

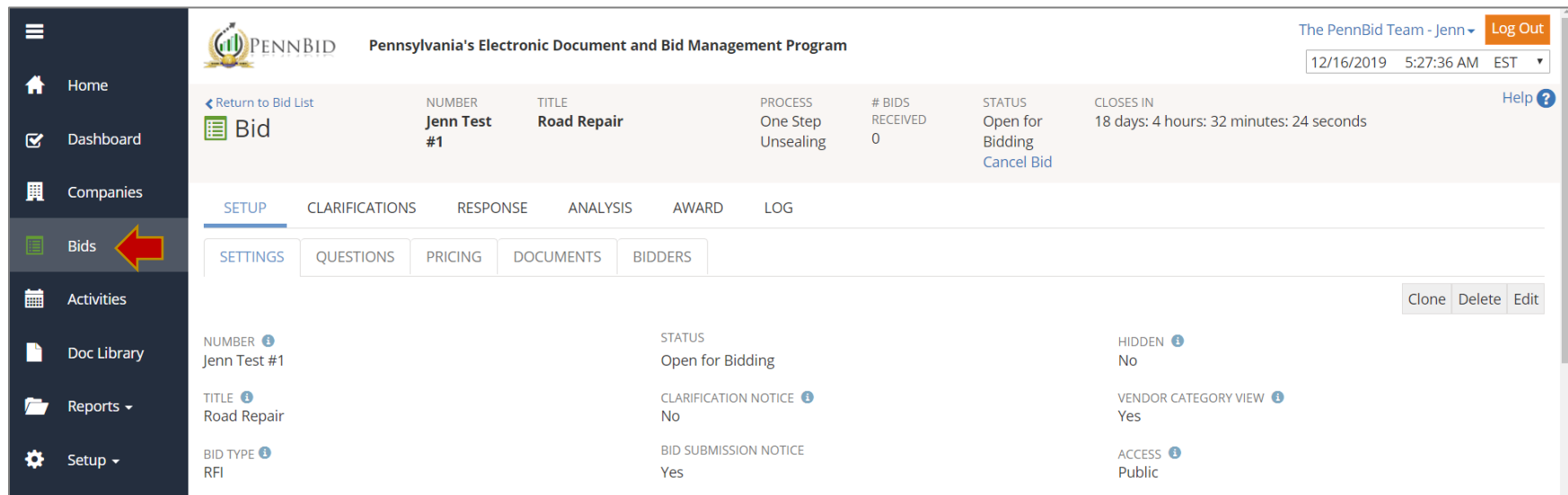
# CLONING A PROJECT

*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 grid of settings: NUMBER (Jenn Test #1), STATUS (Open for Bidding), HIDDEN (No), TITLE (Road Repair), CLARIFICATION NOTICE (No), VENDOR CATEGORY VIEW (Yes), BID TYPE (RFI), BID SUBMISSION NOTICE (Yes), and ACCESS (Public). At the top right of the settings grid 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, showing various sub-sections like "QUESTIONS", "PRICING", "DOCUMENTS", and "BIDDERS". At the bottom right, 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, but with a modal window open. The modal is titled "Select additional sections to include" and contains a list of sections that can be selected for cloning. The "Clone" button is visible at the bottom of the modal.

