

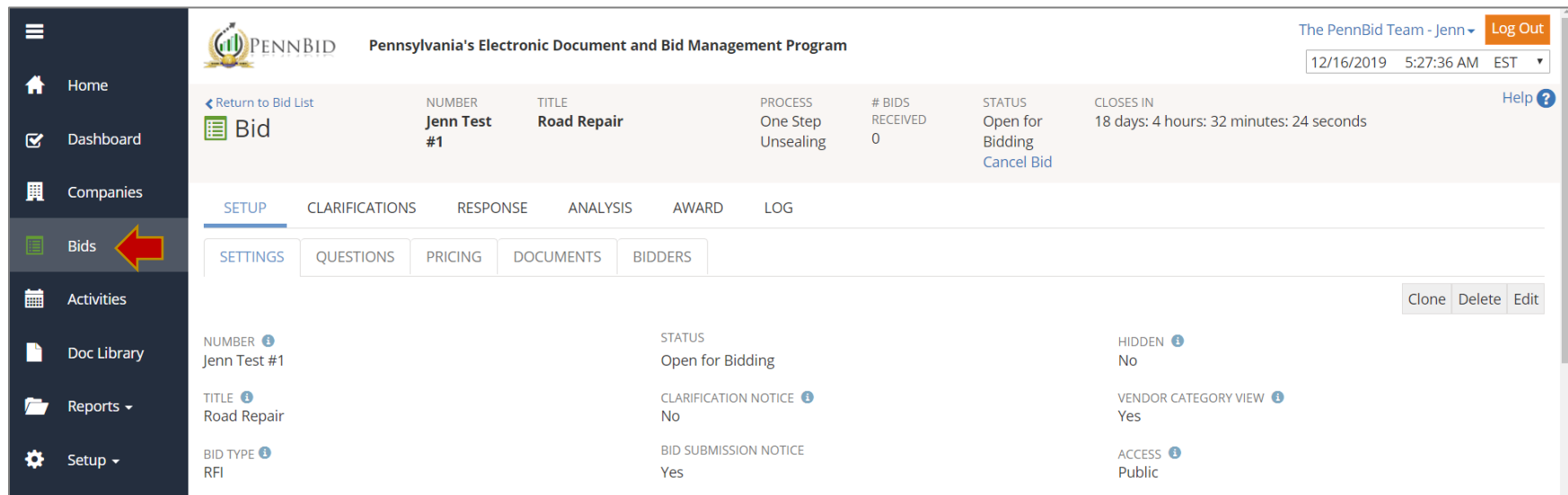
CLONING A PROJECT

Cloning – The act of duplicating an already established project to replicate some or all the features for a new project.

At times it makes more sense to clone a project that already exists than start from scratch when establishing a new project. This is especially helpful for multi-prime projects or term contracts.

Cloning an Existing Project

Log in to PennBid and click **Bids**. Find and open the project you want to clone.



The screenshot shows the PennBid web application interface. On the left is a dark sidebar with navigation options: Home, Dashboard, Companies, Bids (highlighted with a red arrow), Activities, Doc Library, Reports, and Setup. The main content area has a header with the PennBid logo, the text 'Pennsylvania's Electronic Document and Bid Management Program', and user information 'The PennBid Team - Jenn' with a 'Log Out' button. A date and time display shows '12/16/2019 5:27:36 AM EST'. Below the header is a table with columns: NUMBER, TITLE, PROCESS, # BIDS RECEIVED, STATUS, and CLOSES IN. The table contains one row for 'Jenn Test #1' with the following details: PROCESS: One Step Unsealing, # BIDS RECEIVED: 0, STATUS: Open for Bidding, and CLOSES IN: 18 days: 4 hours: 32 minutes: 24 seconds. Below the table are tabs for SETUP, CLARIFICATIONS, RESPONSE, ANALYSIS, AWARD, and LOG. Under the 'SETUP' tab, there are sub-tabs for SETTINGS, QUESTIONS, PRICING, DOCUMENTS, and BIDDERS. The 'SETTINGS' sub-tab is active, showing a list of settings: NUMBER (Jenn Test #1), TITLE (Road Repair), BID TYPE (RFI), STATUS (Open for Bidding), CLARIFICATION NOTICE (No), BID SUBMISSION NOTICE (Yes), HIDDEN (No), VENDOR CATEGORY VIEW (Yes), and ACCESS (Public). At the top right of the settings list are buttons for 'Clone', 'Delete', and 'Edit'.



