



How to Clone a Project in [the HWD App](#)

1. Create a Model Project and its Phases.
2. Once it has been saved, you'll view it. In View (versus Edit) mode, some fields (like Related Client in the below example) appear as record numbers instead of names. If it's necessary to see names, Edit the record.
3. In View mode, a "More" menu appears (below). Click it and select "Copy this Project." A copy of it will appear; modify as necessary, and save. (Notice: this procedure only makes a copy of the record itself, not of its child records, like phases or tasks.)

The screenshot shows the HWD App interface with a navigation bar at the top containing icons for Home, Users, Employees, Clients, Projects, Phases, Tasks, Employee Days, Progress, and New Table. Below the navigation bar, there are tabs for 'Projects' and 'Project #53'. A '+ New Project' button is visible. The main content area shows a table with columns: Related Client, Project ID, Project, Type, Quantity, Units, Rate, Price, and Complete. The 'More' menu is open, showing options: Copy this Project, New notification..., Print, and Delete this Project. A red arrow points to the 'Copy this Project' option.

4. Now your new Project record is made. Next, we need to add Phases to it without having to record them individually. Open the Phases table by clicking on the Phases icon.
5. Filter on the Model Project. We are going to copy and paste its Phases into your new Project.

The screenshot shows the HWD App interface with the 'Phases' table. The navigation bar at the top has the 'Phases' icon highlighted with a red box. Below the navigation bar, there are tabs for 'Phases' and 'Phases Home'. A '+ New Phase' button is visible. The main content area shows a table with columns: Client Name, Project ID, Project, Phase Name, Total % of Project, Total Allocated Price, Project Total, Average % Complete, Total Earned Income, Total Expense, Total Contribution Margin, and Average CM Billable Hour. The 'FILTERS' section on the left is highlighted with a red box, and the 'Model Residential Custom' filter is selected with a red arrow.

6. Now in the below figure, we've filtered on the Model Project whose Phases we want to emulate in our new Project. To copy them, click Grid Edit.

Phases Home

Search these phases: Project Model Commercial

+ New Phase Grid Edit

Client Name	Project ID	Project	Phase Name	Total % of Project	Total Allocated Price	Project Total	Average % Complete	Total Earned Income	Total Expense	Total Contribution Margin	Average CM : Billable Hour
AAA Model Client	03	Model Commercial	3D Modeling								
AAA Model Client	03	Model Commercial	As-Builts								
AAA Model Client	03	Model Commercial	Change Order								
AAA Model Client	03	Model Commercial	Construction Docs								
AAA Model Client	03	Model Commercial	Construction Observation								
AAA Model Client	03	Model Commercial	Design Development								
AAA Model Client	03	Model Commercial	Energy								
AAA Model Client	03	Model Commercial	Extra Services								
AAA Model Client	03	Model Commercial	Feasibility								
AAA Model Client	03	Model Commercial	Permit								

7. Here's how the Phases you want to copy appear in Grid Edit view. Notice that this display scrolls, that there may be more Phases in the list than you can see in one screen. Scroll as necessary to work with the whole list.

Reporting Defaults 20 Phases

Save Apply Changes Cancel

Client Name *	Project ID	Project *	Phase Name *	Total % of Project	Total Allocated Price	Project Total	Average % Complete	Total Earned Income	Total Expense	Total Contribution Margin	Average CM : Billable Hour
AAA Model Client	03	Model Commercial	3D Modeling								
AAA Model Client	03	Model Commercial	As-Builts								
AAA Model Client	03	Model Commercial	Change Order								
AAA Model Client	03	Model Commercial	Construction Docs								
AAA Model Client	03	Model Commercial	Construction Observation								
AAA Model Client	03	Model Commercial	Design Development								
AAA Model Client	03	Model Commercial	Energy								
AAA Model Client	03	Model Commercial	Extra Services								
AAA Model Client	03	Model Commercial	Feasibility								
AAA Model Client	03	Model Commercial	Permit								

8. Highlight the visible Phases you want to copy into your new project, right-click, and copy.

The screenshot shows the 'Phases' reporting interface. The table has the following columns: Client Name, Project ID, Project, Phase Name, Total % of Project, Total of Allocated Price, Project Total, Average % Complete, Total Earned Income, Total Expense, Total Contribution Margin, and Average CM : Billable Hour. The 'Phase Name' column contains entries like '3D Modeling', 'As-Builts', 'Change Order', 'Construction Docs', 'Construction Observation', 'Design Development', 'Energy', 'Extra Services', 'Feasibility', and 'Permit'. A red arrow labeled 'Highlight' points to the 'Phase Name' column. Another red arrow labeled 'Right-Click' points to a context menu that is open over the 'Phase Name' column, with 'Copy' circled in red.

- Now we need to insert more rows at the bottom of this grid, paste our phases into it, and add them to our new Project. Repeat as necessary until you have enough blank rows to paste all of the Phases for your new Project.

The screenshot shows the 'Phases' reporting interface. The table has the same columns as the previous screenshot. The 'Phase Name' column contains entries like 'Site Plan', 'Programming', 'Research', 'Natural Resource Assessment', 'Demolition', 'Critical Areas Ordinance', 'Native Vegetation Protection Area', and 'Conditional Use'. A red arrow points to the bottom of the table. Another red arrow points to a context menu that is open over the bottom of the table, with 'Insert Blank Rows' circled in red.

