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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.

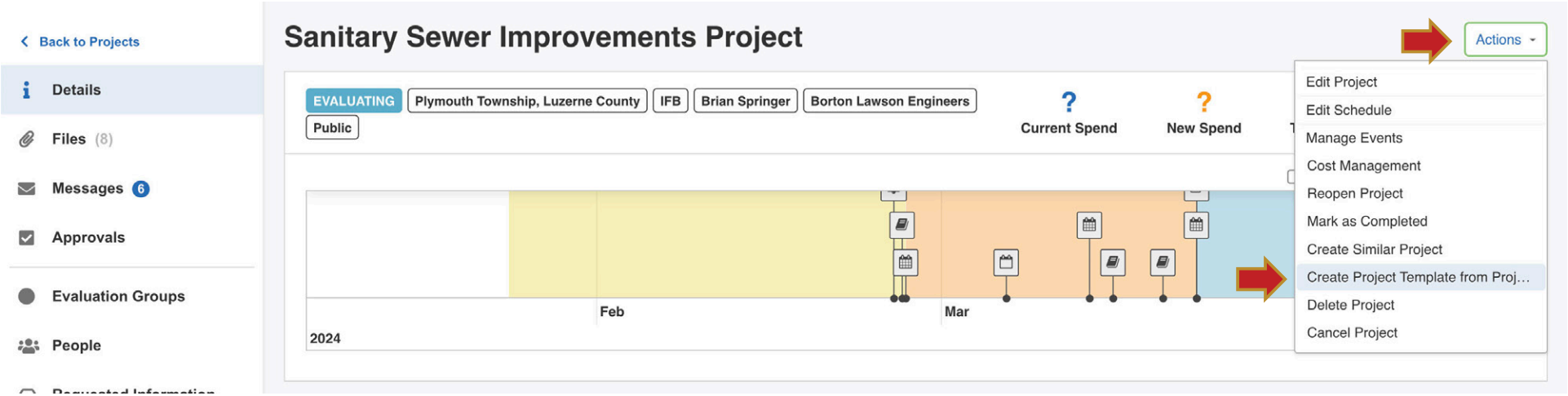
Project Templates are formatted shells created without any distinctive project content, such as important dates, assigned reviewers, submissions or reporting. Templates may be best used on projects that run on a cyclical basis, or that contain similar content and structures.

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 <u>not</u> 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.



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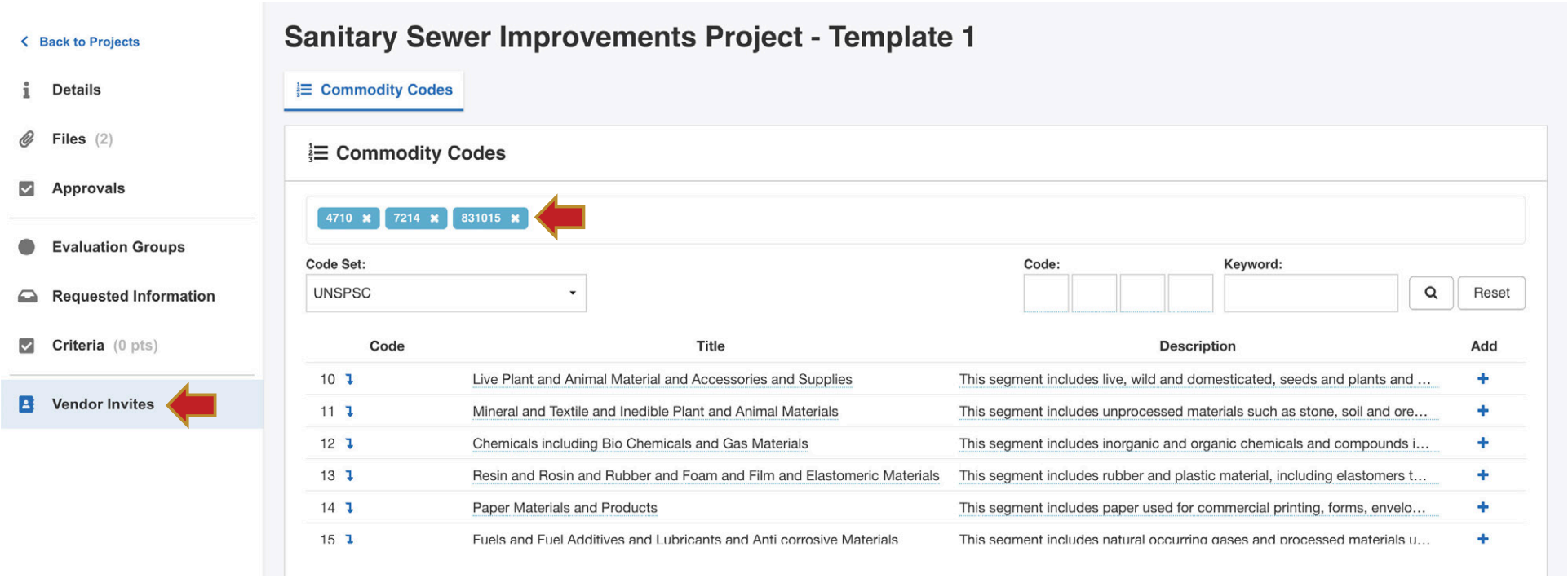
Select the **Vendor Invites** page and delete all **Commodity Codes** by clicking the **"x"** in each code.



