

Creating Project Templates

If you frequently post similar types of projects, you can **Create Project Template** to save time on the initial setup of future projects.

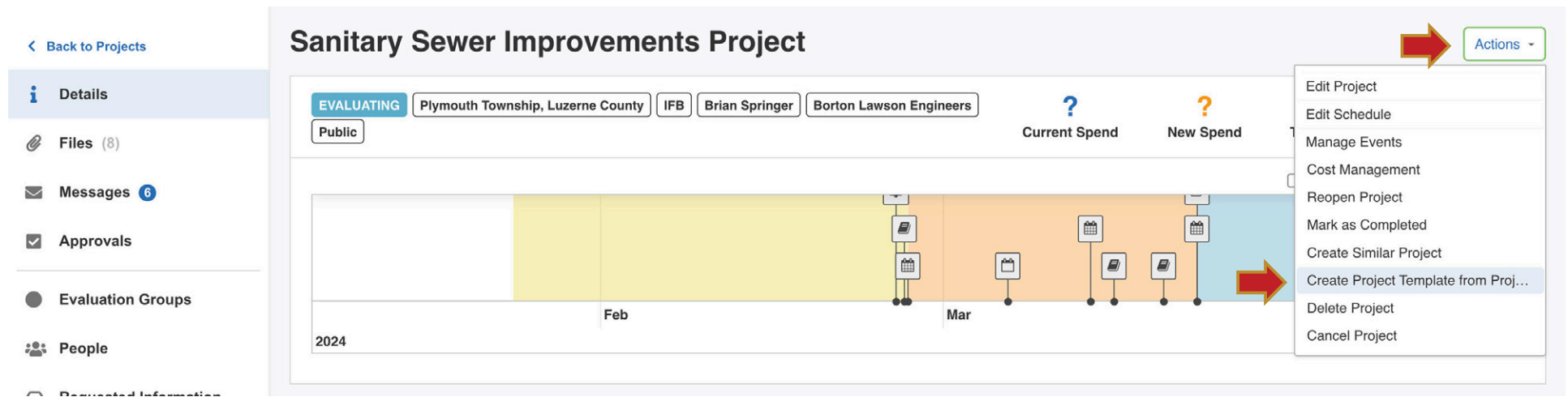
Project Templates are formatted shells created without any distinctive project content, such as important dates, assigned reviewers, submissions or reporting. Templates may be best used on projects that run on a cyclical basis, or that contain similar content and structures.

Notes: (1) We recommend always using the **Create Project Template** function instead of **Create Similar Project**. Utilizing **Create Similar Project** bypasses the Draft status and immediately publishes the copied project.

(2) Most Departments will find that 1 or 2 templates will suffice to create all subsequent projects (1 single contract template and 1 multi-category decision template). If you believe your department may need more specialized templates please contact the PennBid team for assistance.

Templates can be created from a **Strategic Sourcing** project that is not in **Draft** status. This guide walks you through the process of creating a **Single Contract** template. If you would like a Multi-Category Template please contact the PennBid team for assistance.

Open a non-draft project and click the **Actions** button. Select the **Create Project Template from Project** option in the drop down.



The screenshot shows the project management interface for the "Sanitary Sewer Improvements Project". The project is in the "EVALUATING" status. The interface includes a sidebar with navigation options: Details, Files (8), Messages (6), Approvals, Evaluation Groups, and People. The main content area displays project details: "Plymouth Township, Luzerne County", "IFB", "Brian Springer", and "Borton Lawson Engineers". It also shows "Current Spend" and "New Spend" sections with question marks. A Gantt chart at the bottom shows a timeline for 2024, with a yellow bar for February and an orange bar for March. A red arrow points to the "Actions" button in the top right corner, which has opened a dropdown menu. The menu options are: Edit Project, Edit Schedule, Manage Events, Cost Management, Reopen Project, Mark as Completed, Create Similar Project, Create Project Template from Proj... (highlighted), Delete Project, and Cancel Project.

Select the **Vendor Invites** page and delete all **Commodity Codes** by clicking the “x” in each code.

