

1. Open the Needed Document Template (<http://www.portfolio-engineering.com/Documents/Templates/Document Templates.htm>):

Template Type	Description
Project Charter Template	A formal document used by a project sponsor to initiate and authorize new projects.
Scope Statement Template	A formal document used by a project manager to document the project scope in detail.
Project Log Template	An Excel log used by the project team to manage issues, action items, risks, changes, notes, decisions, lessons learned, assumptions and constraints.
Communication Plan Template	A formal planning document used by the project manager to plan and manage project communications requirements.
Change Request Template	A document used by change management to record the details of a request change.
Change Analysis Template	A document used by change management to record the analysis (including the impact to the project) of a change request.

2. Save the Template with an Appropriate New Name

3. Edit the “File, Properties” on the “Summary” Tab:

Property Type	Use Description	Example
Title	Document title	“Proposal of Work”, “Project Charter”
Subject	Not currently used	Not currently used
Author	Current document author	“Glenn Searle”



Property Type	Use Description	Example
Manager	Project manager	“Glenn Searle”
Company	Document authoring company	“Portfolio-Engineering”
Category	Not currently used	Not currently used
Keywords	Not currently used	Not currently used
Comments	Not currently used	Not currently used
Hyperlink base	Not currently used	Not currently used

4. Edit the “File, Properties” on the “Custom” tab:

Note: Remember to use the “modify” button after making each change.

Property Type	Use Description	Example
Client	Client company name	“ABC Company”
Document Number	Current document version number	“1.31”
Date Completed	Date of completion of current document version	“May 13, 2003”
Destination	Client contact, intended recipient of document	“Jane Smith”
Project	Name of project document is related to	“Operations Re-engineering”
Status	Document status	“Draft”, “Final”
Microsoft Theme	Document presentation theme	strtedge 111

5. Update the Header and Footer Fields:

1. View a page other than the title page
2. Click on View, Header and Footer
3. Ctrl-A to highlight all
4. F9 to update fields



5. Click on “close” to return to the document body

6. Update all of the fields in the document body.

1. Click anywhere on the document body
2. Ctrl-A to highlight all
3. F9 to update fields
1. “Update entire table” to regenerate Table of Content

7. Complete the Document

8. Proof-read Final Document

9. Turn-off Comments

1. To remove the “balloon” comments in the document templates...
 - a. With the Review toolbar showing (click on View, Toolbars and check Reviewing)...
 - b. Click on Show and selection Options
 - c. Uncheck the Balloons, Use Balloons option

10. OPTIONALLY - Protect the Body of the Document from Change

- a. Click on Tools, Protect Document, Forms and OK.

