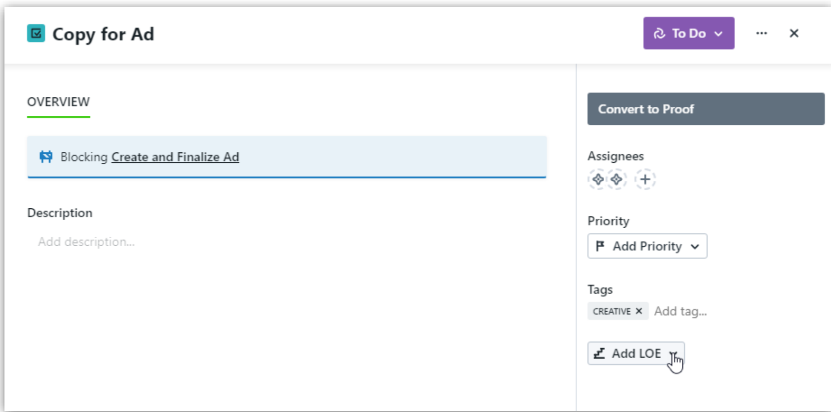
[Custom fields](https://guide.lytho.com/help/managing-custom-fields) (https://guide.lytho.com/help/managing-custom-fields) enable you to add unique fields to Projects in order to search for and report on valuable Project details that are unique to your process and business.

In our example, we have a custom field dropdown to choose which department is involved with the Project. This type of Project will always be assigned to our Creative team, so we're setting it to pre-populate as "Creative" in the template.

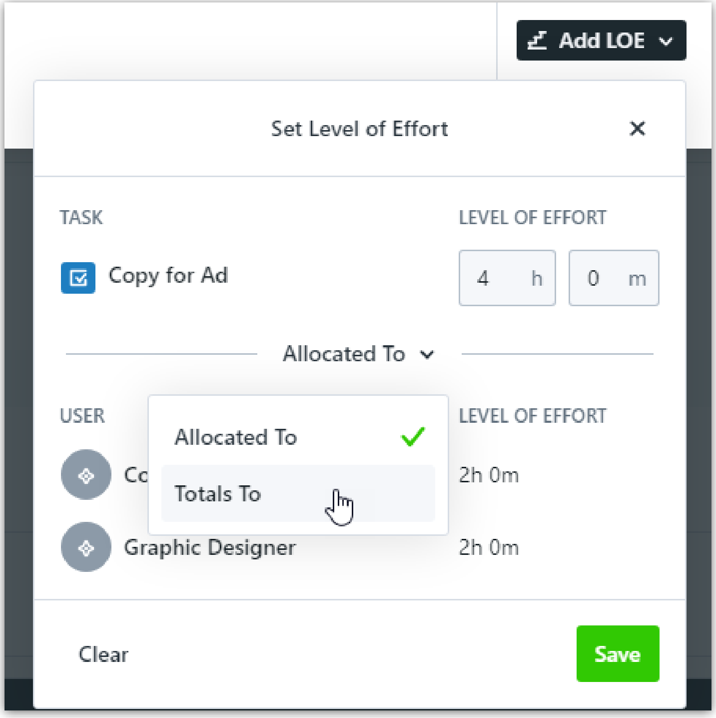
Adding Level of Effort

Select a work item and click **Add LOE** to begin adding level of effort.

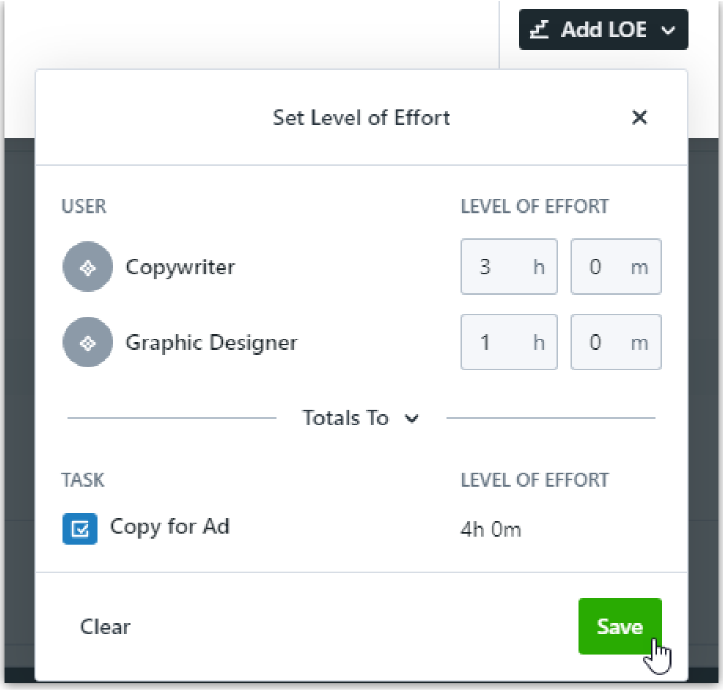


Input the number of hours and/or minutes below **LEVEL OF EFFORT**. If you have users assigned to your template, the hours will be evenly distributed.

You can redistribute how the hours are allocated by clicking **Allocated To** and selecting **Totals To** from the dropdown menu.



Input the number of hours and/or minutes for each user below **LEVEL OF EFFORT**. These numbers will automatically update the overall level of effort. Select **Save** when complete.



Changing Default Work Status*

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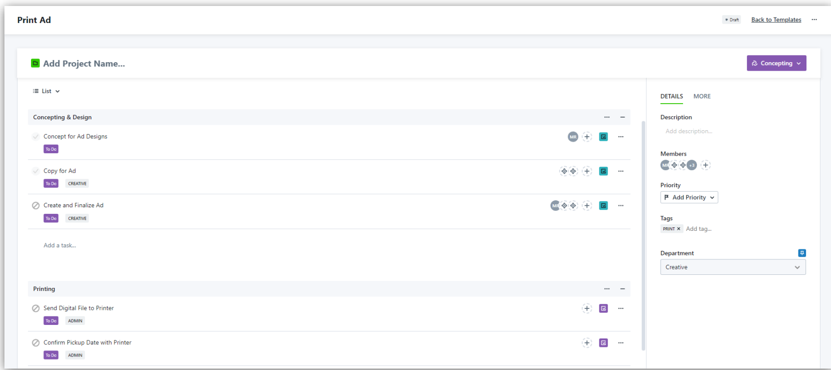
By default, new Projects are set to the account's default "To Do" status, but you can change the Project's default to another work status, including a custom work status (https://guide.lytho.com/help/custom-work-statuses).

In our example, if we want to immediately kick off all print ad Projects into our custom status called "Concepting", we can set that as the default in this Project template.



Tasks and Proofs can be modified the same way, by clicking into the work item you want to change and updating the status.

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