

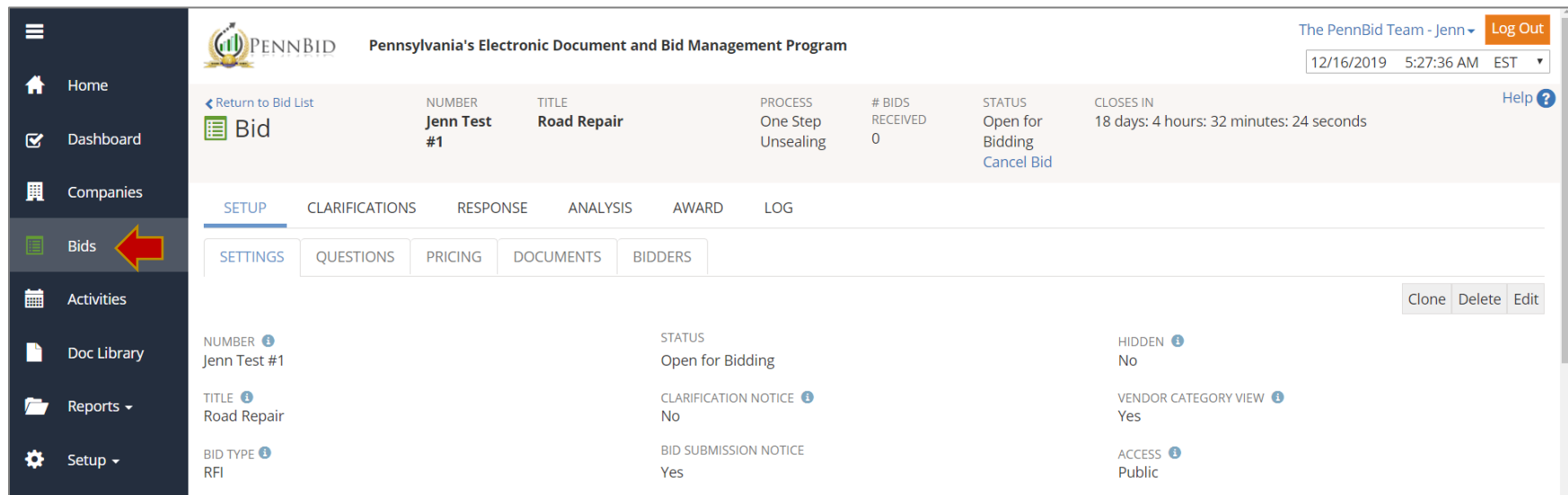
CLONING A PROJECT

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 CLOSING TIME. The table contains one row for 'Jenn Test #1' with the following details: PROCESS: One Step Unsealing, # BIDS RECEIVED: 0, STATUS: Open for Bidding, CLOSING TIME: 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 area 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 web application interface. The top navigation bar includes the PennBid logo, the program name "Pennsylvania's Electronic Document and Bid Management Program", the user name "The PennBid Team - Jenn", and a "Log Out" button. A date and time dropdown shows "12/16/2019 5:27:36 AM EST". The main content area displays bid details for "Jenn Test #1" with a title of "Road Repair". The process is "One Step Unsealing", and 0 bids have been received. The status is "Open for Bidding" with a "Cancel Bid" link. The closing time is "18 days: 4 hours: 32 minutes: 24 seconds". Below the bid details 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". At the bottom right of the bid details, there are three buttons: "Clone", "Delete", and "Edit". A red arrow points to the "Clone" button.

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

The screenshot shows the same PennBid interface as above, but with a modal window open. The modal is titled "Select additional sections to include" and contains a message: "Depending on how many sections you choose to include, this operation may take some time." Below the message is a list of seven sections with checkboxes: "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", and "Associated scoring documents - Round and Criteria Group instruction documents". At the bottom of the modal is a "Clone" button. The background interface is dimmed, and the "Clone", "Delete", and "Edit" buttons are visible at the bottom right.