On the right of the **Settings** tab there are three project options. Click the “Clone” button.

The screenshot shows the PennBid interface for a bid titled "Road Repair". The "Settings" tab is active, and the "Clone" button is highlighted with a red arrow. The interface includes a sidebar with navigation options like Home, Dashboard, Companies, Bids, Activities, Doc Library, and Reports. The main content area shows bid details such as "NUMBER Jenn Test #1", "TITLE Road Repair", "PROCESS One Step Unsealing", "# BIDS RECEIVED 0", "STATUS Open for Bidding", and "CLOSES IN 18 days: 4 hours: 32 minutes: 24 seconds". Below the bid details, there are tabs for "SETUP", "CLARIFICATIONS", "RESPONSE", "ANALYSIS", "AWARD", and "LOG". The "SETUP" tab is selected, and sub-tabs for "SETTINGS", "QUESTIONS", "PRICING", "DOCUMENTS", and "BIDDERS" are visible. The "Clone" button is located at the bottom right of the settings area.

A new window will pop up with seven sections available to clone.

The screenshot shows the PennBid interface with a dialog box titled "Select additional sections to include" open. The dialog box contains a list of sections that can be selected for cloning. The "Clone" button is visible at the bottom of the dialog box. The background shows the same bid details as the previous screenshot, but the "Clone" button is no longer highlighted.

Select additional sections to include

Depending on how many sections you choose to include, this operation may take some time.

- Activities - Will not copy Bid Event or native date Activities
- Forms - Item Groups, Question (RFI) Items, and Pricing Items
- Documents - All existing files and folders for this Bid
- Bidders - All Companies and Contacts on Bidders List
- Workflows - Reset
- Scoring information - Rounds, Criteria Groups, Evaluators, Evaluation Criteria
- Associated scoring documents - Round and Criteria Group instruction documents

Clone



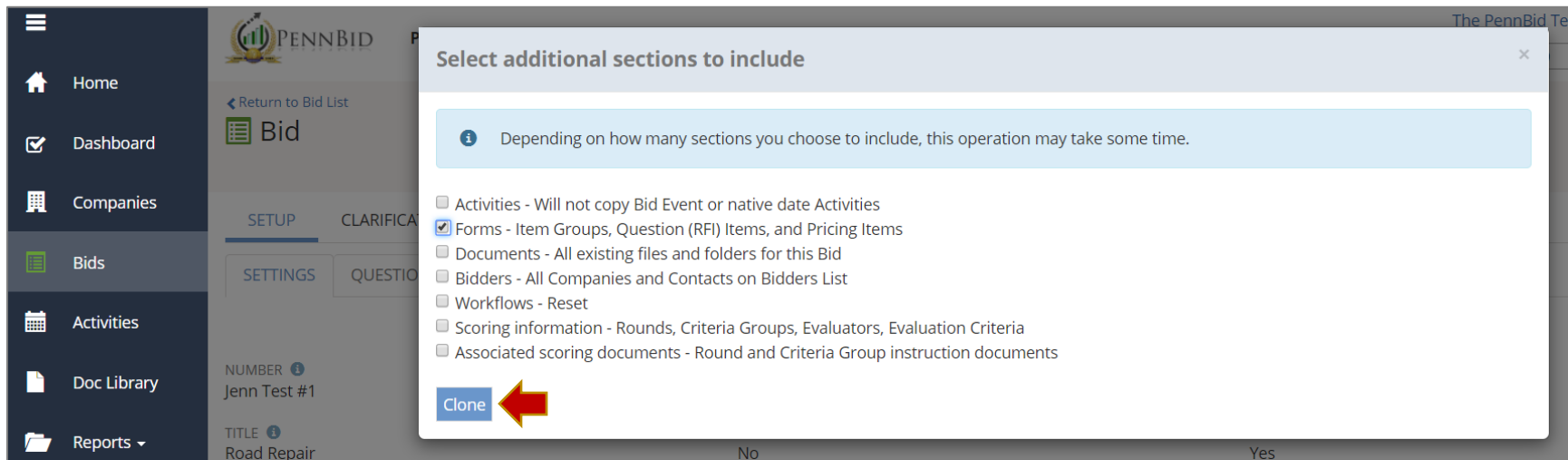
In most cases, the desired project will retain basic information, but will not include the bidding documents, pre-bid meeting information or any award information. These all contain dates and are usually edited with revised project due dates/times.