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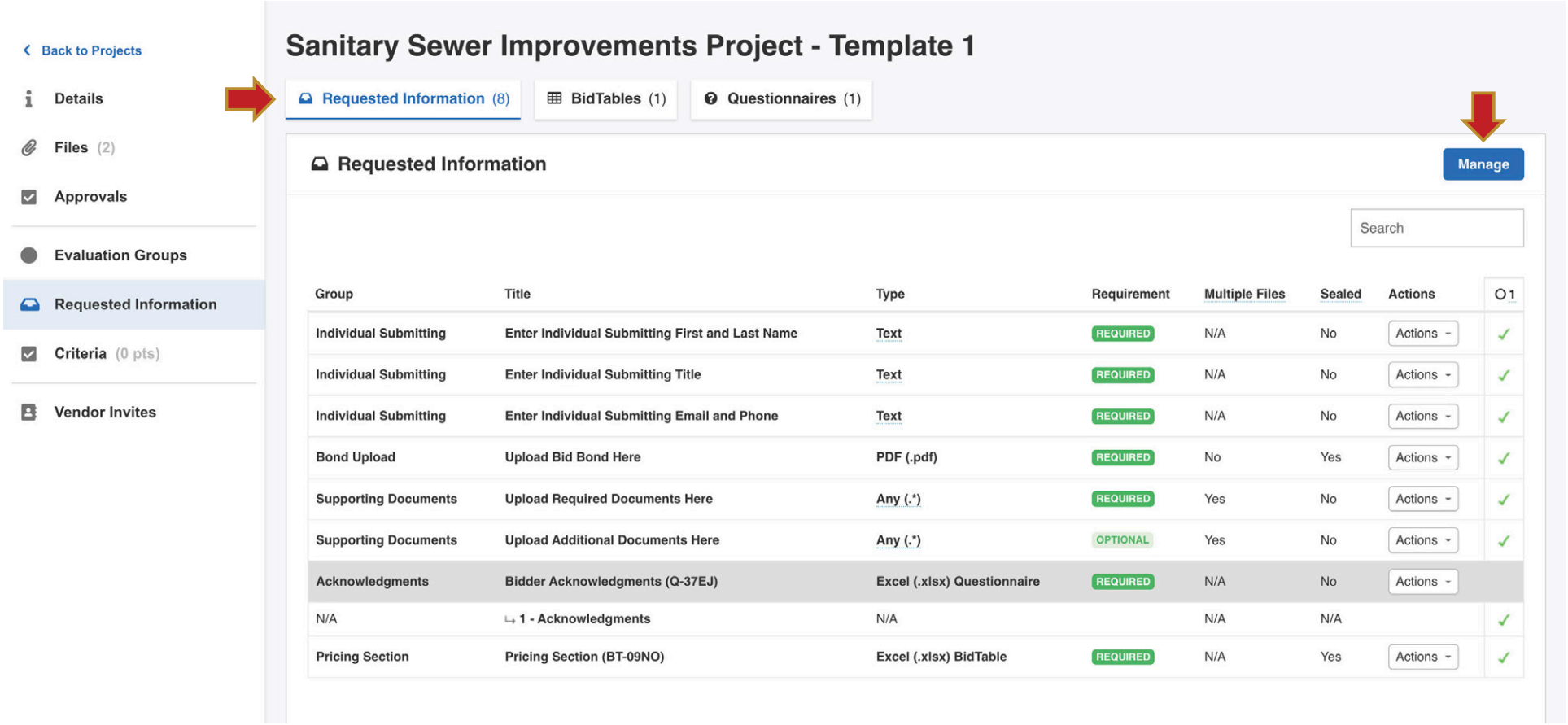
Proceed to the **Requested Information** page, and review all the Requested Information items. Make sure that all items you wish to have in your template are included. Items can be added using the **Manage** button. At times it is easier to list all required items here and delete unnecessary items when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



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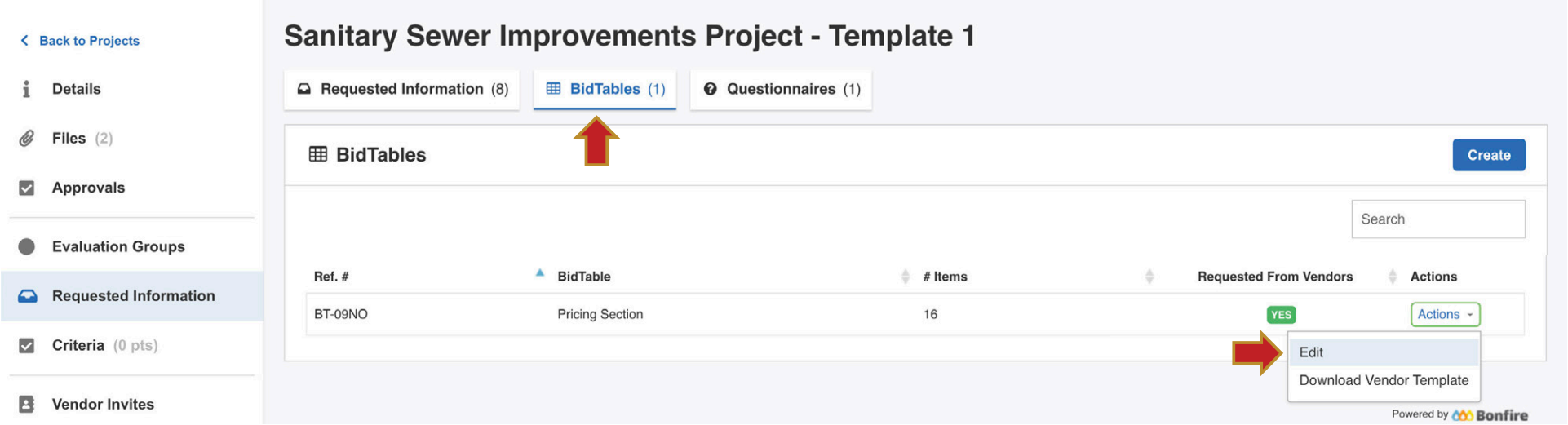
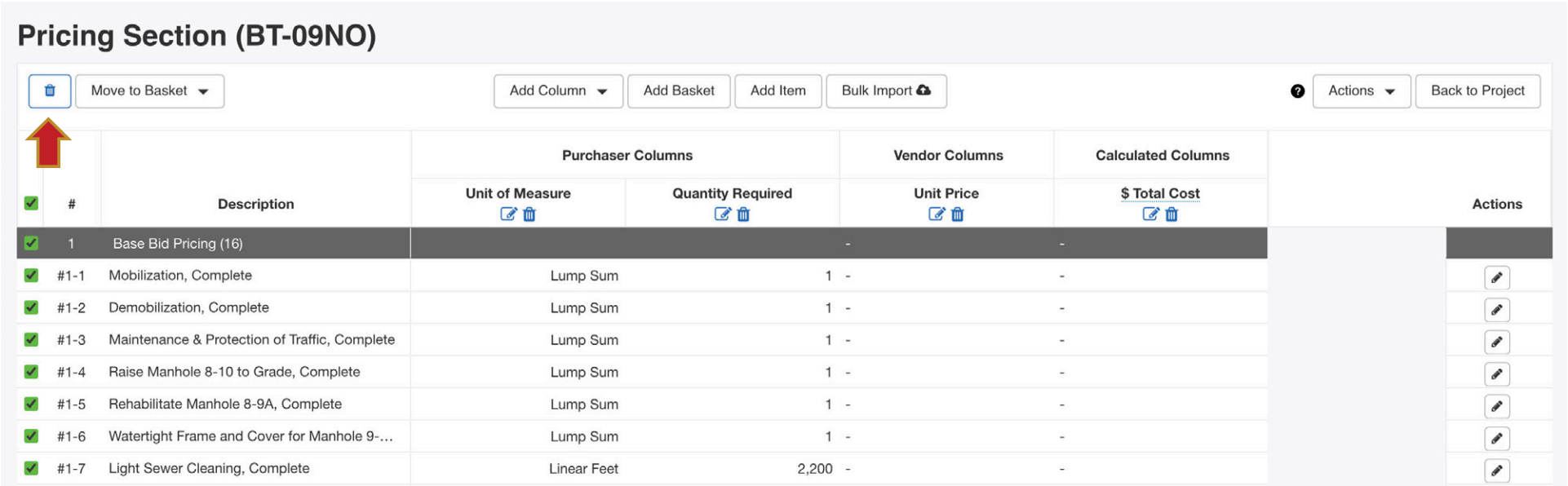
Select the **BidTables tab**, click the **Actions button**, and select **Edit** from the drop-down menu.



