

How to Use This Template

Why Can't I Change Anything? — This document is initially locked. To unlock, go to 'Tools', 'Unprotect Document'. The document is now unlocked and may be modified.

What Do I Do First? —

1. Save template under new name using common format; e.g. "Project Charter v0.1 (15 June 2009)"
2. Unlock document; customise headers & footers to your project (see below for instructions)
3. If desired, modify format of this template to reflect needs of your project – add or delete fields as required
4. Lock the document by clicking on 'Protect Document' in the 'Tools' menu, then select 'Forms:' and click 'OK'
5. Ready for your content – enter information in form fields; space expands as you type

How Do I Change Headers & Footers? — Double-click on header or footer (or click on 'Header and Footer' in the 'View' menu) to access the fields. Note that header/footer on first page is not linked to headers/footers on remaining pages. They need to be updated separately. Type over applicable text in current headers/footers to customise information (i.e. document title, version no., etc.); make sure to update the version information on the second page header each time you update this template.

How Do I Complete this Template? — Once locked, you will only be able to enter information into form fields (grey-coloured boxes) and you will NOT be able to change the headings or any instructions. Navigate through fields using 'Tab' key on your keyboard, or by clicking on desired field. Some grey boxes feature pull-down menus when clicked on. Please note that if you now unlock and re-lock the document, the data you enter in the fields will be lost. It is recommended that you only begin entering data when you have customised the template to your preferences and saved it with a different name.

Template Name & Number — The name of this template appears on top right of this page. The GTAC assigned number of this template is listed in bottom left corner of each footer. If you have questions about this template, or suggestions for improvement, use this information to help us identify the document you are referring to.

Questions/Suggestions? — Contact the Government Technical Advisory Centre, National Treasury, Telephone: (012) 315-5587; Email: ppminfo@gtac.gov.za or Website: <http://www.gtac.gov.za>

Adapted and used with the permission of the Project Management Centre of Excellence, Government of Ontario

You may wish to delete this box before re-locking your document.

About the Client Sign-Off Form

*The purpose of this document is to formally record the client/client/end-user's acceptance of the project end result—i.e. the service and/or product produced. This approval is in addition to any contracts and agreements to be signed during project close-out. You may wish to refer to and attach the **Project Deliverables Acceptance Sheet (IMP_9)** from Implementation Phase 7.2 to this document.*

You may wish to delete this box before circulating your document.

Client Sign-Off Form

End Result

Deliverables / Outputs

-
-
-
-
-

Approved by

Signature

I/we have reviewed the deliverables provided by _____ and verify that they are completed and acceptable.

Date
