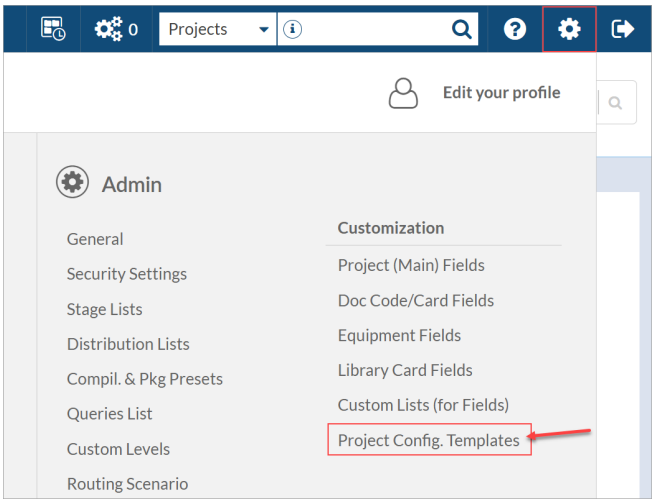
Project Configuration Templates

09/28/2026 8:10 am MDT

Project configuration templates enable you to pre-define and reuse settings for projects, making project setup quick and easy.

Create a new template

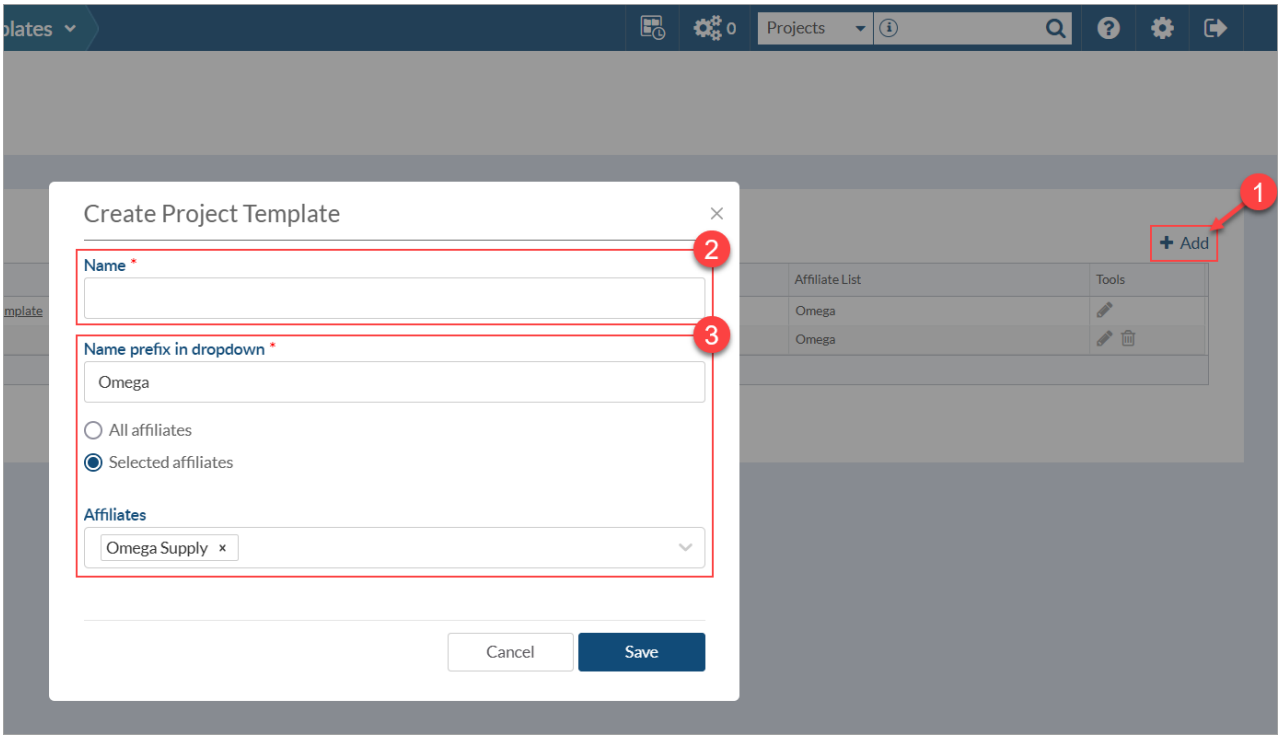
To create a new project configuration template, navigate to **System Menu > Admin > Project Config. Templates.**



Once on the page, click the "+ Add" button above the grid (top right), and give the new template a name.