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.



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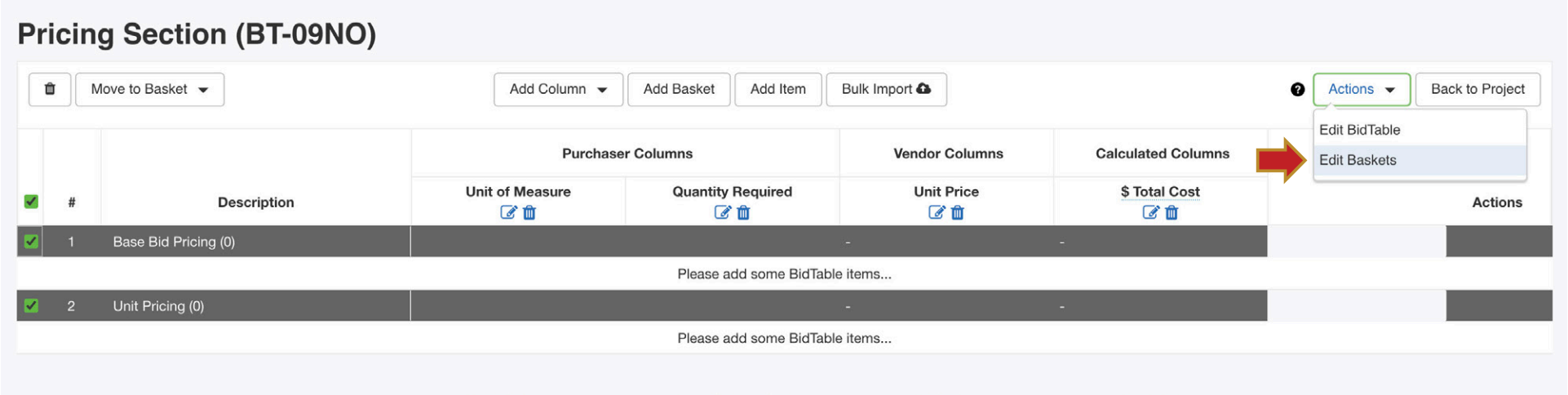
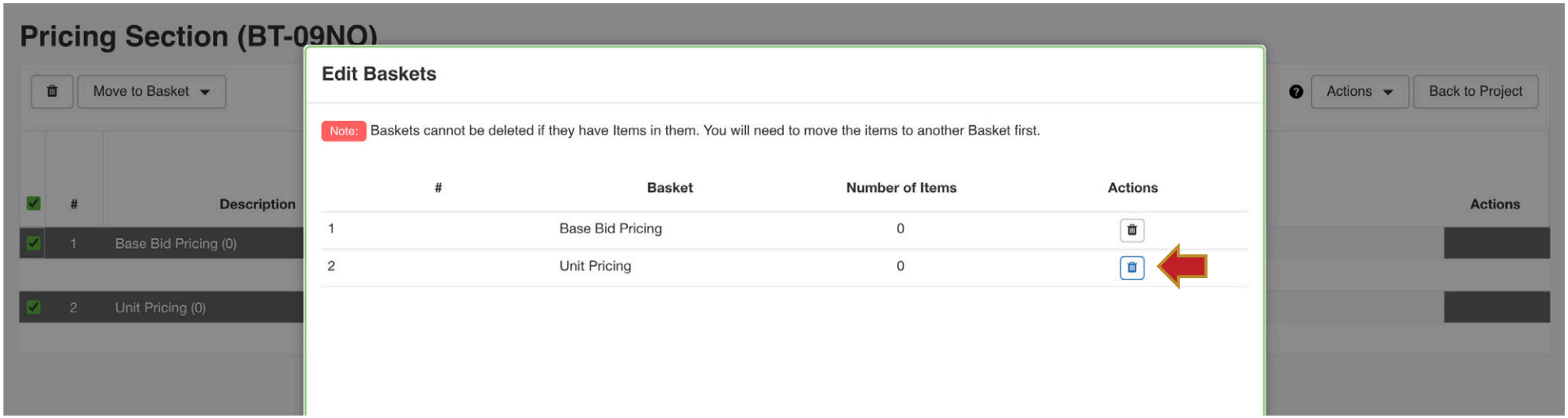
Delete all pricing **Baskets** except the **Base Bid Pricing** basket by clicking the **Action button** in the top right corner of the screen and select the **Edit Baskets** option from the drop-down menu.