- After you've inserted enough rows for all of your new Project's Phases, position the cursor in the Phase column, in the first blank row. Right-click, and paste the Phases you had previously copied in Step 8.

The screenshot shows a software interface with a navigation bar at the top containing icons for Home, Users, Employees, Clients, Projects, Phases, Tasks, Employee Days, Progress, and New Table. Below the navigation bar, there are tabs for 'Phases' and 'Reporting Defaults', with sub-tabs for 'SETTINGS' and 'REPORTS & CHARTS'. A 'Save' button and an 'Apply Changes' button are visible on the right. The main area is a table with 12 columns: Client Name, Project ID, Project, Phase Name, Total % of Project, Total Allocated Price, Project Total, Average % Complete, Total Earned Income, Total Expense, Total Contribution Margin, and Average CM : Billable Hour. The table has 20 rows. The first two rows are populated with data. A yellow highlight is on the 'Phase Name' cell of the second row, and a context menu is open over it, showing options like Cut, Copy, Paste, Fill Down, etc.

Client Name *	Project ID	Project *	Phase Name *	Total % of Project	Total Allocated Price	Project Total	Average % Complete	Total Earned Income	Total Expense	Total Contribution Margin	Average CM : Billable Hour
AAA Model Client	03	Model Commercial	Native vegetation Protection Area								
AAA Model Client	03	Model Commercial	Conditional Use								

11. Here's how our grid looks with the Phases copied in Step 8 pasted in Step 10. We're just about done. Now, we just need to assign these Phases to our new Client and that client's new Project by recording them in the first blank row, then filling down, just like in a spreadsheet.

The screenshot shows the same software interface as above. The table now contains 14 rows of data. The first two rows are the same as in the previous screenshot. The next 12 rows have their 'Phase Name' cells populated with a list of phase names: 3D Modeling, As-Built, Change Order, Construction Docs, Construction Observation, Design Development, Energy, Extra Services, Feasibility, Permit, and Pre-design. A yellow highlight is on the 'Construction Docs' cell. A red box highlights a block of three columns (Client Name, Project ID, and Project) for the first blank row (row 13) and the first 12 rows of the new phase list (rows 14-25).

Client Name *	Project ID	Project *	Phase Name *	Total % of Project	Total Allocated Price	Project Total	Average % Complete	Total Earned Income	Total Expense	Total Contribution Margin	Average CM : Billable Hour
AAA Model Client	03	Model Commercial	Native vegetation Protection Area								
AAA Model Client	03	Model Commercial	Conditional Use								
			3D Modeling								
			As-Built								
			Change Order								
			Construction Docs								
			Construction Observation								
			Design Development								
			Energy								
			Extra Services								
			Feasibility								
			Permit								
			Pre-design								

12. Click on these fields and choose your new client and project from the drop-down list, populating the first row. Then, highlight the whole block – all three columns – Client Name, Project ID, and Project, right click, and choose Fill Down.

Home Users Employees Clients Projects Phases Tasks Employee Days Progress New Table

Phases Reporting Defaults Save Apply Changes

SETTINGS REPORTS & CHARTS

New Phase More 20 Phases

Client Name *	Project ID	Project *	Phase Name *	Total % of Project	Total Allocated Price	Project Total	Average % Complete	Total Earned Income	Total Expense	Total Contribution Margin	Average CM : Billable Hour
AAA Model Client	03	Model Commercial	Native vegetation Protection Area								
AAA Model Client	03	Model Commercial	Conditional Use								
Next Client		New Project	3D Modeling								
			As-Builts								
			Change Order								
			Construction Docs								
			Construction Observation								
			Design Development								
			Energy								
			Extra Services								
			Feasibility								
			Permit								
			Pre-design								

Cut
Copy
Paste
Fill Down
Reset to Original Values
Insert Blank Rows
Delete
Undelete
Undo Cell Change

13. Voila! You've just cloned your Model Project's Phases in your new Project. Click Save, and you're done!

Home Users Employees Clients Projects Phases Tasks Employee Days Progress New Table

Phases Reporting Defaults Save Apply Changes

SETTINGS REPORTS & CHARTS

New Phase More 20 Phases

Client Name *	Project ID	Project *	Phase Name *	Total % of Project	Total Allocated Price	Project Total	Average % Complete	Total Earned Income	Total Expense	Total Contribution Margin	Average CM : Billable Hour
AAA Model Client	03	Model Commercial	Native vegetation Protection Area								
AAA Model Client	03	Model Commercial	Conditional Use								
Next Client		New Project	3D Modeling								
Next Client		New Project	As-Builts								
Next Client		New Project	Change Order								
Next Client		New Project	Construction Docs								
Next Client		New Project	Construction Observation								
Next Client		New Project	Design Development								
Next Client		New Project	Energy								
Next Client		New Project	Extra Services								
Next Client		New Project	Feasibility								
Next Client		New Project	Permit								
Next Client		New Project	Pre-design								