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Details

[Files \(2\)](#)

Approvals

Evaluation Groups

Requested Information

Criteria (0 pts)

Vendor Invites

Sanitary Sewer Improvements Project - Template 1

Commodity Codes

4710 ✕
7214 ✕
831015 ✕
←

Code Set:

UNSPSC

Code:

Keyword:

Code	Title	Description	Add
10 ↓	Live Plant and Animal Material and Accessories and Supplies	This segment includes live, wild and domesticated, seeds and plants and ...	+
11 ↓	Mineral and Textile and Inedible Plant and Animal Materials	This segment includes unprocessed materials such as stone, soil and ore...	+
12 ↓	Chemicals including Bio Chemicals and Gas Materials	This segment includes inorganic and organic chemicals and compounds i...	+
13 ↓	Resin and Rosin and Rubber and Foam and Film and Elastomeric Materials	This segment includes rubber and plastic material, including elastomers t...	+
14 ↓	Paper Materials and Products	This segment includes paper used for commercial printing, forms, envelo...	+
15 ↓	Fuels and Fuel Additives and Lubricants and Anti corrosive Materials	This segment includes natural occurring gases and processed materials u...	+

Proceed to the **Requested Information** page, and review all the Requested Information items. Make sure that all items you wish to have in your template are included. Items can be added using the **Manage** button. At times it is easier to list all required items here and delete unnecessary items when you build a new project from the template.

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Sanitary Sewer Improvements Project - Template 1

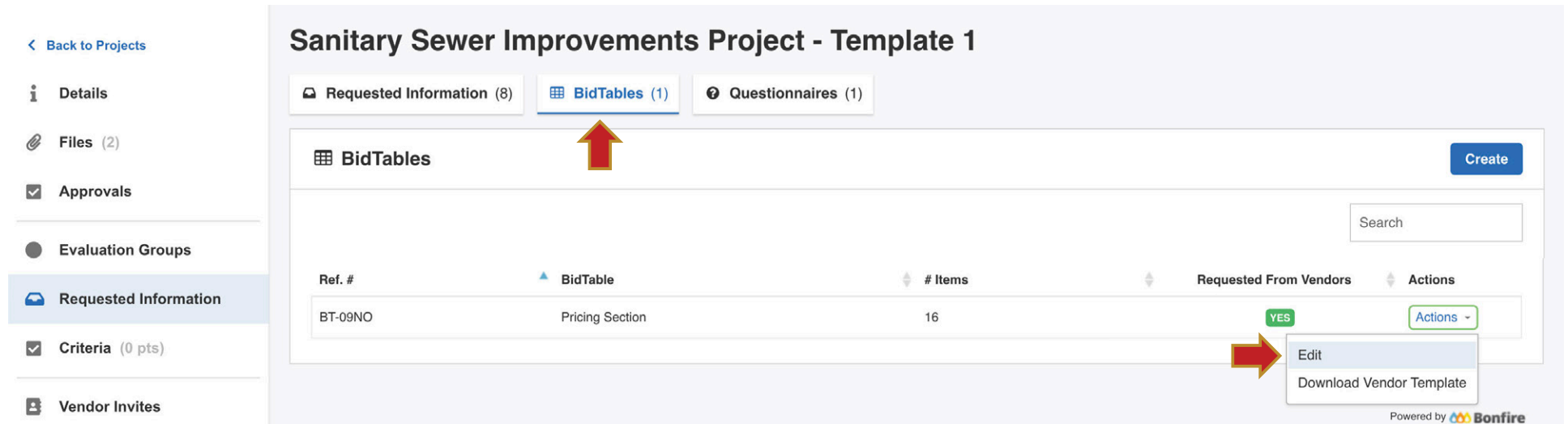
[Requested Information \(8\)](#)
[BidTables \(1\)](#)
[Questionnaires \(1\)](#)

Search

[Manage](#)

Group	Title	Type	Requirement	Multiple Files	Sealed	Actions	O 1
Individual Submitting	Enter Individual Submitting First and Last Name	Text	REQUIRED	N/A	No	Actions -	✓
Individual Submitting	Enter Individual Submitting Title	Text	REQUIRED	N/A	No	Actions -	✓
Individual Submitting	Enter Individual Submitting Email and Phone	Text	REQUIRED	N/A	No	Actions -	✓
Bond Upload	Upload Bid Bond Here	PDF (.pdf)	REQUIRED	No	Yes	Actions -	✓
Supporting Documents	Upload Required Documents Here	Any (*)	REQUIRED	Yes	No	Actions -	✓
Supporting Documents	Upload Additional Documents Here	Any (*)	OPTIONAL	Yes	No	Actions -	✓
Acknowledgments	Bidder Acknowledgments (Q-37EJ)	Excel (.xlsx) Questionnaire	REQUIRED	N/A	No	Actions -	
N/A	↳ 1 - Acknowledgments	N/A		N/A	N/A		✓
Pricing Section	Pricing Section (BT-09NO)	Excel (.xlsx) BidTable	REQUIRED	N/A	Yes	Actions -	✓

Select the **BidTables** tab, click the **Actions** button, and select **Edit** from the drop-down menu.