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





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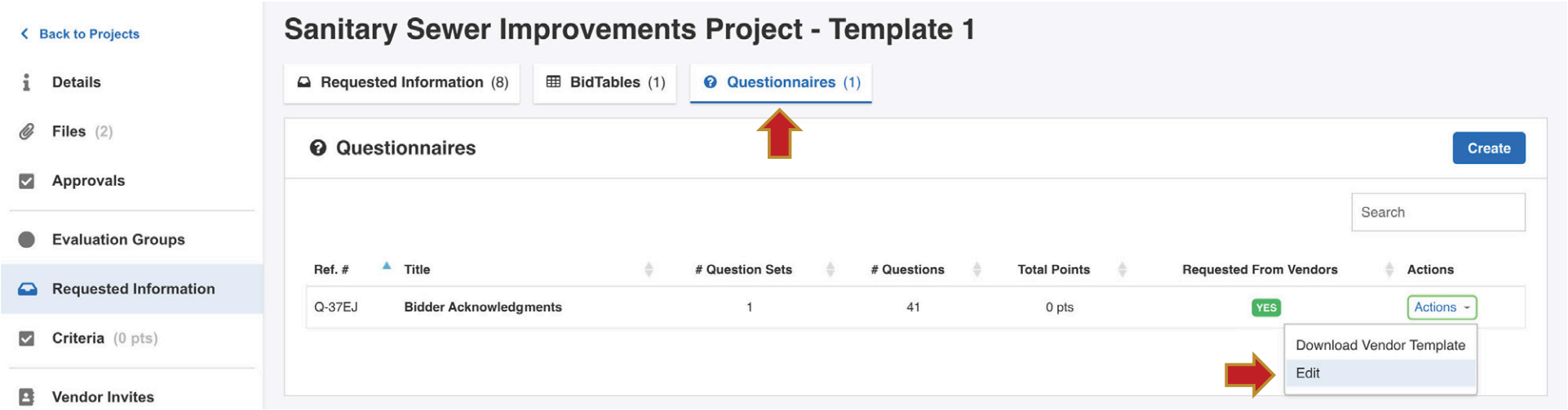
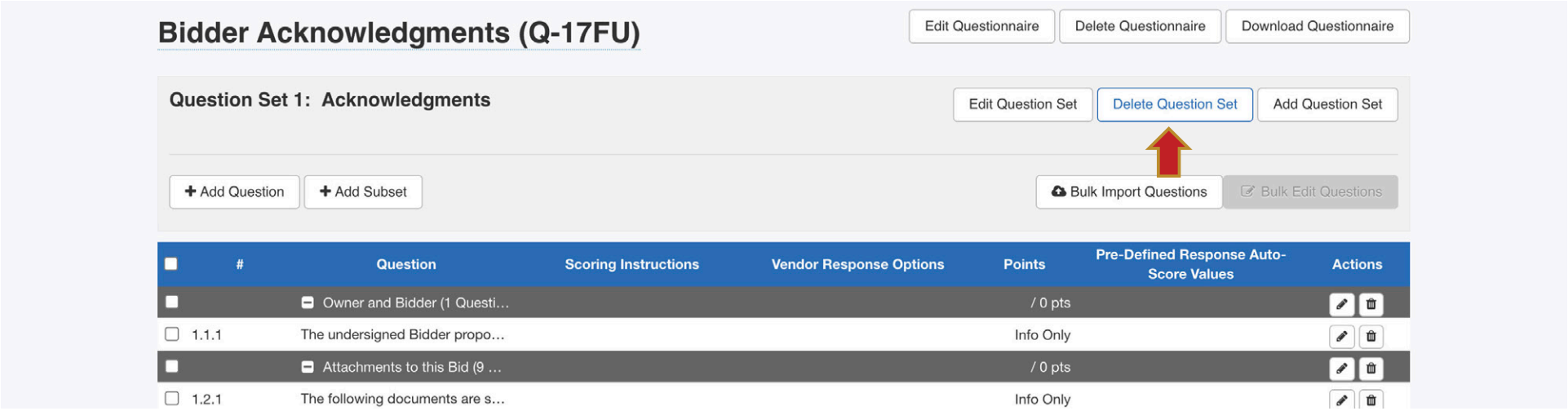
Review your **Questionnaire**. If the Questionnaire contains a standard set of **Bidder Acknowledgments** that you use for every solicitation keep it as part of this **Template** and skip to page 8 of this guide.

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.



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



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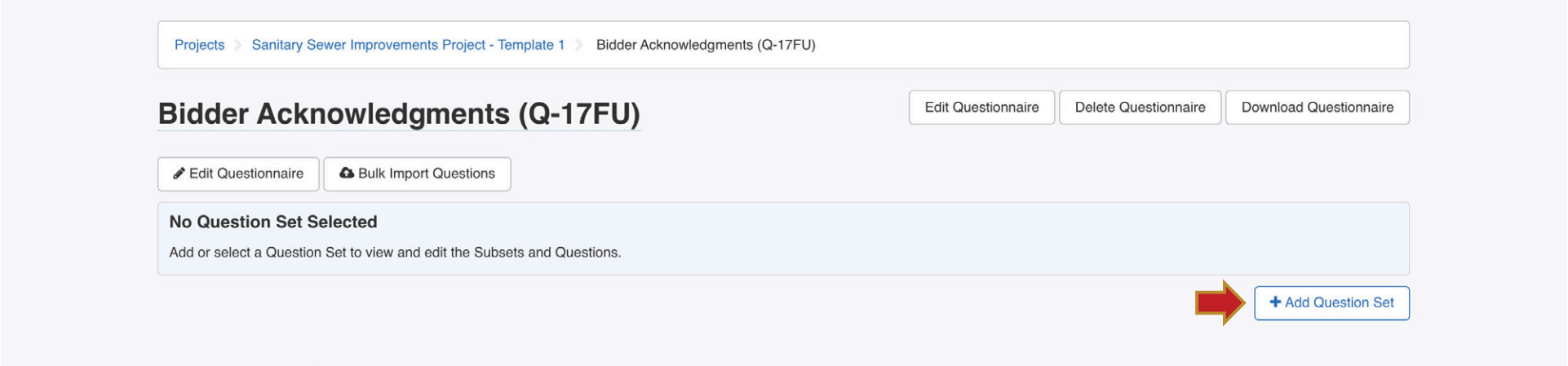
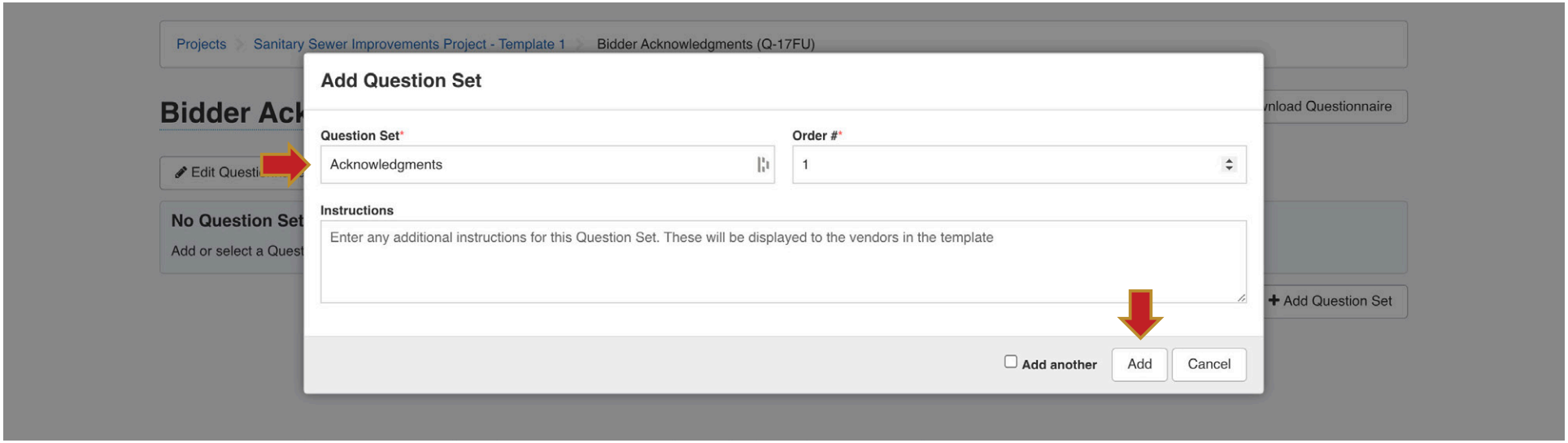
Create a new **Question Set** by clicking the **+ Add Question Set button** in the lower right.