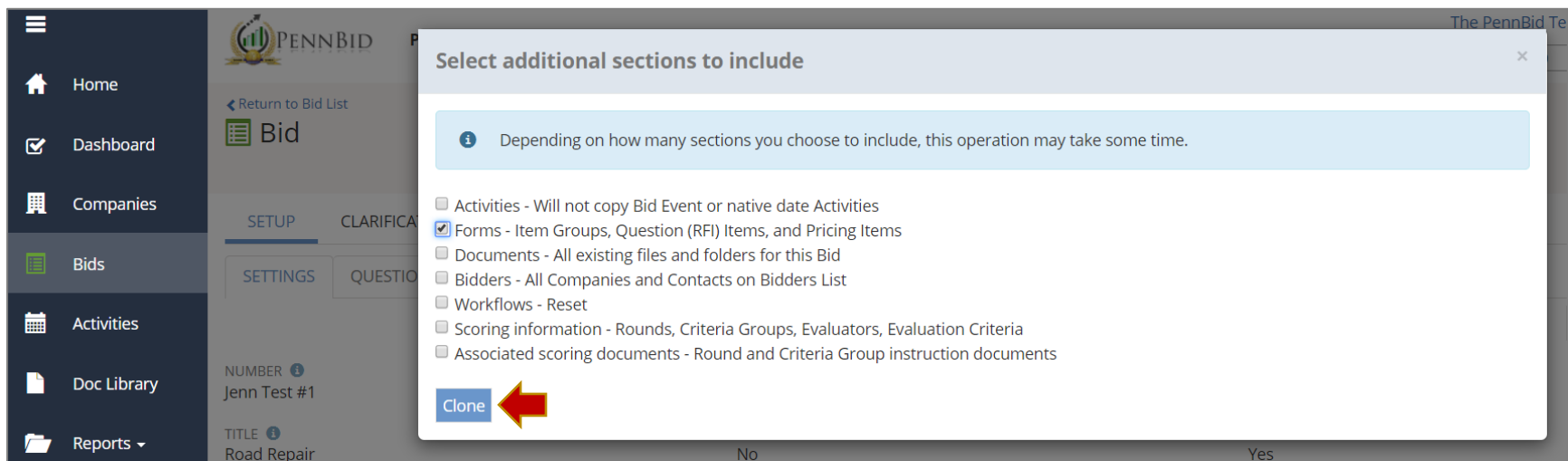
In most cases, the desired project will retain basic information, but will not include the bidding documents, pre-bid meeting information or any award information. These all contain dates and are usually edited with revised project due dates/times.

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 displays 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, a breadcrumb trail shows "Return to Bid List" and "Bid". A summary row displays key project information: "NUMBER Jenn Test #1-Clone", "TITLE Road Repair", "PROCESS One Step Unsealing", "# BIDS RECEIVED 0", "STATUS Draft", and "OPENS IN 29 days: 23 hours: 59 minutes: 32 seconds". A "Help" icon is also present. The main content area features a tabbed interface with "SETUP" selected, and sub-tabs for "SETTINGS", "QUESTIONS", "PRICING", "DOCUMENTS", and "BIDDERS". On the right side of the main content area, there are three buttons: "Clone", "Delete", and "Edit". A red arrow points to the "Edit" button. The main content area displays a list of project details in a grid format:

NUMBER ⓘ Jenn Test #1-Clone	STATUS Draft	HIDDEN ⓘ No
TITLE ⓘ Road Repair	CLARIFICATION NOTICE ⓘ No	VENDOR CATEGORY VIEW ⓘ Yes
BID TYPE ⓘ RFI	BID SUBMISSION NOTICE Yes	ACCESS ⓘ Public
PROCESS ⓘ One Step Unsealing	INCLUDE INTENT TO BID Yes	BIDDER LIST ACCESS ⓘ Public
AVAILABLE DATE ⓘ 1/15/2020 5:46 AM	BID BOND REQUIRED Yes	PRICING RESULTS VISIBILITY ⓘ Public Details
CLARIFICATION DEADLINE ⓘ 1/16/2020 5:46 AM	USER GROUP ⓘ AAA Test	CONTACT INFORMATION ⓘ
DUE DATE ⏰ ⓘ 1/17/2020 5:46 AM		
DESCRIPTION ⓘ Patch and road repair		



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. The main content area shows the bid details for "Jenn Test #1-Clone" with a title of "Road Repair". The process is "One Step Unsealing", and the status is "Draft". The "Available Date" is 1/15/2020 5:46 AM, the "Clarification Deadline" is 1/16/2020 5:46 AM, and the "Due Date" is 1/17/2020 5:46 AM. The description is "Road Repair". The form also includes fields for "Status" (Draft), "Hidden" (unchecked), "Vendor Category View" (checked), "Access" (Public), "Bidder List Access" (Public), "Pricing Results Visibility" (Public Details), and "Contact Information" (Enter Text). The "Number" field contains "Jenn Test #1-Clone". Red arrows point to the NUMBER, TITLE, AVAILABLE DATE, CLARIFICATION DEADLINE, DUE DATE, and DESCRIPTION fields, indicating they need to be updated.



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 fields for NUMBER (Jenn Test #1), TITLE (Road Repair), BID TYPE (RFI), PROCESS (One Step Unsealing), AVAILABLE DATE (1/24/2020 8:00 AM), CLARIFICATION DEADLINE (2/13/2020 4:00 PM), DUE DATE (2/21/2020 11:00 AM), STATUS (Draft), CLARIFICATION NOTICE (unchecked), BID SUBMISSION NOTICE (checked), INCLUDE INTENT TO BID (checked), BID BOND REQUIRED (checked), USER GROUP (AAA Test), HIDDEN (unchecked), VENDOR CATEGORY VIEW (checked), ACCESS (Public), BIDDER LIST ACCESS (Public), PRICING RESULTS VISIBILITY (Public Details), and CONTACT INFORMATION (Enter Text). A red arrow points to the 'Save' button in the top right corner.

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, but with the 'BIDDERS' sub-tab selected. The 'BIDDERS' tab is highlighted with a red arrow. The 'Clone Delete Edit' buttons are visible in the top right corner. The bid details are: NUMBER: Jenn Test #1, TITLE: Road Repair, PROCESS: One Step Unsealing, # BIDS RECEIVED: 0, STATUS: Draft, and OPENS IN: 39 days: 1 hours: 58 minutes: 27 seconds.