Sanitary Sewer Improvements Project - Template 1

Requested Information (8) **BidTables (1)** Questionnaires (1)

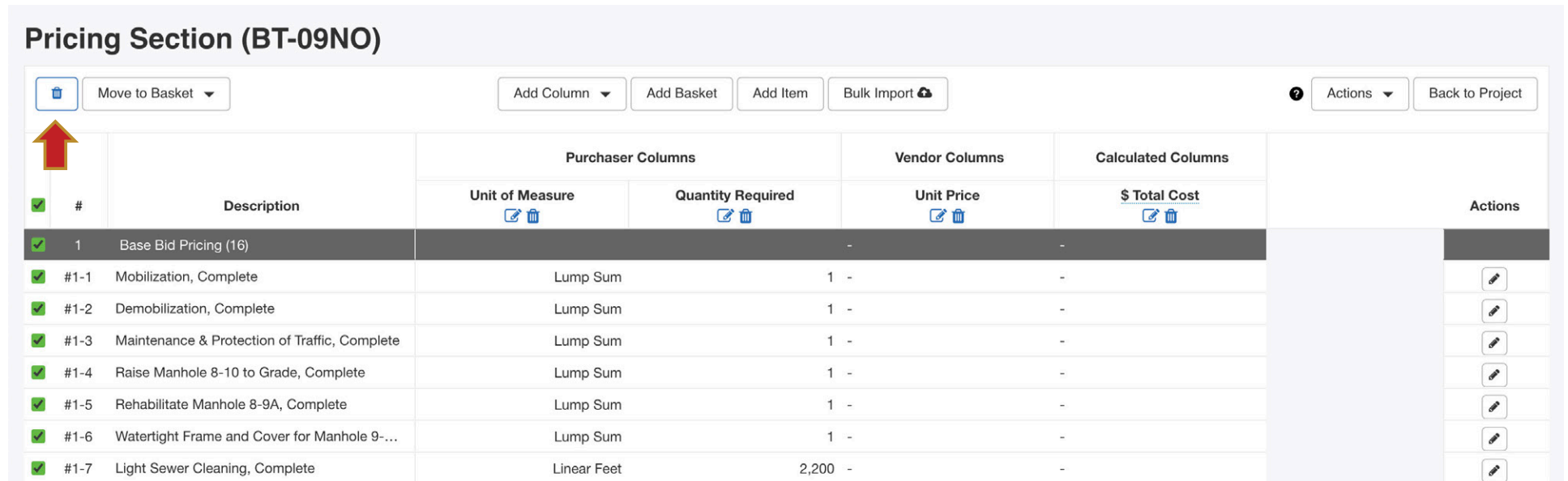
BidTables Create

Search

Ref. #	BidTable	# Items	Requested From Vendors	Actions
BT-09NO	Pricing Section	16	YES	Actions

Powered by 

Make sure all Pricing Items are selected, and click the **Trash Can** in the upper left corner of the screen to **delete** all pricing elements.



Pricing Section (BT-09NO)

Move to Basket Add Column Add Basket Add Item Bulk Import Actions Back to Project

#	Description	Purchaser Columns		Vendor Columns	Calculated Columns	Actions
		Unit of Measure	Quantity Required	Unit Price	\$ Total Cost	
<input checked="" type="checkbox"/>	1 Base Bid Pricing (16)					
<input checked="" type="checkbox"/>	#1-1 Mobilization, Complete	Lump Sum	1 -	-		
<input checked="" type="checkbox"/>	#1-2 Demobilization, Complete	Lump Sum	1 -	-		
<input checked="" type="checkbox"/>	#1-3 Maintenance & Protection of Traffic, Complete	Lump Sum	1 -	-		
<input checked="" type="checkbox"/>	#1-4 Raise Manhole 8-10 to Grade, Complete	Lump Sum	1 -	-		
<input checked="" type="checkbox"/>	#1-5 Rehabilitate Manhole 8-9A, Complete	Lump Sum	1 -	-		
<input checked="" type="checkbox"/>	#1-6 Watertight Frame and Cover for Manhole 9-...	Lump Sum	1 -	-		
<input checked="" type="checkbox"/>	#1-7 Light Sewer Cleaning, Complete	Linear Feet	2,200 -	-		


Delete all pricing **Baskets** except the **Base Bid Pricing** basket by clicking the **Action button** in the top right corner of the screen and select the **Edit Baskets** option from the drop-down menu.

Click the **Trash Can** icon to the right of each **Basket** to delete it.

Pricing Section (BT-09NO)

Move to Basket ▾
Add Column ▾
Add Basket
Add Item
Bulk Import 📄
Actions ▾
Back to Project

✓	#	Description	Purchaser Columns		Vendor Columns	Calculated Columns	Actions
			Unit of Measure	Quantity Required	Unit Price	\$ Total Cost	
✓	1	Base Bid Pricing (0)			-	-	
Please add some BidTable items...							
✓	2	Unit Pricing (0)			-	-	
Please add some BidTable items...							