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.





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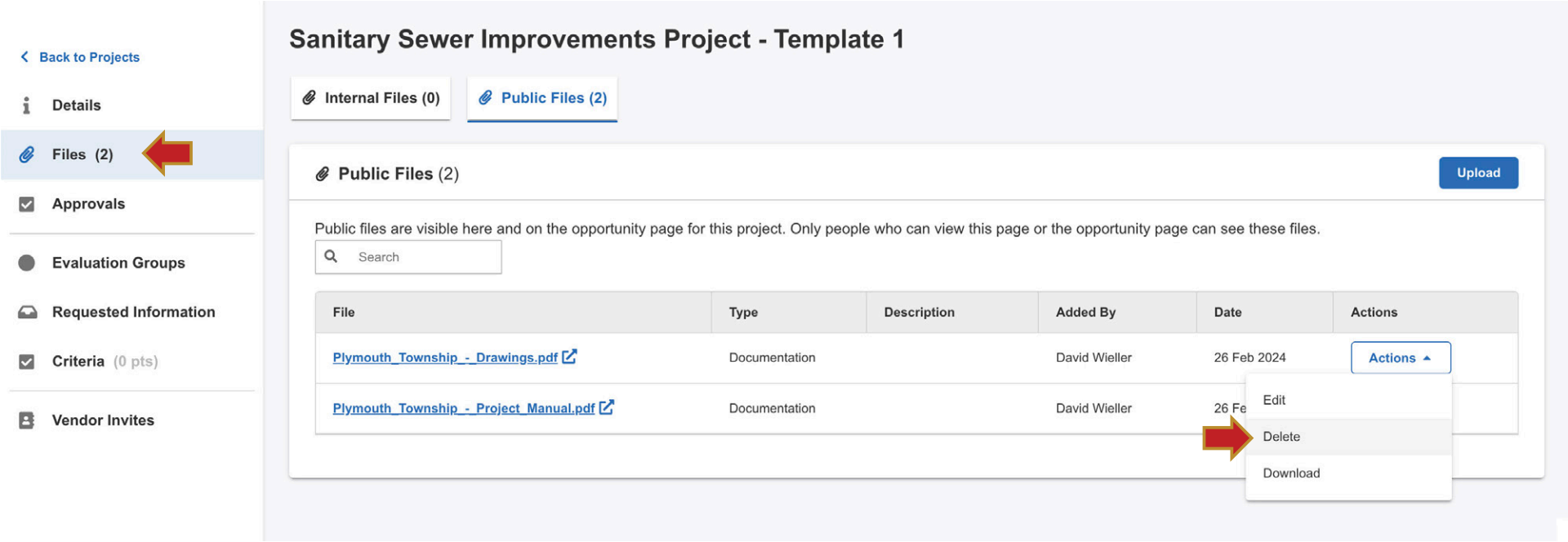
Delete all **Documents** from **Files** by clicking the **Actions button** by each file and selecting **Delete** from the drop-down menu.

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



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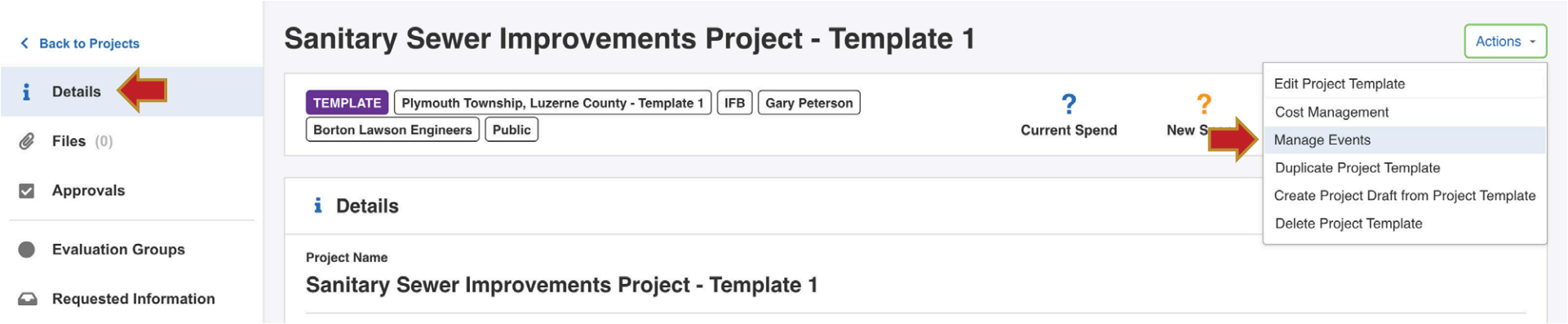
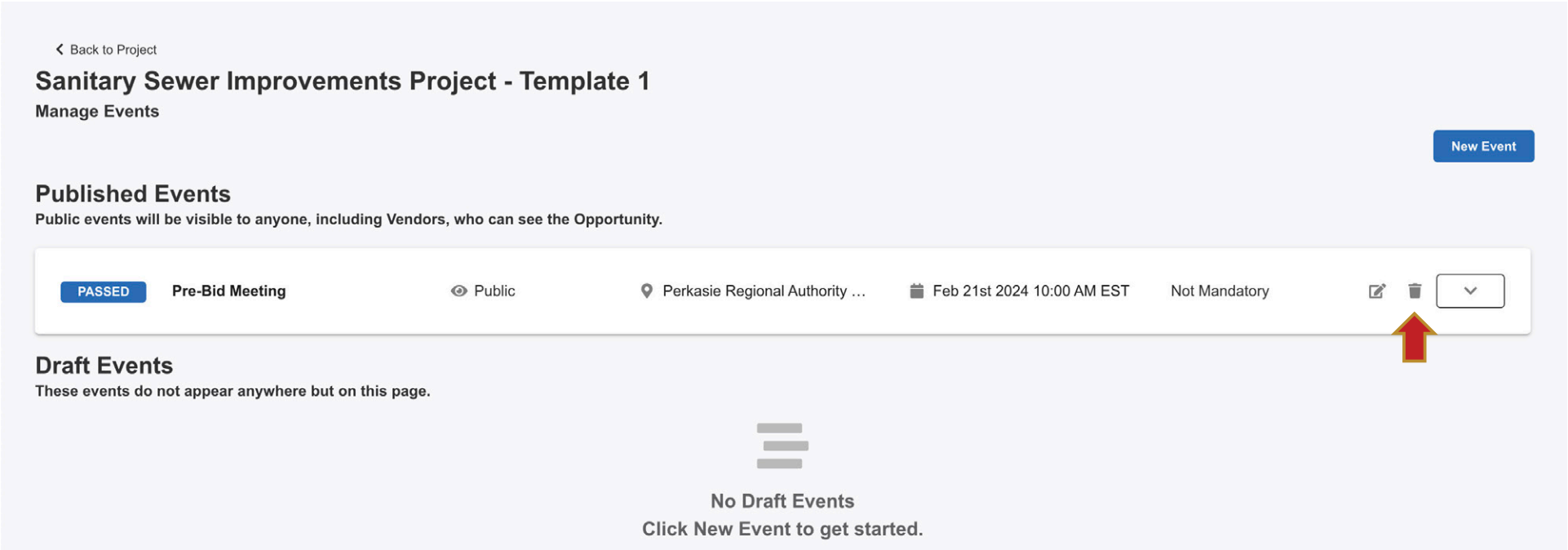
Remove any **Events** that were copied from the **Create Project Template** process. From the **Details** page click the **Actions button** and click **Manage Events** from the drop down menu.