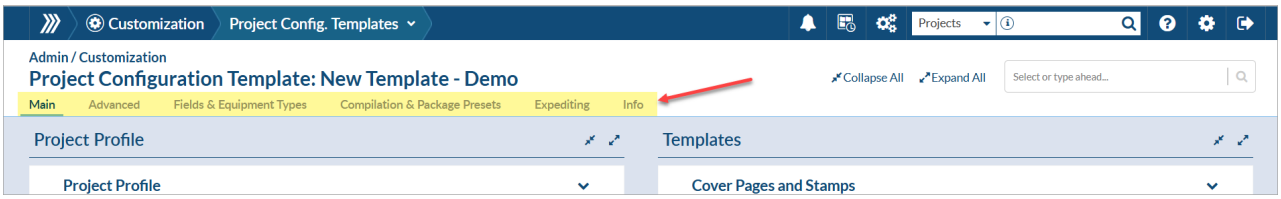
> Make sure to name the template something that is easy to identify so that it is distinguishable from other templates when creating a new project.

If using affiliates, also select which affiliates this template will be available for. The prefix will be automatically set to the short name of the initially selected affiliate, but can be modified if desired.



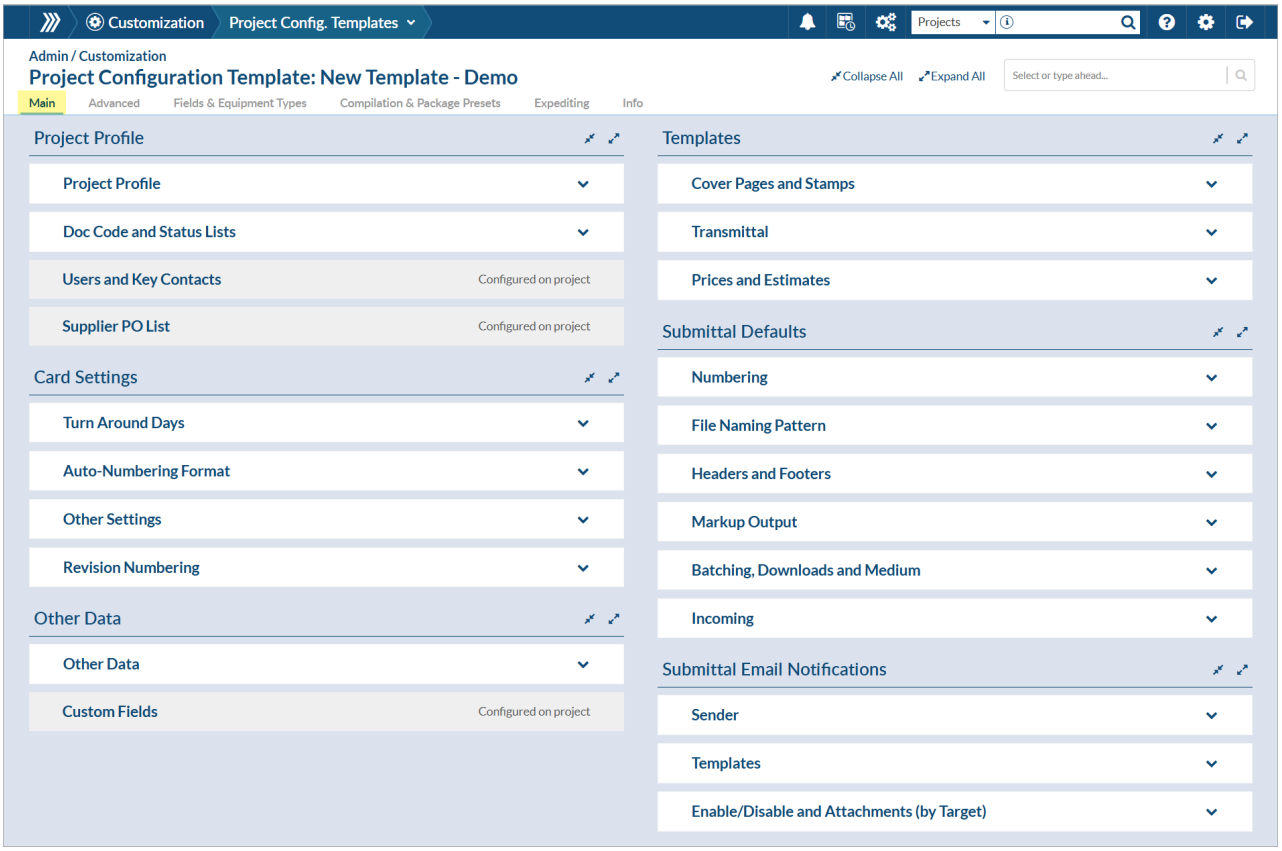
Configure template settings

Once created, you will be redirected to the project configuration page. Navigate to each category "tab" to view and adjust settings as needed.