Note: You can always edit the new project, regardless of which sections you clone up front.

We recommend that you do not clone the bidders list. Your new project will start fresh with communications and generating a bidders list.

If the Questions and Pricing items are the same, or are very close to identical, it makes sense to clone the Forms. You can still modify Questions and Pricing if necessary. If the scope of work has drastically changed or the Pricing Form is completely different, we recommend not cloning this section.

Once you checked the sections you wish to clone, click the “Clone” button.





Editing the Cloned Project

Once you clone, your new project will appear. There are multiple fields you need to edit. To begin, click the “Edit” button on the right side of the screen.

The screenshot shows the PennBid web application interface. The top navigation bar includes the PennBid logo, the text "Pennsylvania's Electronic Document and Bid Management Program", the user name "The PennBid Team - Jenn", and a "Log Out" button. A date and time display shows "12/16/2019 5:47:25 AM EST". Below the navigation bar, there is a breadcrumb trail: "Return to Bid List" > "Bid". The main content area displays bid details for "Jenn Test #1-Clone". The bid number is "Jenn Test #1-Clone", the title is "Road Repair", the process is "One Step Unsealing", and the status is "Draft". The number of bids received is 0, and the bid opens in 29 days, 23 hours, 59 minutes, and 32 seconds. There are buttons for "Clone", "Delete", and "Edit". A red arrow points to the "Edit" button. The "Edit" button is located in the top right corner of the bid details section. Below the bid details, there are tabs for "SETUP", "CLARIFICATIONS", "RESPONSE", "ANALYSIS", "AWARD", and "LOG". The "SETUP" tab is active, and it contains sub-tabs for "SETTINGS", "QUESTIONS", "PRICING", "DOCUMENTS", and "BIDDERS". The "SETTINGS" sub-tab is selected, and it displays various bid settings such as "NUMBER", "TITLE", "BID TYPE", "PROCESS", "AVAILABLE DATE", "CLARIFICATION DEADLINE", "DUE DATE", "DESCRIPTION", "STATUS", "CLARIFICATION NOTICE", "BID SUBMISSION NOTICE", "INCLUDE INTENT TO BID", "BID BOND REQUIRED", "USER GROUP", "HIDDEN", "VENDOR CATEGORY VIEW", "ACCESS", "BIDDER LIST ACCESS", "PRICING RESULTS VISIBILITY", and "CONTACT INFORMATION".



At a minimum, update the “Number,” “Title,” “Available Date,” “Clarification Deadline,” “Due Date” and “Description” fields. If the “Number” remains the same, just delete the work “Clone” at the end.

Note: Make sure to update times on the “Available Date,” “Clarification Deadline” and “Due Date” fields.

Note: Review all fields to make sure that the auto-populated information is correct.