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



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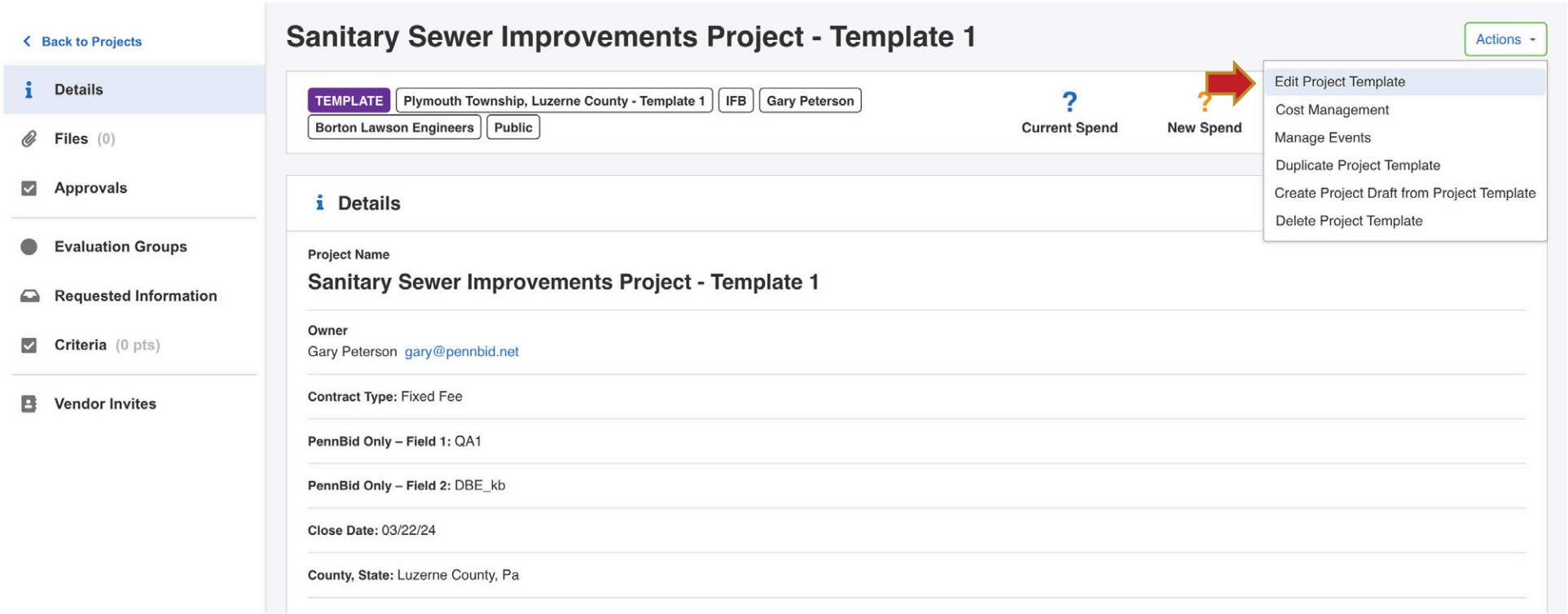
Clear all the basic project fields within the **Edit Project Template** screen. From the **Details** page click the **Actions button** and click **Edit Project Template** from the drop down menu.



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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.

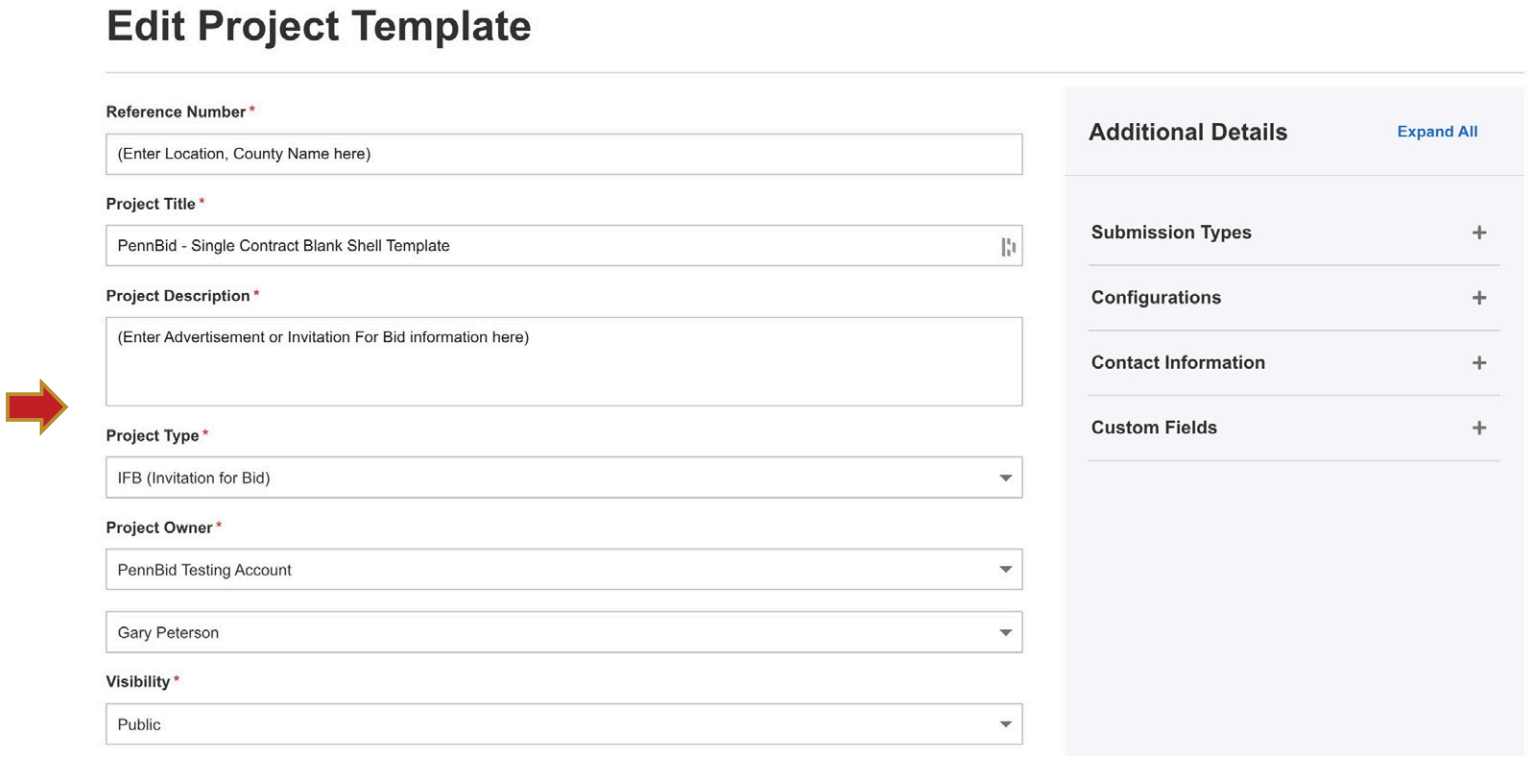
Name your **Template** in the **Project Title field**. We recommend your Organization Name plus a description of the Template type.