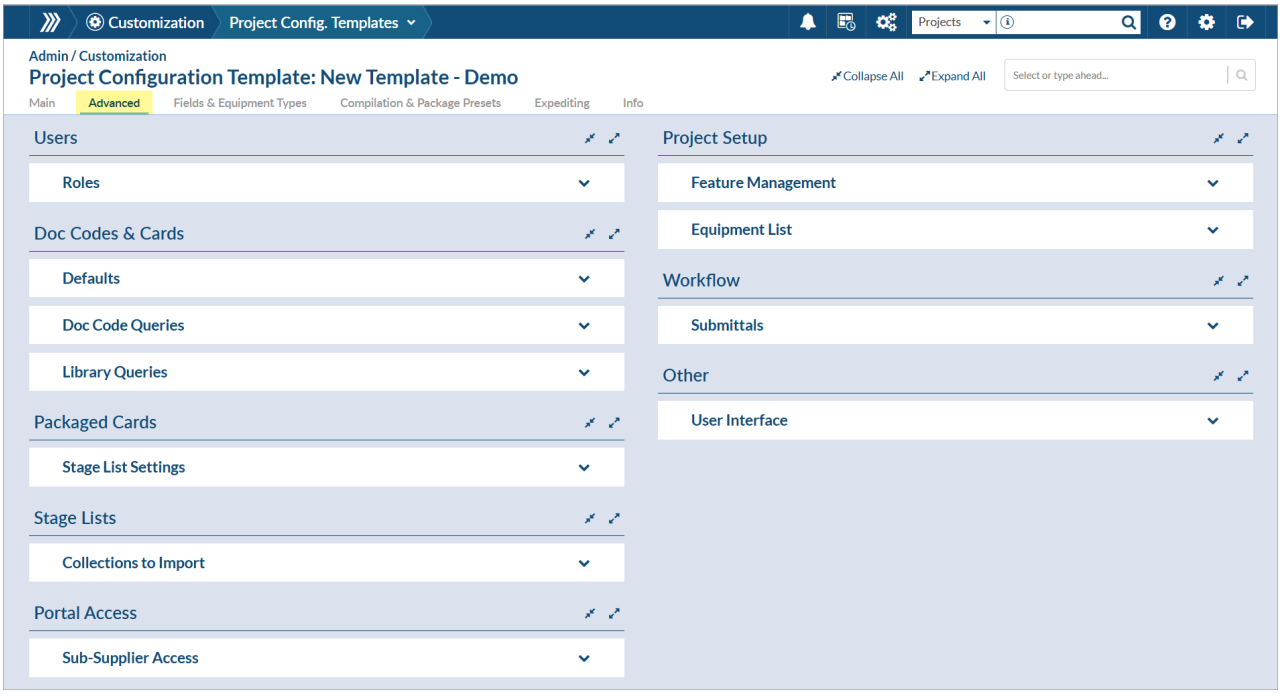
Main

- Adjust general project settings, including (but not limited to) document auto-numbering patterns, submittal patterns, file naming patterns, header/footer patterns, and template settings.
- For an in-depth look at the options on this page, see this article: Project Main.



Advanced

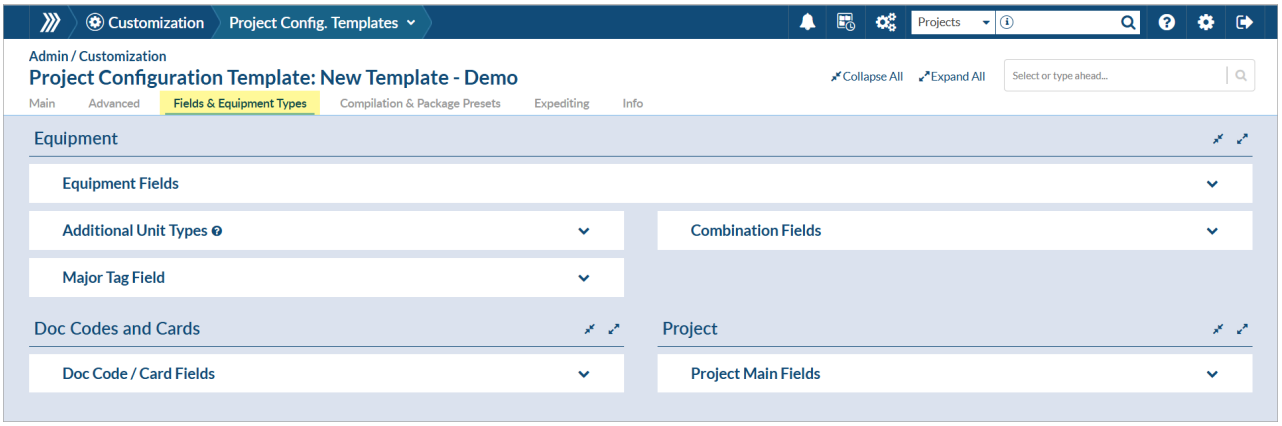
- Adjust additional project settings, including (but not limited to) project defaults (e.g., equipment number, doc code level, stage list, etc.), defining stage lists to be imported (at project creation), enabling/disabling certain features (e.g., manual cards, major tags, internal approval), and submittal workflow options.