Pricing Section (BT-09NO)

Move to Basket ▾
Actions ▾
Back to Project

Edit Baskets

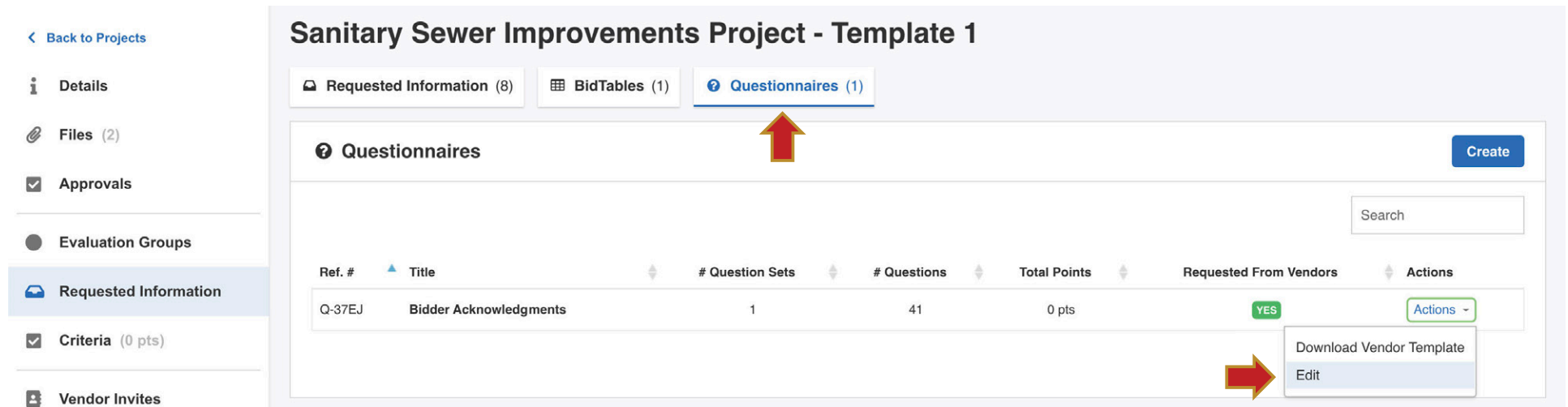
Note: Baskets cannot be deleted if they have Items in them. You will need to move the items to another Basket first.

#	Basket	Number of Items	Actions
1	Base Bid Pricing	0	
2	Unit Pricing	0	



Review your **Questionnaire**. If the Questionnaire contains a standard set of **Bidder Acknowledgments** that you use for every solicitation keep it as part of this **Template** and skip to page 8 of this guide.

If each solicitation or bid requires a unique set of Bidder Acknowledgments for bidders, delete all questions from the **Questionnaire** using the following steps. Select the **Questionnaires tab**, click the **Actions button**, and select **Edit** from the drop-down menu.



Sanitary Sewer Improvements Project - Template 1

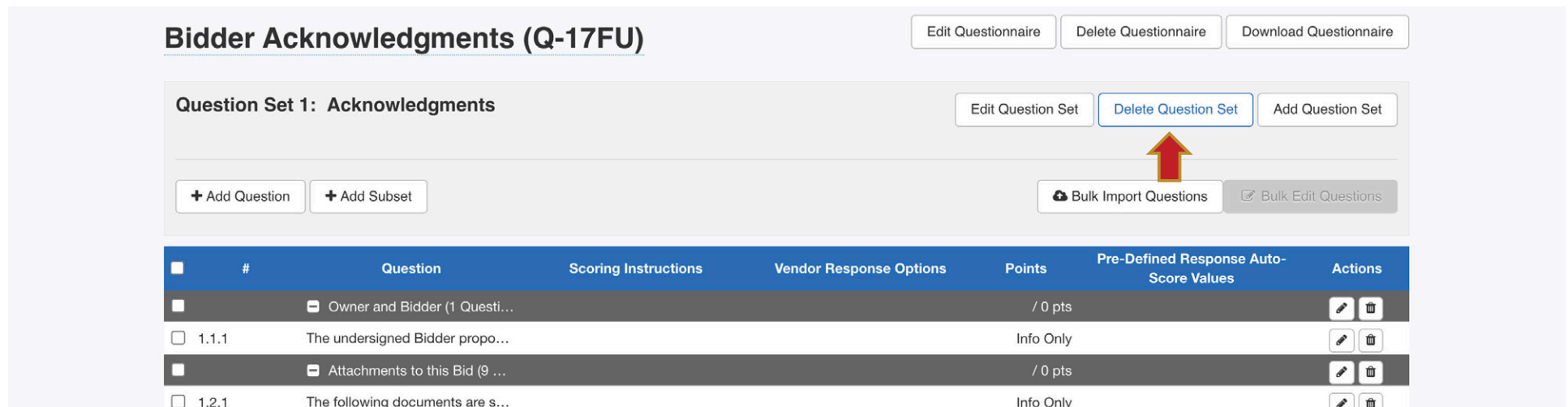
Requested Information (8) BidTables (1) **Questionnaires (1)**

