

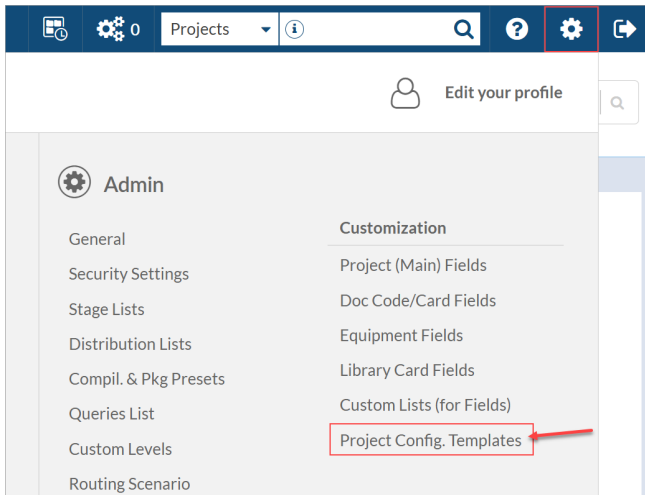
# Project Configuration Templates

10/02/2025 1:01 pm 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**.

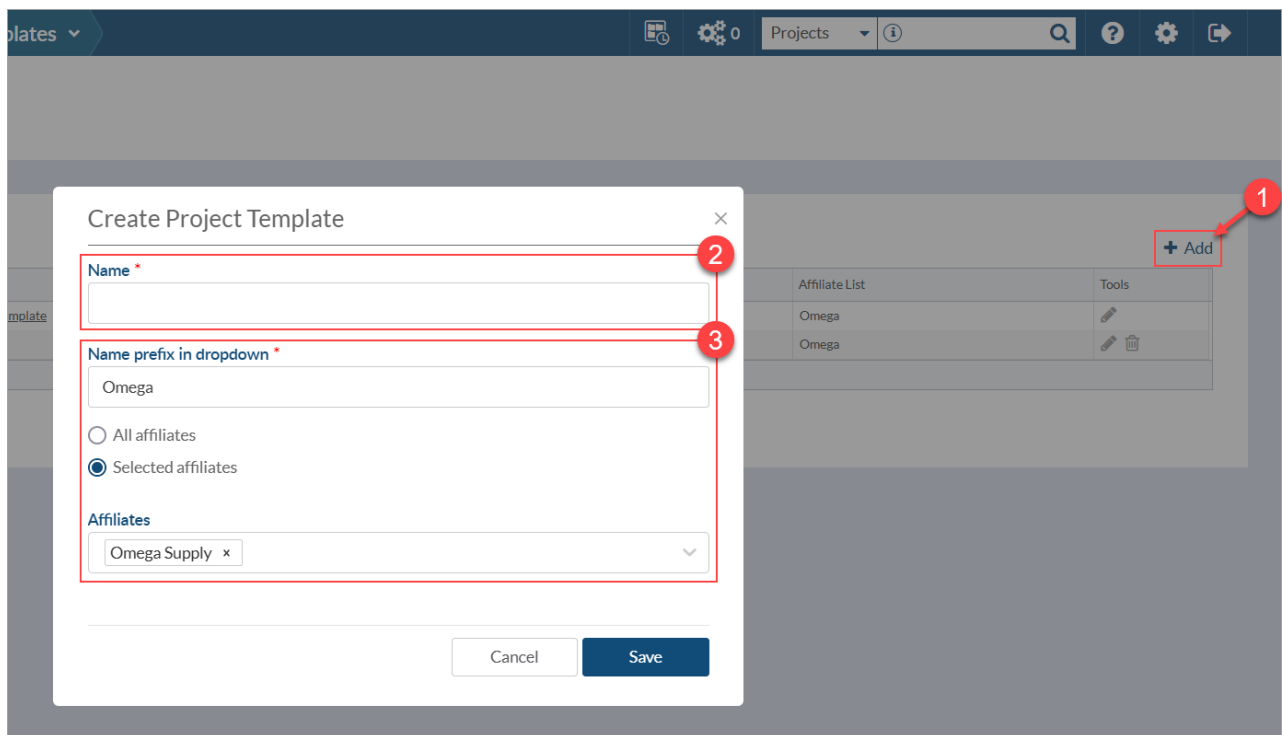


Once on the page, click the “+ Add” button above the grid (top right), and give the new template a name.



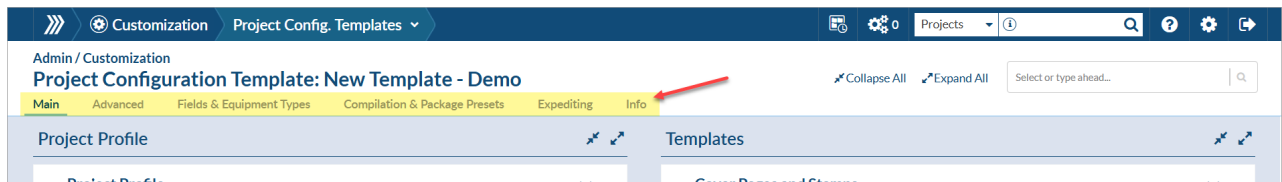
Make sure to name the template something that is easy to identify so that it is distinguishable from other templates when creating a new project.

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](#).

- 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.

Admin / Customization  
Project Configuration Template: New Template - Demo

Main Advanced Fields & Equipment Types Compilation & Package Presets Expediting Info

Equipment

Equipment Fields

Additional Unit Types

Major Tag Field

Doc Codes and Cards

Doc Code / Card Fields

Combination Fields

Project

Project Main Fields

## 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](#).

Admin / Customization  
Project Configuration Template: New Template - Demo

Main Advanced Fields & Equipment Types Compilation & Package Presets Expediting Info

Compilation Preset

Source

Select or type ahead...

Package Preset

Source

Default Package Preset

## 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.

Admin / Customization  
Project Configuration Template: New Template - Demo

Main Advanced Fields & Equipment Types Compilation & Package Presets Expediting Info

General

Enable expedite module for project

Off On

Expediting

Expediting Targets

Customer Recipients

Sub-Supplier and Recipients

Internal/Third-Party Recipients

Settings & Customization

Report Format

Card Grouping/Sorting

Email Template

## 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)).

### Template Details

Name \*

New Template - Demo

Owner

Clemente Palermo

Name prefix in dropdown \*

Omega

☐ All affiliates

Selected affiliates

## Affiliates

Omega Supply x