Fields & Equipment Types

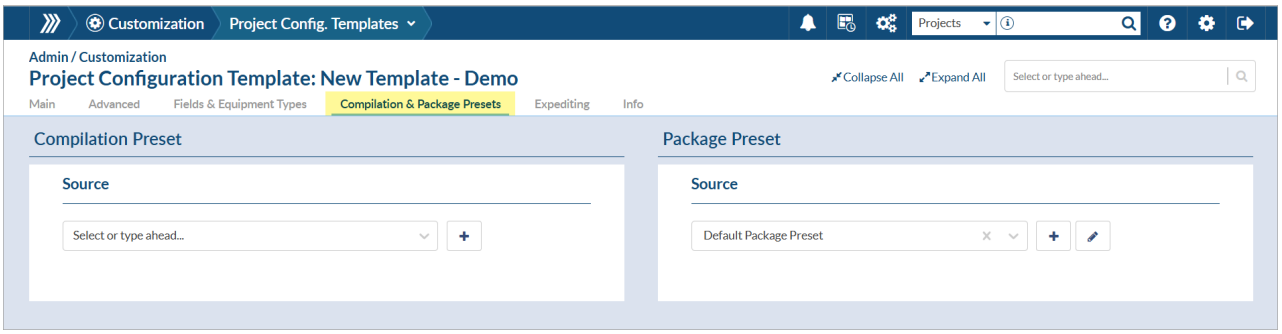
- Import (and enable) custom fields, including doc code/card fields, equipment fields, and project (main) fields.

Additional unit types and combination fields can also be configured. If using major tags, the major tag field name can be added here, too.



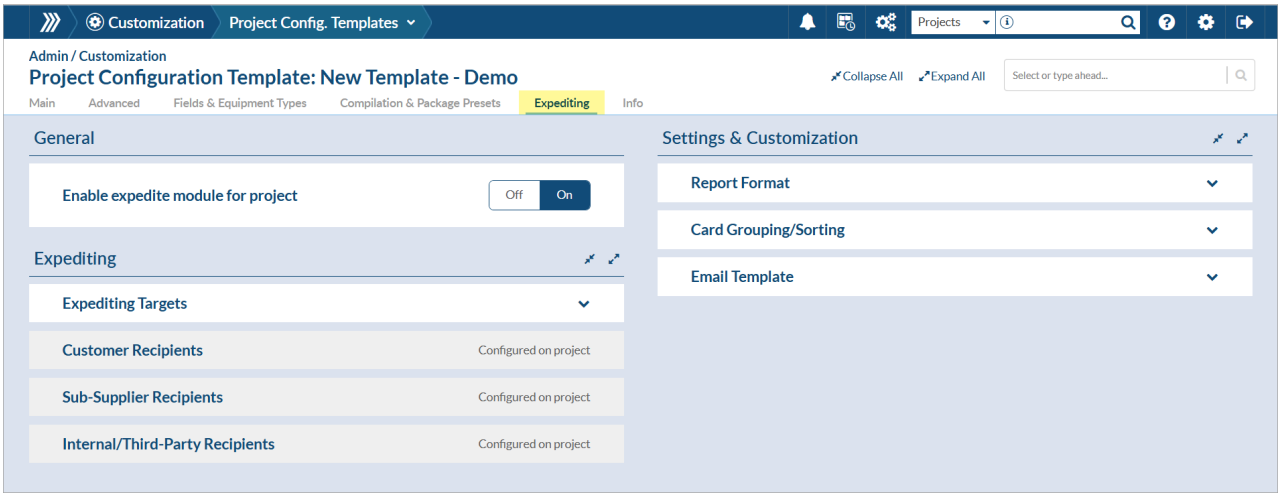
Compilation & Package Presets

- Select a preset for compilations, and a preset for packages. New presets can also be added, and/or pre-existing presets can be adjusted.
- For more information about compilation & package presets, see this article: Compilation Structure & Styling Presets.



Expediting Settings

- Toggle expediting on or off for each target, and configure settings including the format of the report, how the cards are grouped and sorted, and the email templates used (for each target). The recipients of expedite reports are to be configured on each individual project.



Info

- Overview of information set at the time the template was created (i.e., the template name, owner, and affiliate(s) with access (if applicable)).