Questionnaires Create

Search

Ref. #	Title	# Question Sets	# Questions	Total Points	Requested From Vendors	Actions
Q-37EJ	Bidder Acknowledgments	1	41	0 pts	YES	Actions - Download Vendor Template Edit

Click the **Delete Question Set** button to delete all questions.



Bidder Acknowledgments (Q-17FU) Edit Questionnaire Delete Questionnaire Download Questionnaire

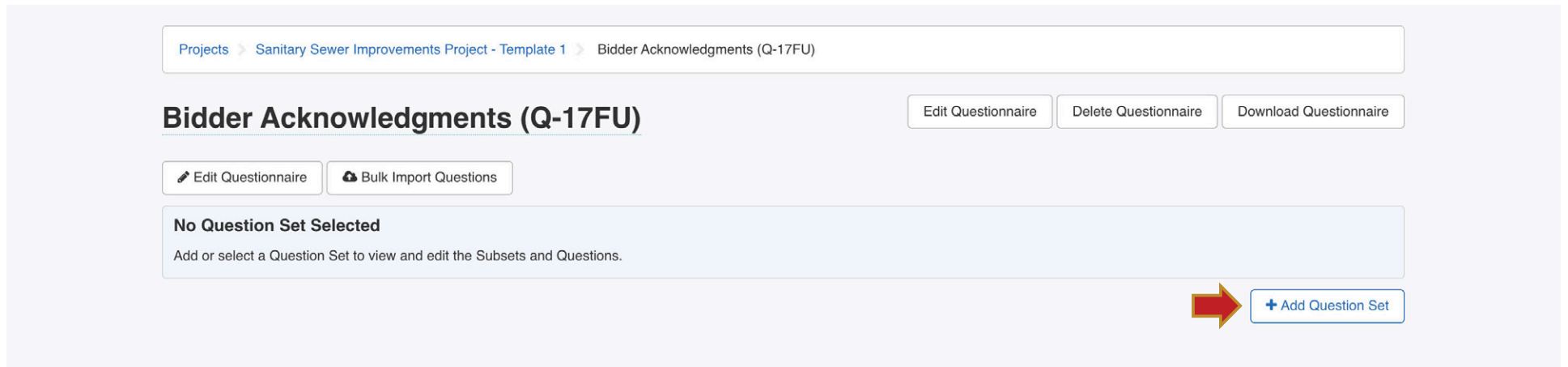
Question Set 1: Acknowledgments Edit Question Set **Delete Question Set** Add Question Set

+ Add Question + Add Subset Bulk Import Questions Bulk Edit Questions

#	Question	Scoring Instructions	Vendor Response Options	Points	Pre-Defined Response Auto-Score Values	Actions
	Owner and Bidder (1 Questi...			/ 0 pts		
1.1.1	The undersigned Bidder propo...			Info Only		
	Attachments to this Bid (9 ...			/ 0 pts		
1.2.1	The following documents are s...			Info Only		

Create a new **Question Set** by clicking the **+ Add Question Set button** in the lower right.

In the **Question Set field**, enter the question set name as **Acknowledgments**. Keep the **Order #** as **1**. The **Instructions** field is not a required field in the process. [Copy entered in the Instructions field will be displayed at the top of the Questionnaire Excel download file.](#)



Projects > Sanitary Sewer Improvements Project - Template 1 > Bidder Acknowledgments (Q-17FU)