The screenshot displays the PENNBID web application interface for setting up a bid. The top navigation bar includes the PENNBID logo, the program name "Pennsylvania's Electronic Document and Bid Management Program", the user "The PennBid Team - Jenn", and a "Log Out" button. A clock shows the date and time as 12/16/2019 5:50:46 AM EST. Below the navigation bar, a summary row shows the bid details: NUMBER "Jenn Test #1-Clone", TITLE "Road Repair", PROCESS "One Step Unsealing", # BIDS RECEIVED "0", STATUS "Draft", and OPENS IN "29 days: 23 hours: 56 minutes: 10 seconds". A "Cancel Bid" link is also present. The main content area is divided into tabs for SETUP, CLARIFICATIONS, RESPONSE, ANALYSIS, AWARD, and LOG. Under the SETUP tab, there are sub-tabs for SETTINGS, QUESTIONS, PRICING, DOCUMENTS, and BIDDERS. The SETTINGS sub-tab is active, showing a form with various fields. Red arrows point to the following fields: NUMBER (containing "Jenn Test #1-Clone"), TITLE (containing "Road Repair"), AVAILABLE DATE (containing "1/15/2020 5:46 AM"), CLARIFICATION DEADLINE (containing "1/16/2020 5:46 AM"), DUE DATE (containing "1/17/2020 5:46 AM"), and DESCRIPTION (empty). Other fields include STATUS (set to "Draft"), HIDDEN (unchecked), VENDOR CATEGORY VIEW (checked), ACCESS (set to "Public"), BIDDER LIST ACCESS (set to "Public"), PRICING RESULTS VISIBILITY (set to "Public Details"), and CONTACT INFORMATION (containing "Enter Text"). The form also includes checkboxes for CLARIFICATION NOTICE, BID SUBMISSION NOTICE, INCLUDE INTENT TO BID, and BID BOND REQUIRED, all of which are checked. A "Cancel" and "Save" button are located at the top right of the form area.



Once you finish editing the “Settings” tab, click the “Save” button on the right.

The screenshot shows the 'Settings' tab for a bid. The bid details are: NUMBER: Jenn Test #1-Clone, TITLE: Road Repair, PROCESS: One Step Unsealing, # BIDS RECEIVED: 0, STATUS: Draft, and OPENS IN: 29 days: 23 hours: 46 minutes: 49 seconds. The 'SETTINGS' sub-tab is active, showing various configuration options. A red arrow points to the 'Save' button in the top right corner.

NUMBER	TITLE	PROCESS	# BIDS RECEIVED	STATUS	OPENS IN
Jenn Test #1-Clone	Road Repair	One Step Unsealing	0	Draft	29 days: 23 hours: 46 minutes: 49 seconds

Sub-tabs: SETUP (active), CLARIFICATIONS, RESPONSE, ANALYSIS, AWARD, LOG

Sub-sub-tabs: SETTINGS (active), QUESTIONS, PRICING, DOCUMENTS, BIDDERS

Buttons: Cancel, Save

Use the bottom set of tabs to add or delete Questions, Pricing and Documents in the new project.

The screenshot shows the same bid details as the previous image. The 'BIDDERS' sub-tab is now selected, and a red arrow points to it. The 'SETTINGS' sub-tab is no longer active. The 'Clone', 'Delete', and 'Edit' buttons are visible in the top right corner.

NUMBER	TITLE	PROCESS	# BIDS RECEIVED	STATUS	OPENS IN
Jenn Test #1	Road Repair	One Step Unsealing	0	Draft	39 days: 1 hours: 58 minutes: 27 seconds

Sub-tabs: SETUP, CLARIFICATIONS, RESPONSE, ANALYSIS, AWARD, LOG

Sub-sub-tabs: SETTINGS, QUESTIONS, PRICING, DOCUMENTS, BIDDERS (active)

Buttons: Clone, Delete, Edit