**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



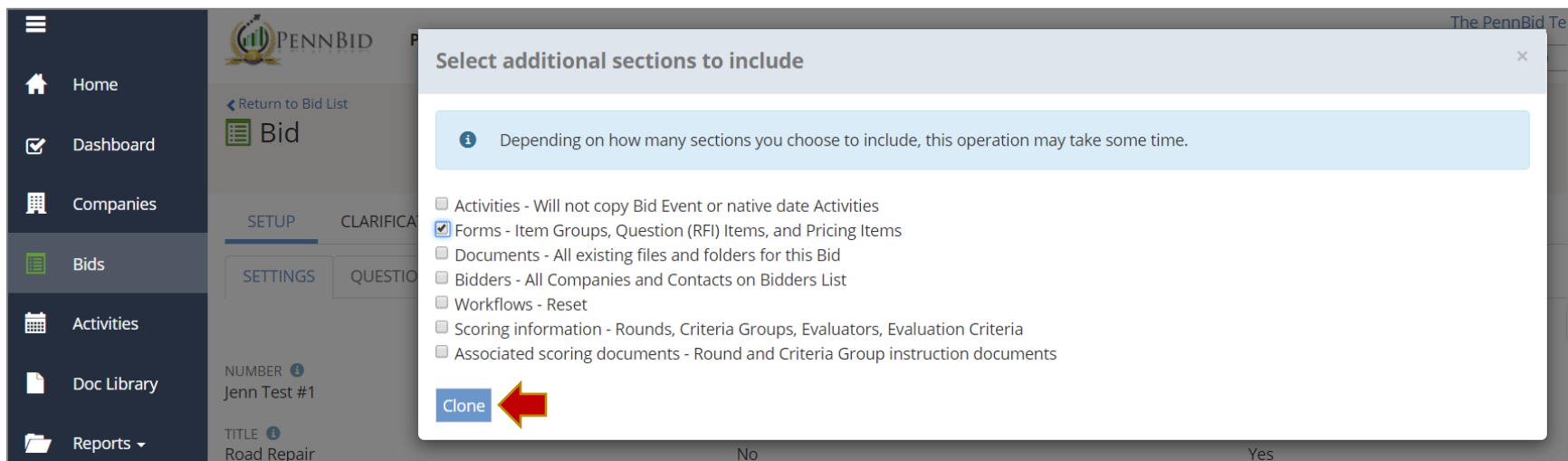
In most cases, the desired project will retain basic information, but will not include the bidding documents, pre-bid meeting information or any award information. These all contain dates and are usually edited with revised project due dates/times.

*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 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 summary row shows project details: "Return to Bid List", "Bid", "NUMBER Jenn Test #1-Clone", "TITLE Road Repair", "PROCESS One Step Unsealing", "# BIDS RECEIVED 0", "STATUS Draft", "OPENS IN 29 days: 23 hours: 59 minutes: 32 seconds", and a "Help" icon. A secondary navigation bar contains 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 main content area shows a list of project settings with the following details:

| 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 | CONTACT INFORMATION |
|--------------------|-------------|----------|--------------------|-------------------|------------------------|-------------------|-----------------------|--------|----------------------|-----------------------|-----------------------|-------------------|------------|--------|----------------------|--------|--------------------|----------------------------|---------------------|
| Jenn Test #1-Clone | Road Repair | RFI      | One Step Unsealing | 1/15/2020 5:46 AM | 1/16/2020 5:46 AM      | 1/17/2020 5:46 AM | Patch and road repair | Draft  | No                   | Yes                   | Yes                   | Yes               | AAA Test   | No     | Yes                  | Public | Public             | Public Details             |                     |

At the top right of the settings list, there are three buttons: "Clone", "Delete", and "Edit". A red arrow points to the "Edit" button.



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 managing 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. The current date and time are 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 bid is in a "Draft" status and has 0 bids received. The process is "One Step Unsealing". 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 form is divided into sections: SETUP, CLARIFICATIONS, RESPONSE, ANALYSIS, AWARD, and LOG. The SETUP section is further divided into SETTINGS, QUESTIONS, PRICING, DOCUMENTS, and BIDDERS. The form is currently in the SETTINGS section. Red arrows point to the NUMBER, TITLE, AVAILABLE DATE, CLARIFICATION DEADLINE, DUE DATE, and DESCRIPTION fields, indicating that these fields need to be updated. The form also includes "Cancel" and "Save" buttons.



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 |

Settings fields include: 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), HIDDEN (No), CLARIFICATION NOTICE (No), BID SUBMISSION NOTICE (Yes), INCLUDE INTENT TO BID (Yes), BID BOND REQUIRED (Yes), USER GROUP (AAA Test), ACCESS (Public), BIDDER LIST ACCESS (Public), PRICING RESULTS VISIBILITY (Public Details), and CONTACT INFORMATION (Enter Text).

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

The screenshot shows the bottom set of tabs in the PennBid interface. The 'SETTINGS' tab is active, and a red arrow points to the 'DOCUMENTS' tab. 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 |

Bottom tabs: SETTINGS, QUESTIONS, PRICING, DOCUMENTS, BIDDERS. Buttons: Clone, Delete, Edit.