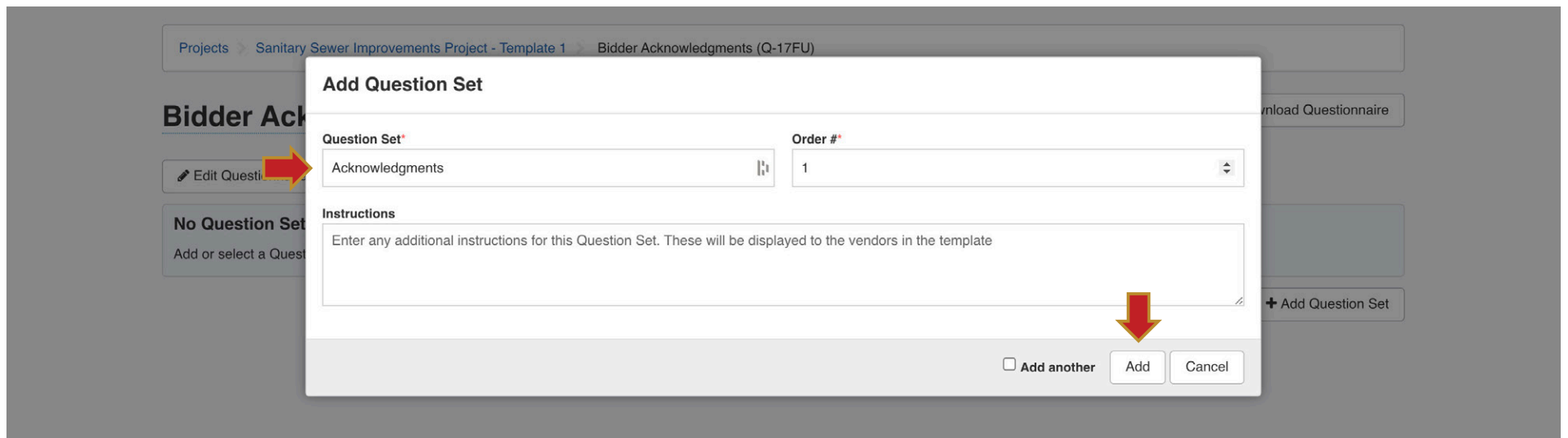
Bidder Acknowledgments (Q-17FU)

Edit Questionnaire Delete Questionnaire Download Questionnaire

Edit Questionnaire Bulk Import Questions

No Question Set Selected
Add or select a Question Set to view and edit the Subsets and Questions.

+ Add Question Set



Projects > Sanitary Sewer Improvements Project - Template 1 > Bidder Acknowledgments (Q-17FU)

Bidder Acknowledgments (Q-17FU)

Edit Questionnaire Bulk Import Questions

No Question Set Selected
Add or select a Question Set to view and edit the Subsets and Questions.

+ Add Question Set

Add Question Set

Question Set* Acknowledgments Order #* 1

Instructions
Enter any additional instructions for this Question Set. These will be displayed to the vendors in the template

Add another Add Cancel

Delete all **Documents** from **Files** by clicking the **Actions button** by each file and selecting **Delete** from the drop-down menu.

Note: If there are standard Files that you want to include in all solicitations, add those files to your template.

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Details

Files (2) ←

Approvals

Evaluation Groups

Requested Information

Criteria (0 pts)

Vendor Invites

Sanitary Sewer Improvements Project - Template 1

Internal Files (0)
Public Files (2)

Public Files (2) Upload

Public files are visible here and on the opportunity page for this project. Only people who can view this page or the opportunity page can see these files.

File	Type	Description	Added By	Date	Actions
Plymouth Township - Drawings.pdf	Documentation		David Wieller	26 Feb 2024	Actions ^
Plymouth Township - Project Manual.pdf	Documentation		David Wieller	26 Feb 2024	<div style="border: 1px solid #ccc; background-color: white; padding: 2px; width: 100px; margin: 0 auto;"> <div style="background-color: #f2f2f2; padding: 2px;">Edit</div> <div style="background-color: #f2f2f2; padding: 2px;">Delete</div> <div style="background-color: #f2f2f2; padding: 2px;">Download</div> </div>

Remove any **Events** that were copied from the **Create Project Template** process. From the **Details** page click the **Actions button** and click **Manage Events** from the drop down menu.

Sanitary Sewer Improvements Project - Template 1

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- Details
- Files (0)
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TEMPLATE Plymouth Township, Luzerne County - Template 1 IFB Gary Peterson

Borton Lawson Engineers Public

Current Spend New Spend

Actions

- Edit Project Template
- Cost Management
- Manage Events
- Duplicate Project Template
- Create Project Draft from Project Template
- Delete Project Template

Details

Project Name

Sanitary Sewer Improvements Project - Template 1

Delete the Events by clicking the **Trash Can icon** by each Event.

Back to Project

Sanitary Sewer Improvements Project - Template 1

Manage Events

New Event

Published Events

Public events will be visible to anyone, including Vendors, who can see the Opportunity.

PASSED Pre-Bid Meeting Public Perkasio Regional Authority ... Feb 21st 2024 10:00 AM EST Not Mandatory

Draft Events

These events do not appear anywhere but on this page.

No Draft Events

Click New Event to get started.