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.*



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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 limited.

Custom Fields:

Contract Type – Leave blank

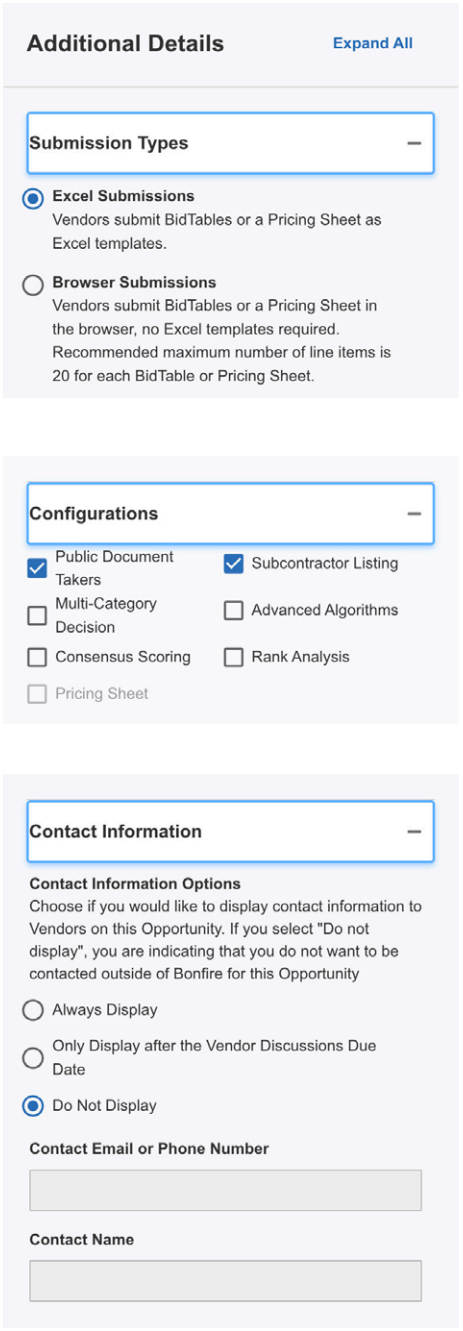
PennBid Only Field 1 & 2 – ***Clear all data from both fields. The PennBid staff uses these fields for internal administration, including quality control checks.***

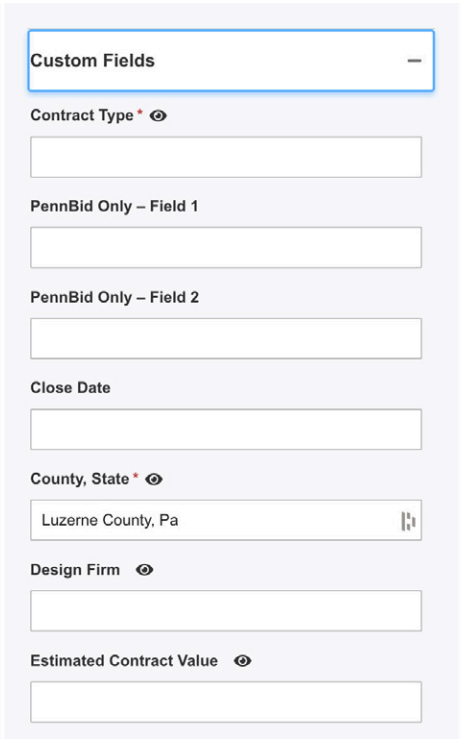
Close Date – entered when a Project is created.