Clear all the basic project fields within the **Edit Project Template** screen. From the **Details** page click the **Actions button** and click **Edit Project Template** from the drop down menu.

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- i Details**
- 📎 Files (0)
- ☑ Approvals
- Evaluation Groups
- 📁 Requested Information
- ☑ Criteria (0 pts)
- 👤 Vendor Invites

Sanitary Sewer Improvements Project - Template 1 Actions ▾

TEMPLATE
Plymouth Township, Luzerne County - Template 1
IFB
Gary Peterson

?
Current Spend

?
New Spend

📎 Borton Lawson Engineers
Public

i Details

Project Name
Sanitary Sewer Improvements Project - Template 1

Owner
Gary Peterson gary@pennbid.net

Contract Type: Fixed Fee

PennBid Only – Field 1: QA1

PennBid Only – Field 2: DBE_kb

Close Date: 03/22/24

County, State: Luzerne County, Pa

- Edit Project Template
- Cost Management
- Manage Events
- Duplicate Project Template
- Create Project Draft from Project Template
- Delete Project Template

If your template is for a **Public Agency** and the **Location and County** never change, enter that information in the **Reference Number field**. If the template is for an **A&E firm** with clients located in varying locations leave the placeholder text in this field to be updated as you create **Projects** from the template.

Name your **Template** in the **Project Title field**. We recommend your Organization Name plus a description of the Template type.

Project Description field remains empty with placeholder text. Advertisement or IFB information is entered when the Project is created.

Project Type will be selected when you create a project from the **Template**. Typically IFB or RFP are selected.

The **Project Owner** field 1 will be set to your **Department** and you can choose the **appropriate individual** from the field 2 drop down. We recommend selecting the same point of contact for all **Templates**.

Note: *Templates are accessible to the entire Department, regardless of the assigned Owner.*

Edit Project Template



Reference Number *

(Enter Location, County Name here)

Project Title *

PennBid - Single Contract Blank Shell Template

Project Description *

(Enter Advertisement or Invitation For Bid information here)

Project Type *

IFB (Invitation for Bid)

Project Owner *

PennBid Testing Account

Gary Peterson

Visibility *

Public

Additional Details

[Expand All](#)

Submission Types

+

Configurations

+

Contact Information

+

Custom Fields

+

Additional Details

Submission Types – set to Excel Submissions.

Configurations – Public Document Takers and Subcontractor Listing should be checked. **Note:** If it’s a multi-contract Template, Multi-Category Decision should also be checked.

Contact Information – Do Not Display. This is visible to Bidders and external communications should be limited.

Custom Fields:

Contract Type – Leave blank

PennBid Only Field 1 & 2 – **Clear all data from both fields. The PennBid staff uses these fields for internal administration, including quality control checks.**

Close Date – entered when a Project is created.

County, State – If your template is for a Public Agency and the County location never changes, enter your County, State. If the template is for an A&E firm and the County location varies, leave this blank.

Design Firm – If the template is for an A&E firm, enter your firm name here.

Estimated Contract Value - Leave blank

Additional Details
Expand All

Submission Types

- Excel Submissions**
Vendors submit BidTables or a Pricing Sheet as Excel templates.
- Browser Submissions**
Vendors submit BidTables or a Pricing Sheet in the browser, no Excel templates required. Recommended maximum number of line items is 20 for each BidTable or Pricing Sheet.

Configurations

- Public Document Takers
- Subcontractor Listing
- Multi-Category Decision
- Advanced Algorithms
- Consensus Scoring
- Rank Analysis
- Pricing Sheet

Contact Information

Contact Information Options
Choose if you would like to display contact information to Vendors on this Opportunity. If you select "Do not display", you are indicating that you do not want to be contacted outside of Bonfire for this Opportunity

- Always Display
- Only Display after the Vendor Discussions Due Date
- Do Not Display

Contact Email or Phone Number

Contact Name

Custom Fields

Contract Type *

PennBid Only – Field 1

PennBid Only – Field 2

Close Date

County, State *

Design Firm

Estimated Contract Value

Final **Template** preview.

PennBid is happy to review any template you created prior to you using it for your first project setup. Let us know by contacting the PennBid team by email at info@pennbid.net or call **610-693-4769**.