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





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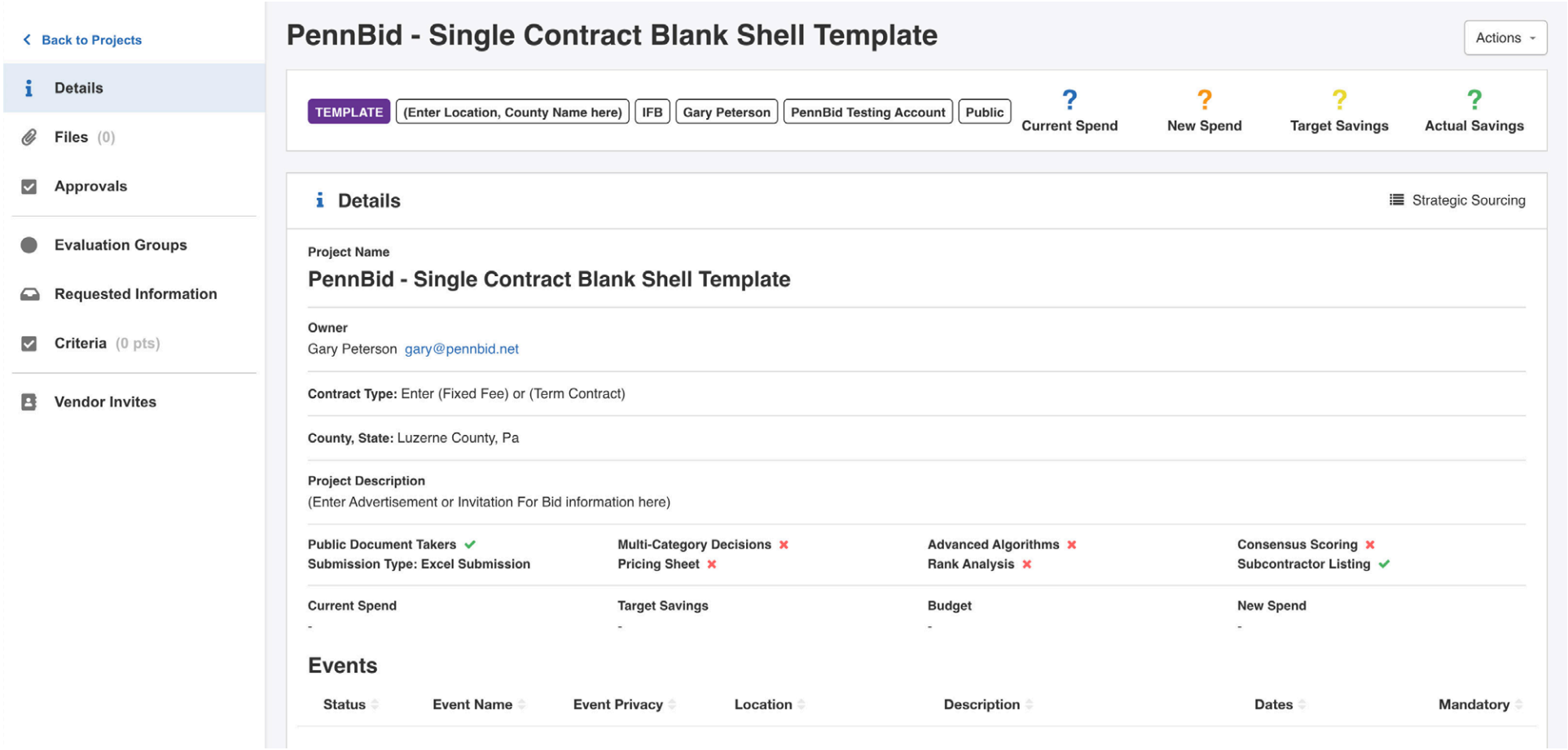
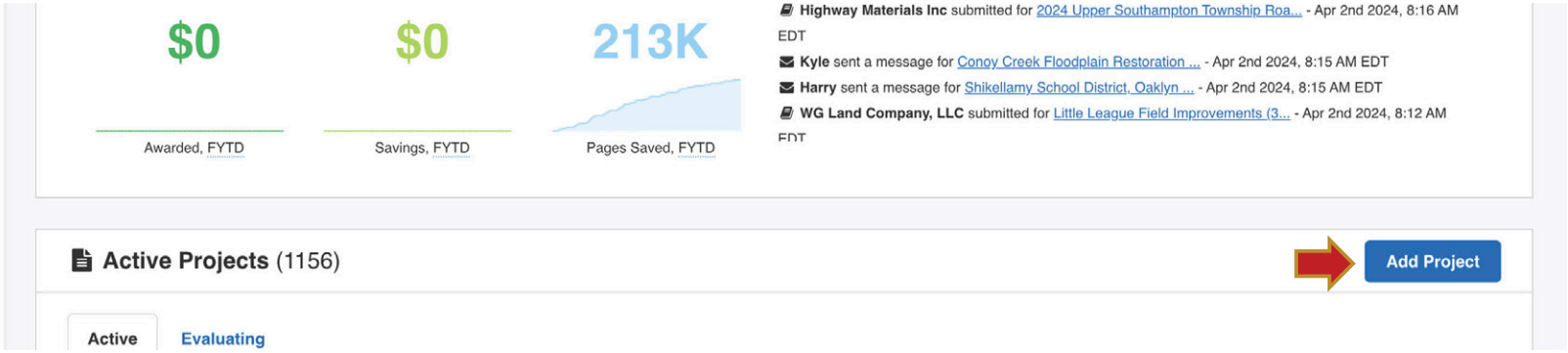
Final **Template** preview.

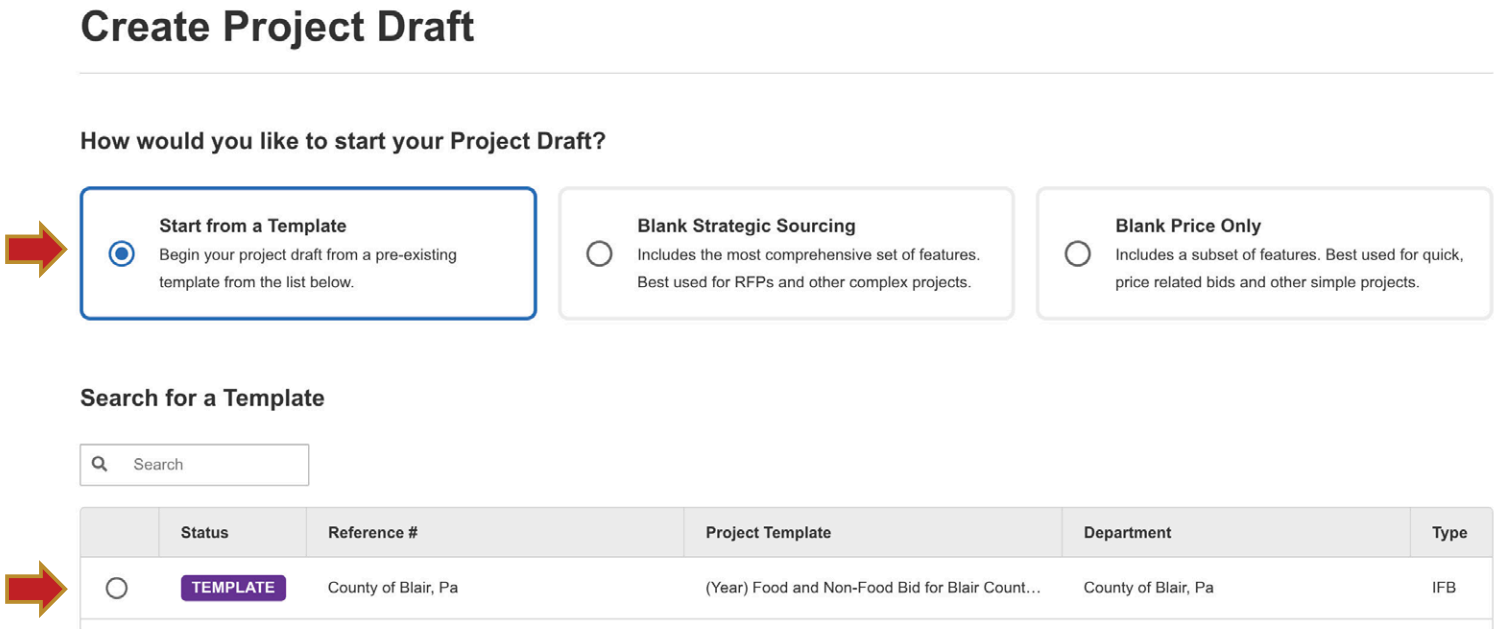
PennBid is happy to review any template you created prior to you using it for your first project setup. Let us know by contacting the PennBid team by email at **info@pennbid.net** or call **610-693-4769**.



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.





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