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- Files (0)
- Approvals
- Evaluation Groups
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- Criteria (0 pts)
- Vendor Invites

PennBid - Single Contract Blank Shell Template

Actions ▾

TEMPLATE
(Enter Location, County Name here)
IFB
Gary Peterson
PennBid Testing Account
Public

? Current Spend

? New Spend

? Target Savings

? Actual Savings

i Details ☰ Strategic Sourcing

Project Name
PennBid - Single Contract Blank Shell Template

Owner
 Gary Peterson gary@pennbid.net

Contract Type: Enter (Fixed Fee) or (Term Contract)

County, State: Luzerne County, Pa

Project Description
 (Enter Advertisement or Invitation For Bid information here)

Public Document Takers ✓ Submission Type: Excel Submission	Multi-Category Decisions ✗ Pricing Sheet ✗	Advanced Algorithms ✗ Rank Analysis ✗	Consensus Scoring ✗ Subcontractor Listing ✓
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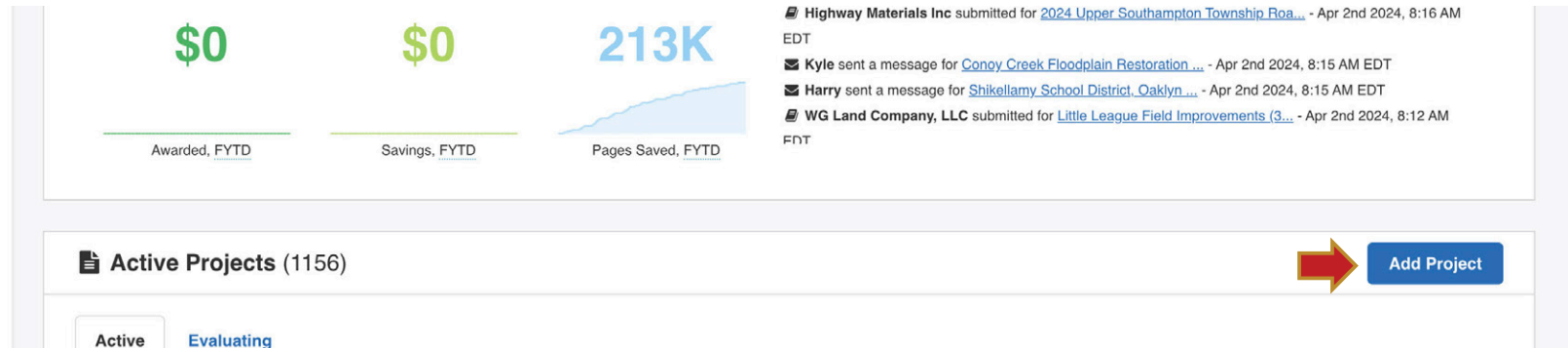
Current Spend -	Target Savings -	Budget -	New Spend -
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Events

Status ▾	Event Name ▾	Event Privacy ▾	Location ▾	Description ▾	Dates ▾	Mandatory ▾
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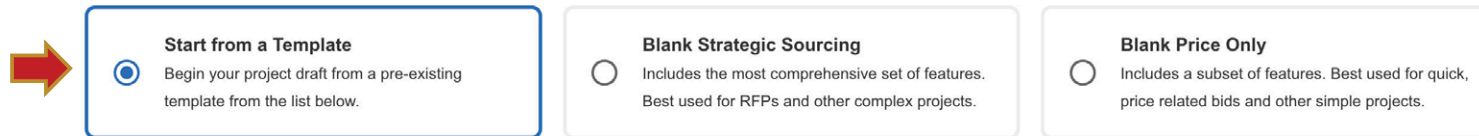
To use your **Template**, click the **Add Project** button from the **Projects Dashboard** screen.

Select the **Start from a Template** option, and select the Template you want to use by checking the **Button** next to the Template name.

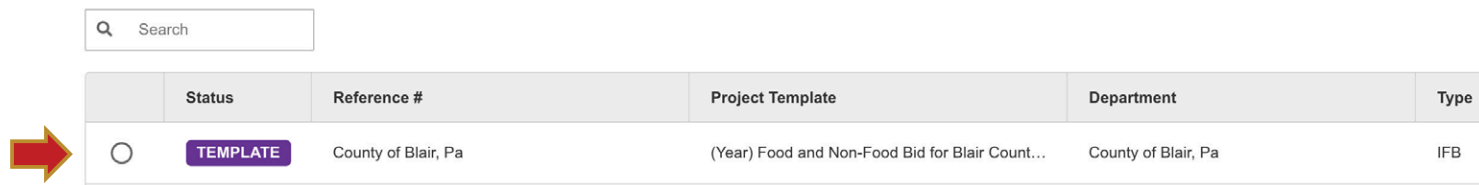


Create Project Draft

How would you like to start your Project Draft?



Search for a Template



Status	Reference #	Project Template	Department	Type
<input type="radio"/> TEMPLATE	County of Blair, Pa	(Year) Food and Non-Food Bid for Blair Count...	County of Blair, Pa	IFB

Should you have any questions or require assistance, please contact PennBid at info@pennbid.net, or **610-693-4769**.